
PeopleSoft 9.2: Staffing Front Office

December 2020

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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.

Hosted PeopleSoft Online Help

You can access the hosted PeopleSoft Online Help on the [Oracle Help Center](#). The hosted PeopleSoft 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. The hosted PeopleSoft Online Help is available in English only.

To configure the context-sensitive help for your PeopleSoft applications to use the Oracle Help Center, see [Configuring Context-Sensitive Help Using the Hosted Online Help Website](#).

Locally Installed Help

If you're setting up an on-premise PeopleSoft environment, and your organization has firewall restrictions that prevent you from using the hosted PeopleSoft Online Help, you can install the online help locally. See [Configuring Context-Sensitive Help Using a Locally Installed Online Help Website](#).

Downloadable PeopleBook PDF Files

You can access downloadable PDF versions of the help content in the traditional PeopleBook format on the [Oracle Help Center](#). 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.
& (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

Select About This Help in the left navigation panel on any page in the PeopleSoft Online Help to see information on the following topics:

- Using the PeopleSoft Online Help
- Managing Hosted online help
- Managing locally installed PeopleSoft Online Help

Common Elements Used for Financials and Supply Chain Management

Account	ChartField that identifies the nature of a transaction for corporate accounts. This is a delivered PeopleSoft ChartField, specific use of which is typically defined by your organization during implementation of General Ledger.
Activity ID	Activity ID assigned to the individual tasks or events you want to update in a project.
Affiliate	ChartField used to map transactions between business units when using a single interunit account.
As of Date	The last date for which a report or process includes data.
Attachment	Click this link to add or view attachments for My Wallet entries, travel authorizations, cash advances, and expense reports. For examples of how to view attachments and how to attach a document to a transaction, see "Understanding Attachments" (PeopleSoft FSCM 9.2: Expenses).
Business Unit	An identification code that represents a high-level organization of business information. You can use a business unit to define regional or departmental units within a larger organization.
Class	ChartField used to identify a unique appropriation budget key. This is a delivered PeopleSoft ChartField, specific use of which is typically defined by your organization during implementation of General Ledger.
Department	ChartField that indicates who is responsible for or affected by the transaction.
Description	Free form text up to 60 characters.
Deselect All	Click this button to remove all check marks on the page.

Effective Date

Date on which a table row becomes effective; the date that an action begins. For example, if you want to close out a ledger on June 30, the effective date for the ledger closing would be July 1. This date also determines when you can view and change the information. Pages or panels and batch processes that use the information use the current row.

See *PeopleTools PeopleBook: PeopleSoft Applications User's Guide*, "Working with Pages," Using Effective Dates



(embedded help)

Click the Embedded Help icon to open up a secondary window with information about this page or section. Embedded help can provide information about specific fields and point the user to additional help. See *PeopleTools PeopleBook: PeopleSoft Application Designer Developer's Guide* for more information on creating and modifying embedded help.

EmplID (employee ID)

Unique identification code for an individual associated with your organization.

Fund

An accounting entity established for the purpose of carrying on specific activities or attaining certain objectives in accordance with special regulations, restrictions, or limitations. This is a delivered PeopleSoft ChartField, specific use of which is typically defined by your organization during implementation of General Ledger.

Fund Affiliate

ChartField used to correlate transactions between funds when using a single intraunit account.

Language or **Language Code**

The language in which you want the field labels and report headings of your reports to print. The field values appear as you enter them.

Language also refers to the language spoken by an employee, applicant, or non-employee.

Operating Unit

ChartField used to identify a location, such as a distribution warehouse or sales center.

PC Business Unit

Business unit assigned to the project in PeopleSoft Project Costing.

Process Frequency

Select the appropriate frequency from the drop-down box:

Process Once: Executes the request the next time the batch process runs. After the batch process runs, the process frequency is automatically set to *Don't Run*.

Don't Run: Ignores the request when the batch process runs.

Always Process: Executes the request every time the batch process runs.

Process Monitor	This link takes you to the Process List page, where you can view the status of submitted process requests. See <i>PeopleTools PeopleBook: PeopleSoft Process Scheduler</i>, "Understanding PeopleSoft Process Scheduler."
Product	ChartField that captures additional information useful for profitability and cash flow analysis by product sold or manufactured.
Program	ChartField that identifies groups of related activities, cost centers, revenue centers, responsibility centers, and academic programs. Tracks revenue and expenditures for programs.
Project	ChartField that captures information for project/grants accounting.
Report ID	The report identifier.
Report Manager	This link takes you to the Report List page, where you can view report content, check the status of a report, and see content detail messages (which show you a description of the report and the distribution list). See <i>PeopleTools PeopleBook: PeopleSoft Process Scheduler</i>, "Understanding PeopleSoft Process Scheduler."
Request ID	A request identification that represents a set of selection criteria for a report or process.
Resource Type	Resource category, such as labor, associated with a given cost. Used in conjunction with resource category, resource subcategories, and resource groups in PeopleSoft Project Costing.
Run	This button takes you to the Process Scheduler request page, where you can specify the location where a process or job runs and the process output format. See <i>PeopleTools PeopleBook: PeopleSoft Process Scheduler</i>, "Understanding PeopleSoft Process Scheduler."
Run Control ID	An identification code that identifies the run parameters for a report or process.
Select All	Click this button to select all options on the page.
SetID	An identification code that represents a set of control table information or TableSets. A TableSet is a group of tables (records) necessary to define your company's structure and processing options.
Short Description	Free form text up to 15 characters.

Status	Indicates whether a row in a table is <i>Active</i> or <i>Inactive</i> . You cannot display inactive rows on transaction pages or use them for running batch processes. Inactivate rather than delete data you no longer use in order to maintain an audit trail.
User Defaults	User preferences and defaults used for PeopleSoft Expenses.
User ID	The system identifier for the individual who generates a transaction.

PeopleSoft FSCM Related Links

[Oracle Help Center](#)

[Hosted Online Help](#)

[PeopleSoft Information Portal](#)

[My Oracle Support](#)

Financial and Supply Chain Management information for Search Framework search engine can be found in PeopleSoft Application Fundamentals documentation. For application specific information, see the "Understanding Search Pages within Components " (PeopleSoft FSCM 9.2: Application Fundamentals) topic.

[PeopleSoft Training from Oracle University](#)

[PeopleSoft Video Feature Overviews on YouTube](#)

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

[PeopleSoft Spotlight Series](#)

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Send your suggestions to pssoft-infodev_us@oracle.com. Please include the applications update image or PeopleTools release that you're using.

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Chapter 1

Getting Started with PeopleSoft Staffing Front Office

PeopleSoft Staffing Front Office Business Processes

PeopleSoft Staffing Front Office provides these business processes:

- Manage Applicant Information
- Manage Employee and Contractor Information
- Manage Customers and Prospects
- Manage Contact Information
- Process Orders
- Process Online Applications
- Post Orders Internally
- Match Employees and Contractors to Orders
- Perform Searches
- Manage Assignments
- Manage Agendas
- Review History
- Manage Resource Calendar

These business processes are discussed in the business process topics in this documentation.

Note: For the total PeopleSoft Staffing solution, Oracle recommends that you implement the following PeopleSoft applications: Pay/Bill Management (including PeopleSoft Project Costing, PeopleSoft Contracts, PeopleSoft Billing, PeopleSoft Payables, PeopleSoft Human Capital, PeopleSoft Time and Labor, PeopleSoft Payroll for North America, and PeopleSoft Global Payroll), PeopleSoft General Ledger, and PeopleSoft Receivables.

PeopleSoft Staffing Front Office Integrations

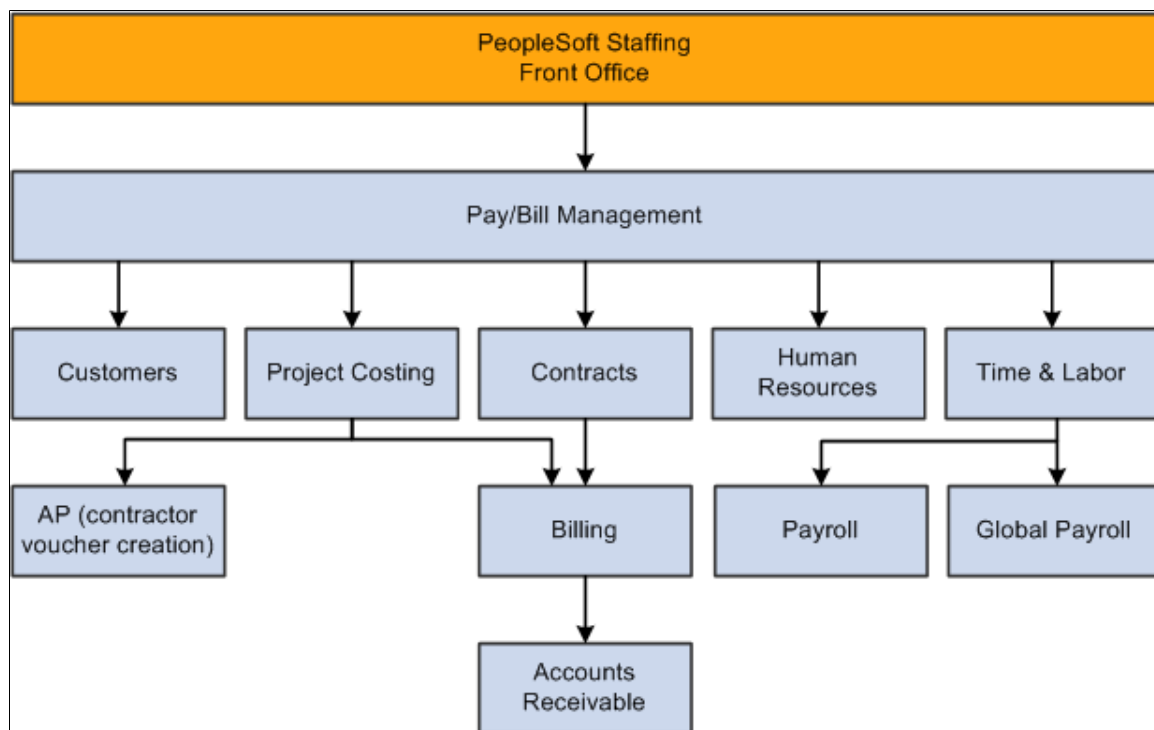
Note: Throughout this documentation, there are references to an *integrated environment*. This refers to situations in which both PeopleSoft Staffing Front Office and Oracle's PeopleSoft Pay/Bill Management are installed. The term *standalone* refers to situations in which Staffing Front Office is installed without Pay/Bill Management.

Because PeopleSoft Staffing Front Office and Pay/Bill Management share the same transaction tables for employees, customers, contacts, orders, and assignments, Pay/Bill Management can be thought of as an integration layer between PeopleSoft Staffing Front Office and other back-office applications such as PeopleSoft Project Costing, PeopleSoft Contracts, PeopleSoft Billing, PeopleSoft Accounts Payable, PeopleSoft HR, PeopleSoft Payroll, and PeopleSoft Time and Labor.

This following diagram illustrates how PeopleSoft Staffing Front Office integrates with other products through PeopleSoft Pay/Bill Management.

Image: PeopleSoft Staffing Front Office integration flow

This following diagram illustrates how PeopleSoft Staffing Front Office integrates with other products through PeopleSoft Pay/Bill Management.



Note: Journal entries can be sent to PeopleSoft General Ledger from PeopleSoft Project Costing, PeopleSoft Contracts, PeopleSoft Billing, PeopleSoft Accounts Receivable, PeopleSoft Payroll, and PeopleSoft Global Payroll.

PeopleSoft Staffing Front Office Implementation

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

Other Sources of Information

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

Common Elements Used in the Staffing Front Office Product Documentation

Applicant (Pending)	An individual who has applied for work online. An individual can be turned into an applicant when an authorized user has reviewed that person's records.
Applicant	An individual who has or is applying for work and can be considered for current job orders.
Employee	Individuals who can be placed on temporary assignments and for whom payroll records have been established.
Temporary Assignment	The placement of an employee of the staffing company at a client to perform work for a pre-determined period of time.
Career Assignment	The permanent placement of an individual at a client. The person becomes an employee of the staffing company's customer.
Career Master	The name of the customer record that is used to document information relating to the placement of individuals in career assignments. This record includes fee scheduling and other recruitment processing information.
Job Supplement	Provides the customer definition of a job, such as essential job functions for a position, unique safety requirements, equipment needs, and so on.
Order - Career	A request by a customer of a staffing agency to find one or more people to perform work at the client site on permanent basis as an employee of that customer.
Order - Temporary	A request by a customer of a staffing agency to find one or more people to perform work at the client site for a set period of time.

PeopleMatch	A feature of the Staffing Front Office application that searches for available candidates and matches those people to open orders based on specified criteria.
Quality Feedback	Provides information about the level of service and satisfaction for customers and employees. Uses online and mailed questionnaires as the primary instrument for gathering this information. Results are recorded for future reference.
Sales User	An individual who is responsible for the customer who uses your staffing company to place the order. The sales user is defined in the setup for the customer.
Service User	The customer service representative on a specific order who is responsible for order fulfillment and other aspects of customer service. The service user is defined in the setup for the customer.
Target Qualifications	Work-related qualifications that are most commonly used or sought by a customer, contact, or order
Worksite Master	Provides address, contact, and general information about the customer's workplace. The information provided can be specified when the system is set up. Examples of the types of information that could be entered are: location directions, dress codes, shift schedules, eating and break facilities, Americans with Disability Act (ADA) accommodations, and so on.

Navigating in PeopleSoft Staffing Front Office

Navigating in PeopleSoft Staffing Front Office

PeopleSoft Staffing Front Office provides custom navigation center pages that contain groupings of folders that support a specific business process, task, or user role.

Note: In addition to the PeopleSoft Staffing Front Office custom navigation center pages, PeopleSoft provides menu navigation, standard navigation pages, and PeopleSoft Navigator

See the product documentation for *PeopleTools: PeopleSoft Application User's Guide*

Pages Used to Navigate in Staffing Front Office

This table lists the Custom Navigation Center pages that are used to navigate in Staffing Front Office.

Page Name	Navigation	Usage
Front Office Management Center	Staffing > Front Office Management Center	Access the key areas of the application to manage your staffing business.
Agenda and History	Click the Agenda and History link on the Front Office Management Center page.	Work with your agenda. View and create history items.
Customers and Contacts	Click the Customers and Contacts link on the Front Office Management Center page.	Add or view customer and contact information for companies or individuals.
Reports	Click the Reports link on the Front Office Management Center page.	View and create related reports.
Orders and Assignments	Click the Orders and Assignments link on the Front Office Management Center page.	Add or view orders and assignments.
Resources	Click the Resources link on the Front Office Management Center page.	Add, update, or review applicant, employee, and contractor information.
Search	Click the Search link on the Front Office Management Center page.	Search for candidates, orders, and customers.

Viewing Staffing Navigation Collections

This topic provides an overview of Navigation Collections and discusses how to set up navigation collections.

Pages Used to View Navigation Collections

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
Navigation Collections - Find an Existing Collection Page	PTPP_SCSRCH	Search for an existing Navigation Collection that you want to edit or delete. Access pages that you can use to create new Navigation Collections.
Maintain Collection - Navigation Collection Page	PTPP_SCMAINTCOLL	Maintain Navigation Collections.

Understanding Navigation Collections

Navigation collections are sets of links into Financials database that support the users' ability to perform key business processes in a services organization. PeopleSoft delivers Navigation Collections to facilitate the performance of key business processes. The primary users of Navigation Collections are directors, resource supervisors, project and program managers, resources, and contract and billing administrators. System administrators can modify a Navigation Collection to include links to any component or page in the Financials database.

Viewing Staffing Navigation Collections

Staffing Navigation Collections group common functional areas used in Staffing into a single tile. This tile can be added to the Fluid Homepage so that a user can have easy access to the Staffing functional areas grouped under the Staffing Navigation Collections.

To view Navigation Collections in Staffing:

Navigation

Select Personalize Homepage link on the PeopleSoft Fluid Homepage.

Select Add Tile >FSCM Navigation Collections >Staffing, Save.

Select the Staffing tile on the Fluid Home Page.

Image: Staffing Navigation Collections page

This example illustrates the fields and controls on the Staffing Navigation Collections page..

Navigation Collections - Find an Existing Collection Page

Use the Navigation Collections - Find an Existing Collection page (PTPP_SCSRCH) to search for an existing Navigation Collection that you want to edit or delete.

You can use these to create new Navigation Collections.

Navigation

PeopleTools > Portal > Portal Utilities > Navigation Collections

Maintain Collection - Navigation Collection Page

Use the Maintain Collection - Navigation Collection page (PTPP_SCMAINTCOLL) to maintain Navigation Collections.

Navigation

Select the Edit link for an existing Navigation Collection on the Navigation Collections - Find an Existing Collection page.

Administrators can modify Navigation Collections as follows:

1. Search for the navigation collection that identifies the business process that you want to modify.
2. Select the Edit link corresponding to the Navigation Collection.
3. Add or edit links or folders on the Maintain Collection - Navigation Collection page.

See *PeopleTools: Portal Technology*, "Working With Navigation Pages."

Defining Your Operational Structure

Understanding PeopleSoft Table Setup

PeopleSoft applications rely on tables to store your business transactions as well as the structure and processing rules that drive your system. Before you start, set up your basic framework using the pages in PeopleTools . If you are integrating with PeopleSoft Pay/Bill Management, some of this framework should be defined first in other core Financials or HCM applications. You should work closely with administrators from your human resource and financials areas as you prepare to populate these tables.

Because of the relational design of PeopleSoft applications, the order in which you make important decisions about using the application is not necessarily the order in which you use the online pages to set up the database tables. Certain tables work as a group when you make processing or implementation decisions; therefore, you must establish data in some tables before others.

Understanding PeopleSoft Search Engine

PeopleSoft combined with People Tools provides search capabilities using the Oracle Search Framework, which is implemented through the PeopleSoft Search Framework.

The PeopleSoft Search Framework provides a standard method to use search indexes for all PeopleSoft applications. The Search Framework depends on the Search Framework.

Five search types — PeopleMatch, PeopleSearch, Order Search, Customer Search, and Contact Search—use the Search Framework.

For more information about setting up and using searches for PeopleSoft Staffing Front Office, "Searching PeopleSoft Staffing Front Office".

For more information about PeopleSoft Search for Financials and Supply Chain Management, See PeopleSoft Application Fundamentals product documentation, PeopleSoft Search for Financials and Supply Chain Management

Setting Up Your General Business Environment

To set up your business environment, use the TableSet Control (SETID_TBL) and Staffing Branch (FO_BRANCH_TBL) components.

Your implementation team must decide how to classify your organization's data in Staffing Front Office. This involves determining how to define your TableSet sharing. This topic provides an overview of TableSet sharing and discusses how to set up general business environment.

Pages Used to Set Up Your General Business Environment

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
TableSet Control Page	SETID_TBL	Establish TableSet IDs to share within your environment.
Staffing Branch Page	FO_BRANCH_TBL	Define branch information and business unit mapping.

Related Links

"Installation Options - Staffing Installation Page" (PeopleSoft FSCM 9.2: Application Fundamentals)

Understanding TableSet Sharing

TableSet sharing is a way to share common information among business units. The key to sharing that information is defining what data is available under specific circumstances. To do this, PeopleSoft uses SetIDs. TableSet sharing consists of assigning SetIDs to specific record groups.

PeopleSoft Staffing Front Office provides several record groups for business unit and SetID functionality.

Record groups ensure that TableSet sharing is applied consistently across related tables and views in your system. A record group can contain a single table or many tables and views. Because table sharing is defined by a record group and not by individual tables, you do not need to know every table that is involved in a particular function, such as establishing customers.

For example, mapping a new SetID to record group FO_01 links that SetID to all views and tables that are contained in that record group. PeopleSoft delivers your Staffing Front Office system with all tables and views assigned to record groups.

Note: Set up TableSet controls if you are sharing data across business units. If you are integrating with PeopleSoft Pay/Bill Management, the SetIDs used for customers, suppliers, departments, and rates must match the SetIDs used within the Financials and HCM databases.

Branches

Branches offer your organization a structuring device through which you can implement PeopleSoft Staffing Front Office based on how your business is organized. Your branches might be companies, subsidiaries, divisions, departments, or branch offices within your organization.

Each branch is actually a separate part of your organization. For example, you might have a southwest staffing branch and a southeast staffing branch for temporary resources.

When you establish branches in Staffing Front Office, be aware that no predefined definitions exist; use the branch organizational level in the ways most useful to you.

Understanding URL Setup

Staffing Front Office enables you to interact with your intranet and the Internet. Some functions in Staffing Front Office draw upon stored uniform resource locators (URLs) or web site addresses. URLs are

used, for example, by the attachment functionality and to check stock quotes. You can add other URLs to accommodate future enhancements.

It is recommended that you create two URL Identifiers for PeopleSoft Staffing Front Office using the "URL Maintenance Page" (PeopleSoft 9.2: Approval Framework) to set . Values are:

ATTACHMENTS: Defines the file transfer protocol (FTP) that specifies where in your network to store files that are attached to records in your Staffing Front Office components. For example, the path that is specified in the URL field is where you store resumes that are attached to an applicant's data. Be sure to use the exact value.

STOCK_SYMBOL: Specifies the website in which to find stock quotes for a company. You can find a customer's current stock value by clicking the stock quote link in the Customer component. Be sure to use the exact value.

TableSet Control Page

Use the TableSet Control page (SETID_TBL) to establish TableSet IDs to share within your environment.

Navigation

PeopleTools > Utilities > Administration > TableSet IDs

Description	Enter a name to identify the TableSet control.
Short Description	Enter a short name to identify the TableSet control.

Warning! TableSet IDs must be five characters long to avoid affecting system performance.

Staffing Branch Page

Use the Staffing Branch page (FO_BRANCH_TBL) to define branch information and business unit mapping.

Navigation

Set Up Financials/Supply Chain > Product Related > Staffing > General > Branch/Business Unit Mapping

Image: Staffing Branch page

This example illustrates the fields and controls on the Staffing Branch page. You can find definitions for the fields and controls later on this page.

Staffing Branch

Branch FRA01

Description Paris Branch

Short Description Paris

Email

Phone

Fixed Cost Margin 5.00 (Example: 8.15)

Rate Type CRRNT Current Rate

Business Unit Mapping

Contracts Business Unit FRA01 FRANCE OPERATIONS

PC Business Unit FRA01 FRANCE OPERATIONS

AP Business Unit FRA01 FRANCE OPERATIONS

Location Code FRA01 France - Paris

Job Board Distributor

Branch

Select the ID of the staffing branch.

Description and Short Description

Enter the name of the branch or region. The system uses this value on reports, and on your internal website if you publish orders.

Fixed Cost Margin

Enter the average overhead percentage rate for this branch, not including workers' compensation. The system uses this percentage to calculate the margin for your assignments. This value appears by default in the Order Margin estimator.

Rate Type

Select the rate type that you want to use for this branch.

Job Board Distributor

Select an option from a list of Job Board Distributor suppliers for the branch. Job Board Distributor suppliers are defined on the Supplier Integration Setup page.

See the topic “Setting Up Third-party Integrations”, “Supplier Integration Setup Page”.

When you select a value in this section, it overrides the default selection on the Installation Options – Staffing Installation page.

Note: You must set up TableSet controls if you share data across business units.

Business Unit Mapping

Contracts Business Unit

Displays the PeopleSoft Contracts business unit associated with the branch.

Note: This field appears only if you have Pay/Bill Management installed. When an order is first saved with a status different than Draft, PeopleSoft Pay/Bill Management automatically creates a contract in the PeopleSoft Contracts application using the contract business unit associated with the staffing branch specified in the job order.

PC Business Unit

Select the PeopleSoft Project Costing business unit that is associated with the branch. This Project Costing business unit appears by default on the Add History page (Staffing, Agenda and History, Add History).

Note: This field appears even if you do not have PeopleSoft Pay/Bill Management installed since a PeopleSoft Project Costing business unit is part of the key of the order transaction. If PeopleSoft Pay/Bill Management is installed, however, when an order is first saved with a status different than Draft, the system automatically creates a project in the PeopleSoft Project Costing application using the projects business unit associated with the staffing branch specified in the job order.

AP Business Unit

The PeopleSoft Payables business unit associated with the branch.

Note: This field appears only if you have PeopleSoft Pay/Bill Management installed. When temporary assignments are created for non-employees, PeopleSoft Pay/Bill Management provides functionality to automatically create a voucher in the PeopleSoft Payables application using the non-employee time reported in PeopleSoft Time and Labor. PeopleSoft Pay/Bill Management creates this voucher using the AP Business Unit associated with the staffing branch specified in the order.

Location Code

Enter the physical address of the branch.

Job Board Distributor

Select an option from a list of Job Board Distributor suppliers for the branch. Job Board Distributor suppliers are defined on the Supplier Integration Setup page. [Supplier Setup Page](#)

When you select a value in this section, it overrides the default selection on the "Installation Options - Staffing Installation Page" (PeopleSoft FSCM 9.2: Application Fundamentals).

Setting Up PeopleSoft Project Costing Business Units

Staffing orders are keyed by PeopleSoft Project Costing business units—even if you are not using PeopleSoft Project Costing. You must set up PeopleSoft Project Costing business units and map the staffing branches to the corresponding PeopleSoft Project Costing business unit. If you have PeopleSoft Staffing Front Office without PeopleSoft Pay/Bill Management, this is the only PeopleSoft Project Costing related configuration you must complete.

See "Project Costing Definition Page" (PeopleSoft FSCM 9.2: Project Costing).

Defining Common Definitions

This topic discusses how to define common definitions.

Pages Used to Define Common Definitions

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
"Auto Numbering Page" (PeopleSoft FSCM 9.2: Application Fundamentals)	AUTO_NUM_PNL	Set up automatic numbering for customers, contacts, and affiliate suppliers. Orders and assignments do not use the autonumbering table, but instead use the Last EmplID Used field on the Installation Options - Staffing page. Affiliate supplier autonumbering is only applicable if you have PeopleSoft Staffing Front Office installed without PeopleSoft Pay/Bill Management.
Market Rate Type	RT_TYPE_TBL	Define rate types to further categorize market rates.
"Country Description Page" (PeopleSoft FSCM 9.2: Application Fundamentals)	COUNTRY_DEFN	Add or review country descriptions.
"Location - State Page" (PeopleSoft FSCM 9.2: Application Fundamentals)	STATE_DEFN	Add or review a state or province codes. PeopleSoft HCM has additional state codes for the United States that begin with special characters. These State codes are used by PeopleSoft Payroll. Therefore, you should not synchronize the HCM and Financials state tables.
"Currency Code Page" (PeopleSoft FSCM 9.2: Global Options and Reports)	CURRENCY_CD_TABLE	Add or update currency codes.

Page Name	Definition Name	Usage
National ID Types	NID_TYPE_TABLE	Assign a national ID type to a country code and provide a default national ID value. This configuration component is used only for Staffing Front Office when implemented without PeopleSoft Pay/Bill Management. If you have implemented PeopleSoft Pay/Bill Management along with PeopleSoft Staffing Front Office, synchronize this table from the HCM configuration. The Default field is used for synchronization with PeopleSoft back-office applications only. The system does not automatically enter national IDs with a default value in PeopleSoft Staffing Front Office. PeopleSoft Staffing Front Office uses a blank for the default value. See <i>PeopleSoft HCM 9.2 Defining National ID Types</i>, National ID Types Page

Setting Up User Preferences

To set up user preferences, use the Staffing (OPR_DEF_TABLE_FO) component.

User preferences are a way to set up default values that facilitate faster data entry into transaction tables. The users can override these default values on the application pages.

This topic discusses how to set up user preferences.

Pages Used to Set Up Staffing User Preferences

Page Name	Definition Name	Usage
"User Preferences – Staffing General Preferences Page" (PeopleSoft FSCM 9.2: Application Fundamentals)	OPR_DEF_TABLE_FO1	Set up general user preferences.
"Defining Staffing Job Data Preferences" (PeopleSoft FSCM 9.2: Application Fundamentals)	OPR_DEF_TABLE_FO2	Define PeopleSoft Staffing Front Office default values for the Job Data section of the Applicant setup pages.

Setting Up Security

To set up security, use the following components:

- Department (DEPARTMENT)
- Staffing Department Security (SCRTY_TABL_DEPT)
- Unit by Permission List (SEC_BU_CLS)
- Unit by User ID (SEC_BU_OPR)
- TableSet by Permission List (SEC_SETID_CLS)
- TableSet by User ID (SEC_SETID_OPR)
- Security Views (SECURITY_VIEWS)

You can grant access to a department, SetID, or business unit using permission lists or user IDs. The pages that you use to define security using permission lists or user IDs work the same way. Security for SetIDs and business units are discussed in the *PeopleSoft Application Fundamentals*.documentation. Department security is specific to PeopleSoft Staffing Front Office.

This topic provides an overview of security and discusses how to set up security.

Pages Used to Set Up Security

Page Name	Definition Name	Usage
<u>Department Page</u>	DEPARTMENT	Create a departmental reporting structure. If you have PeopleSoft Staffing Front Office and PeopleSoft Pay/Bill Management you can set up departments in either HCM or in Financials and application messaging will synchronize the information. If you add departments in Financials and the information is sent by application messaging to HCM, you must populate extra fields in the HCM department component that are not visible in the Financials department component.
<u>Department Security Page</u>	SCRTY_TABL_DEPT	Assign users permission lists to the appropriate department in the tree structure.
Department Security	FO_APPLY_SCTY	Update security entries for security trees.
Business Unit Security by Permission List	SEC_BU_CLS	Set up the information that an operator can access when prompting for business units. Accessed by permission list, this page displays all the business units that are accessible by the operators associated with a given permission list.
Business Unit Security By User ID	SEC_BU_OPR	Grant access to business units using user IDs.

Page Name	Definition Name	Usage
TableSet Security by Permission List	SEC_SETID_CLS	Grant access to SetIDs using permission lists.
TableSet Security by User ID	SEC_SETID_OPR	Grant access to SetIDs using user IDs.
Security Views	SECURITY_VIEWS	Define the type of security for each view of your system.
Apply Security Setups	RUN_FIN9001	Run the process to apply your security options.

Understanding Security

This section discusses:

- Department security.
- Business unit and SetID security.

Department Security

You must assign every applicant and employee who is entered in PeopleSoft Staffing Front Office to a department. Associating a department with an employee is necessary for payroll processing and data security. All PeopleSoft users have individual security profiles that define the data that they can view or update.

You cannot access information about applicants or employees if you have not completed department security correctly.

These items must be set up for department security to work correctly:

- Department table.
- Department tree.
- Department security table.

Your security administrator should set up the department security tree using PeopleSoft Tree Manager and department security tables. Departments are SetID-driven.

To enable data entry for applicants and employees, assign the user permission lists to the appropriate level in the security tree. The users with a particular permission list have access to that department's data and all data that falls underneath the department in the department tree.

Place departments on a department tree in your organization's appropriate reporting structure. You do so to ensure that the correct people at each level access the correct data.

To enter and retrieve applicant and employee data in PeopleSoft Staffing Front Office, add all active departments to the tree manager table that is linked to your PeopleSoft logon.

Note: To gain access to an applicant or employee, add the department to the department tree under PeopleSoft Tree Manager. In addition, you must add the node (or a higher level node) to the permission list for that user under Department Security in Set Up Staffing. When you select a department for the applicant, all departments appear regardless of security. Consequently, you can mistakenly add an applicant for which no access exists.

See the product documentation for *PeopleTools: PeopleSoft Tree Manager*

Business Unit and SetID Security

You maintain business unit and SetIDs in edit tables. You can use them as primary keys throughout the system. When a field uses an edit table to select values, you can select only the values that have been defined for that table. When PeopleSoft row-level application security is activated, you can specify values from the edit table so that only those values are available in a particular view.

Views are a means to access data horizontally across more than one table. Views are Structured Query Language (SQL) statements that filter out data rows whose key values are not needed as valid access parameters. The result is that users with the authority to access SetIDs and business units see only a subset of the values from these edit tables.

After views are set up, you can specify which users or permission lists can access the pages that contain secured field values.

PeopleSoft delivers its applications with security views that apply to the key fields in your system. You can alter these views or build views of your own. A view name has one of these three file extensions to reflect the type of security for the view:

- NONVW: No security is selected for that view.
- OPRVW: Operator security is selected for that view.
- CLSVW: Class list security is selected for that view.

After you select your security options and set up security view names, you can define the actual secured field values that are used by each user or permission list. The page that you use to secure fields in your application depends on your level of system security. If you select operator-level security, you utilize user security pages. If you select class-level security, you use the permission list security pages.

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

Department Page

Use the Department page (DEPARTMENT) to create a departmental reporting structure.

Navigation

Set Up Financials/Supply Chain > Common Definitions > Design ChartFields > Define Values > ChartField Values > Department

Image: Department page

This example illustrates the fields and controls on the Department page. You can find definitions for the fields and controls later on this page.

Department

SetID

SHARE

Department

10000

Effective Date

Find | View All

First 1 of 1 Last

'Effective Date'

01/01/1900

'Status'

Active

'Description'

Human Resources

'Short Description'

HR

Manager ID

KU0079

Company

Attributes

Long Description

Budgetary Only

Manager Name

Ball,Nancy

- Status

Select the current status of the department. Values are *Active* or *Inactive*.
- Description and Short Description

Enter a description and short description. These fields appear on pages and in reports.
- Manager ID and Manager Name

Enter the manager ID and name for this department.
- Company

Select the payroll company into which the department reports.
The system uses the payroll company to calculate workers' compensation. The system also uses the department on the order in conjunction with the state to look up the appropriate workers' compensation rate.

Note: If PeopleSoft Staffing Front Office is installed with PeopleSoft Pay/Bill Management, this table will be populated by either the HCM or core Financials users (thus PeopleSoft Staffing Front Office users do not need to configure it).

Department Security Page

Use the Department Security page (SCRTY_TABL_DEPT) to assign users permission lists to the appropriate department in the tree structure.

Navigation

Set Up Financials/Supply Chain > Security > Staffing Department Security

- Row Security Permission List

Displays the row security permission list that you selected. This is established under Maintain Security.
- SetID

Enter the set control value on which the system is to base your department structure.
- Dept (department)

Enter the department ID that you entered on the department security tree. Users with this permission list have access to the department and any child departments that are associated with it.

Access Code

Specify which type of access the permission list has to the department ID: *No Access* or *Read/Write*.

Update security entries for security trees as necessary by accessing the second Department Security page.

Setting Up the PeopleSoft Search Engine

PeopleSoft combined with People Tools provides search capabilities using the Oracle Search Framework, which is implemented through the PeopleSoft Search Framework.

The PeopleSoft Search Framework provides a standard method to use search indexes for all PeopleSoft applications. The Search Framework depends on the Search Framework.

Five search types - PeopleMatch, PeopleSearch, Order Search, Customer Search, and Contact Search - use the Search Framework.

For more information about setting up and using searches for PeopleSoft Staffing Front Office, see Understanding the Search Framework. For more information about PeopleSoft Search for Financials and Supply Chain Management, see "Understanding Financials and Supply Chain Search" (PeopleSoft FSCM 9.2: Application Fundamentals).

Chapter 4

Structuring PeopleSoft Staffing Front Office Processing Environment

Understanding Event Categories, Process Events, and Individual Events

It is important to understand the relationship between event categories, process events (and sub-events), and individual events.

Event Category

An event category enables you to categorize several event types. Therefore, if you choose to map event assignments for team members at the event category level, then this is the easiest to setup your system.

Process Event

A process event is another way to group event types and usually refers to a group of tasks that need to be completed in order to be considered complete. Process events are only used for the Recruiting Funnel feature.

Individual Event

An individual event is the most detailed setup you can create because it refers to specific events that you associate to a user.

A user can be assigned to an event category, a process event, and an individual event at same time. Therefore, all events available within an event category, a process event, and an individual event are available to the user.

Setting Up Resource Tables

Use the pages described in this topic to set up the tables and processing rules that PeopleSoft Staffing Front Office uses to process information entered into the Employee and Applicant component pages.

To set up resource tables, use the following components:

- Jobcodes (RS_CM_JOBCODE_TBL)
- Lines of Business (LINE_OF_BUSINESS)
- Frequencies (RS_CM_FREQNCY)
- Tests (RS_CM_TEST_TBL)

- Schools (RS_CM_SCHOOL_TBL)
- Majors (RS_CM_MAJOR_TBL)
- Degrees (RS_CM_DEGREE_TBL)
- Shifts (SHIFT_CODE_TABLE)
- Recruiting Source Categories (RECRUIT_SRC_TABLE)
- Recruiting Sources (RECR_CATSRC_TABLE)
- Action Reasons (ACTRSN_TBL_GBL)

Note: In the following list, the items marked with an asterisk (*) are, in an integrated environment where you have PeopleSoft Pay/Bill Management installed as well as PeopleSoft Staffing Front Office, configured in and owned by PeopleSoft HCM. You set these up in HCM, and the information from these tables is synchronized with the information in the Financials tables through application messaging. The items in the following list that are not marked with an asterisk are set up in and owned by PeopleSoft Financials, and they do not exist in HCM.

This topic discusses how to:

- Enter job code definitions.

Note: If you have both PeopleSoft Staffing Front Office and PeopleSoft Pay/Bill Management installed, most of the job code setup is done in HCM, but you set up margin percents in the Financials database.

- Enter lines of business.

You can associate lines of business with applicants and employees. The system then uses the information as searching and matching criteria.

- Define frequencies.

Note: If you have both PeopleSoft Staffing Front Office and PeopleSoft Pay/Bill Management installed, perform this setup in HCM.

- *Enter the name of tests.
- *Enter the names of schools.
- *Enter the names of majors.
- *Enter the names of degrees.
- Enter shift names.
- Set up recruiting source categories.
- Set up individual recruiting sources.
- *Define reasons for your job actions.

When an employee job record changes, the action reason can further clarify the reason for the action taken. The values for the Action and Reason fields should be coordinated with your human resources group, and, if you are using PeopleSoft Pay/Bill Management, the values should be identical in both PeopleSoft Staffing Front Office and HR.

- Determine the sequence in which pages appear in the Apply Online component.

PeopleSoft Staffing Front Office enables potential candidates to apply to your staffing organization online using a special web page that you set up. The Apply Online Setup table determines the sequence in which each page appears to users in the self-service application.

In addition, you must set up the following information:

Type	Navigation	Reference
Resource Setup	Set Up Financials/Supply Chain, Common Definitions, Resources Data, Resource Setup	<i>PeopleSoft HCM: Application Fundamentals</i> Defining Financials and Supply Chain Management Common Definitions, "Setting Up Resources" See "Setting Up Resources" (PeopleSoft FSCM 9.2: Application Fundamentals).
*Competencies	Set Up Financials/Supply Chain, Common Definitions, Resources Data, Competencies Note: If you have Pay/Bill Management installed, you must set up this table in HCM, not in Financials.	See PeopleSoft Resource Management, "Setting Up PeopleSoft Resource Management Without an Integrated HCM," See "Establishing Application Setup Tables for Competencies" (PeopleSoft FSCM 9.2: Resource Management).
*Competency Types	Set Up Financials/Supply Chain, Common Definitions, Resources Data, Competency Types Note: If you have Pay/Bill Management installed, you must set up this table in HCM, not in Financials.	See PeopleSoft Resource Management, "Setting Up PeopleSoft Resource Management Without an Integrated HCM". See "Establishing Application Setup Tables for Competencies" (PeopleSoft FSCM 9.2: Resource Management).
Load Holidays	Set Up Financials/Supply Chain, Common Definitions, Resources Data, Load Holidays	See PeopleSoft Resource Management, "Enabling Resource Schedules". See "Defining Holidays on Resource Schedules" (PeopleSoft FSCM 9.2: Resource Management).
Holidays Holiday Schedule	Set Up Financials/Supply Chain, Common Definitions, Resources Data, Holidays	See PeopleSoft Resource Management, "Setting Up PeopleSoft Resource Management Without an Integrated HCM". See "Establishing Application Setup Tables for Work Definitions" (PeopleSoft FSCM 9.2: Resource Management).

Type	Navigation	Reference
*Honors/Awards	Set Up Financials/Supply Chain, Common Definitions, Resources Data, Honors/Awards Note: If you have Pay/Bill Management installed, you must set up this table in HCM, not in Financials.	See PeopleSoft Resource Management, “Setting Up PeopleSoft Resource Management Without an Integrated HCM”, “Establishing Application Setup Tables for Accomplishments”. See "Establishing Application Setup Tables for Qualifications" (PeopleSoft FSCM 9.2: Resource Management).
*Languages	Set Up Financials/Supply Chain, Common Definitions, Resources Data, Languages Note: If you have Pay/Bill Management installed, you must set up this table in HCM, not in Financials.	See PeopleSoft Resource Management, “Setting Up PeopleSoft Resource Management Without an Integrated HCM”, “Establishing Application Setup Tables for Accomplishments”. See "Establishing Application Setup Tables for Qualifications" (PeopleSoft FSCM 9.2: Resource Management).
*Licenses/ Certifications	Set Up Financials/Supply Chain, Common Definitions, Resources Data, Licenses/Certifications Note: If you have Pay/Bill Management installed, you must set up this table in HCM, not in Financials.	See PeopleSoft Resource Management, “Setting Up PeopleSoft Resource Management Without an Integrated HCM”, “Establishing Application Setup Tables for Accomplishments”. See "Establishing Application Setup Tables for Qualifications" (PeopleSoft FSCM 9.2: Resource Management).
*Memberships	Set Up Financials/Supply Chain, Common Definitions, Resources Data, Memberships Note: If you have Pay/Bill Management installed, you must set up this table in HCM, not in Financials.	See PeopleSoft Resource Management, “Setting Up PeopleSoft Resource Management Without an Integrated HCM”, “Establishing Application Setup Tables for Accomplishments”. See "Establishing Application Setup Tables for Qualifications" (PeopleSoft FSCM 9.2: Resource Management).
*Rating Models	Set Up Financials/Supply Chain, Common Definitions, Resources Data, Rating Models Note: If you have Pay/Bill Management installed, you must set up this table in HCM, not in Financials.	See PeopleSoft Resource Management, “Setting Up PeopleSoft Resource Management Without an Integrated HCM”, “Establishing Application Setup Tables for Competencies”. See "Establishing Application Setup Tables for Competencies" (PeopleSoft FSCM 9.2: Resource Management).
*School Types	Set Up Financials/Supply Chain, Common Definitions, Resources Data, School Types Note: If you have Pay/Bill Management installed, you must set up this table in HCM, not in Financials.	See PeopleSoft Resource Management, “Setting Up PeopleSoft Resource Management Without an Integrated HCM”, “Establishing Application Setup Tables for Accomplishments”. See "Establishing Application Setup Tables for Qualifications" (PeopleSoft FSCM 9.2: Resource Management).

Type	Navigation	Reference
*Name Prefix	- Set Up Financials/Supply Chain, Product Related, Staffing, Resources, Name Prefix - Set Up HCM, Foundation Tables, Personal, Name Prefix, Name Prefix Table Note: If you have Pay/Bill Management installed, you must set up this table in HCM, not in Financials.	<i>PeopleSoft HCM: Application Fundamentals</i> “Setting Up Personal Information Foundation Tables, Setting Up Additional Name Information”.
*Name Suffix	- Set Up Financials/Supply Chain, Product Related, Staffing, Resources, Name Suffix - Set Up HCM, Foundation Tables, Personal, Name Suffix, Name Suffix Table Note: If you have Pay/Bill Management installed, you must set up this table in HCM, not in Financials.	<i>PeopleSoft HCM: Application Fundamentals</i> “Setting Up Personal Information Foundation Tables, Setting Up Additional Name Information”.
*National ID Types	Set Up Financials/Supply Chain, Product Related, Staffing, Resources, National ID Types Note: If you have Pay/Bill Management installed, you must set up this table in HCM, not in Financials.	See the product documentation for <i>PeopleSoft HCM: Application Fundamentals</i> “Setting Up Personal Information Foundation Tables, Defining National ID Types”. See Understanding PeopleSoft Table Setup Defining Common Definitions.
Resource Group Setup	Staffing, Resources, Resource Group Setup	See PeopleSoft Resource Management, “Enabling Resource Matching and Cache Processes, Establishing Resource Groups”. See "Establishing Resource Groups" (PeopleSoft FSCM 9.2: Resource Management). Note: The Resource Pool and Supervisor fields do not appear when you access this page from the Staffing menu path. In addition, while the Resource Management tree is based on a department tree, resource groups created for staffing use a staffing branch tree.

Pages Used to Set Up Resource Tables

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
<u>Job Code Definition Page</u>	RS_CM_JOBCODE_TBL	Define job code information in PeopleSoft Staffing Front Office. Before entering this information, set up your lines of business. If you are integrating with PeopleSoft Pay/Bill Management, job codes are established in HCM. The Jobcode Definition and Billing Calculation pages should be used for retrieving and updating job codes with specific PeopleSoft Staffing Front Office information. You should not create them using this page.
<u>Lines of Business Page</u>	LINE_OF_BUSINESS	Define broad categories of job sectors and product areas in which your applicants and employees have worked and your customers operate their businesses.
<u>Frequency Setup Page</u>	RS_CM_FREQNCY_TBL	Define payroll frequencies. If you have PeopleSoft Pay/Bill Management installed, configure frequencies in HCM and you must set up this table in HCM, not in Financials.
<u>Test Page</u>	RS_CM_TEST_TBL	Define the names of the tests that you regularly administer to applicants and employees. If you have PeopleSoft Pay/Bill Management installed, you must set up this table in HCM, not in Financials. See PeopleSoft Human Resources, “Manage Competencies, Setting Up Competencies and Accomplishments, Setting Up Educational Qualifications and Accomplishments”.

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
<u>School Page</u>	RS_CM_SCHOOL_TBL	Define the names of the schools to be referred in the education records of your applicants and employees. The school code table serves as a prompt table on the Education page in the Applicant and Employee components. If you have PeopleSoft Pay/Bill Management installed, you must set up this table in HCM, not in Financials. See PeopleSoft Human Resources, “Setting Up Competencies and Accomplishments, Setting Up Educational Qualifications and Accomplishments”.
<u>Major Page</u>	RS_CM_MAJOR_TBL	Define the names of the majors to be referenced in the education records of your applicants and employees. If you have PeopleSoft Pay/Bill Management installed, you must set up this table in HCM, not in Financials. See PeopleSoft Human Resources, “Setting Up Competencies and Accomplishments, Setting Up Educational Qualifications and Accomplishments”.
<u>Degree Page</u>	RS_CM_DEGREE_TBL	Define the names of the degrees to be referenced in the education records of your applicants and employees. If you have PeopleSoft Pay/Bill Management installed, you must set up this table in HCM, not in Financials. See PeopleSoft Human Resources, “Manage Competencies, Setting Up Competencies and Accomplishments, Setting Up Educational Qualifications and Accomplishments”.
<u>Shift Page</u>	SHIFT_CODE_TABLE	Define the shifts that your employees can work.
<u>Recruiting Source Categories Page</u>	RECRUIT_SRC_TABLE	Define categories for recruiting sources.
<u>Recruiting Sources Page</u>	RECR_CATSRC_TABLE	Define individual recruiting sources.

Page Name	Definition Name	Usage
Action Reason Page	ACTRSN_TBL_GBL	Define the reasons for your organization's employment actions. If you have PeopleSoft Pay/Bill Management installed, you must set up this table in HCM, not in Financials. <i>PeopleSoft HCM: Human Resources Administer Workforce “Setting Up the Administer Workforce Business Process, Defining Duty Types and Reasons for Personnel Actions”.</i>
Apply Online Page	FO_ESS_OPTIONS	Determine the sequence of pages in the Apply Online component.

Related Links

[Entering Data to Create New Applicant Records](#)

Job Code Definition Page

Use the Job Code Definition page (RS_CM_JOBCODE_TBL) to define job code information in PeopleSoft Staffing Front Office.

Before entering this information, set up your lines of business.

Navigation

Set Up Financials/Supply Chain > Common Definitions > Resources Data > Jobcodes

Effective Date	Select the effective date for this row of job code data.
Status	Select the status of this job code as of the effective date: <i>Active</i> or <i>Inactive</i> .
Line of Business	Enter the product area to which the job code belongs.

Lines of Business Page

Use the Lines of Business page (LINE_OF_BUSINESS) to define broad categories of job sectors and product areas in which your applicants and employees have worked and your customers operate their businesses.

Navigation

Set Up Financials/Supply Chain > Product Related > Staffing > General > Lines of Business

Enter a unique code to identify this line of business, and enter a short and long description.

Frequency Setup Page

Use the Frequency Setup page (RS_CM_FREQNCY_TBL) to define payroll frequencies.

Navigation

Set Up Financials/Supply Chain > Common Definitions > Resources Data > Frequencies

Image: Frequency Setup page

This example illustrates the fields and controls on the Frequency Setup page. You can find definitions for the fields and controls later on this page.

Frequency Setup

Frequency Id H

Pay/Bill Installation Options Find | View All First 1 of 1 Last

'Effective Date 01/01/1900

'Status Active

'Description Hourly

Short Desc Hourly

'Maintenance Responsibility P PeopleSoft

'Frequency Type Hourly ☒ Use StdHours for Annualization

Frequency Annualization Factor

Note: If you are integrating with PeopleSoft Pay/Bill Management, you establish the frequency information in PeopleSoft HCM, and send it to Financials via application messaging. If this is your situation and you are a system administrator, PeopleSoft recommends that you do not make this page accessible to general users.

Maintenance Responsibility

Select a maintenance responsibility:

- *C* (customer): You define the frequency ID and are responsible for keeping this frequency code up to date.
- *P* (PeopleSoft): PeopleSoft delivers the frequency in the system and is responsible for keeping it up to date. The other fields on this page become unavailable.

Frequency Type

Select a frequency type, such as: *Annual*, *Hourly*, or *Daily*.

Use StdHours for Annualization (use standard hours for annualization)

Select to have the system use job standard hours for annualization instead of the frequency annualization factor. The system sets the frequency annualization factor to 0. After you select this check box and save the page, the Frequency Annualization Factor field becomes unavailable.

Note: You can use only hourly frequencies that use standard hours for annualization for compensation and pay frequency in PeopleSoft HCM, PeopleSoft Payroll for North America, and PeopleSoft Global Payroll.

The Use StdHours for Annualization check box becomes available after you save the page but only if you select the *Hourly* frequency type.

Frequency Annualization Factor

Enter the number of frequency periods to occur in one year.

For example, a *Daily* compensation frequency is 260 because there are 260 workdays in the year. You can also define a frequency. For example, a frequency ID you name W53 would have a *Weekly* frequency type and a frequency annualization factor of 53.

Warning! If you change the effective status, frequency type, or annualization factor of an existing frequency, you receive a warning message saying that previous calculations using this frequency are not synchronous with the new values of the frequency.

Related Links

"Establishing Application Setup Tables for Work Definitions" (PeopleSoft FSCM 9.2: Resource Management)

Test Page

Use the Test page (RS_CM_TEST_TBL) to define the names of the tests that you regularly administer to applicants and employees.

Navigation

Set Up Financials/Supply Chain > Common Definitions > Resources Data > Tests

Enter a short and long description for the test.

Note: Test table codes are global, not driven by SetID.

School Page

Use the School page (RS_CM_SCHOOL_TBL) to define the names of the schools to be referred in the education records of your applicants and employees.

The school code table serves as a prompt table on the Education page in the Applicant and Employee components.

Navigation

Set Up Financials/Supply Chain > Common Definitions > Resources Data > Schools

School Code and Description	Enter a unique code and description for each school.
Country	Enter the country in which the school is located.
State	Enter the state in which the school is located.

Major Page

Use the Major page (RS_CM_MAJOR_TBL) to define the names of the majors to be referenced in the education records of your applicants and employees.

Navigation

Set Up Financials/Supply Chain > Common Definitions > Resources Data > Majors

Enter a unique code for the major and a short and long description.

Degree Page

Use the Degree page (RS_CM_DEGREE_TBL) to define the names of the degrees to be referenced in the education records of your applicants and employees.

Navigation

Set Up Financials/Supply Chain > Common Definitions > Resources Data > Degrees

Enter a Degree Code, Description, Short Description, and Country for the degree.

Shift Page

Use the Shift page (SHIFT_CODE_TABLE) to define the shifts that your employees can work.

Navigation

Set Up Financials/Supply Chain > Product Related > Staffing > Resources > Shifts

Enter a Shift Code, Description, and Short Description, for the shift.

Recruiting Source Categories Page

Use the Recruiting Source Categories page (RECRUIT_SRC_TABLE) to define categories for recruiting sources.

Navigation

Set Up Financials/Supply Chain > Product Related > Staffing > Resources > Recruiting Source Categories

Note: Access this page only if you have PeopleSoft Staffing Front Office installed.

Enter a Category, Description, and Short Description.

Recruiting Sources Page

Use the Recruiting Sources page (RECR_CATSRC_TABLE) to define individual recruiting sources.

Navigation

Set Up Financials/Supply Chain > Product Related > Staffing > Resources > Recruiting Sources

Enter a Source, Description, and Short Description.

Action Reason Page

Use the Action Reason page (ACTRSN_TBL_GBL) to define the reasons for your organization's employment actions.

Navigation

Set Up Financials/Supply Chain > Product Related > Staffing > Resources > Action Reasons

Enter the Effective Date and Status of the action reason as well as a short and long description.

Note: If you have PeopleSoft Pay/Bill Management in addition to PeopleSoft Staffing Front Office, this table should be configured in HCM and synchronized with Financials through application messaging. If this is your situation and you are a system administrator, do not make this page accessible to general users.

If you do not have PeopleSoft Pay/Bill Management installed, use this page to maintain the information.

Apply Online Page

Use the Apply Online page (FO_ESS_OPTIONS) to determine the sequence of pages in the Apply Online componentSet Up Financials/Supply Chain > Product Related > Staffing > Resources > Apply Online.

Image: Apply Online Page

This example illustrates the fields and controls on the Apply Online Page. You can find definitions for the fields and controls later on this page.

Apply Online

Pages to include in Online Application

	Sequence
☒ Welcome	1
☒ Resume	2
☒ Job Opening	5
☒ Personal Information	10
☒ Contact Information	15
☒ Competencies	16
☒ Education	17
☒ Availability	20
☒ Submit Application	99
☐ Staffing Branch	12
☐ Opportunities	24

You must select the check boxes for the *Welcome Page* and the *Submit Application* page, and these must be ordered first and last, respectively.

Select the check box next to the other pages that you want to include (or deselect those you do not want to include) and indicate the order in which you want them to appear by entering a number that is greater than 1 and less than 99 in the corresponding Sequence column field.

Setting Up Order Tables

To set up your order tables, use the Rate Profile (FO_RATE_PROFILE), User Order Type (FO_ORDER_TYPE), and Rate Element (FO_RATE_ELEMENT) components.

You can use the pages described in this topic to set up the tables and processing rules that PeopleSoft Staffing Front Office references to process the information entered into the Order and Assignment component pages.

This topic discusses how to set up order tables.

- Set up order event groups.

The system uses order event groups to automatically schedule a set of agenda items, such as calls or visits, once a candidate accepts a temporary or career assignment. Each order event is associated with a SetID.

Order events automatically generate agenda items based on the criteria that are set. The objective for multiple agenda items is to monitor the status of an order or how an employee is working out on a career or temporary order. The system schedules order events when an applicant or an employee accepts an offer.

- Create career order fee schedules.

The fee schedules that you set up are used to calculate the placement fee fields on the in the Order component. Fee schedules enable you to project a maximum and minimum income amount based on the salary range you enter on the career order. Potential income scales are SetID-driven.

- Create fall off terms.

A fall off indicates that a candidate did not begin or complete a career placement that he or she accepted. When PeopleSoft Pay/Bill Management is installed in addition to PeopleSoft Staffing Front Office, a credit is automatically created for the customer in the PeopleSoft Billing application when a fall off occurs.

Pages Used to Set Up Order Tables

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
<u>Rate Profile Page</u>	FO_RATE_PROFILE	Define rate profile elements for temporary and salaried staff as well as contractors. Use this page whether or not you have PeopleSoft Pay/Bill Management installed.
<u>User Order Type Page</u>	FO_ORDER_TYPE	Set up user-defined order types.
<u>Rate Element Page</u>	FO_RATE_ELEMENT	Define FLSA category, rate behavior, and employee type for the rate element, and enter pay descriptions for temporary and salaried staff and contractors. Set the action for how you want to use the pay type, and enter the factor by which you want the system to multiply the pay rate.
<u>Order Event Group Page</u>	FO_ORDR_EVENT	Define a series of agenda items that you want to schedule when a candidate accepts an offer. The order events trigger the creation of entries in the agenda table.
<u>Fee Schedule Page</u>	POTENTIAL_INCOME	Define career order fee schedules. The fee schedules are used in career orders to determine the percentage to be applied on the employee's compensation to calculate the placement fee.
<u>Fall Off Page</u>	FALL_OFF_TBL	Define a list of terms to indicate why a candidate did not begin or complete a career placement that he or she accepted.

Rate Profile Page

Use the Rate Profile page (FO_RATE_PROFILE) to define rate profile elements for temporary and salaried staff as well as contractors.

Use this page whether or not you have PeopleSoft Pay/Bill Management installed.

Navigation

Set Up Financials/Supply Chain > Product Related > Staffing > Orders > Rate Profile

Image: Rate Profile page

This example illustrates the fields and controls on the Rate Profile page. You can find definitions for the fields and controls later on this page.

Rate Profile

SetID **SHARE**

Rate Profile ID **GP**

*Description **Global Payroll**

Short Description **GP**

Rate Profile Available To

☐ NA Payroll Hourly Employee
☐ NA Payroll Salaried Employee
☐ Non-Employee
☒ Global Payroll Employee

Rate Elements Personalize | Find | View All | First 1 of 1 Last

Rate Element	Short Description	Sort Order Number
MARK	mar	1

Description and Short Description

Enter descriptions for the Rate Profile ID you selected. For example, *NA Salaried* (North American salaried) or *GPEMP* (global employee).

Note: When PeopleSoft Staffing Front Office is installed without PeopleSoft Pay/Bill Management, only four rate profiles can be created (one each for NA hourly employees, NA salaried employees, non-employees, and Global Payroll employees). When PeopleSoft Staffing Front Office is installed with PeopleSoft Pay/Bill Management, you can create as many different rate profiles as needed.

Rate Profile Available To

NA Payroll Hourly Employee (North American payroll hourly employee), **NA** available.

Payroll Salaried Employee (North American payroll salaried employee),

Non-Employee, or **Global Payroll Employee**

Rate Element

Enter the rate elements for this profile ID.

Sort Order Number

Enter the order in which each rate element appear when creating an assignment that uses this rate profile.

Related Links

"Rate Profile Page" (PeopleSoft 9.2: Pay/Bill Management)

User Order Type Page

Use the User Order Type page (FO_ORDER_TYPE) to set up user-defined order types.

Navigation

Set Up Financials/Supply Chain > Product Related > Staffing > Orders > User Order Types

Image: User Order Type Page

This example illustrates the fields and controls on the User Order Type Page. You can find definitions for the fields and controls later on this page.

The screenshot shows the 'User Order Type' page with the following fields and controls:

- *User Order Type**: A text input field containing 'TMP'.
- *Description**: A text input field containing 'Temporary'.
- *Type of Order**: A dropdown menu with 'Temporary Order' selected.
- Temp To Hire**: A text input field with a magnifying glass icon to its right.

User Order Type

Enter up to a five-character title for this order type.

Description

Enter a description of the order type.

Type of Order

Select the system-defined order type: *Career Order* or *Temporary Order*.

Note: Each user-defined order type must map to one of these two system-defined order types.

Temp To Hire

If you select *Temporary Order* in the *Type of Order* field, enter a user-defined order type to be used in case a temporary assignment is converted to a permanent placement at the customer site.

If you previously selected a value for *Temp To Hire*, and later, you choose to leave the *Temp To Hire* field as blank, then the system will automatically clear the *Separate Fixed Billing and Revenue* check box for all business units for this temporary Order Type. Therefore, all service orders created subsequently will be created without the *Separate Fixed Billing and Revenue* check box being selected. To make the *Separate Fixed Billing and Revenue* check box available for use, you must select a value in the *Temp To Hire* field and then re-configure the *Separate Fixed Billing and Revenue* check box on the Contract Profile page for the business unit and temporary order.

For more information, see "Understanding Contract Profiles" (PeopleSoft 9.2: Pay/Bill Management)

Rate Element Page

Use the Rate Element page (FO_RATE_ELEMENT) to define FLSA category, rate behavior, and employee type for the rate element, and enter pay descriptions for temporary and salaried staff and contractors.

Set the action for how you want to use the pay type, and enter the factor by which you want the system to multiply the pay rate.

Navigation

Set Up Financials/Supply Chain > Product Related > Staffing > Orders > Rate Elements

Image: Rate Element page

This example illustrates the fields and controls on the Rate Element page. You can find definitions for the fields and controls later on this page.

The screenshot shows the 'Rate Element' page with the following details:

- SetID:** SHARE
- Rate Element:** APEXP
- *Description:** Billable AP Expenses
- *Short Description:** Bil AP Exp
- FLSA Category:**
 - ☐ Regular
 - ☐ Overtime
 - ☒ Other
- Rate Behavior:**
 - *Rate Action:** Mark-up (dropdown)
 - Regular Time Multiplier Factor:** 1.00
 - Markup Default Factor:** 1.05
- Employee Type:**
 - ☒ NA Payroll Hourly Employee
 - ☒ NA Payroll Salaried Employee
 - ☒ Non-Employee
 - ☒ Global Payroll Employee

This page is discussed in the *PeopleSoft Pay/Bill Management* documentation. Only the first page in this component is used when PeopleSoft Staffing Front Office is installed without PeopleSoft Pay/Bill Management. When PeopleSoft Pay/Bill Management is installed, both pages are used.

Related Links

"Setting Up Rate Elements and Rate Profiles" (PeopleSoft 9.2: Pay/Bill Management)

Order Event Group Page

Use the Order Event Group page (FO_ORDR_EVENT) to define a series of agenda items that you want to schedule when a candidate accepts an offer.

The order events trigger the creation of entries in the agenda table.

Navigation

Set Up Financials/Supply Chain > Product Related > Staffing > Orders > Order Event Groups

Image: Order Event Group page

This example illustrates the fields and controls on the Order Event Group page. You can find definitions for the fields and controls later on this page.

Order Event Group

SetID SHARE

Order Event Group FOLLOW_UP ☐ Default

Long Description Follow up call once resource has accepted the assignment.

Order Event Detail Find | View All First 1 of 1 Last

Agenda Event Type CALL Call

Agenda Event Days 1 ☐ Before Date

Agenda Event Date Start Date

Priority Medium

Contact Method Telephone Call

Order Type Both

Default

Select this check box to set the order event group that will be the default used if a group has not been selected for a contact or an order.

Agenda Event Type

Enter an event, such as *AVAIL* (availability), *CALL*, or *OFFER* (make offer).

Agenda Event Days

Enter the number of days from the agenda event date that you want the agenda item scheduled. This value determines when a call or visit should occur using the current date, the start date of the assignment, or the end date of the assignment as a counting point.

Before Date

Select this check box to indicate that you want the item scheduled before the agenda event date.

Agenda Event Date

Select either *Current Date*, *End Date* (for the assignment), *Guarantee Date* (for the assignment), or *Start Date* (for the assignment).

Priority

Select a priority to associate with the agenda event when the system schedules the item to the agenda: *High*, *Low*, *Medium*.

Contact Method

Select *E-Mail*, *In-Person*, *In-Writing*, *Telephone Call*, or *Verbal*. The method displays as the preferred contact method when the system creates the agenda item.

Order Type

Select an option to indicate whether the agenda event applies to temporary orders, career orders, or both.

Fee Schedule Page

Use the Fee Schedule page (POTENTIAL_INCOME) to define career order fee schedules.

The fee schedules are used in career orders to determine the percentage to be applied on the employee's compensation to calculate the placement fee.

Navigation

Set Up Financials/Supply Chain > Product Related > Staffing > Orders > Fee Schedules

From and To

Enter the lower and upper salary range for the fee percentage.

Note: Salary ranges must begin at the lowest amount and continue to the highest. Salary ranges cannot overlap.

Fee % (fee percent)

Enter the percentage of salary plus additional pay (for example, a hiring bonus) that your organization takes as a placement fee.

Fall Off Page

Use the Fall Off page (FALL_OFF_TBL) to define a list of terms to indicate why a candidate did not begin or complete a career placement that he or she accepted.

Navigation

Set Up Financials/Supply Chain > Product Related > Staffing > Orders > Fall Offs

Enter a fall off code in the Fall Off Code field as well as a Description and any Comments. Fall off codes are SetID-driven.

Examples include a candidate not showing up for work on the first day (*No Show*) or a candidate not returning to work after starting the job (*Quit*).

Setting Up General Information Tables

To set up general information tables, use the following components:

- Event Category (FO_EVENT_CATEGORY)
- Manage Teams (FO_SVC_GROUP_PG)
- Replace Group Team Member (FO_TEAM_REPLACE_PG)
- Process Group Team Member (RUN_TEAM_REP_PG)
- Billing Calculation (FO_JOB_BILLING)
- Job Titles (FO_JOBTITLE)
- Event Types (FO_EVENT_TYPE)
- Contact Type Codes (CONTACT_TYPE_CODE)
- Contact Events (FO_EVENT_CONT_TYPE)
- Process Events (FO_EVENTS_PROC)

- Event Lists (FO_EVENT_LIST)
- Form Items (TEMPLATE_ITEM_TBL)
- Forms (FO_TEMPLATE_TABLE)
- Email Templates (FO_EMAIL_TMPL)
- Affiliate Suppliers (AFFL_VENDOR)
- Order Priority (RS_SO_PRIORITY)
- Resource Priorities (FO_RSRC_PRIORITY)
- Salutation Table (SALUTATION_TABLE)
- Attachments (ATTACHMENT_TBL)
- Auto Numbering (AUTO_NUM_PNL)
- Auto Numbering by Installation (AUTO_NUM_INSTALL)
- Qualification Profile (RS_RESRC_TEMPLT)
- Task Categories (RS_TASK_TYPE)
- Test Configuration Details (FO_TEST_CFG_DTL)
- Sales Data Ranges (FO_SALES_DATA)
- Search Criteria Configuration (FO_SRCH_CRIT_CFG)
- Source Records (FO_SC_SRC_RCDS_SEC)
- Mass Change Types (FO_MC_TYPE)
- Contract Rates Non Compliance Reasons (FO_MCR_REASON)

You can use the pages described in this topic to set up the tables and processing rules that PeopleSoft Staffing Front Office will employ to process information entered into the Order, Applicant, Employee, Customer, and Assignment components.

This topic discusses how to set up general information tables.

Pages Used to Set Up General Information Tables

Page Name	Definition Name	Usage
<u>Event Categories Page</u>	FO_EVENT_CATEGORY	Define event categories.
<u>Manage Teams Page</u>	FO_SVC_GROUP_PG	Create teams and add users to the team.
<u>Replace Team Members Page</u>	FO_TEAM_REPLACE_PG	Specify the outgoing user ID and their replacement user ID, along with the date the change is effective. Also displays a history of processed replacements.

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
<u>Process Team Replacements Page</u>	RUN_TEAM_REP_PG	Process team member replacements. The AppEngine process changes only the Service Operators and teams and Event Assignments records. It will not update events that have already been assigned to team members.
<u>Billing Calculation Page</u>	FO_JOB_BILLING	Define default values for pay grades and the margin rates at which an order is profitable.
<u>Job Category and Related Titles Page</u>	FO_JOBTITLE	Define job title codes.
Contact Type Code	CONTACT_TYPE_CODE	
<u>Contact Events Page</u>	FO_EVENT_CONT_TYPE	Define a list of marketing events in which you want to include the contacts.
<u>Process Events Page</u>	FO_EVENTS_PROC	Define process events that contain one or more sub-events.
<u>Event Categories Page</u>	FO_EVENT_CAT_CMP	Define event categories which are used as filters on the Review Agenda/History page.
<u>Event Types Page</u>	FO_EVENT_TYPE	Define events for the agenda, history, recruiting funnel, and event group functions.
<u>Event Lists Page</u>	FO_EVENT_LIST	Define which events and their sequence for each event list.
<u>Form Item Page</u>	TEMPLATE_ITEM_TBL	Define items that will appear on your forms.
<u>Form Page</u>	FO_TEMPLATE_TABLE	Group form items into a form.
<u>Public Email Template Page</u>	FO_EMAIL_TMPL	Create email templates to be used to send mail from pages in the application.
<u>Roles and Email Templates Page</u>	FO_ROLE_TEMPL	Assign different templates to a role on this page.
<u>Supplier Page</u>	AFFL_VENDOR	Define affiliate suppliers that you might use to fill orders for temporary work if all of your resources are busy on assignments. This component should only be used by customers who have PeopleSoft Staffing Front Office without PeopleSoft Pay/Bill Management.
Supplier Phone Information Page	VENDOR_PHONE_SEC	Enter phone information for affiliate suppliers. <u>Supplier Page</u>

Page Name	Definition Name	Usage
<u>Order Priority Page</u>	RS_SO_PRIORITY	Define the relative priority of orders.
<u>Resource Priority Page</u>	FO_RSRC_PRIORITY	Define the relative priority of resources.
Salutation Table	SALUTATION_TABLE	Define the salutations or greetings that you want to use in your system.
"Attachment Type Page" (PeopleSoft FSCM 9.2: Application Fundamentals)	ATTACHMENT_TBL	Define the types of attachments that you want the system to accept.
"Auto Numbering Page" (PeopleSoft FSCM 9.2: Application Fundamentals)	AUTO_NUM_PNL	Define automatic numbering specifications for customers, contacts and affiliate suppliers.
Auto Num Install (Auto Number Install)	AUTO_NUM_INSTALL	Set up automatic numbering specifications by installation for agenda, history, and applicant IDs.
<u>Qualification Profile Page</u>	RS_RESRC_TEMPLT	Create or update qualification profiles for personal use.
<u>Task Categories Page</u>	RS_TASK_TYPE	Create task categories. At least one task category needs to be created for staffing assignments if you configure the Staffing Installation options to populate the Resource Calendar when assignments are created.
<u>Test Configuration Details Page</u>	FO_TEST_CFG_DTL	Create test configuration details. The test configuration details enable users to do combination searches in PeopleMatch and PeopleSearch by specifying both a test ID and a test score as part of the search criteria.
<u>Sales Data Ranges Page</u>	FO_SALES_DATA	Create sales data ranges for use in defining customers.
<u>Search Criteria Configuration Page</u>	FO_SRCH_CRIT_CFG	Identify search criteria for assignment mass rate changes.
<u>Source Records Page</u>	FO_SC_SRC_RCDS_SEC	Define source records for the search criteria configuration.
<u>Mass Change Types Page</u>	FO_MC_TYPE	Define mass change types.
Contract Rates Non-compliance Reasons	FO_MCR_REASON	Define reasons for not using the rates determined by a customer's master contract.
Pending Applicant Template	FO_PNDG_TEMP_PG	Create pending applicant templates.
Hot List Categories	FO_APLHT_SETUP_PG	Define categories for the Hot List pagelets. Users can also define categories on the Staffing - User Preferences page.

Related Links

"Defining Additional Common Information" (PeopleSoft FSCM 9.2: Application Fundamentals)

Manage Teams Page

Use the Manage Teams page (FO_SVC_GROUP_PG) to add user IDs to teams and assign events to each team member.

Navigation

Set Up Financials/Supply Chain >Product Related >Staffing >General >Manage Teams

Image: Manage Teams Page

This example illustrates the fields and controls on the Manage Teams Page. You can find definitions for the fields and controls later on this page.

Manage Teams

Teams can be assigned to complete tasks in addition to the Service Operator. A lead recruiter is identified, and at least one team member is required who can view and/or perform tasks, with the event categories they are responsible for.

Team Name Recruiters SF

*Description Recruiters SF Bay Area

*Primary (Lead) Recruiter VP1 Kenneth Schumacher ☒ Send Notifications

Team Members ? Find First 1-3 of 3 Last

*User ID SAMPLE Theresa Monroe ☒ Send Notifications + -

Event Assignments ? Find First 1 of 1 Last

☒ Apply to All Order Types Order Type

Generate Assignments By...

Event Categories

Event Category			
1			+ -

Process Events

Process Event			
1			+ -

Individual Events

Event Type	Call		
1 CALL	Call		+ -
2 INT	Interview		+ -
3 REFER	Reference Check		+ -

VP1 Kenneth Schumacher ☒ Send Notifications + -

Event Assignments ?

VP2 Michael Buhler ☒ Send Notifications + -

Event Assignments ?

Primary (Lead) Recruiter

Enter the user ID of the team leader.

This is a required field. The Primary (Lead) Recruiter can also be in the Team Members grid, even though they are marked as

primary, then they can also be assigned responsibility to specific event categories, process events, and individual events.

Team Members

User ID

Enter the ID for each team member.

Apply to All Order Types

Select this check box, to apply the data entered in the level 1 scroll. If cleared, multiple rows for multiple order types are allowed.

Note: Each customer can be assigned one or more order types. Each customer order type can be associated with an event list. This means that each customer could have many different event lists available, if they are assigned to many order types.

Order Type

If you do not select the Apply to All Order Types check box, you can select individual order types to apply to this user ID.

Generate Assignments By

You can enter event data for each team member:

Event Categories: Group of events. Event category is the highest level. All events under this category are assigned to individual team members, no matter if it is an individual event or a process event.

Process Events: Group of events that typically usually must be performed in order to consider the process complete. It is the second level. All events belonging to a process event are assigned to individual team members.

Individual Events: Single events. It is the lowest level.

Note: Process Events override Categories; Individual Events override Categories, and Process Events override Individual Events.

If a Process Event is assigned to a team member, then this assignment overrides any Category assignment. Example: Team member1 is assigned to Category 1 and Team Member2 is assigned Process Event1. If Process Event1 falls under category 1, Events automatically created for Process Event1 will be assigned to team member2.

If an Individual Event is assigned to a team member, then this assignment overrides any category assignment. Example: Team member1 is assigned category 1 and team member2 is assigned Event1. If Event1 falls under category1, Events automatically created for Event1 will be assigned to team member2.

If both, a Process Event and an Individual Event (within that process event) are assigned to two different team members, then the Process Event overrides Individual event, if in same

event list. Example: Team member1 is assigned Process Event1 (which event 2 is a sub-event of), and team member2 is assigned event 2. Events automatically created for Process Event1 will be assigned to team member1.

If any data is missing such that the system cannot determine who is assigned this task, the system will assign it to the Primary (Lead) Recruiter as the default.

Note: When the system creates task assignments and assigns users to those tasks, if any data is missing such that the system cannot determine who is assigned to this task, the system only displays the task in the "Team Agenda Pagelet" (PeopleSoft FSCM 9.2: Financials, ESA, ALM, and SCM Portal Packs) and no one will be assigned to it.

Replace Team Members Page

Use the Replace Team Members page (FO_TEAM_REPLACE_PG) to specify an outgoing used ID and their replacement user ID, along with the date that the change is effective. Also displays a history of processed replacements.

Navigation

Set Up Financials/Supply Chain >Product Related >Staffing >Replace Team Members.

Image: Replace Team Members page

This example illustrates the fields and controls on the Replace Team Members page.

The screenshot shows the 'Replace Team Members' page with the 'Pending' tab selected. The page includes a table with the following data:

Outgoing User ID	Name	New User ID	New Name	Effective From
VP1	Kenneth Schumacher	VP2	Michael Buhler	08/14/2012

Additional controls visible include a 'Completed' tab, a 'Pending' status indicator, and navigation buttons like 'Personalize', 'Find', 'First', '1 of 1', and 'Last'.

Pending Tab

Specify the outgoing user ID and their replacement user ID, along with the date to commit the change.

Completed Tab

After rows in the Pending tab are processed by the Process Team Member Replacements AppEngine program, the rows will appear in this tab. This tab retains a history of replaced user ID's unless you elect to delete the history.

Delete History

Select this check box for each row you want to delete from this page. Once saved, the next time the AppEngine process is run to process new replacements; any rows marked for deletion are deleted from this record.

Process Team Replacements Page

Use the Process Team Replacements page (RUN_TEAM_REP_PG) to process the team member replacements specified on the [Replace Team Members Page](#).

Navigation

Set Up Financials/Supply Chain >Product Related >Staffing >General >Process Team Replacements.

This Application Engine FO_REPLACE_AE processes team member replacements and applies changes to only the team member and event assignment records. It does not update events that have already been assigned to team members.

To update events that have already been assigned to team members, use the [Review Agenda/History Page](#), and use the Change Assigned To field in the Available Actions for Selected Items section.

Billing Calculation Page

Use the Billing Calculation page (FO_JOB_BILLING) to define default values for pay grades and the margin rates at which an order is profitable.

Navigation

Set Up Financials/Supply Chain > Common Definitions > Resources Data > Jobcodes > Billing Calculation

Image: Billing Calculation page

This example illustrates the fields and controls on the Billing Calculation page. You can find definitions for the fields and controls later on this page.

The screenshot displays the 'Billing Calculation' page. At the top, there are two tabs: 'Job Code Definition' and 'Billing Calculation'. Below the tabs, the 'SetID' is 'SHARE' and the 'Job Code' is '140080'. The main section is titled 'Billing Calculation' and includes a 'Find | View All' link, 'First' and 'Last' navigation buttons, and a '1 of 1' indicator. Below this, there is an 'Effective Date' field set to '01/01/1980' and a 'Comments' text area. At the bottom, there are two tables: 'Standard Bill and Pay Rates' and 'Caution Margin'.

Standard Bill and Pay Rates		
	Bill	Pay
Pay Grade A:	102.00	85.00
Pay Grade B:	62.40	52.00
Pay Grade C:	42.00	35.00

Caution Margin	
Caution	10.00
Critical	8.00

Billing Calculation

Effective Date and Comments

Enter the date that the job code rates and margins are effective and any comments.

Note: This effective date is independent of the effective date for the job code on the Job Code Definition page.

Standard Bill and Pay Rates

Bill and Pay

Enter values for the pay grades that will display on the Orders - Billing page. You can use this information to determine the appropriate rates.

Standard Margins

Caution and Critical

Enter the margin percentages at which an order is not profitable. The system uses this entry for a calculation in the Order and Assignment components. Color-coded symbols signal the profitability of the order. A margin that falls below the specified caution margin displays a yellow symbol; a margin that falls below the critical margin displays a red symbol.

Job Category and Related Titles Page

Use the Job Category and Related Titles page (FO_JOBTITLE) to define job title codes.

Navigation

Set Up Financials/Supply Chain > Product Related > Staffing > General > Job Titles

Image: Job Category and Related Titles page

This example illustrates the fields and controls on the Job Category and Related Titles page. You can find definitions for the fields and controls later on this page.

Job Category and Related Titles

Category 201

Description Secretaries

Job Title Code	Description	
201162010	Social Secretary	+ -
201362010	Legal Secretary	+ -
201362014	Medical Secretary	+ -
201362022	School Secretary	+ -

Find | View All First 1-4 of 4 Last

Category	Displays a three-character job title category.
Job Title Code and Description	Enter a unique code for the job title and enter a description.

Related Links

"Establishing Application Setup Tables for Work Definitions" (PeopleSoft FSCM 9.2: Resource Management)

Event Categories Page

Use the Event Categories page (FO_EVENT_CATEGORY) to define event categories. Multiple event types can be assigned to event categories. Event categories are used as filters on the Review Agenda/History page and define which events are displayed on the My Agenda pagelet.

Navigation

Set Up Financials/Supply Chain >Product Related >Staffing >General >Event Categories

Image: Event Categories Page

This example illustrates the fields and controls on the Event Categories Page. You can find definitions for the fields and controls later on this page.

*Category	*Description	*Sequence number
BACKGRND	Background Check	2
ONBOARDING	Onboarding Process	1

Sequence number This field is no longer used and will be removed in a future release.

Event Types Page

Use the Event Types page (FO_EVENT_TYPE) to define events for the agenda, history, recruiting funnel, and event group functions.

Navigation

Set Up Financials/Supply Chain > Product Related > Staffing > General > Event Types

Image: Event Types Page

This example illustrates the fields and controls on the Event Types Page. You can find definitions for the fields and controls later on this page.

*Event Type	Show on Pagelets	*Description	Short Description	Event Category	Process Event
ACAD	☐	Academic Check	Academic		☐
ASGN	☐	Assignment	Assign		☐
AVAIL	☒	Availability	Availability	Onboarding Process	☐
BASIC	☐	Basic Background Check	Basic		☒
BCKGRND	☐	Background Check	Background		☒
CALL	☒	Call	Call		☐
CREDIT	☒	Credit Check	Credit	Background Check	☐

Event Type and Description

Enter a unique code to identify an event type, and then enter a description.

Show on Pagelets

Select to indicate that the event type should appear on Agenda pagelets.

Event Category

Select an event category to be associated to each event type. More than one event type can be associated with an event category.

This is an optional step.

Process Event

Select to indicate that this event type is part of a process.

When this check box is selected, the sub-events below the process event inherit the category that is assigned to the process event, regardless of whether the individual event is assigned to a different category in this grid. This means that the process event category overrides the individual event category.

Warning! You can modify or add event types to this list. However, do not change the following events: *CALL*, *OFFER*, and *FALL*.

Process Events Page

Use the Process Events page (FO_EVENTS_PROC) to set up the events within a process event.

Navigation

Set Up Financials/Supply Chain > Product Related > Staffing > General > Process Events

Image: Process Events page

This example illustrates the fields and controls on the Process Events page. You can find definitions for the fields and controls later on this page.

Event Type			
1 CREDIT	Credit Check		
2 CRIME	Criminal Check		
3 DRUG	Drug Screening		

Both the process event and the related sub-events need to be pre-defined on the Event Type page and have the Process Event check box selected. The sub-events cannot be defined as process events.

Event Lists Page

Use the Event Lists page (FO_EVENT_LIST) to set up a series of events that must occur during the application and hiring process. The lists can be effective dated and activated or inactivated. Also, you can force the sequence of the events so that each event cannot be attempted until the previous event is completed.

Navigation

Set Up Financials/Supply Chain > Product Related > Staffing > General > Event Lists

Image: Event Lists page

This example illustrates the fields and controls on the Event Lists page. You can find definitions for the fields and controls later on this page.

*Sequence Number	*Event Type		Process Event	
1	INT	Interview	☐	
2	BASIC	Basic Background Check	☒	
3	OFFER	Offer Letter	☐	

Force Dependency

Indicates that the previous event, in the event list, must be completed before a candidate can proceed to the next event.

	Note: This value may be set at the event level, at the customer event list, or at the order level. There is a hierarchy beginning with the event level. The value will be carried over to the customer event list. The value at the customer event list level will be carried over to the order level. You can overwrite the value defaulted from the previous level in the hierarchy.
Status as of Effective Date	Select either <i>A</i> (active) or <i>I</i> (inactive).
Sequence Number	Enter the sequence number for this event type. This sequence number is the criteria used by the Force Dependency functionality.
Event Type	Select an event type to be used with this event list.
	Note: The assignment and the hire event types (examples “ASGN” and “HIRE”) provide additional functionality. When used within the Candidate Summary page on the Recruiting Funnel, the assignment event type can automatically bring up the Assignment Header page. The hire event type can automatically bring up Applicant – Contact Information page. See "Installation Options - Staffing Installation Page" (PeopleSoft FSCM 9.2: Application Fundamentals).
Process Event	Identifies if this is a process event and is always read only. The system derives the value from the event type setup.

Contact Events Page

Use the Contact Events page (FO_EVENT_CONT_TYPE) to define a list of marketing events in which you want to include the contacts.

Navigation

Set Up Financials/Supply Chain > Product Related > Staffing > General > Contact Events

Event Contact Type	Enter the name of the contact event.
Contact Event Frequency	Enter how often the event takes place, such as <i>QUARTERLY</i> or <i>MONTHLY</i> .

Form Item Page

Use the Form Item page (TEMPLATE_ITEM_TBL) to define items that will appear on your forms.

Navigation

Set Up Financials/Supply Chain > Product Related > Staffing > General > Form Items

In Field Name, enter a description of the type of data you are capturing. This description can be questions or field names that will appear on the form entry pages.

Form Page

Use the Form page (FO_TEMPLATE_TABLE) to group form items into a form.

Navigation

Set Up Financials/Supply Chain > Product Related > Staffing > General > Forms

Effective Date	Enter the date the form is effective.
Status as of Effective Date	Select the status of the form: <i>Active</i> or <i>Inactive</i> .
Description	Enter the name of the form.
Sequence Number	Enter a number to determine the order in which the form items will appear. Form items appear from the lowest to the highest number.
Form Item	Select the form item that you want to appear on the form.

Public Email Template Page

Use the Public Email Template page (FO_EMAIL_TMPL) to create email templates to be used to send mail from pages in the application.

Navigation

Set up Financials/Supply Chain > Product Related > Staffing > General > Public Email Template

Image: Public Email Template Page

This example illustrates the fields and controls on the Public Email Template Page. You can find definitions for the fields and controls later on this page.

Public Email Template

Template ID 000000000001 *Status **Active**

*Description **Propose PS Search Candidates** *Template Access **Public**

☒ Multiple mail Template

From %EmailAddress

To

CC

BCC

Subject **Candidates for your review**

Message Text

Dear ,

Attached are the resumes of some resources at which you might want to take a look. They are highly skilled in the areas in which you are interested.

Please get back to me quickly if you are interested in any of these candidates, as I am sure that they will not be available for long. Thank you.

%Signature

Attachment %Attach(all, ",")

E-mail Component Interface Record View All First 1 of 1 Last

*Component Name **FO_PEOPLE_SRCH**

Component Interface Name

E-mail Token Personalize Find First 1 of 1 Last

Token ID	Occurs level	Primary Record	Record Name	Field Name

Save As

Users can define email templates using a token to reference data from any field in the Component Interface (CI) except as stated below. The system will replace the reference data with the embedded variables when users click the Apply button on the Compose Mail page.

The following two cases are the exceptions:

- Email Candidate or Propose Candidate button (Search Results grid) on the PeopleMatch page

Since the data in the Search Results grid on the PeopleMatch page are not saved to the database, the CI cannot extract the data (Candidate Name, Candidate email address, and Candidate resume attach ID) that belong to this grid. To resolve this problem, the system passes the Candidate email address or Candidate Name and Candidate resume attach ID from the Order component to the Compose Mail component. The system administrator defines the email template using a token to reference data from any field in the CI and the variables *%CandidateEmailAddr*, *%CandidateName*, and *%Attach*. These variables reference data that are passed from the Order Component. The system will replace the reference data with the embedded variables when users click the Apply button on the Compose Mail page.

- Email Candidate or Propose Candidate button (Search Results grid or Considering grid) on the PeopleSearch page.

The search record for this component is INSTALLATION. The INSTALLATION table does not have any keys. The CI requires using the key values in the search record to retrieve the data. To resolve this problem, the system will pass the Candidate email address or Candidate Name and Candidate resume attach ID from the PeopleSearch component to the Compose Mail component. The system administrator defines the Email Template using the variables *%CandidateEmailAddr*, *%CandidateName*, and *%Attach*. These variables reference data that are passed from the PeopleSearch component. The system will replace the reference data with the embedded variables when users click the Apply button on the Compose Mail page.

The system allows for the creation of public and private templates.

Template ID	The system uses autonumbering to assign a unique ID upon saving the page.
Status	The default value is <i>Active</i> .
Description	Enter a description for the template.
Template Access	Indicate whether this template is public or private. Private templates can only be used by the user creating the template. Public templates can be used by anyone with access to the Send Email page.
From	Enter the address originating the email.
To	Enter destination email addresses.
CC	Copy email addresses.
BCC	Enter blind copy email addresses.
Subject	Enter an email subject.
Message Text	Enter the body of the email.
Attachment	Enter email attachments.
Component Name	Enter the name of the component to which the template is applicable.
Component Interface Name	Enter the name of the CI used to extract the data from the calling component.
Token ID	Links to a bind reference in the email template.
Occurs Level	Component level in which the value to be extracted resides.
Primary Record	Primary record name in the rowset.
Record Name	Record definition containing the value to be extracted.
Field Name	Field within the record that contains the value to be extracted.

Save As

Click this button to save the template with a new name.

The following tables lists system variables that can be used in place of tokens. For some variables, such as *%CandidateEmailAddr*, the use of variables is required since the information is not contained in the component.

Variable	Replacement Value
<i>%Date</i>	The current system date.
<i>%EmailAddress</i>	The email address of the current user.
<i>%SystemEmailAddress</i>	A generic email address used to send anonymous emails.
<i>%Time</i>	The current system time.
<i>%UserDescription</i>	The description (if any) listed for the current user.
<i>%Signature</i>	The value of the Email Signature field (OPR_DEF_TBL_FO.FO_EMAIL_SIGNATURE) from the User Preferences – Staffing page for the current user.
<i>%CandidateEmailAddr(p)</i> or <i>%CandidateEmailAddr(all, separator)</i>	The email address of the candidate. Use this variable to define an Email Template for the Email Candidate (Search Results) button on the PeopleMatch or PeopleSearch page, or the Email Candidate (Considering) button on the PeopleSearch page.
<i>%CandidateName(p)</i> or <i>%CandidateName(all, separator)</i>	The name of the candidate. Use this variable to define an Email Template for the propose Candidate (Search Results) button on the PeopleMatch or PeopleSearch page, or the Propose Candidate (Considering) button on the PeopleSearch page.
<i>%Attach(p)</i> or <i>%Attach(all, separator)</i>	The resume attachment ID of the candidate. Use this variable to define an Email Template for the propose Candidate (Search Results) button on the PeopleMatch or PeopleSearch page, or the Propose Candidate (Considering) button on the PeopleSearch page.
<i>%n</i>	<i>%n</i> where n is the token number in the template definition.
<i>%n(p)</i>	<i>%n(p)</i> Where p is the row number. 0 is used for all rows.
<i>%n(all, separator)</i>	<i>%n(all, ";")</i> List all values in the scroll separated by a semi colon.

Roles and Email Templates Page

Use the Roles and Email Templates page (FO_ROLE_TEMPL) to assign different templates to a role on this page.

Navigation

Set Up Financials/Supply Chain > Product Related > Staffing > General > Roles and Email Templates

Image: Roles and Email Templates page

This example illustrates the fields and controls on the Roles and Email Templates page. You can find definitions for the fields and controls later on this page.

Roles and Email Templates						
Template ID		Personalize Find				
Role ID	Role Description	Template ID	Description	Single mail Template	Multiple mail Template	
1 PBM User	PBM Users	000000000001	Propose PS Search Candidates	☐	☒	
2 PBM User	PBM Users	000000000002	Propose PS Search Single Cand	☒	☐	
3 PBM User	PBM Users	000000000005	Order Hot List	☒	☐	
4 PBM User	PBM Users	000000000006	Contact Applicant	☒	☐	
5 PBM User	PBM Users	000000000007	Propose Candidate	☒	☐	
6 PBM User	PBM Users	000000000008	Email Employee	☒	☐	
7 PBM User	PBM Users	000000000015	Propose Candidate PM Search	☒	☐	
8 PBM User	PBM Users	000000000016	Email Multiple Candidates	☐	☒	
9 PBM User	PBM Users	000000000021	Contact Hot List	☒	☐	
10 PBM User	PBM Users	000000000022	Order Contact	☒	☐	
11 PBM User	PBM Users	INVALID_TEMPLATE	Invalid Candidate Template	☐	☒	
12 PBM User	PBM Users	VALID_TEMPLATE	Valid Candidate Template	☐	☒	

You can define a role ID to multiple templates. Select either Single mail Template or Multiple mail Template.

Supplier Page

Use the Supplier page (AFFL_VENDOR) to define affiliate suppliers that you might use to fill orders for temporary work if all of your resources are busy on assignments.

This component should only be used by customers who have PeopleSoft Staffing Front Office without PeopleSoft Pay/Bill Management.

Navigation

Staffing > Suppliers and Contractors > Affiliate Suppliers

Note: If you have PeopleSoft Pay/Bill Management installed along with PeopleSoft Staffing Front Office, it is recommended that you do not make this page accessible to general users.

Name Enter the supplier name.

Federal ID Enter the federal tax ID of the supplier.

Website URL Enter a link to the supplier's website.



Click the URL button to connect to the supplier website entered to the left of the button. If you are adding a new affiliate supplier, you may have to save the page before using the URL button.

Contact Name Enter the name of the contact at the supplier.

Email ID Enter the contact's email address.



Click the Send Email button to send an email. If you are adding a new affiliate supplier, you may have to save the page before using the Send Email button.

Country

Select the country where the supplier is located.

Note: The system displays the address fields based on the country you select. Enter the address information after you enter the country.

Telephone

Click this link to enter the supplier's phone numbers.

Order Priority Page

Use the Order Priority page (RS_SO_PRIORITY) to define the relative priority of orders.

Navigation

Set Up Financials/Supply Chain > Product Related > Staffing > Orders > Order Priority

Sequence Number

Enter a value to indicate the relative priority of orders.

Description

Enter a description of the priority.

Resource Priority Page

Use the Resource Priority page (FO_RSRC_PRIORITY) to define the relative priority of resources.

Navigation

Set Up Financials/Supply Chain > Product Related > Staffing > Resources > Resource Priorities

Priority Sequence Number and Description

Enter a value to indicate the relative priority of resources. Enter a Description as well.

Qualification Profile Page

Use the Qualification Profile page (RS_RESRC_TEMPLT) to create or update qualification profiles for personal use.

Navigation

Staffing > Resources > My Qualification Profiles.

Profile Description

Description

Enter a description for this profile.

Comments

Enter any comments to accompany the profile.

This qualification profile is for my personal use only. Do not make this profile visible to any other users.

Select this check box to prevent other users from being able to view your profile.

Profile Competencies

Competency

Enter a competency you want the resource to possess, their Proficiency at it, its relative Importance, and the preferred Years of Work Experience you would like the resource to have using the particular competency.

Profile Accomplishments

Select the accomplishments you want the resource to have achieved.

Degrees

Enter Accomplishment, Major Code, and Importance.

Languages

For each language, select the appropriate desired efficiency that the resource Speak, Read, and Write, and the overall Importance of their language skill.

Licenses

Enter the Accomplishment, Country, State, and Importance.

Memberships

Enter the Accomplishment and Importance.

Task Categories Page

Use the Task Categories page (RS_TASK_TYPE) to create task categories.

At least one task category needs to be created for staffing assignments if you configure the Staffing Installation options to populate the Resource Calendar when assignments are created.

Navigation

Set Up Financials/Supply Chain > Product Related > Staffing > General > Task Categories

You must configure at least one task category and select the Use for Assignment check box. This category must be the same as the Default Task Category specified on the Staffing Installation page.

Note: The Map Time Reporting Codes group box is only to be used for PeopleSoft Resource Management, not for PeopleSoft Staffing Front Office.

Resource Schedule Categories

Task Description

Enter a description of the task category.

Use for Assignment

Select this check box if you want the system to use the task category for assignments.

Comments

Enter any comments relevant to the task category.

Flexibility and Reserved Status Flexibility

Enter a decimal value between 0 and 1 to indicate the relative possibility that a task in this task category can be moved or rescheduled.

Map Time Reporting Codes**SetID**

Enter the SetID to which you want to map the time reporting code. This field is used only by PeopleSoft Resource Management. It is not used by PeopleSoft Staffing Front Office.

Time Reporting Code

Enter the code to map to the SetID. This field is used only by PeopleSoft Resource Management. It is not used by PeopleSoft Staffing Front Office.

Test Configuration Details Page

Use the Test Configuration Details page (FO_TEST_CFG_DTL) to create test configuration details.

The test configuration details enable users to do combination searches in PeopleMatch and PeopleSearch by specifying both a test ID and a test score as part of the search criteria.

Navigation

Set Up Financials/Supply Chain > Product Related > Staffing > General > Test Configuration Details

Test ID

Enter the ID of the test you selected.

Pass/Fail

Select to indicate the test result is measured through a simple pass or fail assessment.

Range

Select to indicate that the test results are measured via a numeric score. In the From and To fields, enter a range to define the acceptable scores for the test.

Sales Data Ranges Page

Use the Sales Data Ranges page (FO_SALES_DATA) to create sales data ranges for use in defining customers.

Navigation

Set Up Financials/Supply Chain > Product Related > Staffing > Customers > Front Office Sales Data Ranges.

Image: Front Office Sales Data Ranges Page

This example illustrates the fields and controls on the Front Office Sales Data Ranges Page. You can find definitions for the fields and controls later on this page.

The screenshot shows the 'Front Office Sales Data Ranges' page. At the top, there are labels for 'SetID', 'SHARE', and 'CORPORATE SETID'. Below these are three main sections, each with a title bar and search controls:

- SALES_LEVELS**: Title bar includes 'Find | View All' and 'First 1 of 6 Last'. Search controls include 'Seq Num' (1), 'Currency' (USD), 'From' (empty), and 'To' (\$100,000) with '+' and '-' buttons.
- Potential Temp Workers**: Title bar includes 'Find | View All' and 'First 1 of 7 Last'. Search controls include 'Seq Num' (1), 'From' (empty), and 'To' (25) with '+' and '-' buttons.
- Head Count**: Title bar includes 'Find | View All' and 'First 1 of 8 Last'. Search controls include 'Seq Num' (1), 'From' (empty), and 'To' (500) with '+' and '-' buttons.

Sales Levels

Enter a range of values to use for possible sales level ranges of customers. Captures the level of sales in terms of possible revenue that will be generated by this location.

Potential Temp Workers

Enter a range of values to use for possible potential numbers of workers the customer will use at this location.

Head Count

Enter a range of values to use for possible company and location head count ranges.

Search Criteria Configuration Page

Use the Search Criteria Configuration page (FO_SRCH_CRIT_CFG) to identify search criteria for assignment mass rate changes.

Navigation

Set up Financials/Supply Chain > Product Related > Staffing > General > Search Criteria Configuration.

Image: Search Criteria Configuration

This example illustrates the fields and controls on the Search Criteria Configuration. You can find definitions for the fields and controls later on this page.

Search Criteria Configuration

Base Search Criteria STANDARD

*Description

Mass Assignment Rate Changes

Comments

Search Criteria for Mass Assignment Rate Changes

*Main Source Record

FO_MC_ASGRRT_SR

Assignment Info

Define Source Records

Model Record

Refresh

Re-order

Search Criteria Configuration Detail

Selected	*Sort Order	*Model Record	*Field Name	*Name	Edit Type	Operator	Prompt Table	Build In List	Required	Decimal Position	Source Record	
☒	10	FO_ASGN_RT_VW	FO_BRANCH	Staffing Branch	Prompt	=	FO_BRANCH_TBL	☐	☒		FO_ASGN_RT_VW	+ -
☒	20	FO_ASGN_RT_VW	CUST_ID	Customer ID	Prompt	=	FO_SC_CUST_VW	☐	☐		FO_ASGN_RT_VW	+ -
☒	30	CUSTOMER	NAME1	Customer Name	No Edit	BeginsW		☐	☐		CUSTOMER	+ -
☒	40	FO_ASGN_RT_VW	ADDRESS_SEQ_NUM	Location	Prompt	=	FO_CST_ADDR_VW	☐	☐		FO_ASGN_RT_VW	+ -
☒	50	FO_ASGN_RT_VW	VENDOR_ID	Vendor ID	Prompt	=	FO_SC_VNDR_VW	☐	☐		FO_ASGN_RT_VW	+ -
☒	60	VENDOR	NAME1	Vendor Name	No Edit	BeginsW		☐	☐		VENDOR	+ -
☒	70	FO_ASGN_RT_VW	DEPTID	Department ID	Prompt	=	FO_SC_DEPT_VW	☐	☐		FO_ASGN_RT_VW	+ -
☒	80	FO_ASGN_RT_VW	BUSINESS_UNIT	Business Unit	Prompt	=	SP_BU_PC_NONV	☐	☐		FO_ASGN_RT_VW	+ -
☒	90	FO_ASGN_RT_VW	SO_ID	Service Order ID	Prompt	=	FO_ORD_SRCH_VW	☐	☐		FO_ASGN_RT_VW	+ -
☒	100	FO_ASGN_RT_VW	ASSIGNMENT_ID	Work Assignment ID	No Edit	BeginsW	RS_ASSIGNMENT	☐	☐		FO_ASGN_RT_VW	+ -

Main Source Record

Identifies the record that will be used as the base when building the SQL to retrieve the impacted rows of data according to the search criteria. The SQL will retrieve distinct records for the main source record primary key.

Define Source Records

Click this link to access the Define Source Records page.

Model Record

This field is used as a template and can store details of the search criteria items such as Name, EditType, or Prompt Table.

Refresh

Re-builds the Search Criteria Configuration Detail grid with the fields of the model record.

Re-order

Click this button to re-order the grid. The grid will be sorted by Selected then by Sort Order. The Sort Order fields will be updated starting from 10 and will increase by 10 for each item.

Search Criteria Configuration Detail

Selected

Select to identify whether the search criteria item is to be part of the initial search criteria or not.

Sort Order

Defines the order in which the items will be displayed in the search criteria.

Model Record

Enter the model record. Name, EditType and Prompt Table values default from information defined in the record definition of the model record and field name.

Field Name

Enter the field name of the search criteria items. Name, EditType and Prompt Table values default from information defined in the record definition of the model record and field name.

Name	Enter a name to define what will be displayed for the search criteria item wherever it is displayed in the system.
Edit Type	Identifies the type of information that is available for the item. Options are: • <i>No Edit</i>: indicates the field is a free form field. • <i>Prompt</i>: indicates that validation will occur against the prompt table specified in the Prompt Table field. • <i>Translate</i>: indicates that the criteria will be presented as a drop down list box. • <i>Yes/No</i>: indicates that the only values allowed are either <i>Yes</i> or <i>No</i>.
Operator	Defines the default comparison operator for the search criteria item. Options are: <i>Begins With</i> , <i>Contains</i> , <i>=</i> , <i>Not =</i> , <i>IsBlank</i> , <i>IsNotBlank</i> , <i>Between</i> , <i>In</i> , <i>Not In</i> , <i>></i> , <i>>=</i> , <i><</i> , <i><=</i> . The options available depend on the value selected in the Edit Type field.
Prompt Table	Identifies a prompt table for the search criteria. This is only available if the criterion is of type STRING, or NUMBER and Edit Type is <i>NoEdit</i> or <i>Prompt</i> .
Build In List	Indicates whether to present a prompt to the users in order to view all options and build in list criterion. This is only available if the Edit Type is <i>Translate</i> .
Required	Indicates if the criterion is a mandatory criterion.
Decimal Position	If the criterion is <i>Number</i> , this field specifies the number of decimal positions to be displayed.
Source Record	Defines the source record that the criterion refers to when building the SQL that is generated for the search criteria. Each search criteria item must exist in the source record.

Source Records Page

Use the Source Records page (FO_SC_SRC_RCDS_SEC) to define source records for the search criteria configuration.

Navigation

Click the Define Source Records link on the Search Criteria Configuration page.

Image: Source Records page

This example illustrates the fields and controls on the Source Records page. You can find definitions for the fields and controls later on this page.

Source Records

Base Search Criteria STANDARD

Source Records Personalize Find First 1-8 of 8 Last

	Primary	*Source Record	Record Description	*Record Alias	Join with Source Record	Record Group ID	Set Control Field		
1	☒	FO_MC_ASGRT_SRC	Assignment Info	S					+ -
2	☐	AFFL_VENDOR		AV	FO_ASGN_RT_	FO_05	BUSINESS_UNIT		+ -
3	☐	FO_ASGN_RT_VW	Assignment Info	A	FO_MC_ASGRT				+ -
4	☐	FO_ASGRTPRFL_VW	Assignment Rate Profile	RP	FO_ASGN_RT_				+ -
5	☐	CUSTOMER	Customer Header Information	C	FO_ASGN_RT_	FS_23	BUSINESS_UNIT		+ -
6	☐	FO_RATE_ELEMENT	Rate Elements	RE	FO_ASGN_RT_	FO_04	BUSINESS_UNIT		+ -
7	☐	VENDOR	Supplier Header Table	V	FO_ASGN_RT_	FS_38	BUSINESS_UNIT		+ -

Primary

Indicates the main source record. This value is automatically set when user enters the Main Source Record on the Search Criteria Configuration page.

Source Record

Mandatory field that specifies a source record to be used in the search criteria. It will be part of the FROM statement of the SQL that will be generated for the search criteria.

Record Alias

Relates the source record to an alias in the FROM statement of the SQL that will be generated for the search criteria. All source records must have a unique record alias.

Join with Source Record

Identifies the record that this source record will join with in the WHERE statement of the SQL that will be generated for the search criteria. All source records, except the main source record, must have the join information defined.

Record Group ID

If the source record has SETID in its primary key, this field will store the record group ID that this record belongs to. Otherwise, it will be blank. This is a display only field.

Set Control Field

If the source record has SETID in its primary key, this field will store the value that will be used to get the SETID for the set of data to be retrieved in the SQL that will be generated for the search criteria. This value will default from the record definition of the source record.

Mass Change Types Page

Use the Mass Change Types page (FO_MC_TYPE) to define mass change types.

Navigation

Set up Financials/Supply Chain > Product Related > Staffing > General > Mass Change Types.

Image: Mass Change Types page

This example illustrates the fields and controls on the Mass Change Types page. You can find definitions for the fields and controls later on this page.

Mass Change Type	Defines the type of mass change this user mass change type relates to.
Search Criteria	Identifies the base search criteria that all mass changes requests created under this user mass change type will use.
Search Results Record Name	Specifies the record to be used in the search results. For Mass Assignment Rate Changes the Search Results Record Name must be FO_MC_ART_SRES.
Selected Items Record Name	Specifies the record to be used for the selected items. For Mass Assignment Rate Changes the Selected Items Record Name must be FO_MC_ART_SEL.

Setting Up Payroll Tables

To set up payroll tables, use the following components:

- Companies (COMPANY_TBL)
- Location (LOCATION_TBL)
- Benefit Programs (BEN_DEF_PROG)
- Pay Groups (PAYGROUP_TABLE)
- Tax Locations (TAX_LOCATION_TBL)
- State Tax Properties (STATE_TAX_TABLE)

- Local Tax Properties (LOCAL_TAX_TABLE)
- Workers' Comp Company Setup (FO_WC_CO_MOD)
- Workers' Comp State Codes (FO_WC_STATE)
- Workers' Comp State Rates (FO_WC_CO_STATE)
- Workers' Comp by Job Code (FO_JOBCODE_PRD)

Use the pages described in this topic to set up the tables and processing rules that PeopleSoft Staffing Front Office will use to process information entered into the pages that make up the Applicant, Employee, and Assignment components.

This topic discusses how to:

- Create or modify your payroll company.

You must define at least one company. If your PeopleSoft Staffing Front Office application integrates with PeopleSoft HCM, each employee must be associated with a company to pass payroll and human resource information to PeopleSoft Pay/Bill Management. In integrated environments, companies should be defined in HCM and synchronized with Financials through application messaging. Work with your human resources group to establish appropriate company values. The company value is global, not SetID-driven.

Note: If you have PeopleSoft Payroll for North America in addition to PeopleSoft Staffing Front Office, you only configure the tax tables in HCM.

- Set up your company's benefit programs.

You must define at least one benefit program in PeopleSoft Staffing Front Office. Every employee must be associated with a benefit program in PeopleSoft Staffing Front Office to pass payroll and benefits information in PeopleSoft Pay/Bill Management. In integrated environments, benefit programs should be defined in HCM and are synchronized with Financials through application messages.

- Create payroll processing groups.

You must define at least one pay group in PeopleSoft Staffing Front Office. Paygroups are set up by company, and are not driven by SetID. To enter a pay group, you must first create a company for payroll. In integrated environments, pay groups should be defined in HCM and synchronized with Financials via application messaging.

- Define payroll tax locations.

You must define at least one tax location code in PeopleSoft Staffing Front Office. The values you specify are the individual taxing locations for payroll processing; payroll uses these codes. The tax location code value is global, not driven by SetID. In integrated environments, tax location codes should be defined in HCM and synchronized with Financials through application messaging.

- Set up the state tax properties.

The information that appears in PeopleSoft Staffing Front Office is for reference purposes only. You should maintain the information in the application that you use for back-office transactions.

- Set up for local tax properties.
- Set up local withholding tax methods and rates.
- Set up a locality's tax reporting requirements.
- Set up a company's workers' compensation rules.
- Associate a workers' compensation code with a state.
- Establish rates for each of your workers' compensation codes.
- Associate workers' compensation codes with job codes.

Note: If you are integrating with PeopleSoft Pay/Bill Management, these tables are set up in PeopleSoft HCM and are sent back to Financials through application messaging to be used when hiring employees and filling orders. These pages should not be accessible to users within PeopleSoft Staffing Front Office.

Pages Used to Set Up Your Payroll Tables

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
<u>Company Page</u>	COMPANY_TBL	Define or modify your payroll company. If you have PeopleSoft Staffing Front Office and PeopleSoft Pay/Bill Management installed, configure this table in HCM and synchronize it with Financials through application messaging.
"Location - Definition Page" (PeopleSoft FSCM 9.2: Application Fundamentals)	LOCATION_TBL	Define locations codes, including all address information. You must define at least one location in PeopleSoft Staffing Front Office. Location is a required field in PeopleSoft HCM. If you have PeopleSoft Staffing Front Office and PeopleSoft Pay/Bill Management installed, configure this table in HCM and synchronize it with Financials through application messaging.
"Location - Detail Page" (PeopleSoft FSCM 9.2: Application Fundamentals)	LOCATION_TBL2	Add details to a location definition.
<u>Benefit Program Page</u>	BEN_PROG_DEFN1	Define the benefit programs your organization offers. If you have PeopleSoft Staffing Front Office and PeopleSoft Pay/Bill Management installed, configure this table in HCM and synchronize it with Financials through application messaging. <i>PeopleSoft HCM: Benefits Administration Building Automated Benefit Programs, Building Benefit Programs with the Benefit Program Table</i>

Page Name	Definition Name	Usage
<u>Pay Group Page</u>	PAYGROUP_TABLE1	Define processing payroll groups. If you have PeopleSoft Staffing Front Office and PeopleSoft Pay/Bill Management installed, configure this table in HCM and synchronize it with Financials through application messaging. <i>PeopleSoft HCM: Payroll for North America Setting Up Pay Groups, Defining Pay Groups</i>
<u>Tax Location Page</u>	TAX_LOCATION_TBL1	Define payroll tax locations. If you have PeopleSoft Staffing Front Office and PeopleSoft Pay/Bill Management installed, configure this table in HCM and synchronize it with Financials through application messaging. <i>PeopleSoft HCM: Application Fundamentals Setting Up Payroll Tax Tables, (USA) Defining Tax Locations</i>
<u>State Tax Properties Page</u>	STATE_TAX_TABLE	This setup page is used for prompts when capturing employee tax information in environments where PeopleSoft Staffing Front Office is used as a standalone application (PeopleSoft Pay/Bill Management is not installed).
<u>Local Tax Table1 Page</u>	LOCAL_TAX_TABLE1	Define geographical area information for local taxing authorities. Use this page for prompts when capturing employee tax information in environments where PeopleSoft Staffing Front Office is used as a standalone application (PeopleSoft Pay/Bill Management is not installed).
<u>Local Tax Table2 Page</u>	LOCAL_TAX_TABLE2	Define local withholding tax methods and rates. Use this page for prompts when capturing employee tax information in environments where PeopleSoft Staffing Front Office is used as a standalone application (PeopleSoft Pay/Bill Management is not installed).
<u>Local Tax Table3 Page</u>	LOCAL_TAX_TABLE3	Define a locality's tax reporting requirements. Use this page for prompts when capturing employee tax information in environments where PeopleSoft Staffing Front Office is used as a standalone application (PeopleSoft Pay/Bill Management is not installed).

Page Name	Definition Name	Usage
<u>Workers' Comp Company Setup Page</u>	FO_WC_CO_MOD	Define the workers' compensation companies that you want to use to determine bill and pay rates in margin calculations. If you have PeopleSoft Staffing Front Office and PeopleSoft Pay/Bill Management installed, configure this table in HCM and synchronize it with Financials through application messaging.
<u>Workers' Comp State Codes Page</u>	FO_WC_STATE	Associate workers' compensation codes to states. If you populate the workers' compensation control tables, your PeopleSoft Staffing Front Office users do not need an in-depth understanding of workers' compensation regulations to create an order. If you have PeopleSoft Staffing Front Office and PeopleSoft Pay/Bill Management installed, configure this table in HCM and synchronize it with Financials through application messaging.
<u>Workers' Comp State Rates Page</u>	FO_WC_CO_STATE	Set up the applicable workers' compensation rates that your company pays in each state in which your employees work. The system uses this rate in the margin calculation to determine optimal pay and bill rates for orders and assignments. If you have PeopleSoft Staffing Front Office and PeopleSoft Pay/Bill Management installed, configure this table in HCM and synchronize it with Financials through application messaging.
<u>Workers' Comp by Job Code Page</u>	FO_JOBCODE_PRD	Associate job codes with workers' compensation codes for the states in which your organization conducts business. If you have PeopleSoft Staffing Front Office and PeopleSoft Pay/Bill Management installed, configure this table in HCM and synchronize it with Financials through application messaging.

See also the PeopleSoft Human Resources documentation.

Company Page

Use the Company page (COMPANY_TBL) to define or modify your payroll company.

If you have PeopleSoft Staffing Front Office and PeopleSoft Pay/Bill Management installed, configure this table in HCM and synchronize it with Financials through application messaging.

Navigation

Set Up Financials/Supply Chain > Product Related > Staffing > Payroll > Companies

After you enter an ID to define the company, select an Effective Date and enter a Description.

Benefit Program Page

Use the Benefit Program page (BEN_PROG_DEFN1) to define the benefit programs your organization offers.

If you have PeopleSoft Staffing Front Office and PeopleSoft Pay/Bill Management installed, configure this table in HCM and synchronize it with Financials through application messaging.

Navigation

Set Up Financials/Supply Chain > Product Related > Staffing > Payroll > Benefit Programs

Status as of Effective Date Enter the current status of this benefit program: *Active* or *Inactive*.

Currency Code Enter the default currency code for the benefit program.

If you do not offer benefits, set up a program for no benefits. The benefit program value is global, not driven by SetID.

Pay Group Page

Use the Pay Group page (PAYGROUP_TABLE1) to define processing payroll groups.

If you have PeopleSoft Staffing Front Office and PeopleSoft Pay/Bill Management installed, configure this table in HCM and synchronize it with Financials through application messaging.

Navigation

Set Up Financials/Supply Chain > Product Related > Staffing > Payroll > Pay Groups

Enter the date the pay group is effective, and then enter a short and long description.

Tax Location Page

Use the Tax Location page (TAX_LOCATION_TBL1) to define payroll tax locations.

If you have PeopleSoft Staffing Front Office and PeopleSoft Pay/Bill Management installed, configure this table in HCM and synchronize it with Financials through application messaging.

Navigation

Set Up Financials/Supply Chain > Product Related > Staffing > Payroll > Tax Locations

Select the current Status of the tax location code (*Active* or *Inactive*) and enter a long and short description.

State Tax Properties Page

Use the State Tax Properties page (STATE_TAX_TABLE) to this setup page is used for prompts when capturing employee tax information in environments where PeopleSoft Staffing Front Office is used as a standalone application (PeopleSoft Pay/Bill Management is not installed).

Navigation

Set Up Financials/Supply Chain > Common Definitions > Payroll Tax > State Tax Properties

Image: State Tax Properties page

This example illustrates the fields and controls on the State Tax Properties page. You can find definitions for the fields and controls later on this page.

The screenshot shows the 'State Tax Properties' page for State AK (Alaska). The page includes a header with the state name and a search bar. The main form area contains the following fields and controls:

- *Effective Date:** 01/01/2013
- *Status:** Active
- *State Tax Calculation Type:** Graduated Tax Tbls-Allowances
- FICA Credit:** No FICA Credit
- FWT Credit:** ☐
- Single Standard Deduction:**
- Married Standard Deduction:**
- Allowance Taken:**
- Non-Resident Declaration Req:** ☐
- Allow Withholding Reduction:** ☐
- Supplemental Method:**
 - *Paid with Regular Wages:** Aggregate
 - *Separate Payment:** Percent of Taxable Gross
 - Supplemental Wage Rate:**

State

Enter the state for which you are creating or modifying information.

State Tax Calculation Type

Select the type of tax calculation that is required by the state:

- *Graduated Tax Tbls-Allowances*
- *Graduated Tax Tbls-Annl Exem*
- *No State Withholding*
- *Not Applicable*
- *Percent of FWT (Many)*
- *Percent of FWT (One)*
- *Percent of Taxable Gross*

FICA Credit (Federal Insurance Contributions Act credit)	Select a value to indicate whether the state gives credit for FICA during calculation of state income tax withholding: <i>Act. FICA</i> , <i>NO FICA</i> , or <i>Prorate</i> .
FWT Credit (federal withholding tax credit)	Select this check box to indicate whether the state gives credit for FWT during calculation of state income tax withholding.
Single Standard Deduction	Enter the standard deduction amount for single tax filers.
Non-Resident Declaration Req (non-resident declaration required)	Select this check box to indicate whether the state requires a non-resident declaration for non-resident employees.
Married Standard Deduction	Enter the standard deduction amount for married tax filers.
Allow Withholding Reduction	Select this check box to indicate whether the state allows a reduction amount to be computed in the state withholding calculation.
Note: Currently, this field applies to Connecticut only.	
Allowance Taken	Enter the amount tax filers are allowed to deduct from their taxes.

Supplemental Method

Paid with Regular Wages and Separate Payment

This PeopleSoft application delivers the required selection:

- *Aggregate*
- *Aggregate - No Annualize*
- *Aggregate-No Tax else Percent*
- *Non-Resident Supplemental*
- *Not Applicable*
- *Percent of Taxable Gross*
- *Special Table*
- *Special Table with Exemptions*

Supplemental Wage Rate

Enter the rate at which supplemental wages should be calculated.

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

“Setting Up Payroll Tax Tables”, “Viewing Standard Deductions, Allowance Amounts, and Supplemental Taxes”.

Local Tax Table1 Page

Use the Local Tax Table1 page (LOCAL_TAX_TABLE1) to define geographical area information for local taxing authorities.

Use this page for prompts when capturing employee tax information in environments where PeopleSoft Staffing Front Office is used as a standalone application (PeopleSoft Pay/Bill Management is not installed).

Navigation

Set Up Financials/Supply Chain > Common Definitions > Payroll Tax > Local Tax Properties

Maintenance Responsibility	Select Customer if your organization will maintain the locality; otherwise, select PeopleSoft.
Local Jurisdiction	Define for the tax entity: • <i>Combined</i>: Select to indicate that the locality represents both a municipality and a school district. • <i>County</i>: Select to indicate that the locality represents a county. • <i>Municipal</i>: Select to indicate that the locality represents a municipality. • <i>Other</i>: Select to indicate an entity other than those in the list. • <i>School</i>: Select to indicate that the locality represents a school district. • <i>State</i>: Select to indicate that the locality represents a state.
Partial Indicator (PA Only) (partial indicator [Pennsylvania only])	Select this check box to indicate if multiple municipalities apply to a single school district for any Pennsylvania locality.
Locality Name	Enter the municipality name from the register (except for school district entries, which are school district names). Combined jurisdictions end with M+SD.
Other Locality Name	For Pennsylvania localities, combined entries display the school district name.
School dist code (PA only) (school district code [Pennsylvania only])	Enter the appropriate school district for any Pennsylvania locality.

“Setting Up Payroll Tax Tables,” (USA) Updating Local Tax Information.

Local Tax Table2 Page

Use the Local Tax Table2 page (LOCAL_TAX_TABLE2) to define local withholding tax methods and rates.

Use this page for prompts when capturing employee tax information in environments where PeopleSoft Staffing Front Office is used as a standalone application (PeopleSoft Pay/Bill Management is not installed).

Navigation

Set Up Financials/Supply Chain > Common Definitions > Payroll Tax > Local Tax Properties > Local Tax Table2

Local Tax Information

Local Tax Calculation Type	Select the calculation method used to determine the amount of local income tax withheld: • <i>Amt Per Mo</i> (amount per month) • <i>Amt Per Pd</i> (amount per period) • <i>Amt Per Q</i> (amount per quarter) • <i>Amt Per Yr</i> (amount per year) • <i>Rate x SWT</i> (rate multiplied by SWT) • <i>Rt x FLSA</i> (rate multiplied by the Fair Labor Standards Act rate) • <i>Rt x TaxGr</i> (rate multiplied by the tax grade) • <i>Tax Tables</i>
Withhold On Work Locality Only	Select to have taxing authorities consider only the wages earned in that locality as taxable for resident taxes. If the employee does not work in the locality, the tax authority does not take resident taxes.
Graduated Tax Table Code	This option takes effect if the locality requires that the system reference tax tables during calculation, as they do for New York City, Yonkers, and Maryland counties, for example. The graduated tax table code that you enter here links the record to the appropriate entry in the PeopleSoft Federal/State Tax Table, where tax rates are stored.
Tax Class	Enter the appropriate tax class, such as <i>Excise</i>, <i>Local ER</i>, or <i>Occ Priv</i>. Tax classes identify different taxes that share certain characteristics.
Low Gross	Enter the minimum taxable gross for the bracket.
Minimum Tax	If a particular type of tax has a minimum limit, enter that amount.
Maximum Tax	If a particular type of tax has a maximum limit, enter that amount.
Annual Exemption	If the tax has an annual exemption, enter the amount.

Tax Rates

Resident Enter the tax rate for residents of the locality.

Nonresident Enter the tax rate for non-residents of the locality.

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

“Setting Up Payroll Tax Tables,” (USA) Updating Local Tax Information.

Local Tax Table3 Page

Use the Local Tax Table3 page (LOCAL_TAX_TABLE3) to define a locality's tax reporting requirements.

Use this page for prompts when capturing employee tax information in environments where PeopleSoft Staffing Front Office is used as a standalone application (PeopleSoft Pay/Bill Management is not installed).

Navigation

Set Up Financials/Supply Chain > Common Definitions > Payroll Tax > Local Tax Properties > Local Tax Table3

Tax Reporting

Locality Short Name Enter a name for the locality.

Tax Reporting Select the interval required by the locality for tax reporting:
Annual, Monthly, or Quarterly.

W2 Print Name Enter the name that you want to print on the W2 form.

W2 Mag Media Code (W2 magnetic media code) Enter the magnetic media code for the W2s you will be printing.

Employee Detail Required Select this check box to require employee detail.

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

“Setting Up Payroll Tax Tables,” (USA) Updating Local Tax Information.

Workers' Comp Company Setup Page

Use the Workers' Comp Company Setup (Workers' Compensation Company Setup) page (FO_WC_CO_MOD) to define the workers' compensation companies that you want to use to determine bill and pay rates in margin calculations.

If you have PeopleSoft Staffing Front Office and PeopleSoft Pay/Bill Management installed, configure this table in HCM and synchronize it with Financials through application messaging.

Navigation

Set Up Financials/Supply Chain > Product Related > Staffing > Payroll > Workers' Comp Company Setup

Status	Select the status of the workers' compensation company.
Company Modifier	Enter the number by which you want to multiply workers compensation rates for employees hired in this company.

Workers' Comp State Codes Page

Use the Workers' Comp State Codes (Workers' Compensation State Codes) page (FO_WC_STATE) to associate workers' compensation codes to states.

If you populate the workers' compensation control tables, your PeopleSoft Staffing Front Office users do not need an in-depth understanding of workers' compensation regulations to create an order. If you have PeopleSoft Staffing Front Office and PeopleSoft Pay/Bill Management installed, configure this table in HCM and synchronize it with Financials through application messaging.

Navigation

Set Up Financials/Supply Chain > Product Related > Staffing > Payroll > Workers' Comp State Codes

Enter the Workers' Comp Code that you want to associate with the state, and then enter a long and short description.

Note: Oracle recommends you have a workers' compensation specialist set up the information in this table.

Workers' Comp State Rates Page

Use the Workers' Comp State Rates (Workers' Compensation State Rates) page (FO_WC_CO_STATE) to set up the applicable workers' compensation rates that your company pays in each state in which your employees work.

The system uses this rate in the margin calculation to determine optimal pay and bill rates for orders and assignments. If you have PeopleSoft Staffing Front Office and PeopleSoft Pay/Bill Management installed, configure this table in HCM and synchronize it with Financials through application messaging.

Navigation

Set Up Financials/Supply Chain > Product Related > Staffing > Payroll > Workers' Comp State Rates

Image: Workers' Comp State Rates page

This example illustrates the fields and controls on the Workers' Comp State Rates page. You can find definitions for the fields and controls later on this page.

Workers' Comp State Rates

Company GBI Country USA State CA California

Workers' Comp State Rates Find | View All First 1 of 1 Last

Effective Date 01/01/1980 Status Active

Company State Modifier 1.000 (Example: 1.021)

☐ Monopolistic State

Base Rates Personalize Find View All [?] [] First 1 of 2 Last			
Workers Comp Code	Description	Rate Type	Base Rate
8810	Clerical	Percentage	5.00000

Status

Select either *Active* or *Inactive*.

Company State Modifier

If you have a company factor to be applied to premiums in this state, enter the value here. This value overrides the company modifier.

Monopolistic State

Select this check box to override the modifier with a value of *1*. This selection results in the modifier having no effect on the workers' compensation calculation.

Note: Viewing the Workers' Comp Rates page is dependent upon setting up values in the Workers' Comp Company Setup and Workers' Comp State Code pages.

Base Rates

Workers Comp Code

Select the workers' compensation code that you want associated with the chosen Company, Country, and State.

Rate Type

Select either *Per Hour* or *Percentage*.

Base Rate

Enter a percentage or the hourly rate to represent the workers' compensation rate you pay in the state.

Workers' Comp by Job Code Page

Use the Workers' Comp by Job Code (Workers' Compensation by Job Code) page (FO_JOBCODE_PRD) to associate job codes with workers' compensation codes for the states in which your organization conducts business.

If you have PeopleSoft Staffing Front Office and PeopleSoft Pay/Bill Management installed, configure this table in HCM and synchronize it with Financials through application messaging.

Navigation

Set Up Financials/Supply Chain > Product Related > Staffing > Payroll > Workers' Comp by Job Code

Image: Workers' Comp by Job Code page

This example illustrates the fields and controls on the Workers' Comp by Job Code page. You can find definitions for the fields and controls later on this page.

Workers' Comp by Job Code

SetID SHARE Job Code 120000 Administrator

Workers' Comp by Job Code Find | View All First 1 of 1 Last

Effective Date 01/01/1980 Status Active

Country	State	Description	Workers Comp Code	Description
USA	CA	California	9000	Management
USA	NJ	New Jersey	2000	Manager

Enter the Country, State, and Workers Comp Code that you want to associate with the Job Code.

Setting Up Third-party Integrations

This topic discusses how to set up third-party integrations.

Pages Used to Set Up Third-party Integrations

Page Name	Definition Name	Usage
Supplier Setup Page	FO_VENDOR_SETUP	Review the imported configuration.
Mapping Setup Page	FO_MAP_SETUP	Link an internal mapping element to a map name defined on the Application Integration Framework. This is used to define the specific map name that is being used by staffing for the integration.
Mapping Setup Values Page	FO_MAP_VALUES	Assign values for the selected map and domain name.
Mapping Errors Page	FO_MAP_ERRORS	Review mapping errors that occurred during resume load.

Understanding Resume Parsing

Staffing Front Office enables you to set up integrations to third-party resume parsing and job board integration suppliers.

Resume parsing refers to stripping a resume of its formatting, resulting in basic and consistent data on an applicant's work history, skill sets, education, and so on. Once the data is parsed, it can be loaded into the database and into the appropriate fields for processing and searching.

There are two types of data mapping, dynamic and static. Dynamic data mapping is used when the XREF tables can change (add/update/delete) from time to time. Static data mapping is used when the codes used by the system are not changed a lot from time to time but still have different values used by candidates, such as gender. Static data mapping is covered in other documentation.

See "Understanding Application Integration Framework Web Services" (PeopleSoft 9.2: Application Integration Framework)

Understanding the Steps to Setting up Resume Parsing

This topic breaks the steps to setting up resume parsing into these sections:

- Configure Integration Broker.
- Configure Enterprise Components.
- Configure Supplier Integration Setup.
- Configure Installation Options.

Configure Integration Broker

1. Set domain status to active using the Domain Status page (PeopleTools, Integration Broker, Service Operations Monitor, Administration, Domain Status).
2. Define the local gateway using the Gateways page (PeopleTools, Integration Broker, Configuration, Gateways).
3. Define gateway setup properties for advanced configuration using the PeopleSoft Node Configuration page (PeopleTools, Integration Broker, Configuration, Quick Configuration).
4. Add the proxy using the Gateway Properties page (PeopleTools, Integration Broker, Configuration, Quick Configuration). These settings depend on your environment.

Configure Enterprise Components

Define 11 maps using the Define Value Maps page (Enterprise Components, Integration Definitions, Transformation Framework, Define Value Maps).

See the product documentation for "Understanding the Application Integration Framework" (PeopleSoft 9.2: Application Integration Framework)

Configure Supplier Integration Setup

1. Assign the maps that are used by Staffing using the [Mapping Setup Page](#) (Set Up Financials/Supply Chain, Product Related, Staffing, Integration Suppliers, Mapping Setup) and the Mapping Setup Values pages (Set Up Financials/Supply Chain, Product Related, Staffing, Integration Suppliers, Mapping Values).

2. Configure a Resume Parsing Supplier using the Supplier Setup Page (Setup Financials/Supply Chain, Product Related, Staffing, Integration Suppliers, Supplier Integration Setup).

Configure Installation Options

On the "Installation Options - Staffing Installation Page" (PeopleSoft FSCM 9.2: Application Fundamentals) (Set Up Financials/Supply Chain, Install, Installation Options) define the PeopleSoft Domain Name field, Candidate Registration field, After Update Status field, and Resume Parsing Provider section.

Supplier Setup Page

Use the Supplier Setup page (FO_VENDOR_SETUP) to review the imported configuration.

Navigation

Set Up Financials/Supply Chain >Product Related >Staffing >Integration suppliers >Supplier Integration Setup

Image: Supplier Integration Setup Page

This example illustrates the fields and controls on the Supplier Integration Setup Page. You can find definitions for the fields and controls later on this page.

Supplier Integration Setup

Transaction Group ResumeExtractor
Version 1

Supplier Setup

Long Name Resume Mirror Inc
Status Active

Short Name RM

Description Resume Mirror Inc

Unique Sys Filename ResumeMirrorFSCM.zip
Submit Configuration File

☐ Allow Node Updates on Upload

PeopleSoft Domain PSFT

Partner Domain HRXML

Transactions

Transaction	Log Style	Node
ResumeExtract	Log Everything	FOOL_3

Transaction ID

Understanding Resume Parsing

Submit Configuration File

This button appears when you add a new supplier. Every new supplier integration requires a zip file that includes these files:

- **PSConfig.xsd:** This is the schema file for the configuration file, it should be included and unedited, as delivered by PeopleSoft. This file should be located in the root of the zip file.
- **PSConfig.xml:** This is the xml configuration file, it must comply to PSConfig.xsd, be called PSConfig.xml and be located in the root of the zip file.
- **XSLT Files:** Any transformation XSLT files listed on the configuration file should be included in this zip file.

Unique Sys Filename

This is the name of the zip file that was submitted when the supplier was created.

Submit File

Allows the administrator to load a new supplier file.

Allow Node Updates on Upload

If there is a change on the supplier's configuration file, users can select this check box to allow node changes when reloading the config file.

Partner Domain

Defaulted from the map definitions created in the Application Integration Framework.

Log Style

Select to *Log All* transactions, *Never Log* the transactions, or *On Error* only.

Node

Click to access the Node Definition page.

Test

This is a quick test interface to check if the integration is operational. The users can upload a resume document to execute a simple extraction test.

Mapping Setup Page

Use the Mapping Setup page (FO_MAP_SETUP) to link an internal mapping element to a map name defined on the Application Integration Framework.

This is used to define the specific map name that is being used by staffing for the integration.

Navigation

Set Up Financials/Supply Chain >Product Related >Staffing >Integration Suppliers >Mapping Setup

Image: Mapping Setup Values page

This example illustrates the fields and controls on the Mapping Setup Values page. You can find definitions for the fields and controls later on this page.

The screenshot shows the 'Mapping Setup' page with the following fields and values:

- 'Staffing Element':** A dropdown menu with 'Language Code' selected.
- Dynamic Flag:** A checkbox that is checked.
- 'Map Name':** A text box containing 'LanguageXREF' with a magnifying glass icon to its right.
- 'Domain Name':** A text box containing 'HRXML'.

Understanding Resume Parsing

Staffing Element	Select a staffing element.
Dynamic Flag	This check box is display only and is either selected or cleared depend upon the value selected in the system data.
Map Name	Select a map. The map definition must be must be previously defined on the Application Integration Framework using the same domain defined on the supplier Integration Configuration page.
Domain Name	Select the domain that was created in the Application Integration Framework.

Mapping Setup Values Page

Use the Mapping Setup Values page (FO_MAP_VALUES) to assign values for the selected map and domain name.

Navigation

Set Up Financials/Supply Chain >Product Related >Staffing >Integration suppliers >Mapping Values

Image: Mapping Setup Values Page

This example illustrates the fields and controls on the Mapping Setup Values Page. You can find definitions for the fields and controls later on this page.

Mapping Setup Values

Map Name LanguageXREF **Domain Name** HRXML

Mapping Values

Mapping Setup [Personalize](#) | [Find](#) | [View All](#) | | First 1-5 of 57 Last

	Select	Accomplishment	Description
1	Select	AF	Afrikaans
2	Select	AM	Amharic
3	Select	AR	Arabic
4	Select	ASL	American Sign Language
5	Select	BH	Bahasa (Indonesian)

Mapping Setup Values [Personalize](#) | [Find](#) | [View All](#) | | First 1 of 1 Last

	Sequence Number	Accomplishment
1		

Understanding Resume Parsing

The field labels on this page vary depending upon the map name selected.

Select

Click this button to define the external value for the internal value. Then enter the external values in the Mapping Setup Values grid. If you have already defined the external values for the internal values, the Mapping Setup Values grid will populate with the external values when you click this button.

Sequence Number

Enter a unique number for each row.

Searching PeopleSoft Staffing Front Office

Understanding the Search Framework

Oracle's search engine is integrated into PeopleSoft applications via the PeopleTools Search Framework. The searches are not performed directly against the database but are performed by the search engine against the indexes stored in the Search Framework server. The indexes are created based on the information contained in PeopleSoft Staffing Front Office. The indexes are not updated online, but through a batch process.

The search is implemented as an Application Class that receives search criteria as input and returns results in the form of resources, orders, and so on, with associated scores.

PeopleSoft Staffing Front Office uses five types of searches:

- PeopleMatch
- PeopleSearch
- Customer Search
- Contact Search
- Order Search

The first two of these are forward searches, meaning that they look for resources that match specific criteria. The last three search types are reverse searches, meaning that they look for customers, contacts, and orders that match specific criteria, typically a candidate's experience or preferences. The last three searches are combined in a single component called Opportunity Search.

The PeopleSoft product delivers a standard searching template for these search types. However, PeopleSoft Staffing Front Office customers must define their own search criteria for their organization as part of the implementation process.

To optimize searching capabilities and performance, the system extracts data from PeopleSoft Staffing Front Office records via PS Query and places the data into an XML file. The XML file is sent to the Search Framework server for indexing.

For PeopleMatch and PeopleSearch, the system can also extract information from electronic attachments such as resource resumes. However, the creation of search indexes may be slower when electronic documents are processed. To optimize performance when resume searches are needed, PeopleSoft Staffing Front Office provides a field in the Applicant and Employee components into which users can paste resume ASCII text. Using this method (instead of electronic attachments) reduces search index creation time. Even if users paste their resumes this way, they can still attach electronic resumes to the applicant and employee records to present them to customers.

The Search Index Creation process (PTSF_GENFEED) captures search definitions and generates the appropriate index files (XML). The system applies a key to the templates according to a Key field (SRCH_TYPE_CD). This key is used to identify the correct index files for the Search Framework.

When configuring the five search types, you define the following attributes:

- The availability algorithm to be used (applicable to PeopleMatch and PeopleSearch only).
- Factor weights.

You can define factor weights as part of the search configuration and factor family weights in the actual search pages.

- The list of configurable fields and settings used in the search type.

Note: For instructions about installing the Search Framework with PeopleSoft Staffing Front Office, refer to the installation procedures for PeopleSoft Staffing Front Office on the Oracle's My Oracle Support website.

Reverse Searching

Opportunity Search is a reverse search. Reverse searching consists of searching orders, customers, and contacts that would be a good match for a particular resource.

Forward Searching

PeopleMatch and PeopleSearch are forward searches. They consist of searching resources that meet certain criteria, such as required job order and desired qualifications. Forward searches calculate both the resource qualification and preference scores. These searches can also provide resource availability information.

The choice of availability algorithm is defined in the search type configuration. For an availability algorithm to be used with a search type, the resource calendar must be current.

For additional information about PeopleSoft Search, see "Understanding Financials and Supply Chain Search" (PeopleSoft FSCM 9.2: Application Fundamentals).

Distance Searches

Distance search is used on the PeopleSearch and PeopleMatch pages.

To enable the Distance Search feature, a developer must populate the geocode table to map each postal code to its latitude and longitude.

Developer Guidelines:

1. Locate files containing postal codes, cities, states, latitude, and longitude for the countries to which your organization operates and download them. Many web sites offer these files for free or a small fee. You can also subscribe to a geocoder web service and create your own geocoded files. The key is to create a file containing postal code, city, state, country, latitude, and longitude in a CSV (spreadsheet) format.
2. Modify the file layout and AE process to populate the geocode table.

- Modify the file layout RS_GEOCODE_CITY in Application Designer to match the layout and location of the file created in step one.
- Open the RS_GEOCODE AE process in Application Designer.
- Change the input file name and path to match the file downloaded from the internet.
- Run the process to read the input file and insert the data into the RS_GEOCODE_CITY table.

Normally this only needs to run one time because city locations don't normally change. It may be necessary to download and import a new file when new cities or postal codes are added to the geocode databases. The RS_GEOCODE_CITY table serves as input to the Search Framework index building processes as well as the location prompt tables.

Setting Up the Search Framework and Cache Administration Process

This topic discusses how to set up Search Framework and Cache Administration process.

Pages Used to Set Up the Search Framework and Cache Administration Process

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
<u>Search Settings Page</u>	RS_SEARCH_CONFIG	Configure parameters for the Search Framework.
<u>Factor Weights Page</u>	RS_SRCH_FACT_WGHT	Define the relative importance of each factor within its family.
<u>Configurable Fields Page</u>	RS_SRCH_CONFIG_FLD	Define fields to be used in searches.
<u>Available Configurable Fields Page</u>	RS_SRCH_REC_FLD	Define search fields to create search index files.
<u>Search Index Agent Manager Page</u>	FO_AGENT_MGR	View agent run status or manually start or stop an agent.
<u>Deploy Search Definition Page</u>	PTSF_DEPLOY_SBO	Deploy definition to search server.
<u>Cache Administration – Miscellaneous Page</u>	RS_CACHE_MISC	Specify processes to refresh cache tables and create Search Framework collections.
<u>Maintain Search Index Page</u>	RS_SRCH_INDEX	Capture the parameters needed to create the Search Framework index files.
<u>Refresh Optimization Cache Page</u>	RUN_RS_DF	Recalculate and cache selected factor fit scores for all eligible resources.

Page Name	Definition Name	Usage
Cache Administration - Summary Page	RS_CACHE_SUMMARY	Confirm the list of processes that you want to run or schedule for the future.

Understanding How To Set Up the Search Framework and Cache Administration Process

Use the pages described in this topic to set up the tables and processing rules that PeopleSoft Staffing Front Office uses when running the Search Framework processes.

You should periodically run the Cache Administration process to correct inaccuracies in the data and to reorganize the database indexes for these tables, as well as to update standings.

To set up the Search Framework, use the Search Configuration (RS_SRCH_CONFIG) component and the Cache Administration (RS_SRCH_INDEX) component.

Search Settings Page

Use the Search Settings page (RS_SEARCH_CONFIG) to configure parameters for the Search Framework.

Navigation

Set Up Financials/Supply Chain > Common Definitions > Resource Search > Search Configuration.

Image: Search Settings page

This example illustrates the fields and controls on the Search Settings page. You can find definitions for the fields and controls later on this page.

Search Settings		Factor Weights	Configurable Fields	Available Configurable Fields
Search Type PLSRC PeopleSearch				
Search Index				
Search Definition	EP_FO_PEOPLE_SEARCH	PeopleSearch		
Index Status	Index is not created			
Performance Settings				
*Buffer Resultset Size(in rows)	300			
Availability Method				
*Availability Method	Daily Summarization			
Search Agent Processing				
☐ Enable Agent		Sleep Interval (secs) 15		
Language Code		Minimum Row Threshold (rows)		10
Maximum Number of Services	500	Maximum Wait Tolerance (secs)		60

Search Type

Displays the type of search:

- CNTSR: Contact Search
- CSTSR: Customer Search
- ORDSR: Order Search
- PLSRC: PeopleSearch
- PMSRC: PeopleMatch

The resume attachment feature for applicants and employees allows applicants to attach their own resumes to PeopleSoft Staffing Front Office. Depending on the setup in the Administer File Attachments page, the attachment process can use FTP, SFTP, or the database (DB) to move the resumes from the users' own workstations into a centralized storage location.

Note: The applicant and employee components capture resumes both in the form of electronic document attachments and in an ASCII text field. Entering resumes in the ASCII text field provides faster indexing performance while adding resume attachments provides them to customers in their original form. You can even do both and the system will index the text version.

Search Index**Search Definition**

Displays the PeopleTools search definition.

Index Status

Displays the status of the index, which determines if the indexes have been built for the search definition.

Performance Settings

Define the size of your result set by entering a value in the Buffer Resultset Size (in rows) field. You must also set the Maximum Number of Results in the Oracle Search Framework Administration Console. It should be larger than the maximum search result set desired on the search pages and greater than the largest Buffer Resultset Size in the Search Configuration component. See *Oracle SES Administration* documentation for the “Global Settings”, Query Configuration page.

Availability Method

Enter the method that the system will use to calculate availability scores in the search results: *Daily Summarization* or *No Availability Calculation*.

Note: This group box appears only if you select the PeopleSearch (PLSRC) or PeopleMatch (PMSRC) search type. When Daily Summarization is selected, the system calculates the percentage of time that a resource will be available between the start and end dates specified in the Order or in the PeopleSearch component. When No Availability Calculation is selected, the system does not calculate availability scores, and users may have to rely on other information, such as the count of active assignments, to infer whether a resource is available.

Search Agent Processing

The search agent:

- Minimizes the number of times the program runs (to reduce overhead and, more importantly, fragmentation).
- Minimizes the time required for a change to be reflected in the collection.

Enable Agent Select this check box to enable search agent processing.

Language Code Select the language to run the agent against.

Note: If a specific language is chosen, all other languages will remain outdated until the next time those languages are selected for updating.

Maximum Number of Services Specify how many times the application engine will go through the sleep time before rescheduling itself and ending.

Sleep Interval (secs)(sleep interval [seconds]) Specify how often the agent will check the log for updates.

Minimum Row Threshold (rows) Specify how many rows are needed for the application to start.

Maximum Wait Tolerance (secs)(maximum wait tolerance [seconds]) Specify the maximum times a row of data can wait before it is updated in the search collection.

Factor Weights Page

Use the Factor Weights page (RS_SRCH_FACT_WGHT) to define the relative importance of each factor within its family.

Navigation

Set Up Financials/Supply Chain > Common Definitions > Resource Search > Search Configuration > Factor Weights

Image: Factor Weights Page

This example illustrates the fields and controls on the Factor Weights Page. You can find definitions for the fields and controls later on this page.

Qualifications		
Importance		
Accomplishments	The resource has the accomplishments (degrees, languages, licenses, and memberships) requested for the assignment.	5 - Much more imp ▼
Configurable Fields		1 - Much less impo ▼
Competency Proficiency	The resource is sufficiently proficient at the competencies that will be utilized on the assignment.	5 - Much more imp ▼
Competency Experience	The resource has the requested number of years of experience with the competencies that will be used on the assignment.	3 - Important ▼

Qualifications

The Staffing Front Office search components present the results with their associated search score. The score is a weighted average of several factors. For each factor family grouping, enter the relative importance of each factor, such as Accomplishments, Competency Proficiency, or Resume. Values are 0 - *Not at all important*, 1 - *Much less important*, 2 - *Less important*, 3 - *Important*, 4 - *More important*, or 5 - *Much more important*.

Configurable Fields Page

Use the Configurable Fields page (RS_SRCH_CONFIG_FLD) to define fields to be used in searches.

Navigation

Set Up Financials/Supply Chain > Common Definitions > Resource Search > Search Configuration > Configurable Fields

Image: Configurable Fields page

This example illustrates the fields and controls on the Configurable Fields page. You can find definitions for the fields and controls later on this page.

Search Settings Factor Weights Configurable Fields Available Configurable Fields									
Search Type PLSRC PeopleSearch									
Details		Personalize Find First 1-8 of 8 Last							
	*Sort Order	*Category	*Column	Show in Search	Show In Results	Free Form	Allow Compare		
1	10	PERSONAL DATA	City	☒	☐	☒	☐		
2	30	PERSONAL DATA	State	☒	☐	☐	☐		
3	40	PERSONAL DATA	Postal	☒	☐	☒	☐		
4	50	PERSONAL DATA	Phone	☒	☐	☐	☐		
5	70	AVAILABILITY	Desired Start Date	☒	☐	☐	☒		
6	90	AVAILABILITY	Minimum Rate	☒	☐	☐	☒		
7	100	TESTS	Test	☒	☐	☐	☐		
8	110	ASSIGNMENTS	Active Assignments	☒	☐	☐	☒		

Sort Order

Enter a number to change the order of the fields on the page. This field controls in which order the fields are listed on the actual search page.

Category

Enter the category to which you want to group fields.

Note: You can define views to join multiple records and use that view for the Search Framework index creation. You can also create views with complex joins or outer joins, but this is considered a specific customer customization. Note that complex joins, outer joins and joins with multiple tables and views may significantly decrease the performance of the Search Framework index creation process. If you are adding new tables, views, or fields not delivered on the Available Configurable Fields page, you must also create the queries to extract the new data, assign the queries to its parent connected query, and update the search definition. For additional information, see *PeopleTools: Search Technology*.

Column

Enter the name of the field as you want it to appear in searches.

Show in Search

Select to indicate which fields appear on the search page. Selecting a check box causes the system to include that field as a search field. If an existing row is not selected, the system includes the field when creating indexes. However, the field is not displayed on the search page.

Show in Results

Select to indicate that the system should display this field in the search result set.

Free Form

Select to make the system treat the field as a free-form search—that is, a search with no field edits. Generally, a free-form

search is used for text searching (for example, searching for a description).

Allow Compare

Select to enable the use of comparison operators (such as <, <=, >, >=, and =) when searching. This field is disabled for text fields because Search Framework supports comparison only on numeric and date fields. For text fields, wildcard searches can be used instead.

Note: Searching on a field using comparative search results may lower system performance.

This table lists search types and fields with available defaults:

Search Type	Field	Available Defaults
PeopleMatch	City	Bill To Customer City Worksite Customer City
PeopleMatch	State	Bill To Customer State Worksite Customer State
PeopleMatch	Postal	Bill To Customer Postal Worksite Customer Postal
PeopleMatch	Desired Start Date	Start Date Date Created Date Open Current Date
PeopleMatch	Minimum Rate	Pay Rate/Max Total Income
PeopleMatch	Primary Branch	Order Branch
PeopleMatch	Employee Status	Default to Active
Opportunity Search — Customer	City	Home Address City Mailing Address City
Opportunity Search — Customer	Postal	Home Address Postal Mailing Address Postal
Opportunity Search — Customer	State	Home Address State Mailing Address State
Opportunity Search — Customer	Job Title	Qualifications Job Titles
Opportunity Search — Customer	Operator ID	Ownership Information User ID

Search Type	Field	Available Defaults
Opportunity Search — Contact	Phone	First three digits of Preferred Phone
Opportunity Search — Contact	Job Title Code	Qualifications Job Code
Opportunity Search — Contact	Operator ID	Ownership Information User ID
Opportunity Search — Order	Branch	Ownership Information Branch
Opportunity Search — Order	Business Unit	HR Business Unit
Opportunity Search — Order	Estimated End Date	Last Date Available
Opportunity Search — Order	Max Salary Range	Minimum Acceptable Pay Rate Amount

Available Configurable Fields Page

Use the Available Configurable Fields page (RS_SRCH_REC_FLD) to define search fields to create search index files.

Navigation

Set Up Financials/Supply Chain > Common Definitions > Resource Search > Search Configuration > Available Configurable Fields.

Image: Available Configurable Fields page

This example illustrates the fields and controls on the Available Configurable Fields page. You can find definitions for the fields and controls later on this page.

Search SettingsFactor WeightsConfigurable FieldsAvailable Configurable Fields

Search Type PLSRC PeopleSearch

Search Configuration DetailPersonalizeFindView All1-20 of 27FirstLast

	Category	*Column	*Record (Table) Name	*Field Name	Result Column	
1	ASSIGNMENTS	Active Assignments	FO_CAND_ACT_AS	ACTIVE_ASSIGNMEN	☐	+
2	ASSIGNMENTS	Total Assignments	FO_CAND_TOT_AS	TOTAL_ASSIGNMENT	☐	+
3	AVAILABILITY	Desired Hours	FO_CAND_AVAIL	DESIRED_HOURS	☐	+
4	AVAILABILITY	Desired Start Date	FO_CAND_AVAIL	DESIRED_START_DT	☐	+
5	AVAILABILITY	Minimum Rate	FO_CAND_AVAIL	MIN_RATE	☒	+
6	AVAILABILITY	Overtime	FO_CAND_AVAIL	OVERTIME	☐	+
7	AVAILABILITY	Pay Frequency	FO_CAND_AVAIL	PAY_FREQ_ABBRV	☒	+
8	AVAILABILITY	Placement Type	FO_CAND_AVAIL	PLACEMENT_TYPE	☐	+
9	AVAILABILITY	Shift Friday	FO_CAND_AVAIL	DESIRED_SHIFT_FR	☐	+
10	AVAILABILITY	Shift Monday	FO_CAND_AVAIL	DESIRED_SHIFT_M	☐	+
11	AVAILABILITY	Shift Saturday	FO_CAND_AVAIL	DESIRED_SHIFT_SA	☐	+
12	AVAILABILITY	Shift Sunday	FO_CAND_AVAIL	DESIRED_SHIFT_SU	☐	+
13	AVAILABILITY	Shift Thursday	FO_CAND_AVAIL	DESIRED_SHIFT_TH	☐	+
14	AVAILABILITY	Shift Tuesday	FO_CAND_AVAIL	DESIRED_SHIFT_T	☐	+
15	AVAILABILITY	Shift Wednesday	FO_CAND_AVAIL	DESIRED_SHIFT_W	☐	+

Note: If you are adding new tables, views, or fields not delivered on the Available Configurable Fields page, you must also create the queries to extract the new data, assign the queries to its parent connected query, and update the search definition. For additional information, see *PeopleTools: Search Technology*.

Category	Enter the name of the category into which you want to group fields.
Column	Enter the name of the field as you want it to appear in searches.
Record (Table) Name	Enter the actual record name.
Field Name	Enter the actual field name.
Result Column	Select the check box to indicate that the system should use the field to display results.

See the product documentation for *PeopleTools: Process Scheduler*

Search Index Agent Manager Page

Use the Search Index Agent Manager page (FO_AGENT_MGR) to view the searches where the search agent is enabled.

Navigation

Set Up Financials/Supply Chain > Common Definitions > Resource Search > Search Index Agent Manager

Image: Search Index Agent Manager Page

This example illustrates the fields and controls on the Search Index Agent Manager Page. You can find definitions for the fields and controls later on this page.

Search Index Agent Manager

Process Monitor

Search Index Agent Manager

Search Type	Run Status	Process Instance	Last Run On	Last Activity		
					Start	Stop

This page lists the searches that have the agent enabled.

Search Type	Displays the search type.
Run Status	Displays the status of the agent for each search type.
Process Instance	Displays the process of instance of the agent.
Last Run On	Displays the date and time the agent was last run.
Last Activity	Displays the date and time of the last activity. This field is used in conjunction with the Run Status field.
Start	Click this button to manually start the search agent.
Stop	Click this button to manually stop the search agent.
Refresh	Click this button to refresh the information in the grid.

Configuring Search Definitions for PeopleSoft Staffing

To configure search definitions for PeopleSoft Staffing, use the Security page in the Search Definition component, which is described in the PeopleTools: PeopleSoft Search Technology documentation.

For each search definition prefixed by EP_FO, follow these steps:

1. Select the Source Level Security option.
2. Enter a role that has been assigned to users of the corresponding Staffing search pages.

The security role is only needed to secure the data when searches are performed from outside of PeopleSoft, such as when searching on the Search Framework Search page.

Note: If you leave the Search Definitions as delivered in system data, the Staffing search pages will most likely produce no results. This is because system data is delivered with the PeopleSoft User demo role, which is not used in most production environments.

Deploy Search Definition Page

Use the Deploy Search Definition page (PTSF_DEPLOY_SBO) to deploy the search definition to the Search Framework server. The search definition must be deployed before building the index for the first time.

Navigation

PeopleTools > Search Framework > Administration > Deploy/Delete Object.

Enter EP_FO in the Filter by name field to display search definitions for PeopleSoft Staffing. You should perform the deploy process once for each search definition before building the indexes for the first time.

For additional information about this component, see the *PeopleTools: Search Technology*, Administering PeopleSoft Search Framework, Administering Search Definitions and Search Categories.

Cache Administration – Miscellaneous Page

Use the Cache Administration – Miscellaneous page (RS_CACHE_MISC) to specify processes to refresh cache tables and create search collections.

Navigation

Set Up Financials/Supply Chain > Common Definitions > Resource Search > Cache Administration

Image: Miscellaneous page

This example illustrates the fields and controls on the Miscellaneous page. You can find definitions for the fields and controls later on this page.

The screenshot shows the 'Miscellaneous' tab selected in the top navigation bar. Below the tabs, the 'Process Selection' section contains the following options:

- ☒ Refresh Current Eligible Resources
- ☒ Refresh Resource Schedule Cache
- ☒ Refresh Resource Organizational Unit Cache
- ☐ Maintain Employee Data Cache
 - ☐ Create New
 - ☒ Update Existing
- ☒ Refresh Supply/Demand Cache
- ☐ Refresh Supply Category Analytics Cache
- ☐ Update Assignment Completion

Refresh Current Eligible Resources	Select this check box to update the Eligible Resource Cache table (RS_ELGBL_WKRR) with current eligible resource information. In addition to tracking the current, eligible resources, the table stores the resource's job-related information, such as job code and location. The program is required when routine changes are made to a resource's job-related information. Run this program nightly and as required.
Refresh Resource Schedule Cache	Select to update the Resource Schedule Cache table (RS_DF_WKRR_DATE) that is used to track a resource's schedule. The program purges old availability data and ineligible resource data. It is required when: • Implementation takes place. • Standard hours or default days change in the Scheduling Options group box on the Common Installation Options page. • New holidays are added to the holiday schedule and loaded using the Holiday Load Application Engine process (RS_HOLIDAY). This program runs automatically for a resource when the resource's schedule changes. Run the program manually for all resources as required. Select <i>Create New</i> or <i>Update Existing</i>.
Refresh Resource Organizational Unit Cache	Select to update the Resource Organizational Unit Cache table (RS_WORKER_ORG) that stores organization information from the specified organization tree. The program is required when: • Implementation occurs. • Resources are created individually using the Establish Employee As Resource component (RS_WKRR_CREATE). • A node or detail value changes on the organization tree. • A new organization tree is implemented. • A resource's organization unit value changes, such as the resource's department. Run this program nightly.
Maintain Employee Data Cache	Select this check box to update the FO_CANDIDATE_W table.
Refresh Supply/Demand Cache	Select this check box to update the cache tables for both supply and demand.

Refresh Supply Category Analytics Cache

Note: This field is used by PeopleSoft Resource Management.

Select this check box to update the cache tables for supply category analytics.

Note: This field is used by PeopleSoft Resource Management.

Maintain Search Index Page

Use the Maintain Search Index page (RS_SRCH_INDEX) to capture the parameters needed to create the search index files.

Navigation

Set Up Financials/Supply Chain > Common Definitions > Resource Search > Cache Administration > Maintain Search Index

Image: Maintain Search Index page

This example illustrates the fields and controls on the Maintain Search Index page. You can find definitions for the fields and controls later on this page.

The screenshot shows the 'Maintain Search Index' page with the following sections:

- Tabs:** Miscellaneous, Maintain Search Index (active), Refresh Optimization Cache, Summary.
- Process Selection:** A checked checkbox labeled 'Maintain Search Index'.
- Indexing Options:** Two radio buttons: 'Create New' (selected) and 'Update Existing'.
- Index Language:** Two radio buttons: 'All Installed Languages' and 'Base Language' (selected).
- Index:** A dropdown menu for 'Search Type' with 'Express Search/Fulfill Orders' selected.

Process Selection

Select the Maintain Search Index check box to create the search index as part of this Cache Administration run control.

Indexing Options

Select Create New to delete the existing index and create a new one. Use this option to replace the search index.

Select Update Existing to update the existing index without deleting it by inserting new documents and updating those that have changed since the last time the update process ran.

Index Language

Specify whether the index should be created for all installed languages or a single language.

- Select All Installed Languages to create a collection for each installed language.
- Select Base Language to specify the installed base language.

Index

Specify a Search Type for the index creation.

When you update this page and submit the process, Cache Administration runs the Build Search Index process provided in the Search Framework. You may also run this process directly from the Schedule Search Index page (PeopleTools >Search Framework >Administration >Schedule Search Index). However, PeopleSoft recommends that you use the Cache Administration process so that the cache tables and search indexes are synchronized at all times.

Note: The Optimize Indexes feature has been removed from the Maintain Search Index page. It is now maintained centrally within the Search Framework. See the *Oracle Secure Enterprise Search Administrator's Guide*.

Refresh Optimization Cache Page

Use the Refresh Optimization Cache page (RUN_RS_DF) to recalculate and cache selected factor fit scores for all eligible resources.

Navigation

Set Up Financials/Supply Chain > Common Definitions > Resource Search > Cache Administration > Refresh Optimization Cache

Refresh Optimization Cache

Select to include the Refresh Optimization Cache Application Engine process (RS_DF) as part of this Cache Administration run control.

Cache Administration - Summary Page

Use the Cache Administration - Summary page (RS_CACHE_SUMMARY) to confirm the list of processes that you want to run or schedule for the future.

Navigation

Set Up Financials/Supply Chain > Common Definitions > Resource Search > Cache Administration > Summary

Image: Cache Administration - Summary Page

This example illustrates the fields and controls on the Cache Administration - Summary Page. You can find definitions for the fields and controls later on this page.

Miscellaneous Maintain Search Index Refresh Optimization Cache **Summary**

Run Control ID: 12 Run Control ID: 12 Report Manager Process Monitor [Run](#)

Process List

- ☐ Refresh Resource Organizational Unit Cache
- ☐ Refresh Resource Schedule Cache
- ☐ Refresh Current Eligible Resources
- ☐ Maintain Search Index
- ☐ Maintain Employee Data Cache
- ☒ Refresh Supply/Demand Cache
- ☐ Refresh Supply Category Analytics Cache
- ☐ Update Assignment Completion
- ☐ Refresh Optimization Cache

These check boxes will be selected or deselected according to the options selected on the previous pages:

- Refresh Resource Organizational Unit Cache
- Refresh Resource Schedule Cache
- Refresh Current Eligible Resources
- Maintain Search Index
- Maintain Employee Data Cache
- Refresh Supply/Demand Cache
- Refresh Supply Category Cache

Run

Click this button to run the cache administration program.

Process Monitor

Click this link to review the status of the process scheduler job you initiated when you clicked the Run button.

Performing Searches

Note: Your system administrator establishes the search criteria fields during implementation. If you want to search for additional characteristics, contact your system administrator.

Pages Used to Perform Searches

Page Name	Definition Name	Usage
<u>PeopleSearch Page</u>	FO_PEOPLESRCH	Search for applicants, employees, and contractors who possess particular qualifications.
Resource Group Definition - Resource Groups Page	RS_RESOURCE_GROUPS	Add resource groups that can be used as criteria for your PeopleSearch. <u>PeopleSearch Page</u>
Resource Group Definition - Resource Group Details Page	RS_RSRCGRP_ADD	Specify details about resource groups. <u>PeopleSearch Page</u>
Qualification Detail: License Page	RS_QUALIF_DETAILS	Enter location information for the license. The other qualifications refer to flexible factors, but the flexible factors are only applicable to PeopleSoft Resource Management and are not available to PeopleSoft Staffing Front Office. <u>PeopleSearch Page</u>
Resource Qualifications - Select Qualification Profile Page	RS_SELQUALPROFILE	Add qualifications from a qualification profile. The functionality of this page is similar to that used when adding customers to the system. <u>PeopleSearch Page</u>
Resource Qualifications - Search for Qualifications Page	RS_QUALIF_SRCH	Add qualifications from the qualifications list. The functionality of this page is similar to that used when adding customers to the system. <u>PeopleSearch Page</u>
Resource Qualifications - Select Competencies Page	RS_SO_COMP	Add qualifications from a competency tree. The functionality of this page is similar to that used when adding customers to the system. <u>PeopleSearch Page</u>
<u>Opportunity Search Page</u>	FO_REVERSE_SRCH	Search among current customers, contacts, and orders for potential new placements for existing employees.

Page Name	Definition Name	Usage
<u>Job Scorecard Page</u>	FO_JOB_SCRD	View scoring information for a candidate.
<u>Staffing Searches Pagelet</u>	FO_MYSEARCH_PGLT	Displays a list of saved searches available as quick links from the pagelet, and displays links to add new searches.
<u>Save Search Parameters Page</u>	FO_SRCH_SAVE	Save a PeopleSearch or an Opportunity Search. You can also make these searches available to a specific group or make it a public search. Define if the Saved Search is to be displayed in the Staffing Searches pagelet or not.
<u>Configure User Options Page</u>	FO_MYSRCH_CFG_PG	Enter User Configuration for the Staffing Searches pagelet. You can define which Saved Searches will be displayed in the pagelet.
<u>Delete Saved Searches Page</u>	FO_SRCH_SVD_DEL	Delete a previously Saved PeopleSearch or Opportunity Search.

Understanding How To Perform Searches

The five PeopleSoft Staffing Front Office searches can be executed from these components:

- Order

From this component, users can run PeopleMatch.

- Opportunity Search

From this component, users can perform customer, contact, and order searches.

- A third component is provided to execute PeopleSearch.

PeopleSearch is an impromptu search that is not associated with any particular order.

The PeopleSearch page enables you to define specific sets of qualifications and characteristics, and then search your database to locate employees and applicants that match the search criteria. You can save the searches that you create under different names and recall them for repeated searching.

Note: Your system administrator establishes the search criteria fields during implementation. If you want to search for additional characteristics, contact your system administrator.

PeopleSearch Page

Use the PeopleSearch page (FO_PEOPLESRCH) to search for applicants, employees, and contractors who possess particular qualifications.

Navigation

Staffing > Search > PeopleSearch. .

Image: PeopleSearch page

This example illustrates the fields and controls on the PeopleSearch page. You can find definitions for the fields and controls later on this page.

The screenshot shows the PeopleSearch interface. At the top, there's a 'Resource Group ID' dropdown and an 'Add Resource Groups' link. Below that are 'Candidates per Page' (set to 10), 'Start Date', and 'End Date' fields. A tabbed interface shows 'Qualifications' selected. The 'Currently Selected Qualifications' table lists four items: two competencies (Database Design and Database Administration) and two degrees (Bachelor of Science in Computer Science and Management Information Systems). Below this are buttons for 'Add qualifications from', 'Profile', 'List', and 'Competency Tree'. A 'Keyword Search' field is present with a 'Required' checkbox. Further down are dropdowns for 'Qualifications', 'Preferences', 'Availability', and 'Resume'. A 'Saved Search' dropdown shows 'DBA' with 'Save Search' and 'Delete Search' buttons. The 'Search' button is at the bottom left. The 'Search Results' section shows a table with columns: Score, Avail., Candidate Type, Name, Per Status, Status, Phone, City, State, Distance, and Pay Frequency. The table is currently empty.

Resource Group ID

Select a group of resources on which to search.

Candidates per Page

Enter the maximum number of candidates that you want to view in the Search Results grid. When you perform the search, the system retrieves all matching resources. This field determines the number of rows that appear at one time.

Start Date and End Date

Enter the date range for which you want to check the availability of resources.

Note: These fields appear only if the search type is configured to use an availability algorithm.

Add Resource Groups

Click this link to add resource groups to your search possibilities.

Qualifications

Type and Description	Displays the overall qualification type, such as Competency, Degree, or Language, and the more specific description of the qualification.
Importance	Indicates the relative importance of the qualification, such as <i>Desired</i> or <i>Required</i> . Required criteria filter non-matching records from the search results. Desired criteria do not filter records from the search results, but they do affect the score.
Years of Work Experience	Enter the number of years of experience that the resource should have for the qualification.
Proficiency	Enter the level of proficiency for the qualification, such as <i>0-None, 1-Little, 2-Fair, 3-Good, 4-Very Good, or 5-Expert</i> .
Major	Enter the main field of study for degree qualification types.
Search Also in Resume	Select this check box to have the system check candidate resumes.
Profile, List, and Competency Tree	Click a button to add qualifications to the search criteria. The functionality of these buttons' destination pages is similar to those used when adding customers to the system. See "Adding General Customer Information" (PeopleSoft FSCM 9.2: Order to Cash Common Information).
Key Word Search	Enter text to search for in resumes. You can search for multiple keywords by combining AND and OR logical operators grouped by parenthesis. eg: PeopleSoft AND (Java OR Python). You can also search for phrases by marking the text within single or double quotes. Note: This field is only available for the PeopleMatch and PeopleSearch search type.
Required	The Required check box helps you filter and display the search results as per the keyword you entered. With the Required check box selected, the search results display only those results that match the keyword you entered. This check box is selected, by default. Deselect this check box to make the Keywords as a desired (optional) search parameter.
Qualifications	Enter the relative importance of each factor on the overall score. The factor weight values are: <i>0 - Not at all important, 1 - Much less important, 2 - Less important, 3 - Important, 4 - More important, and 5 - Much more important</i>. The Qualifications factor reflects the competencies, honors, and accomplishments

from the Qualifications page, as well as the configurable fields that are found in the Applicant or Employee component.

Availability

The availability factor refers to the resource's schedule and how it matches the start and end dates specified.

Preferences

The preference factor refers to the preferences field on the Qualifications page of the Applicant and Employee component.

Resume

The resume factor refers to the number of matches in the resource's resume to the keyword search.

Note: This drop-down list box only appears on the PeopleSearch and PeopleMatch pages.

Other Search Criteria

Configurable fields are used in PeopleSearch and PeopleMatch to search for data that do not fall under qualifications in candidate's profiles. The configurable search fields fall under five categories: Assignments, Availability, Personal data, Resume, and Tests. Examples of configurable fields include candidate's address information, test performances, rate information, and so on.

You define these fields as either free-form or comparable in the setup, and specify them as required or desirable in the search.

Postal and Maximum Distance

Select the origin postal code. The prompt pulls in the postal, city, and state. You can then optionally enter the maximum distance and distance unit of measure.

If postal is required, then the system only displays resources that live within the specified distance.

If postal is desired, then the system displays all resources that match the other criteria. However, resources that live within the maximum distance receive a higher score.

Saved Search

Select a saved search to use.

Save Search

Click to save the search for future use.

Delete Search

Click to delete the search.

Note: You may delete any searches, including group and public searches, that you created. You cannot delete searches created by other users.

Search Results

Score

Displays the percentage of the search criteria that the candidate matched.

Click this link to view the candidate's job scorecard.

Avail. (Availability score)	Displays the percentage of time that the candidate is available between the start and end dates specified in the search criteria. Click the link to view the candidate's resource calendar. Note: The Resource Calendar must be enabled as part of the staffing installation options to use this functionality.
Candidate Type	Indicates whether the candidate is an applicant, an employee, or a non-employee.
Name	Displays the candidate's name. Click a link in this column to view the employee record.
Per Status (personnel status)	Displays the candidate's status: Applicant, Employee, or Non employee.
Status	Displays the candidate's job status. Possible values include <i>Active</i> , <i>Hire Pending</i> , <i>Invalid</i> , <i>Pending</i> , and <i>Terminated</i> .
Phone	Displays the candidate's phone number.
City	Displays the candidate's city of residence.
State	Displays the candidate's state of residence.
Distance	Displays the distance the candidate is located from the postal code entered in the search criteria.

Opportunity Search Page

Use the Opportunity Search page (FO_REVERSE_SRCH) to search among current customers, contacts, and orders for potential new placements for existing employees.

Navigation

Staffing > Search > Opportunity Search.

Image: Opportunity Search page

This example illustrates the fields and controls on the Opportunity Search page. You can find definitions for the fields and controls later on this page.

Opportunity Search

Qualifications | Order Fields | Customer Fields | Contact Fields

Currently Selected Qualifications Personalize | View All | [A] First 1-4 of 4 Last

	Type	Description	Importance	Years of Work Experience	Proficiency	Major	
1	Competency	Database Design	Desired	One Year	4-Very Good		[-]
2	Competency	Database Administration	Required	Three Years	4-Very Good		[-]
3	Degree	Bachelor of Science	Desired			Computer Science	[-]
4	Degree	Bachelor of Science	Desired			Management Information Systems	[-]

Add qualifications from Profile List Competency Tree

Clear All Customer Defaults Clear All Contact Defaults Clear All Order Defaults
Restore Customer Defaults Restore Contact Defaults Restore Order Defaults

☐ Search Resource Requests
 ☐ Search Customers
 ☐ Search Contacts
 Max Results 10

Saved Search [Dropdown] Save Search Delete Search

Search Clear All

Orders Matched Personalize | [A] | [Grid]

Score	Business Unit	Order Id	Line	Salary Range	Maximum Salary	View
		Order ID				View

Customers Matched Personalize | [A] | [Grid]

Score	SetID	Customer Id	Customer Name	City	State	View
		Customer ID				View

Contacts Matched Personalize | [A] | [Grid]

Score	SetID	Contact Id	Contact Name	Phone	View
		Contact ID			View

Qualifications Tab

Profile, List, and Competency Tree

Add qualifications by clicking the appropriate button.

Note: The functionality of these buttons and their destination pages is the same as those that you use when adding customers to the system.

See "Adding General Customer Information" (PeopleSoft FSCM 9.2: Order to Cash Common Information).

Search Resource Requests (Orders), Search Customers, and Search Contacts	Select the appropriate check boxes to have the system search for resource requests, customers, and contacts that request the qualifications indicated in the opportunity search criteria.
Max Results (maximum results)	Enter the maximum number of records that you want to include in the search results.
Qualifications and Preferences	Enter the level at which the system weights these attributes.
Score	The percentage of the qualification criteria specified in the search that the order, customer, or contact matched.
Business Unit	Business unit of the resource request found by the search.
Service Order ID	Service order ID of the resource request found by the search.
Line	Line number of the resource request found by the search.
View	Click the associated link to view additional information about the following: • Orders Matched Displays resource requests (order lines) found by the opportunity search. • Customers Matched Displays customers found by the opportunity search. • Contacts Matched Displays contacts found by the opportunity search.
Customer ID and Customer Name	Displays the ID and name of the customer found by the opportunity search. Click a View link to view the customer information in the customer component.
City, State, and Postal Code	Enter the city, state, and address of the customer's residence.
Contact ID, Contact Name, and Phone	Enter the ID, name, and phone number of the contact found by the opportunity search. Click a View link to view the contact information in the contact component.

Order Fields Tab

The order fields are configurable and enable users to search on criteria other than qualifications. The criterion is defined through system configuration and can include fields such as business unit, service user, order status, and so on. For each field specified, indicate whether the criteria is Required or Desired.

Customer Fields Tab

The customer fields are configurable and enable users to search on criteria other than qualifications. The criterion is defined through system configuration and can include fields such as zip code, city, state, and so on. For each field specified, indicate whether the criteria is Required or Desired.

Contact Fields Tab

The contact fields are configurable and enable users to search on criteria other than qualifications. The criterion is defined through system configuration and can include fields such as phone number (for area code searches), contact owner, and so on. For each field specified, indicate whether the criteria is Required or Desired.

Currently Selected Qualifications

Importance

Select the fields to be required by selecting the Required option next to the corresponding search criteria. These required fields narrow the result set. Items that do not meet these required criteria will not appear in the result set.

The Desired option does not exclude records from the result set. Rather, those items that match criteria marked as desired have a higher score than the records that do not match the criteria.

Note: Selecting the Desired option neither extends nor narrows the result set. It only increases or decreases the result that appears in the Score field accordingly.

Click the List button to access the Resource Qualifications page and select additional search criteria.

Click the Competency Tree button to access the Resource Qualifications page for competency trees.

Scoring Results

The system calculates and returns results based on four scores: qualifications, preferences, resumes, and availability (the availability score can only be calculated for PeopleSearch and PeopleMatch).

In the search pages, the user can define the weight that qualifications, preferences, resumes, and availability have in the consolidated score. Additionally, when configuring the searches, you can associate each Qualification factor with a weight within its factor family.

The system calculates scores differently based on how a user enters their search criteria. A weighted average is calculated for each row in the result set.

If a user enters search criteria for four fields, the system assigns 25 percent of the total score to each field. If the user enters a list of key words connected by *AND* or *OR* in one of the fields, the system assigns the results a fraction of the 25 percent total for the field following these rules:

- If a user enters the *Desired* and *AND* conditions for a search field, the system calculates the score based on the number of values that match.

For example, if the user enters three values in the search criteria and the record matches only one value, then the record receives a score of 33 percent of the 25 percent associated with the search field.

- If a user enters the *Desired* and *OR* conditions for a search field using three values in the search criteria and the record matches only one value, then the record receives a score of 100 percent of the 25 percent associated with the search field.
- If a user enters the *Required* and *AND* conditions for a search field using three values in the search criteria, then the system returns only those rows that meet all values and scores the record 100 percent of the 25 percent associated with the search field.

- If a user enters the *Required* and *OR* conditions for a search field using three values in the search criteria, then the system returns all rows that meet at least one value and scores the record at 100 percent of the 25 percent associated with the search field.

Job Scorecard Page

Use the Job Scorecard page (FO_JOB_SCRD) to view scoring information for a candidate.

Navigation

Click the score link for any candidate in the search results grid of the PeopleMatch or PeopleSearch pages.

The staffing job scorecard contains a grid, which provides a detailed breakdown of the list of values from the search criteria and the level to which the candidate's values match the search criteria. The grid captures each value that is entered in the search criteria from both the Qualifications and Other Search Criteria tabs.

Select Candidate	Select this check box to add this candidate to the Considering grid.
Score	Displays the candidates score based on the search criteria.
Availability Score	Click this link to view the candidates resource calendar.
Note: This option is only available if Resource Calendars are enabled as part of the installation and the candidate is an employee.	
Match Status	Displays the match level indicator.
Category	Displays the search type category being searched.
Description	Displays the description of the value being searched.
Criteria	Displays the various criteria for a competency or skill that a candidate could match. For example, the importance, proficiency, or years of work experience. The criteria may differ depending on the type of search criteria being evaluated.
Result	Displays the candidate's results for the criteria being evaluated.
Importance	Displays the desired or required status of the search for this value.
Interest Level	Displays the candidate's interest level in the competency being evaluated.

Job Score Search Results

The search values specified on the Qualifications tab for PeopleSearch and PeopleMatch are derived from three sources: Qualification Profile, Qualifications List, and Competency Tree. On the Qualifications tab, the search fields are classified by the following six search type categories:

- Competencies
- Degrees
- Languages
- Licenses
- Memberships
- Other

Note: The Other category is only used when PeopleSoft Resource Management is installed.

Competencies

This table defines the possible values of the fields in the Competencies search type:

Status	Definition
Matched	The candidate's proficiency level is equal to or higher than the level searched for <i>and</i> the number of years of experience of the candidate in that competency is greater than or equal to the years of experience selected in the search.
Partially Matched	• Either the candidate's proficiency level is lower than the level searched for <i>or</i> the candidate does not have sufficient number of years of experience in the competency as required by the search. • Both the candidate's number of years of experience and proficiency in the competency are lower than the levels required by the search.
Not Matched	The candidate does not possess the qualification being searched.

Degrees

This table defines the possible values of the fields in the Degrees search type:

Status	Definition
Matched	The candidate has the degree (including the major, if specified) as specified in the search.
Not Matched	The candidate does not have the degree specified in the search.

Languages

This table defines the possible values of the fields in the Languages search type:

Status	Definition
Matched	The candidate is qualified in the language that is being searched on <i>and</i> speaking, reading, and writing proficiency levels are higher than the levels, if specified, in the search details.
Partially Matched	The candidate is qualified in the language that is being searched on, but one or more of the proficiency levels (speaking, reading, writing), if specified, is lower than the levels specified in the search criteria.
Not Matched	The candidate's profile does not have the language being searched.

Licenses

This table defines the possible values of the fields in the Licenses search type:

Status	Definition
Matched	The candidate matches all the search criteria of the license, including the country and the state, if specified, in the search details.
Partially Matched	The candidate possesses the license that is being searched, but the license is issued not from the country and the state specified in the search details.
Not Matched	The candidate does not possess the license being searched.

Memberships

This table defines the possible values of the fields in the Memberships search type:

Status	Definition
Matched	The candidate has the membership specified in the search.
Not Matched	The candidate does not have the membership specified in the search.

Understanding How to Use Free-Form Fields

Free-form fields do not allow users to select a value from a prompt when entering search criteria. Examples of free-form fields include description, city, or keywords to search within resumes.

In the PeopleMatch and PeopleSearch search configuration, use the Keyword Search field to search keywords within resume documents.

When entering values in free-form fields, you can enter a value or a partial value.

Partial Values

To enter a partial value, use wildcards to define the value according to the following guidelines:

- * Specifies zero or more alphanumeric characters.
- ? Specifies one alphanumeric character.

Here are three examples of wildcard usage:

- City: *New**

In this example, the city must start with *New* (for example, *New York* or *New Orleans*).

- City: **Orleans**

In this example, the city must contain *Orleans* (for example, *New Orleans*).

- Postal: *94???*

In this example, the postal code must start with *94* and continue with three more alphanumeric characters (for example, *94111*).

Note: Search Framework does not support case sensitive searches. For example, whether you enter New York, new york, or NEW YORK in the field, the system will find the same results.

Searching Using the Logical AND and OR Operators

Within a particular search criterion, you can include multiple values and string them together with either an *OR* or an *AND* operator. If you string values together with an *AND* operator and you mark the criterion as required, then the system returns only search results that possess all of the criteria entered. No additional configuration is required to use this feature. You may not include *AND* and *OR* operators in the criteria for the same field. Also, the system does not support the use of parentheses.

Note: To search for the word *OR* or *AND* (for example, if you search for people living in *Oregon* and the state code is *OR*), enclose *OR* (which corresponds to the state abbreviation) within quotation marks to differentiate it from the logical *OR* operator.

Comparative Search

You can search for values that are greater than or less than the value entered. This type of search is useful when searching on dates (such as checking for availability) or numbers (for example, number of assignments). To use this feature, you must establish the field as available for a comparative search when setting up your search configuration.

Note: Searching on a field using a comparative search typically results in lower system performance.

Combination Search for Test Scores

Test scores are divided into two categories based on the type of values that can be entered:

- Range

The values are divided in ranges that are presented as options when searching. No comparison operator is provided, and a rating of *better than* is the only option.

- Pass/Fail

Options indicate whether the person passed or failed the test.

A few fields are available on the search pages where you might want to search for a combination of values. For example, when a user is searching for applicants that obtained a certain score in a particular test, the user needs to specify not only the score but also the test. This type of search is called a *combination search* because a relationship exists between the two fields involved in the search. If these fields are included in the search configuration, the system displays two fields on the search page (one next to the other and separated by a comparison operator). In this example, the fields are Test and Score.

Staffing Searches Pagelet

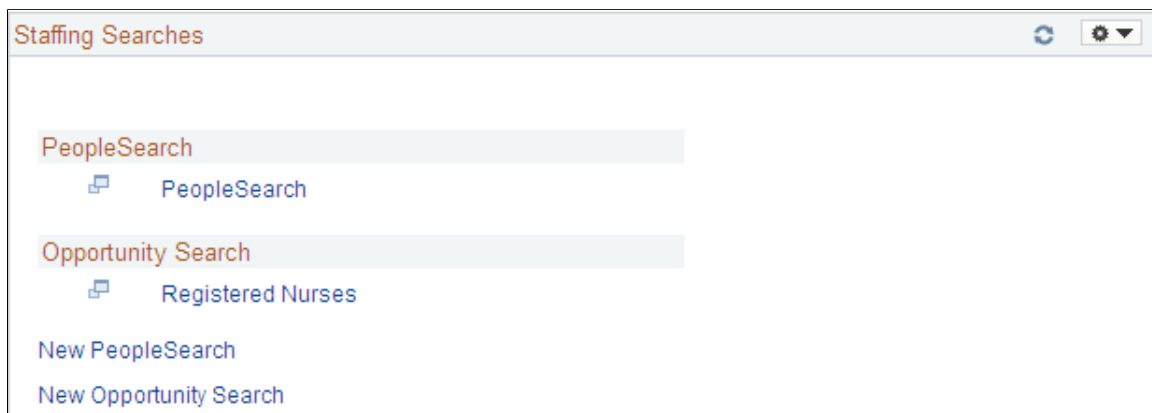
Use the Staffing Searches Pagelet (FO_MYSEARCH_PGLT) to quickly perform a search for people or for opportunities. These searches utilize previously saved search criteria from the PeopleSearch or the Opportunity Search pages.

Navigation

Click the Personalize Content link on the PeopleSoft homepage and select Staffing Searches.

Image: Staffing Searches Pagelet

This example illustrates the fields and controls on the Staffing Searches Pagelet. You can find definitions for the fields and controls later on this page.



The names of the searches under the PeopleSearch and the Opportunity Search headings are quick access links to saved searches. Click the link of the search you want to launch. The system automatically executes the search and displays the results in a separate page.

The Staffing Searches pagelet can include user-specific, team, or public saved searches.

Configuring a New PeopleSearch

Use the PeopleSearch page to configure a new set of search criteria for people. For a detailed description of this page, see [PeopleSearch Page](#).

Navigation

From the Staffing Searches Pagelet, click the New PeopleSearch link. Alternatively, you can click the Save Search button on the PeopleSearch page.

Configuring a New Opportunity Search

Use the Opportunity Search page to configure a new set of search criteria for opportunities, orders, customers, or contacts. For a detailed description of this page, see [Opportunity Search Page](#).

Navigation

From the Staffing Searches Pagelet, click the New Opportunity link. Alternatively, you can click the Save Search button on the Opportunity Search page.

Save Search Parameters Page

To utilize a search multiple times, you must save it. You can:

- Save searches for your own use.
- Save them for your group's use.
- Make the search public.

Navigation

Click the Save Search link on the PeopleSearch or the Opportunity Search pages.

Image: Save Search Parameters Page

This example illustrates the fields and controls on the Save Search Parameters Page. You can find definitions for the fields and controls later on this page.

The screenshot shows the 'Save Search Parameters' page. It has a title bar 'Save Search Parameters'. Below it are two text input fields: 'Saved Search Name' and 'Search Description'. Below these is a section titled 'Options' in a light blue header. Inside the 'Options' section, there are three checkboxes: 'Svc Opr/Team Search', 'Public Search', and 'Add To Staffing Searches'. To the right of the 'Svc Opr/Team Search' checkbox is a dropdown menu with a downward arrow.

Saved Search Name

Enter a descriptive name for the search.

Search Description

Enter a description to explain the purpose of the search.

Svc Opr/Team Search (service operator/team search)

Click the box and select a team name to make the search available to that group. Users see only groups to which they have access.

Public Search

Click the box to make the search available to all users.

Add to Staffing Searches

Click the box to display the search on the Staffing Searches pagelet. You can select or de-select any of the public, team, or user-specific searches.

Add to Staffing Searches has the same functionality as the 'Show in List' field in Personalize Staffing Searches; It causes the Saved Search to display in the pagelet.

Note: The difference is that 'Show in List' is based on an existing list of Saved Searches. Then user defined which ones he/she wants to see in the pagelet.

When you select the 'Add to Staffing Searches' option from the Save Search page, you are saving that search for future use and you are also directing the system to add this search to the "My Searches" pagelet.



(Pagelet Settings icon)

Click the icon and click the Personalize link to open the Configure User Options page.

Search names must be unique and only the user who created the search may alter the name. This functionality is true particularly for public search names. If another user tries to create a new public search using an existing name, the system displays an error message. Multiple users may use the same search name as long as the searches are classified as user-specific.

Configure User Options Page

Use the Configure User Options page (FO_MYSRCH_CFG_PG) to enter user configurations for the Staffing Searches pagelet. You can define which Saved Searches will be displayed in the pagelet.

Navigation

Click the Pagelet Settings icon on the Staffing Searches pagelet.

Image: Configure User Options Page

This example illustrates the fields and controls on the Configure User Options Page. You can find definitions for the fields and controls later on this page.

Configure User Options					
Staffing Searches				Find	First 1 of 1 Last
Search Type	Saved Search Name	Search Description	Show in List		
Opportunity Search	REG NURSES	Registered Nurses	☒		

Search Type

Select either PeopleSearch or Opportunity Search.

Saved Search Name	Select the name of the search you want to update. You can search on the name or the description by clicking the Look Up button.
Search Description	Displays the description of the search.
Show in List	Click the option to show the search on the Staffing Searches page.

Delete Saved Searches Page

Use the Delete Saved Searches page (FO_SRCH_SVD_DEL) to delete a previously saved PeopleSearch or Opportunity search.

Navigation

Click the Delete Search link on the PeopleSearch or Opportunity Search pages.

Creating Applicant and Employee Records

Understanding Applicant and Employee Record Creation

You should be aware of the following PeopleSoft Staffing Front Office processing rules for creating applicant and employee records:

- You can only enter individuals into PeopleSoft Staffing Front Office as applicants.
- After you enter individuals into the system, you can convert them to employees or contractors (non-employees) using the Applicant pages.
- After you enter applicants into the system, you can search for candidates whose skills match open customer orders and place them on assignments.
- You cannot place an applicant on a temporary assignment, however, until the applicant goes through the hire process and is in the system as either an employee or a contractor.

Note: If you have PeopleSoft Pay/Bill Management installed without PeopleSoft Staffing Front Office, you still use the Applicant component to add employees to use in temporary orders. The individual (as a resource) must first be added as an applicant and then hired.

Common Elements Used in Creating Applicant and Employee Records

Assignments	Current or past placements for an employee or contractor.
Contractor	The individual who is associated with a third-party supplier and who can be placed on assignments.
Non-Employee	An individual, such as an outside contractor, who may not be directly employed by your company but who may be working on assignments filled by your company.

Entering Data to Create New Applicant Records

This topic describes the data entry process for creating applicant records. A customer service representative completes the pages with information that is supplied by applicants. When it is complete, a recruiter or supervisor can add additional information, such as responses to interview questions, and move to other related pages from within the application by clicking the links on the various pages.

Applicants or customer service representatives, on behalf of the applicant, can use the pages in the self-service component to apply to the organization. The self-service component can be configured to show or hide the applicable pages.

Pages Used to Enter Data to Create New Applicant Records

Page Name	Definition Name	Usage
<u>Contact Information Page</u>	FO_APP_PERS_DATA1	Enter contact information.
Compose Mail Page	FO_SND_EMAIL	Send an email to the applicant. <u>Contact Information Page</u>
Applicants for Attachment Page	FO_RES_ATTACH	Search for candidates with resumes uploaded to the database and attach the resumes to the email. <u>Contact Information Page</u>
Customer Information for Attachment Page	FO_CUST_SNDMAIL	Allows users to add customer related information to the email. <u>Contact Information Page</u>
Applicants Page	FO_PROFILE_APP	Allows the user to enter an applicant ID and the desired placement. When you click the Upload Profile button, the system runs the Generate Candidates Resume process (FO_APP006) and the generated profile is then attached to the email. <u>Contact Information Page</u>
<u>Personal Data Page</u>	FO_APP_PERS_DATA2	Enter personal information.
<u>Job Data Page</u>	FO_APP_JOB_DATA	Enter job information.
<u>Application Page</u>	FO_APP_AVAIL	Enter placement and preference information.
<u>Resume Page</u>	FO_APP_RESUME	Attach resume or enter resume text. Attach additional items to the Applicant.
<u>Qualifications Page</u>	FO_APP_QUALIFS	Add and update competencies and qualifications.
Competencies Page	FO_APP_COMPS	Add and update competencies. <u>Qualifications Page</u>
School Education Page	FO_APP_SCHOOL	Add and update school information. <u>Qualifications Page</u>

Page Name	Definition Name	Usage
Professional Education Page	FO_APP_EDUC	Add and update professional education information. Qualifications Page
Licenses/Certificates Page	FO_APP_LIC	Add and update licenses and certifications. Qualifications Page
Languages Page	FO_APP_LANG	Add and update language qualifications. Qualifications Page
Memberships Page	FO_APP_MEM	Add and update membership information.
Honors and Awards Page	FO_APP_HON	Add and update honors and awards. Qualifications Page
Test Results Page	FO_APP_TEST	Add and update test results. Qualifications Page
Prior Work Page	FO_APP_PRIWRK	Enter prior work experience information.
References Page	FO_APP_REF	Enter reference information.
Source Page	FO_APP_SRC_DATA	Enter recruitment source information.
Forms Page	FO_APP_FORMS	Add or view pre-defined forms to enter information about the applicant.
Forms Page	FO_APP_FORM_DTL	Enter data about the applicant or employee by using pre-defined forms. Forms Page
Reset Status Page	FO_APP_RESET_STAT	Reset applicant status from <i>Hire Pending</i> to <i>Active</i> in cases where the FO_APP_HIRE application message fails.

Contact Information Page

Use the Contact Information page (FO_APP_PERS_DATA1) to enter contact information.

Navigation

Staffing > Resources > Applicants > Applicants

Image: Contact Information page (1 of 2)

This example illustrates the fields and controls on the Contact Information page (1 of 2). You can find definitions for the fields and controls later on this page.

The screenshot shows the 'Contact Information' page for applicant Kristen Pepper. The top navigation bar includes tabs for Contact Information, Personal Data, Job Data, Application, Resume, Qualifications, Prior Work, References, Source, Forms, and Reset Status. The main content area displays the applicant's name, ID (0000000005), and status (Active). It also shows a 'Candidate Overview' section with a checkbox for 'Show in Pending Applicants List'. Below this, there are buttons for 'Hire as Employee', 'Hire as Non-Employee', 'Make Valid', 'Make Invalid', 'Add to Hot List', and 'Hot List Categories'. The 'Contact Information' section is expanded, showing fields for 'Effective Date' (05/15/2006), 'Person Name' (Name Prefix, First Name, Last Name, Middle Name, Name Suffix, Preferred First Name), and 'Home Address' (Country, Address 1, Address 2, Address 3, City, County, State, Postal). A 'Mailing Address' section is also visible at the bottom.

Image: Contact Information page (2 of 2)

This example illustrates the fields and controls on the Contact Information page (2 of 2). You can find definitions for the fields and controls later on this page.

The screenshot shows the 'Contact Information' page (2 of 2) for applicant Kristen Pepper. It displays three sections: 'Phone Numbers', 'Email Addresses', and 'Web Addresses'. Each section has a table with columns for 'Phone Type', 'Int'l Prefix', 'Telephone', 'Phone Extension', 'Preferred', 'Email Type', 'Email Address', 'Primary Web Addr', and 'URL'. The 'Phone Numbers' section shows one entry: Cellular Phone, 925/750-9912. The 'Email Addresses' section shows one entry: Home, kPepper@hotmail.com. The 'Web Addresses' section shows one entry: Website Type, URL. Below these sections is a 'Candidate Notes' section with a text area. At the bottom, there is a navigation bar with links: Propose Candidate, Add Agenda, Add History, Opportunity Search, View History, Orders, and Candidate Overview.

When you create and save the applicant record, the system automatically assigns the next applicant number in the sequence to the applicant. If the applicant becomes an employee, the system assigns an employee ID.

Warning! Although you can override the automatic numbering feature, it is recommended that you either use the feature as designed or assign applicant ID numbers manually, but not both.

Applicant Status

Available statuses are:

- *Applicant:*

Applies to those individuals who are converted from a pending status or entered directly into the Applicant pages. This resource is visible only through the Applicant pages.

- *Employee*

Apply to those individuals who have been hired as an employee. These resources are visible only through the Employee pages.

- *Non-Employee:* Apply to those individuals who have been hired and who work for a third party. These resources are visible only through the Employee pages.

Status Codes

Available status codes are:

- *Active:*

Applies to those individuals who should be currently considered for placement. This resource is visible only through the Applicants pages.

- *Hired:*

Applies to those applicants who have been converted to either an employee or a non-employee. This resource is visible only through the Employees pages.

- *Hire Pending:*

Applies to those applicants who are in the process of being converted to either an employee or a non-employee. In an integrated environment (where you have both PeopleSoft Staffing Front Office and PeopleSoft Pay/Bill Management installed), this could mean that the application messages are still being processed between the databases. This resource is visible only through the Applicants pages.

- *Applicant Invalid:*

Applies to those individuals who should not be considered for placement for one reason or another. This resource is visible only through the Applicants pages.

- *Applicant Pending:*

Applies to those individuals who are entered through self-service. This status is visible only through the Applicants pages.

Candidate Overview

Click to access the Applicant Overview page to view an overview of the applicant previous order information and qualification details.

Hire as Employee

Enter the hire date and click this button to hire the applicant as an employee.

Note: This button is available only if the applicant has a status of *Active*.

Hire as Non-Employee

Enter the hire date and click this button to hire the applicant as a non-employee (or contractor).

Note: This button is available only if the applicant has a status of *Active*.

Make Valid

For individuals with an *Applicant (Pending)* or *Invalid* status, click this button to change the status to *Active*. After it is clicked, the button becomes unavailable.

Make Invalid

For individuals with an *Active* or *Applicant Pending* status, click this button to change the status to *Invalid*. After it is clicked, this button is unavailable and the Make Applicant Valid button becomes available.

Hot List Categories

Click to assign the applicant to a different hot list category.

Add To Hot List

Click to add the applicant to the Applicant Hot List pagelet. After it is clicked, the button becomes unavailable.

Remove from Hot List

Click to remove the applicant from the Applicant Hot List pagelet. This button is only available if the applicant is listed on the Applicant Hot List pagelet.

Contact Information

Enter the effective date for the person information. Complete all the Person Name fields for which you have information.

If the applicant has a mailing address that is different from his or her home address, click the Mailing Address link and then enter the mailing address.

Note: Because HCM does not provide the *Use Home Address as Mailing* functionality, the system creates two addresses in HCM during the hire process: one for home and one for mail. When the employee is hired, the system hides the Mailing Address link and the Use Home Address as Mailing field to avoid conflicts with data changes in PeopleSoft HCM. Users must click the Edit Address button on the Employee page to view addresses in PeopleSoft HCM.

The Country field is automatically populated from the user's personal preferences, but you can change it. Other address fields may change depending upon the country that is selected.

Phone Numbers, Email Addresses, and Web Addresses

Complete the group box fields for which you have information. At least one phone number must be entered.

Compose Mail Page

Use the Compose Mail page (FO_SND_EMAIL) to send an email to the applicant.

Navigation

Staffing > Resources > Applicants > Applicants

Click the email icon on the Contact Information page.

Image: Compose Mail Page

This example illustrates the fields and controls on the Compose Mail Page. You can find definitions for the fields and controls later on this page.

Compose Mail

Template Order Contact Apply

From change_me@oracle.com

To

CC

BCC

Subject Order Inquiry

Message Text

Format Font Size **B** *I* U abc

Dear Maurice Jenkins,

It's been a while since I heard from you. I was wondering if you had any open positions to fill?

I'm looking forward to hearing from you soon.

Sincerely,

Add Attachment
Attach Resume
Add customer info
Attach Profile
Cancel
Send Email

Attachments	
Filename	View
	View First 1 of 1 Last

Applicants for Attachment Page

Use the Applicants for Attachment page (FO_RES_ATTACH) to search for candidates with resumes uploaded to the database and attach the resumes to the email.

Navigation

Staffing > Resources > Applicants > Applicants

Click the email button on the Contact Information page.

Click the Attach Resume button on the Compose Mail page.

Image: Applicants for Attachment Page

This example illustrates the fields and controls on the Applicants for Attachment Page. You can find definitions for the fields and controls later on this page.

Applicants for attachment		
Search Criteria		
Name		
Search		
E-mail Token Personalize Find View All		
First ◀ 1 of 1 ▶ Last		
	Applicant ID	Name
1 ☐		

Customer Information for Attachment Page

Use the Customer Information for Attachment page (FO_CUST_SNDMAIL) to allows users to add customer related information to the email.

Navigation

Staffing > Resources > Applicants > Applicants

Click the email button on the Contact Information page.

Click the Add Customer Info button on the Compose Mail page.

Image: Customer Information for Attachment Page

This example illustrates the fields and controls on the Customer Information for Attachment Page. You can find definitions for the fields and controls later on this page.

Customer Information for Attachment							
Search Criteria							
SetID		Customer ID					
Business Unit		Service Order ID					
Name							
Search							
Customer Name							
	SetID	Business Unit	Customer ID	Service Order ID	Description	User Order Type	Attached File
1 ☐							

Applicants – Applicants Page

Use the Applicants page (FO_PROFILE_APP) to allows the user to enter an applicant ID and the desired placement.

When you click the Upload Profile button, the system runs the Generate Candidates Resume process (FO_APP006) and the generated profile is then attached to the email.

Navigation

Staffing > Resources > Applicants > Applicants

Click the email button on the Contact Information page.

Click the Attach Profile button on the Compose Mail page.

Additional Links

These links are accessible from all pages in the component.

Propose Candidate	Click the Propose Candidate link to access the Send Email component.
Add Agenda	Click the Add Agenda link to add an agenda item.
Add History	Click the Add History link to add a history item.
Opportunity Search	Click the Opportunity Search link to search for opportunities for this applicant.
View History	Click the View History link to view history items for this applicant.
Orders	Click the Orders link to access the Orders component.

Personal Data Page

Use the Personal Data page (FO_APP_PERS_DATA2) to enter personal information.

Navigation

Staffing > Resources > Applicants > Applicants > Personal Data

Image: Personal Data page

This example illustrates the fields and controls on the Personal Data page. You can find definitions for the fields and controls later on this page.

Pepper, Kristen Applicant ID 00000000005 Candidate Overview
 Applicant Status Applicant Status Code Active

Status and Eligibility Find | View All First 1 of 1 Last

Effective Date 05/15/2006
 *Marital Status Married
☒ Eligible to Work in U.S. Military Status Active Reserve
 Highest Education Level Bachelor's Level Degree

Employment Eligibility Proof

Citizenship (Proof 1) PASSPORT Citizenship (Proof 2) SS CARD
 I9 Date Completed 05/25/2006 Alt Doc Expiration 08/01/2008

Personal Information

Date of Birth 09/07/1972 Birth State *Gender Female
 Birth Country USA

National ID Personalize | Find | First 1 of 1 Last

	Country	*National ID Type	Type	National ID	Primary ID
1	USA	PR	SSN	105-92-4469	☒

Ethnic Group American Indian/Alaska Native *Visible Minority Other
 Person Type ☐ High Profile Candidate

Ownership Information

Supplier ID Supplier Location Priority Code Ok to Place

Commissions Personalize | Find | First 1-2 of 2 Last

	*User ID		Percentage	Primary User ID
1	SAMPLE	Theresa Monroe	50.00	☐
2	VP1	Kenneth Schumacher	50.00	☒

Branches Personalize | Find | First 1 of 1 Last

	*Branch	Percentage	Primary Branch
1	CA001	San Francisco Branch	100.00

Propose Candidate Add Agenda Add History Opportunity Search View History Orders Candidate Overview

Status and Eligibility

Marital Status

Select a marital status for the applicant. Values are:

- *Common Law*
- *Divorced*
- *Hd Hsehd* (Head of Household)
- *Married*

- *Separated*
- *Single*
- *Unknown*
- *Widowed*

If your organization does VETS-100 reporting, enter a value in the Military Status field in the Status and Eligibility group box. Values are:

- *Actv Resv* (active reserve)
- *Inactv Resv* (inactive reserve)
- *No Mil Svc* (no military service)
- *Not Indic.* (not indicated)
- *Other Vet* (other protected veteran)
- *Retired* (retired military)
- *Viet Vet* (veteran of the Vietnam era)
- *Misc. Vet* (veteran (VA Ineligible))
- *Both Vet* (Vietnam & other protected vet)
- *Pre VEV* (pre-Vietnam-era veteran)
- *Not VEV* (not a Vietnam-era veteran)
- *Post VEV* (post-Vietnam-era veteran)
- *Vietnm Vet* (Vietnam vet)
- *Non Vet* (not a veteran)

Eligible to Work in U.S.

Select this check box if the applicant can prove that he or she is eligible to work in the United States.

Highest Education Level

Enter the level that is most closely associated with the highest educational level that the applicant has achieved.

Citizenship (Proof 1) and Citizenship (Proof 2)

Enter the types of proofs of citizenship, such as *DRIVER LIC* (driver's license) or *PASSPORT*, that were provided when filling out the I-9 form.

I9 Date Completed

Enter the date when the identifying documents that are required under the Immigration Reform and Control Act are provided by the applicant.

Alt Doc Expiration (alternate document expiration)

Enter the date that the employee's employment eligibility verification documentation expires. This field pertains to an employee's eligibility to work and is applicable for both citizens and noncitizens.

Personal Information

Complete this section only if you are hiring the applicant and the person will be paid through the company payroll system. Complete all the payroll fields for which you have information.

Date of Birth

Enter the applicant's date of birth.

Note: If you add someone under age 16, the system displays a warning message when you save the record.

Birth Country

Enter the applicant's birth country.

Birth State

Enter the applicant's birth state.

Note: Birth Country and Birth State are required if you are using PeopleSoft HCM and entering a candidate with a national ID country of France or Belgium; otherwise, they are optional.

Gender

Select the applicant's gender. A value of *Male* or *Female* must be entered for this field to hire the applicant as an employee or non-employee.

Country

Enter the country that issued the applicant's national ID.

National ID Type

Enter the type of national ID that was issued to the applicant.

National ID

Enter the applicant's national ID number. For example, for the United States it would be the person's Social Security Number. If a national ID is not entered for the applicant, the system displays a warning message. National ID is required when an applicant is hired.

Primary ID

Select to indicate that this is the primary ID for the applicant.

Ethnic Group, and Visible Minority

If your organization is subject to U.S. Affirmative Action or Equal Employment Opportunity laws and regulations, select the applicant's ethnic group. This may be required for reporting purposes. Values include:

- *American Indian/Alaska Native*
- *Asian*
- *Black/African American*
- *Hispanic/Latino*
- *Native Hawaiian/Oth Pac Island* (native Hawaiian or other Pacific islander)
- *Not Specified*
- *White*

If the applicant's country (national ID country) is *CAN*, select a value in the Visible Minority field. Values include:

- *Black*
- *Chinese*
- *Filipino*
- *Indo-Pak* (Indonesian Pakistani)
- *Japanese*
- *Korean*
- *SE Asian* (southeast Asian)
- *W.Asn, Arab* (west Asian, Arab)
- *Other*
- *Not Visible*

Person Type

This is used by the HCM system to determine how to process the individual. This information is necessary only if the applicant is being converted to an employee in the HCM system. Values include:

- *Applicant*
- *Cobra Part* (Cobra participant)
- *GP Dep/Ben* (global payroll dependent/beneficiary)
- *Independnt* (independent contractor)
- *Leased Wrk* (leased worker)
- *Non HR EE* (non-HR administered employee)
- *Other NEE* (other non-employee)
- *Pen Payee* (pension payee)
- *Stock NEE* (stock non-employee)
- *Suc Candid* (succession candidate)
- *TLContrctr* (Time and Labor contractor)
- *TempWorker* (temporary worker)
- *Training*

High Profile Candidate

Select to indicate that the applicant is an exceptional candidate for placement on job assignments.

Ownership Information

Supplier ID and Supplier Location

If this applicant is a contractor, enter the supplier information for the applicant.

Priority Code

Select a priority that represents the applicant's status in terms of his or her ability to fill a job order. The system administrator can define the selections that appear in this drop-down list box.

Commissions

Enter the user ID and the percentage of the earned commission that each user will receive. The commission percentages that you enter must add up to 100.

Select the Primary User ID check box to indicate that the user who will be primarily responsible for the applicant.

Branches

Enter the branch and the percentage of the earned commission that each branch will receive. The commission percentages that you enter must add up to 100.

Select the Primary Branch check box to indicate the branch that manages the applicant.

Job Data Page

Use the Job Data page (FO_APP_JOB_DATA) to enter job information.

Navigation

Staffing > Resources > Applicants > Applicants > Job Data

Image: Job Data page

This example illustrates the fields and controls on the Job Data page. You can find definitions for the fields and controls later on this page.

Pepper, Kristen
Applicant Status: Applicant
Applicant ID: 0000000005
Status Code: Active
Candidate Overview

Job Information

Company: GBI Global Business Institute 9999
Business Unit HR: US001 GBI BU for US001
*Department: 10500 Benefits
Location Code: KUNY00 Corporate Headquarters
Job Code: 120000 Administrator
*Benefit Program: KU1 GBI Master US Benefit Program
Regulatory Region: USA United States
Labor Agreement:
☐ Previously Employed by Company
Payroll System: NA NA Payroll
*Pay Group: KU1 Weekly PayGroup
Global Pay Group:
Employee Type: Hourly
*Tax Location Code: KUCA00 California Branch
Workgroup: KUWRKPROJ Financials Integration Wrkgrp
Taskgroup: KUTSKPROJ Taskgroup for Proj Integration
Employee Classification:
Salary Compensation
Comp Rate Code: NAHRLY
Compensation Rate:
Currency Code: USD
Frequency: Hourly
Annual Rate:
Positions of Interest
Personalize | Find | 1-3 of 3 | Last

Select	Service Order ID	Description	Line Number	Description
Select	0000000037	New Hospital Ward	1	Nurse-Head
Select	0000000039	Pediatrics Ward	2	Nurse-Registered (Pediatrics)
Select	0000000040	Orthopedics Ward	2	Nurse-Registered (Orthopedics)

Propose Candidate Add Agenda Add History Opportunity Search View History Orders Candidate Overview

Note: You do not need to enter information in most of these fields until you are about to hire the applicant. Many of the values on this page can be supplied by default based upon user preferences. Your system administrator can set up the defaults.

Job Information

Company

Enter the company with which the applicant or employee is associated. If a company is associated with a department, the company value will be supplied by default when the department is entered.

Previously Employed by Company

Select this check box if the applicant or employee was previously employed by the company.

Business Unit HR

Enter the HCM business unit for this applicant. This field appears only if Pay/Bill Management is installed.

Payroll System

Enter the payroll system that your organization will use to process payroll, such as *NA Payroll* (North American Payroll) or *Global Pay*.

Department

Enter the department for this job.

Pay Group	Enter the pay group under which you want to classify the applicant or employee. Pay groups are associated with companies.
Location Code	Enter the location where the applicant or employee will be employed.
Employee Type	Enter the type that best represents the employee or applicant, such as <i>Hourly</i> or <i>Salaried</i> . This value may be supplied by default when you enter the pay group.
Job Code	Enter the job code that is most closely associated with the duties being performed by the applicant or employee.
Global Pay Group	If the applicant is paid using global payroll, enter a global pay group.
Note: This field appears only if Pay/Bill Management is installed. This field is required if you select <i>Global Pay</i> as the Payroll System value.	
Benefit Program	Enter the benefit program under which the applicant or employee will be covered.
Tax Location Code	Enter the tax location from which the applicant or employee will be paid.
Regulatory Region	Enter the regulatory region under which you want to classify the applicant or employee. This field appears only if PeopleSoft Pay/Bill Management is installed. .
Workgroup	Enter the workgroup under which you want to classify the applicant or employee for PeopleSoft Time and Labor. This field appears only if PeopleSoft Pay/Bill Management is installed.
Taskgroup	Enter the task group under which you want to classify the applicant or employee for PeopleSoft Time and Labor. This field appears only if PeopleSoft Pay/Bill Management is installed.
Labor Agreement	Select an entry from the available options. Values originate in the HCM application and are linked to a country. This field appears only if PeopleSoft Pay/Bill Management is installed.
Employee Classification	Enter a classification for the employee, such as <i>Apprentice</i> , <i>Consultant</i> , or <i>Contractor</i> .

Salary Compensation

This section appears only if Pay/Bill Management is installed.

Comp Rate Code (compensation rate code)	Enter the code that represents a pay component that will be used to calculate the employee's pay in the payroll system. For
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PeopleSoft Staffing Front Office, this is normally the code that is associated with the employee's base pay.

Compensation Rate

If the employee is to be paid a base salary, enter an amount in this field. If the employee is paid hourly per assignment, this data is entered on the assignment (or agreement item). In such cases, leave this field blank.

Currency Code

Enter the currency in which the employee will be paid.

Frequency

Select the frequency at which the employee's compensation rate is stated, such as *Hourly*, *Monthly*, or *Weekly*.

Annual Rate

Displays the employee's annual rate of pay based on the entries in the Salary Compensation fields.

Positions of Interest

Select service orders that are of interest for the applicant. When applicant status changes to *valid* the candidate is automatically added to the selected candidate grid for the service order.

Application Page

Use the Application page (FO_APP_AVAIL) to enter placement and preference information.

Navigation

Staffing > Resources > Applicants > Applicants > Application

Image: Application page

This example illustrates the fields and controls on the Application page. You can find definitions for the fields and controls later on this page.

The screenshot displays the 'Application' tab for a candidate named Pepper, Kristen. The page is divided into several sections:

- Header:** Includes tabs for Contact Information, Personal Data, Job Data, Application (selected), Resume, Qualifications, Prior Work, References, Source, Forms, and Reset Status. It also shows the Applicant ID (00000000005), Status Code (Active), and a link to Candidate Overview.
- Availability Section:**
 - *Placement Type: Temp & Career (dropdown)
 - *Application Date: 05/25/2006 (calendar icon)
 - Desired Start Date: 05/25/2006 (calendar icon)
 - Last Date Available: (empty field)
 - Full/Part-Time: Either (dropdown)
 - Assignment Duration: (empty field)
 - Notice Required: (empty field)
 - Desired Hours Per Week: (empty field)
 - Checkboxes: Overtime OK?, Layoff/Recall, Full-Time Student.
 - Desired Work Days:** A table with days of the week and shift options.

Day	Shift
Monday	3rd Shift
Tuesday	3rd Shift
Wednesday	3rd Shift
Thursday	3rd Shift
Friday	3rd Shift
Saturday	(empty)
Sunday	(empty)
- Geographic Preferences Section:**
 - Location 1: (empty field)
 - Location 2: (empty field)
 - Geographic Preference: (empty field)
- Travel Section:**
 - Checkboxes: Willing to Commute, Willing to Relocate, Willing to Travel, Willing to Travel Overnight.
 - Percentage Travel: (empty field)
 - Maximum Travel Distance: (empty field)
 - Transport Availability: (empty field)
 - Restrictions: (empty field)
 - Comments: (empty field)
 - Home Airport: (empty field)
 - Travel Minutes: (empty field)
 - Unit selection: Kilometers (selected), Miles.
- Minimum Acceptable Pay Rate Section:**
 - Amount: (empty field)
 - Pay Frequency: (empty field)
 - Currency Code: (empty field)
 - Annual Rate: (empty field)

At the bottom, there are links: Propose Candidate, Add Agenda, Add History, Opportunity Search, View History, Orders, and Candidate Overview.

Availability

Placement Type

Select the type of placement that the applicant prefers, such as *Career* or *Temp*.

Application Date

Select the date that the applicant applied with your organization. The default value for this field is the current date.

Desired Start Date

Select the first date that the applicant is available for an assignment.

Last Date Available

Select the last date that the applicant is available for an assignment.

Note: The availability dates on this page are not affected by assignment status. You can search for and make offers to all active applicants and employees, even if they are already on assignment.

Full/Part-Time

Select *Either, Full-Time, or Part-Time*.

Assignment Duration

Select the duration of the assignment that is preferred by the applicant, such as *Long Term, Moderate, or Short Term*.

Notice Required

Select the type and length of notice that the applicant prefers when the employer terminates her or his assignment.

Desired Hours Per Week

Enter the number of hours per week that the applicant wants to work.

Overtime OK?

Select this check box if the applicant will work overtime.

Layoff/Recall

Select this check box if the applicant will work in a situation in which a layoff or recall has occurred.

Full-Time Student

Select this check box if the applicant is a full-time student.

Desired Work Days

For each day of the week, select the shift that the applicant wants to work, such as *First Shift, No Shift, Second Shift, or Third Shift*. The system administrator can define the valid values for this field.

Note: After you select a shift for Monday, you can use the Replicate icon to copy the same shift selection to Tuesday through Friday.

Geographic Preferences**Location 1 and Location 2**

Enter the top two locations that are preferred by the applicant.

Geographic Preference

Enter the region that is preferred by the applicant.

Travel**Willing to Commute, Willing to Relocate, Willing to Travel, and Willing to Travel Overnight**

Select the Willing to Commute check box and then enter the number of travel minutes and maximum travel distance that the applicant is willing to commute. Select Kilometers or Miles.

Select Willing to Relocate if the applicant is willing to relocate to secure a position.

Select Willing to Travel if the applicant is willing to travel, and enter the maximum percentage travel to which the applicant is willing to commit.

	Select Willing to Travel Overnight if the applicant is willing to travel overnight.
Percentage Travel	Enter the percent the applicant is willing to travel.
Maximum Travel Distance, Kilometers, or Miles	Enter the maximum distance the applicant is willing to travel. Select Kilometers or Miles.
Home Airport	Enter either the name of the airport or the abbreviation of the airport nearest the applicant, such as <i>SFO</i> , <i>JFK</i> , or <i>CHI</i> .
Travel Minutes	Enter the minutes the applicant is willing to travel.
Transport Availability	Select the availability of transportation that is used most often by the applicant.
Restrictions	Enter any restrictions that the applicant may have regarding travel.
Comments	Enter any comments that you may have regarding the applicant's capacity for commuting or overnight travel.

Minimum Acceptable Pay Rate

Enter the minimum amount of pay for which the applicant is willing to work.

Amount	Enter the minimum pay amount that the applicant will accept.
Currency Code	Enter the currency to use when calculating the annual rate.
Pay Frequency	Select the frequency that the amount represents, for example, an hourly rate, a monthly rate, or an annual rate. The frequency will also affect how the annual rate is calculated.
Annual Rate	Displays the annual rate of pay that the applicant or employee wants to be paid. The system uses the frequency table and assumes full-time employment when calculating the annual rate. The system calculates it based upon the amount and the frequency.

Resume Page

Use the Resume page (FO_APP_RESUME) to attach resume or enter resume text.

Attach additional items to the Applicant.

Navigation

Staffing > Resources > Applicants > Applicants > Resume

Applicants and employees can submit multiple resumes, each of which focuses on different skills and strengths. They can also include samples of their work, letters of reference, or documents explaining special circumstances, such as medical requirements. You associate multiple documents to one person, as

well as track multiple documents for individual applicants or employees, by assigning a unique file name to each resume.

Note: The search index creation occurs more rapidly when information has been pasted into the Resume Text field, as opposed to the information being in an electronic attachment.

Language Code	Enter the language in which the resume is composed.
Resume Text	Paste the body of the resume here.
Add Resume Attachment	Click to browse for and attach additional resume items. If you are using resume parsing, the system will populate several fields in the Applicant component with information from the resume. The system will display a message indicating that any existing data in these fields will be overwritten. The system also creates a log indicating any errors that occurred during parsing.
Additional Attachments	Click to attach items to the applicant in addition to the resume.
Delete Resume Attachment	Click to delete the previously attached resume.

Qualifications Page

Use the Qualifications page (FO_APP_QUALIFS) to add and update competencies and qualifications.

Navigation

Staffing > Resources > Applicants > Applicants > Qualifications

This page displays a variety of qualification information about the applicant. You can add or update information for each of the categories in the first eight group boxes by clicking the respective update link and accessing specific update pages. For the last two categories, Job Titles and Lines of Business, you can look up and add the information directly from the Qualifications page.

Competencies Page

Use the Competencies page (FO_APP_COMPS) to add and update competencies.

Navigation

Click the Update Competencies link on the Qualifications page. From the Competencies page (FO_APP_COMPS), enter the competency description or a partial description, and click Search. Select the check box for the competency that you want to add, and then click the Select button to add it to the Competencies group box at the bottom of the page. Select Proficiency and Interest Level from the drop-down list boxes. Enter the applicant's relevant information in the Year Acquired, Year Last Used, and Years of Work Experience fields. Repeat these steps to add additional competencies. When all the competencies are listed, click the OK button to add the list to the Qualifications page.

School Education Page

Use the School Education page (FO_APP_SCHOOL) to add and update school information.

Navigation

Click the Update School Education link on the Qualifications page.

You can make multiple entries for each applicant, as well as add or delete a school. PeopleSoft Staffing Front Office does not deliver the entries for the School Code field. Your system administrator must provide these during implementation. Staffing Front Office does deliver the values for the School Type and Level Achieved fields. Your system administrator, however, can modify them during implementation to reflect your requirements.

From the update page, enter values for the Country, School Type, Date Acquired, Average Grade, School Code, School Name, State, Area of Study, and Grade fields, and then click the OK button to add the information to the Qualifications page.

Country and State	Enter the information for the school.
School Type	Enter the type of school.
	Note: If school types have been entered into the system, but none appear when you search with the Lookup button, you must add a tableset ID matching the country.
Date Acquired	Select the date that the applicant received the degree.
Average Grade	Enter the applicant's average grade using one decimal place, for example <i>4.0</i> .
Completed	Select if the applicant completed the grade level.
School Code and School Name	Select the school that the applicant attended.
	Note: When you select a value from the School field, the description appears in place of the School Name field. If the school that you are looking for is not on the list, enter the school name directly in the School Name field.
State	Select the state in which the school is located.
Area of Study and Grade	Enter the subject area in which the applicant studied and his or her grade point average.

Professional Education Page

Use the Professional Education page (FO_APP_EDUC) to add and update professional education information.

Navigation

Click the Update Professional Education link on the Qualifications page.

From the update page, enter degree, major, and school information, and then click the OK button to add the information to the Qualifications page.

Degree	Enter the degree that the applicant earned.
---------------	---

Date Acquired	Select the date that the applicant received the degree.
Average Grade	Enter the applicant's average grade using one decimal place, such as <i>4.0</i> .
Graduated	Select if the applicant graduated from the degree program.
Major Code and Major	Select the subject in which the applicant majored. If you select a value, the description appears in place of the Major field. If the correct value does not appear in the major list, you can enter the major in the Major Code field.
School Code and School Name	Enter the school that the applicant attended. Note: When you enter a value from the School Code field, the description appears in place of the School Name field. If the school that you are looking for is not on the list, enter the school name in the School Code field.
Educator	Enter the name of the educator.
Country and State	Enter the country and state in which the school is located.

Licenses/Certificates Page

Use the Licenses/Certificates page (FO_APP_LIC) to add and update licenses and certifications.

Navigation

Click the Update Licenses/Certificates link on the Qualifications page.

From the Licenses/Certificates update page, enter license, issue date, expiration date, and location information, and then click the OK button to add the information to the Qualifications page.

License or Certificate Code	Select the license or certificate code. If the code is missing, your system administrator can add it to the system. The Description field is automatically populated on the Qualifications page.
Issue Date	Enter the date that the license or certificate was issued.
License/Certification Number	Enter the license or certificate number.
Issued By	Enter the group that issued the license or certificate.
Expiration Date	Enter the expiration date of the license or certificate.
License Verified and Renewal in Progress	Select these check boxes to indicate the status of the license or certificate.
Country and State	Enter the information for the license or certificate.

Languages Page

Use the Languages page (FO_APP_LANG) to add and update language qualifications.

Navigation

Click the Update Languages link on the Qualifications page.

From the update page, enter language and proficiency information, and then click the OK button to add the information to the Qualifications page.

Language Code	Select the appropriate language code. The Description field is automatically populated.
Native Language, Translator, and Teacher	Select all check boxes that apply.
Speak, Read, and Write	Select the proficiency for each of these categories.
Evaluation Date	Enter the date on which the language proficiency was evaluated.

Memberships Page

Use the Memberships page (FO_APP_MEM) to add and update membership information.

Navigation

Click the Update Memberships link on the Qualifications page.

From the update page, enter organization and mandate information, and then click the OK button to add the information to the Qualifications page.

Organization	Select the organization of which the applicant is a member. The Description field is automatically populated.
Membership Date	Enter the date on which the applicant began his or her membership.
Mandate	Enter the mandate or purpose of membership.
Mandate Position	Enter the mandate position.
Mandate Begin Date and Mandate End Date	Enter the begin and end dates of the mandate.

Honors and Awards Page

Use the Honors and Awards page (FO_APP_HON) to add and update honors and awards.

Navigation

Click the Update Honors and Awards link on the Qualifications page.

From the update page, enter award and grantor information, and then click the OK button to add the information to the Qualifications page.

Honor or Award	Select the honor or award. The Description field is automatically populated.
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Grantor	Enter the grantor of the award.
Issue Date	Enter the date on which the honor or award was issued.

Test Results Page

Use the Test Results page (FO_APP_TEST) to add and update test results.

Navigation

Click the Update Test Results link on the Qualifications page.

From the update page, enter test and score information, and then click the OK button to add the information to the Qualifications page.

Test and Test Description	Select the test from the predefined list. The Description field is automatically populated.
Test Date	Select the date that the test was administered.
Test Score	Enter the score that the applicant earned on the test.
Passed Test	Select this check box if the applicant or employee achieved a passing score on the test.

Job Titles

For each Job Category entry that you add, enter a Job Title code.

Note: The PeopleSoft system delivers an index of job categories and job titles at the time of installation. You may want to delete this list from the database, in all or in part, and use a job title index that meets your unique business requirements. If you are not satisfied with the job titles and job categories that are available to you, consult with your system administrator.

Lines of Business

Enter as many Lines of Business entries as appropriate.

Prior Work Page

Use the Prior Work page (FO_APP_PRIWRK) to enter prior work experience information.

Navigation

Staffing > Resources > Applicants > Applicants > Prior Work

Start Date and End Date	Select the dates that the applicant started and ended work for the employer.
Currency Code	Enter the currency in which the applicant or employee was paid.
Ending Pay Rate	Enter the applicant's rate of pay when the job ended.

Employer	Enter the employer name in the Employer field. If the employer is a customer of the staffing company, then enter the relevant information in the Customer SetID and Customer ID fields.
Pay Frequency	Select the frequency at which the applicant's pay rate is stated. This field is used to calculate the applicant's annual rate of pay.
Annual Rate	Displays the applicant's annual rate of pay based on his or her ending pay rate and the pay frequency.
Country, City, State, and Telephone	Enter address and telephone information for the employer.
Job Description	Enter a brief description of the duties and responsibilities that are associated with the position. This is a free-form field. You can cut and paste descriptions directly into the field.
Ending Job Title	Enter the applicant's job title when he or she left the job.
Supervisor	Enter the name of the applicant's supervisor.
Termination Code	Select the entry that most closely describes the reason that the applicant separated from the employer.
Would Return to Employer	If the applicant or employee previously worked for an employer, and he or she would work for the employer again through your staffing organization, select this check box.
Customer SetID and Customer ID	Select the customer SetID and customer for whom the applicant worked. If you select a customer ID, the customer name appears in the Employer field. If you do not select a customer ID, you can enter the name of the employer in the Employer field.
	Note: If you select a customer ID but then change the value in the Employer field, the system clears the Customer ID field when you save the page.
Email Address	Enter the email address of the employer. Click the Email Address button to compose and send an email to the selected email address.
	Note: When entering a new email address, you must save the page before clicking the Email Address icon.
Company URL	Enter the website address that is associated with the employer. This is useful when you want to contact an employer to verify credentials on an applicant record. Click the URL button to launch a new page and display the website that is associated with the address that is entered in the field.
	Note: When entering a new website address, you will need to save the record before using the URL icon.
Full/Part Time	Select either <i>Full-Time</i> or <i>Part-Time</i> .

Comments

Enter comments about the applicant's job at the listed employer.

References Page

Use the References page (FO_APP_REF) to enter reference information.

Navigation

Staffing > Resources > Applicants > Applicants > References

Image: References page

This example illustrates the fields and controls on the References page. You can find definitions for the fields and controls later on this page.

The screenshot displays the 'References' page for a candidate named 'Pepper, Kristen'. The page has a top navigation bar with tabs: Contact Information, Personal Data, Job Data, Application, Resume, Qualifications, Prior Work, References (selected), Source, Forms, and Reset Status. Below the tabs, the candidate's name and 'Applicant ID 0000000005' are shown, along with a 'Candidate Overview' link. The 'References' section is active, showing a list of references with one entry: 'Reference 1'. The form for this reference includes fields for *Date Contacted (01/02/2013), *Reference Type (Professional), *Reference Name, Title, Employer, Email Address, User ID (VP1), Comment, Telephone, Phone Extension, Country (USA), Address 1, Address 2, Address 3, City, County, State, and Postal. A 'Generate Reference Email' button is also present. Below the reference form is a 'Reference Form' section with fields for Form Type (REFR), SetID (SHARE), Form Code, and Reference Check By. At the bottom, a 'Form Items' table shows one item with ID 1.

References**Reference Number**

The system generates this number automatically.

Date Contacted and Reference Type

Enter the date on which you obtained the reference information and a reference type: *Personal*, *Professional*, or *Both*.

Reference Name and Title

Enter the reference's name and his or her title. If the reference is a supervisor from a prior employer that was used on the Prior Work page, his or her name appears in the prompt list. If the reference is not from the prior work page, you can enter the name directly in the field.

Employer

Select a previous employer. The values for this field come from the Employer field on the Prior Work page. If the reference is not from a previous employer, you can enter the employer name directly in the field.

Note: If you add employers in the Prior Work page, you must save the applicant before you can see the employers on the References page.

E-mail Address

Enter the email address of the reference.

Note: When entering a new email address, you must save the page before using the Email Address button.

User ID

Enter the user ID of the person performing the reference check. By default, the system displays the user ID of the person entering the information.

Generate Reference Email

Click to send a pre-formatted letter to the email address that is listed for the contact. Your system administrator can modify the letter for your specific requirements using reports.

Comment

Enter any comments that you have about the applicant's reference information.

Telephone, Phone Extension, and Country

Enter the telephone number and phone extension of the reference, and enter the country and other address information as well.

Note: The address-related fields change depending on the country that is selected.

Reference Form**Form Type**

Select the type of form that you want to add to the Reference page. The system is delivered with the form type *REFR* (references).

Reference Check By

Select *Customer*, *Recruiter*, or *Third-Party Service* to indicate how the reference was checked.

SetID

Select the SetID from which to draw the Form Code. This is usually an organizational unit of your company, such as corporate headquarters or a branch.

Form Code

Select the form that you want to add to the page. For example, you can track the applicants' answers if you do multiple or

different kinds of interviews. Selecting a specific form code returns a specific set of questions.

Forms are defined by the system administrator. To make any changes to the list of available forms or to the content of the forms, consult with your system administrator.

Source Page

Use the Source page (FO_APP_SRC_DATA) to enter recruitment source information.

Navigation

Staffing > Resources > Applicants > Applicants > Source

Image: Source page

This example illustrates the fields and controls on the Source page. You can find definitions for the fields and controls later on this page.

The screenshot displays the 'Source' page for applicant Kristen Pepper. The top navigation bar includes tabs for 'Contact Information', 'Personal Data', 'Job Data', 'Application', 'Resume', 'Qualifications', 'Prior Work', 'References', 'Source' (which is the active tab), 'Forms', and 'Reset Status'. Below the tabs, the applicant's name 'Pepper, Kristen' is shown, along with 'Applicant ID 0000000005' and 'Status Code Active'. A 'Candidate Overview' link is also present. The main section is titled 'Recruiting Sources' and contains several input fields: 'Recruit Source Category' (with a dropdown menu showing 'NET'), 'Recruiting Source' (with a dropdown menu showing 'HOTJOB'), 'Recruiting Source ID' (a text field), and 'Ad ID' (a text field). Below this is a section titled 'Application/Resume Source' which includes a 'Source' dropdown menu (showing 'Web'), a 'Date Received' field (showing '05/25/2006'), a 'Referring Name' field, a 'Specific Source' field, and a 'Comment' field with a text area. At the bottom of the page, there is a row of navigation links: 'Propose Candidate', 'Add Agenda', 'Add History', 'Opportunity Search', 'View History', 'Orders', and 'Candidate Overview'.

Recruiting Sources

Recruit Source Category

Enter the category of the recruiting source. Examples include personal referrals, job fairs, and newspaper ads.

Recruiting Source ID

Enter the specific name or number for the recruiting source. This can be any relevant name or number.

Recruiting Source

Enter a recruiting source. For example, if the source category is a newspaper ad, select the name of the newspaper as the source. If the name of the source is not available from the prompt table, enter it directly into the field.

Ad ID (advertisement ID)

Enter the specific advertisement name or number for the recruiting source. This can be any relevant name or number.

Application/Resume Source

Source and Date Received

Select the method by which you received the applicant's application or resume, such as *Email* or *Web*, and the date that you received it.

Referring Name

Enter the name of the person referring the applicant. The entry in this field can be other applicants or employees already in the system. If the person is not in the system, you can manually type in their name.

Note: If you manually enter a name, it must be in PeopleSoft format: lastname,firstname with no spaces in between (for example, *Smith,Jane*).

Specific Source

Enter the source that is associated with your entry in the Source field. For example, if you selected *Direct Hire* as the source, enter the name of the recruiter who first spoke with the person.

Comment

Enter any comments that are related to how the applicant found out about your company or a specific position.

Forms Page

Use the Forms page (FO_APP_FORMS) to add or view pre-defined forms to enter information about the applicant.

Navigation

Staffing > Resources > Applicants > Applicants > Forms

Most of the form setup activity occurs during implementation of the system. The PeopleSoft system delivers the following form types for the Applicant and Employee form pages: *Employee Credit Information*, *Employee General Information*, *Employee Interview Worksheet*, *Employee License Information*, and *Interview Summary General*.

You can select forms that include basic questions that are related to the application process. You can select multiple forms to track the employee's application process. You define the form codes for these form types during implementation. To make any changes to the list of available forms or to the content of the forms, consult with your system administrator.

Click a View Form link to view details of a particular form.

To collect additional information about the applicant:

Click the Add New Form button to enter a new Form type, SetID, Form code, and date. Each form has a different set of questions or fields. It is up to your organization to decide what information should be contained in these forms. Complete all the fields for which you have information.

Click the Form Summary link to return to the forms summary display.

Forms – Forms Page

Use the Forms page (FO_APP_FORM_DTL) to enter data about the applicant or employee by using pre-defined forms.

Navigation

- Click a View Form link on the Forms page.
- Click the Add New Form button on the Forms page.

Image: Forms – Forms Page

This example illustrates the fields and controls on the Forms – Forms Page. You can find definitions for the fields and controls later on this page.

Reset Status Page

Use the Reset Status page (FO_APP_RESET_STAT) to reset applicant status from Hire Pending to Active in cases where the FO_APP_HIRE application message fails.

Navigation

Staffing > Resources > Applicants > Applicants > Reset Status

Click the Reset button to reset an applicant's status from *Hire Pending* back to *Active*. The button will be available only if the applicant's status is *Hire Pending*.

Loading Resume Data

This topic discusses how to load resume data.

Note: These pages are only applicable if you have defined integration to a resume parsing supplier.

Pages Used to Load Resume Data

Page Name	Definition Name	Usage
Load Resume Page	FO_RESLOAD	Load multiple resumes.
Integration Log Page	FO_OI_LOG	View a log of resumes that were loaded.
Mapping Errors Page	FO_MAP_ERRORS	Review any errors that occurred and fix those mapping errors.

Related Links

[Setting Up Third-party Integrations](#)

Load Resume Page

Use the Load Resume page (FO_RESLOAD) to load multiple resumes.

Navigation

Staffing >Resources >Applicants >Resume Loader.

Access the Load Resume page (Staffing, Resources, Applicants, Resume Loader).

The resume files can be added one by one or by uploading a single .ZIP file containing all the resume files.

Resume Load Description	The system populates this field by default with the user ID, date and time of the request. You can change this to any unique value.
Extractor	Select a resume parsing supplier.
Country	Enter the applicant's country.
Language	Select the language of the resumes.
Run Control ID	The system will assign this value using the next available number.
Add Multiple Resumes	Click to add a .ZIP file containing multiple resumes.
Add Resume	Click to add a single resume.
Load Resume	After you have added the resumes to the page, click this button to load the resume data into the applicant records.

Integration Log Page

Use the Integration Log page (FO_OI_LOG) to view a log of resumes that were loaded.

Navigation

Staffing >Resources >Applicants >Integration Log.

Image: Integration Log page

This example illustrates the fields and controls on the Integration Log page. You can find definitions for the fields and controls later on this page.

Integration Log

▼ Search Integration Log

Status

Supplier

Transaction ID

Last Updated From
To

Search

Search Results

Personalize | Find | View All |

First

1-3 of 3

Last

Transaction	Transaction Type	Resume Parsing Provider	Last Updated	Mapping Errors	Status
ResumeExtract	Outbound Synchronous	Resume Mirror Inc	01/30/2013 10:50AM	Mapping Errors	Success
ResumeExtract	Outbound Synchronous	Resume Mirror Inc	01/30/2013 10:51AM	Mapping Errors	Success
ResumeExtract	Outbound Synchronous	Resume Mirror Inc	01/30/2013 10:53AM	Mapping Errors	Success

Transaction

Click on the transaction link to view the outgoing message.

Mapping Errors

Click to access the Mapping Errors page.

Mapping Errors Page

Use the Mapping Errors page (FO_MAP_ERRORS) to review any errors that occurred and fix those mapping errors.

Navigation

Staffing > Resources > Applicants > Integration Log.

Click the Mapping Errors link on the Integration Log page.

Image: Mapping Errors page

This example illustrates the fields and controls on the Mapping Errors page. You can find definitions for the fields and controls later on this page.

Mapping Errors

Log ID

Map Name

Search Results				Personalize	Find			First	1-11 of 11	Last
	Log ID	Map Name	Field Value	Correct Mapping						
1	3	CompetencyXREF	Assessment	Correct Mapping						
2	3	CompetencyXREF	Curriculum	Correct Mapping						
3	3	CompetencyXREF	HTML	Correct Mapping						
4	3	CompetencyXREF	Management	Correct Mapping						
5	3	CompetencyXREF	Troubleshooting	Correct Mapping						
6	3	CountryCodeXREF	GB	Correct Mapping						
7	3	CountryCodeXREF	US	Correct Mapping						
8	3	DegreeXREF	B.A	Correct Mapping						
9	3	EmailTypeDVM	personal	Correct Mapping						
10	3	LicenseXREF	Associate Nurse	Correct Mapping						
11	3	PhoneTypeDVM	personal	Correct Mapping						

Click the Correct Mapping link to correct any mapping errors that occurred during the loading of resumes.

Matching Applicants and Employees to Customers and Job Orders

The Opportunity Search feature enables you to search on orders, customers, and contacts.

After you establish applicants, employees, and customers in your database, you can match the skills and job titles of applicants and employees to the skills and job titles being requested by your customers and contacts.

This topic discusses how to view skills and job title matches of applicants and employees for customer, contact, and resource requests.

Page Used to Match Applicants and Employees to Customers and Job Orders

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
Opportunities for <employee name> Page	FO_REVERSE_MTCH	View matches.

Opportunities for <employee name> Page

Use the Opportunities for <employee name> page (FO_REVERSE_MTCH) to view matches.

Navigation

Click the Opportunity Search link from any of the pages in the Applicants component.

After you display an applicant or an employee record and click the Opportunity Search link, the system attempts to match the skills and job titles of the candidate with the skills and job titles being requested by your contacts, by customers, or by orders that have been placed.

If a match occurs, the system displays the names of the contacts. You can then click the View link on the line for the match to access the contact's record, the customer's record, or the order record and learn more about the types of job titles and skills they are requesting.

Viewing Pending Applicants

This topic discusses how to view pending applicants.

Pages Used to View Pending Applicants

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
Pending Applicants Page	FO_PNDG_APPL_SRCH	View pending applicants and take action on them.

Pending Applicants Page

Use the Pending Applicants page (FO_PNDG_APPL_SRCH) to view pending applicants and take action on them.

Navigation

Staffing >Resources >Applicants >Pending Applicants

Image: Pending Applicants page

This example illustrates the fields and controls on the Pending Applicants page. You can find definitions for the fields and controls later on this page.

Pending Applicants

Search Criteria

Name

Status Code

First Name

Aging Group

Last Name

From Date

Business Unit

To Date

Order

Search

Pending Applicants

Personalize

Find

First 1-11 of 11 Last

	Applicant ID	Name	Order Description	Resume
☐	00000000009	Stein, Carl	System Analyst	
☐	00000000010	Moretti, Dennys	General Practitioner	
☐	00000000009	Stein, Carl	General Practitioner	
☐	00000000005	Pepper, Kristen	Computer Programmer	
☐	00000000011	Gonzales, Eric	Description	
☐	00000000010	Moretti, Dennys	Description	
☐	00000000005	Pepper, Kristen	Description	
☐	00000000008	Smith, Bernard	Description	
☐	00000000009	Stein, Carl	Description	
☐	00000000007	Wingrove, Anna	Description	
☐	00000000022	Green, Susan		

Valid Applicants

Pending Applicants

Select All

Deselect All

Action

Use this page to view pending applicants and perform a specific action. You must select the check box next to the applicant ID, and then select an option in the Action drop-down.

Note: The pending applicants list can also be accessed using PeopleSoft pagelets (From the PeopleSoft home page, click the Personalize Content link and select Pending Applicants).

Search Criteria

Use this section to limit the search results that are displayed in the Pending Applicants section.

(Check box)

Select to indicate that you want to perform an action to the candidate.

Action

Select one of the following actions:

Add Agenda: Select to open the [Agenda Detail Page](#) where you can add an agenda item for the selected applicant.

Add History: Select to open the [History Details Page](#) where you can add a history item for the selected applicants.

Add to Considering List: Select to add the selected applicants to the considering list of the corresponding order.

Add to Hot List: Select to have the system automatically add the selected applicants to the Hot List. The system displays a message confirming that the applicant is added to the hot list.

Make Invalid: Select to mark the selected applicants invalid.

Make Valid: Select to mark the selected applicants valid.

Remove from List: Select to have the system automatically remove the applicant from the list. The system displays a message that reads, “This will delete the Applicant from the list.” You must respond by clicking the OK or Cancel button. If you click OK, the system displays a message confirming that the action was performed successfully. Keep in mind that the system removes the applicant from the list that is displayed. This does not mean that the applicant is no longer pending activities on the Staffing hiring and on-boarding process.

Send Email: Select to send an email to the selected applicants. You must associate an email template to your role to use this option.

(Status)

Displays a green circle for Valid Applicants and a red square for pending applicants.

Name

Position your mouse over the name link to view contact information. Click to access the Applicants – Contact Information page, which opens in a new page.

Order Description

Displays order information when the applicant is assigned to an order.

Resume

Click to access the resume belonging to the applicant, when it is available.

When you position the mouse over this icon:

- If a resume is available, the system displays a message that reads, “View Resume.”
- If a resume is not available, the system displays a message indicating that a resume is not available for the related applicant.

Hiring Applicants

After you decide to hire an applicant as an employee or contractor, you must obtain certain information before you can place that employee on an assignment.

This topic discusses how to hire an applicant as an employee or a non-employee.

Note: If you integrate PeopleSoft HCM and PeopleSoft Pay/Bill Management with your PeopleSoft Staffing Front Office application, employees are hired into your PeopleSoft HCM system. You can continue to access employees from PeopleSoft Staffing Front Office, but the system will direct you to PeopleSoft HCM when you need to update an employee's personal and job-related data.

If you have PeopleSoft Pay/Bill Management installed without PeopleSoft Staffing Front Office, you must use the Applicants component to add your staffing employees.

If you create a new employee in PeopleSoft HCM through the Administer Workforce component and enter a national ID, the system also stores the national ID in PeopleSoft Staffing Front Office. If you attempt to hire that person through PeopleSoft Staffing Front Office, the system validates the uniqueness of the national ID and checks for duplicates.

Employees hired directly in the Administer Workforce component need to be made eligible for staffing before they can be used in PeopleSoft Staffing Front Office.

Warning! If you are using both the PeopleSoft Staffing Front Office Applicant component and the PeopleSoft HR Recruit Workforce component to hire employees, the applicant ID (APPLID) autonumbering ranges for both applications must not overlap.

Page Used to Hire Applicants

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
Contact Information Page	FO_APP_PERS_DATA1	Enter contact information, and hire applicants as employees or non-employees.

Contact Information Page

Use the Contact Information page (FO_APP_PERS_DATA1) to enter contact information, and hire applicants as employees or non-employees.

Navigation

Staffing > Resources > Applicants > Applicants

Enter the hire date.

Click the Hire Applicant as Employee button or the Hire Applicant as Non-Employee button.

Note: When you convert an applicant to an employee, the system assigns an employee ID number.

Warning! If you integrate PeopleSoft HCM and PeopleSoft Pay/Bill Management with your PeopleSoft Staffing Front Office application, staffing non-employees should be added only through PeopleSoft Staffing Front Office, not from PeopleSoft HCM.

Maintaining Employee and Contractor Records

This topic provides an overview of maintaining employee and customer records.

Pages Used to Maintain Employee and Contractor Records

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
<u>Emergency Contacts Page</u>	FO_EMERG_CNTCT	Enter emergency contact information for employees.
<u>Tax Data Page</u>	FO_EMP_TAX_DATA	Enter tax information for employees.

Understanding Employee and Contractor Record Updating

If you are using both PeopleSoft Staffing Front Office and PeopleSoft Pay/Bill Management, you must enter candidates as applicants in PeopleSoft Staffing Front Office and then hire them into PeopleSoft HCM as employees. Prior to being assigned to a temporary order, the applicant must have a valid employee ID, as determined by PeopleSoft HCM.

When the applicant becomes an employee, you can access employee data in PeopleSoft HCM from PeopleSoft Staffing Front Office. Use your HCM application to update personal and job-related information. If you are using Staffing Front Office only, candidates are hired through the PeopleSoft Staffing Front Office system, and all updating is done within PeopleSoft Staffing Front Office.

After you establish an employee or contractor in the system, you can use the pages in this section to periodically update information as needed.

The pages in the Employee component are nearly identical to the pages in the Applicant component, except for the Emergency Contacts page and the Tax Data page, which do not appear in the Applicant component. For a description of the Emergency Contacts page and the Tax Data page, refer to the following section. For descriptions of the other pages in the Employee component, refer to the descriptions of the pages in the Applicant component.

Note: Any employee that you enter directly into your PeopleSoft HCM application will not be available for assignment and update in PeopleSoft Staffing Front Office unless you have made them eligible for Staffing Front Office.

Emergency Contacts Page

Use the Emergency Contacts page (FO_EMERG_CNTCT) to enter emergency contact information for employees.

Navigation

Staffing > Resources > Employees > Employees > Emergency Contacts

Note: This page is applicable to PeopleSoft Staffing Front Office standalone implementations only. If you have PeopleSoft Pay/Bill Management installed, this page is not visible.

Contact Name	Enter the full name of the emergency contact.
Relationship to Employee	Select a description that most closely matches the emergency contact's relationship to the employee, such as <i>DP Daughter</i> (domestic partner daughter), <i>F Son</i> (foster son), <i>Roommate</i> , <i>Rec Child</i> (recognized child)
Same Address as Employee	Select to indicate that the emergency contact lives at the same address as the employee.
Primary Contact	Select to indicate that the emergency contact is the main contact for this employee.
Same Phone as Employee	Select to indicate that the emergency contact has the same phone number as the employee.
Additional Phone Numbers	Click to enter additional phone types and phone numbers for the contact.

Tax Data Page

Use the Tax Data page (FO_EMP_TAX_DATA) to enter tax information for employees.

Navigation

Staffing > Resources > Employees > Employees > Tax Data

Note: This page is applicable to PeopleSoft Staffing Front Office standalone implementations only. This page is informational only. No processes use this data.
Select the Distribution Mail Option that is used to distribute paychecks.

Federal Tax

FWT Marital Status (federal withholding tax marital status)	Select a withholding tax status: <i>Married</i> or <i>Single</i> .
FWT Allowances	Enter the number of allowances that the employee claims.
FWT Additional Amount	Enter the additional amount of tax that the employee wants withheld.
FWT Estimated Amount	Enter the estimated amount of tax that the employee wants withheld.

FWT Additional Percentage

Enter the additional percentage of tax that the employee wants withheld.

EIC Status (earned income credit status)

Select the earned income credit status: *Mar Spc* (married without spouse filing), *Married* (married, both spouses filing), *N/A* (not applicable), or *Single* (single, or head of household).

W2 Information**Statutory Employee**

Select to indicate that the employee is statutory and therefore can report income and expenses as a business. An example is someone who works at home.

Legal Representative

Select to indicate that the employee has legal representation or is a legal representative.

Deceased

Select to indicate that the employee has died.

Retirement Plan

Select to indicate that the employee has a separate retirement plan.

Deferred Compensation

Select to indicate that the employee has deferred compensation. Deferred compensation provides the employee an opportunity to voluntarily shelter a portion of his or her wages from federal income taxes while saving for retirement to supplement social security and pension benefits. Under such plans, federal income tax is not due on deferred amounts or accumulated earnings until the employee receives a distribution (payment) from his or her account.

Household Employee (942)

Select to indicate that the employee will do such things as care for children, clean homes, cook, or provide other personal services, usually within a household.

Medicare Qualified Govt Emp

Select the Medicare Qualified Gov't Emp (Medicare qualified government employee) check box if the employee qualifies for Medicare coverage.

State Tax

Enter information similar to that which you entered for federal tax, including:

SWT Marital/Tax Status (state withholding tax marital tax status)

Select *Married* or *Single*.

Special Tax Status

Select a special status: *Exempt*, *Maintn Grs* (maintain taxable gross), *N/R Alien* (nonresident alien), or *None*.

Resident

Select this check box if the employee is a resident of the State that is entered.

Local Tax

Enter information similar to that which you entered for federal and state tax, including:

LWT Marital/Tax Status (local withholding tax marital tax status) Select *Married* or *Single*.

Auto Calculate Select this check box to indicate whether the taxes will be automatically calculated. This is an informational field only.

Collecting Employee Quality Feedback Information

Use the Employee Feedback page to collect feedback from your employees about their employment experiences with your customers. This enables you to collect valuable information from employees that can be used by your staffing organization to improve the way business is conducted.

This topic discusses how to enter employee feedback information.

Page Used to Collect Employee Quality Feedback Information

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
<u>Provide Employee Feedback Page</u>	FO_EMP_QUAL_FDBK	Collect feedback from employees about their experiences with customers.

Provide Employee Feedback Page

Use the Provide Employee Feedback page (FO_EMP_QUAL_FDBK) to collect feedback from employees about their experiences with customers.

Navigation

Staffing > Resources > Employees > Provide Employee Feedback

Click the Employee Feedback link in the Employee component.

Image: Employee Feedback page

This example illustrates the fields and controls on the Employee Feedback page. You can find definitions for the fields and controls later on this page.

Provide Employee Feedback

Business Unit US004

Assignment 0000000230

Order ID 0000000031

Customer ID 0000050035

Staffing Customer

Empl ID KUX137

Bookout,Ryan

Employee Quality FB

Find | View All

First 1 of 1 Last

SetID SHARE

*Date of Entry 01/02/2013

☐ Qualified Match

Form Type EMPQ

Date Sent

Form Code EMPQ1

Appraiser Name

Specific Feedback Details

Assignment Information:

Working Conditions:

You can enter feedback for an employee anytime after they have been assigned to an assignment.

Complete all the fields for which you have information.

Employee Quality FB

- Date of Entry

Enter the date the feedback was entered into the system.
- Qualified Match

Select this check box to indicate this person was a qualified match for the assignment.
- Date Sent

Enter the date the feedback was sent from the customer.
- Form Code

Enter the specific form you want to use for capturing feedback.

The system updates the page with a set of fields that you can then complete. Each form has a different set of questions or fields. Your organization decides what information should be contained in these forms.
- Appraiser Name

Enter the name of the person appraising the employee's performance.

Specific Feedback Details

The fields that display in this group box depend on the Form Code selected.

Viewing Employee and Applicant History

This topic provides an overview of employee history.

Pages Used to View Employee and Applicant History

Page Name	Definition Name	Usage
<u>Review History Page</u>	FO_HISTORY	View the assignment history and agenda items or an applicant or employee.
<u>History Detail Page</u>	FO_HISTORY_DTL	View the assignment history and agenda item detail.
<u>Employee Overview Page</u>	FO_EMPL_OVW	View employee order, assignment, and task history. View employee applications to orders.
<u>Applicant Overview Page</u>	FO_APPL_OVW	View applicant order, assignment, and task history. View applicant applications to orders.

Understanding Employee History

The Review History page contains a record of the critical transactions that have transpired between you and your customers with regard to a particular employee. It includes data primarily from the agenda and assignment pages, because these pages generate many transactions between your customers and your staffing service. You can, however, save many other types of records and events to the database and retrieve them through the normal search process.

The system generates a history item when a user completes an agenda item and clicks the Add History button. The system also generates a history item in real time after a user completes certain assignment functions, rather than generating the item when the user schedules it as an agenda item.

To view detailed employee or applicant order and assignment history, all on one page, use the Employee or Applicant Overview pages. These pages display employee or applicant order, assignment and existing task history information as well as any orders to which the employee or applicant has applied. The Employee and Applicant Overview pages allow you to view:

- Order history for a particular employee or applicant.
- Orders for which the employee or applicant is under consideration, but to which they are not yet assigned.
- All assignment history for a particular employee or applicant.
- All orders to which an employee or applicant has applied.
- Current order/status information.

Review History Page

Use the Review History page (FO_HISTORY) to view the assignment history for an applicant or employee.

Navigation

Staffing > Resources > Employees > Review Employee History

To view additional detail for a particular transaction, click its View History button.

History Detail Page

Use the History Detail page (FO_HISTORY_DTL) to view the assignment history detail.

Navigation

Staffing > Resources > Employees > Review Employee History > History Detail

The layout of the history page is the same for all types of history records. Blank fields do not have any association with the history event.

Related Links

[Review Agenda/History - History Details Page](#)

Employee Overview Page

Use the Employee Overview page (FO_EMPL_OVW) to view employee order, assignment, and task history. You can also view all orders to which an employee as applied, and view current order and status information.

Navigation

Staffing >Resources >Employees >Employee Overview. Alternatively, click the Candidate Overview link from the Employees, Applicants, or Assignment pages.

Image: Employee Overview Page (1 of 2)

This example illustrates the fields and controls on the Employee Overview Page (1 of 2). You can find definitions for the fields and controls later on this page.

The screenshot displays the 'Employee Overview' page for employee Gunter, Joanne. It includes sections for 'Order Summary' with filter options and a 'Status Information' legend. The 'Order Details' section contains a table with two rows of order data.

Status	Order Number	Line Number	Customer Name	Assignment ID	Job Code	Current Event	Start Date	End Date	End Reason
Under consideration	0000000037	2	Mercy Medical Center of Pleasanton	No Assignment ID	660015	Call	12/01/2012	12/31/2013	
Assignment	0000000041	1	Delta Systems	No Assignment ID	140080	Basic Background Check	05/05/2012	08/30/2012	

Image: Employee Overview Page (2 of 2)

This example illustrates the fields and controls on the Employee Overview Page (2 of 2). You can find definitions for the fields and controls later on this page.

Qualification Details																																											
Availability View All First 1 of 1 Last Placement Desire Temp Annual Salary Desired Hours Per Week Full Part-Time ☐ Willing to Commute ☐ Willing to Travel																																											
Competencies Personalize View All First 1-3 of 10 Last <table border="1"> <thead> <tr> <th>Description</th> <th>Experience</th> <th>Proficiency</th> </tr> </thead> <tbody> <tr> <td>Ability to manage own time</td> <td></td> <td>3-Good</td> </tr> <tr> <td>Ability to prioritize tasks</td> <td></td> <td>4-Very Good</td> </tr> <tr> <td>Stress tolerance</td> <td></td> <td>3-Good</td> </tr> </tbody> </table>				Description	Experience	Proficiency	Ability to manage own time		3-Good	Ability to prioritize tasks		4-Very Good	Stress tolerance		3-Good	Tests Personalize View All First 1 of 1 Last <table border="1"> <thead> <tr> <th>Description</th> <th>Test Date</th> <th>Test Score</th> <th>Passed</th> </tr> </thead> <tbody> <tr> <td></td> <td></td> <td></td> <td>N</td> </tr> </tbody> </table>				Description	Test Date	Test Score	Passed				N																
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Header Section

Name

Click the name hyperlink to view the full employee record.
Hover over the name field to see the employee's phone number, email address, gender, and education.

Other Phone Numbers

Hover over or click the hyperlink to view the employee's other phone numbers.

Other E-mail Addresses

Hover over or click the hyperlink to view the employee's other email addresses.

Resume

Click the hyperlink to view the employee's resume.

View Notes

Click the hyperlink to view freeform notes regarding the employee.

Order Summary

To view specific records, you can filter the results by using the Filter Option field in the Order Summary section of the page.

Image: Example: Employee Overview Page - Filter Option

This example illustrates the fields and controls on the Example: Employee Overview Page - Filter Option. You can find definitions for the fields and controls later on this page.

The filter option dropdown controls the available filter criteria:

Customer Name	Includes all the customer names in the grid.
Job Code	Includes all the job codes in the grid.
From Date (start date values)	Includes all start date values in the grid.
To Date (end date values)	Includes all the end date values in the grid.
Status	Includes the options <i>assignment</i> , <i>current status</i> , <i>recently applied</i> , or <i>under consideration</i> .

Order Details

Click the title of any of the columns to sort by the values in that column.

Order Number	Click to view the order.
Line Number	Click to view the line number of the resource request.
Customer Name	Click to view the worksite customer.
Assignment ID	Click to view the assignment details.
Job Code	Displays the resource request line number detail regarding the job code.
Current Event	Displays the position of the candidate within the onboarding process (that is represented by the Recruiting Funnel) for that particular resource request. The current event is per order and resource request. The system calculates the current event as follows: 1. The system seeks the most recent event is at an “in progress” status; if there is one, then this is the current event. If there is not such an event, the system proceeds to the next step.

2. The system seeks the most recent “partially complete” event; if there is one, then this is the current event. If there is not such an event, the system proceeds to the next step.
3. The system seeks the most recent “complete” event; if there is one, then this is the current event. If there is no such event, the current event is blank.

Start Date

Displays the start date from the order if no assignment exists. If an assignment exists, the system displays the start date from the assignment. If multiple start dates exist on the order or assignment, the system displays the earlier start date.

End Date

Displays the end date from the order if no assignment exists. If no end date exists on the order, the system displays the estimated end date. If an assignment exists, the system displays the assignment end date. If multiple end dates exist on the order or the assignment, the system displays the latest end date. If an actual end date exists on the assignment, then the system displays that date.

End Reason

Displays the assignment end reason. If no value exists, then the system displays the order end reason.

Pay Rate

Displays the regular pay rate from the assignment. If a pay rate does not exist, then the system displays the standard pay rate from the order (located on the Billing Tab.)

Bill Rate

Displays the regular bill rate from the assignment. If a bill rate does not exist, then the system displays the standard bill rate from the order (located on the Billing Tab.)

Salary

Displays only for career orders. If an assignment exists, the system displays the salary. If no assignment exists, the system displays the minimum and maximum salary for the order. Click the link to view the Billing page.

Compensation

Displays only for permanent placements. If an assignment exists, the system displays the compensation field. If no assignment exists, then the system displays the minimum and maximum compensation for the order. Click the link to view the Billing page.

Margin

Displays the margin for the assignment if it exists. If it does not exist, the system displays the margin from the order.

Markup

Displays the margin for the assignment if it exists. If it does not exist, the system displays the markup from the order.

Availability**Placement Desire**

Displays the employee’s desired Placement Type from the Employee Application page.

Annual Salary	Displays the employee's desired salary from the Employee Application page.
Desired Hours Per Week	Displays the employee's desired hours per week from the Employee Application page.
Full/Part-time	Displays the employee's desired full or part time status from the Employee Application page.
Willing to Commute	Displays the employee's desired commute status from the Employee Application page.
Willing to Travel	Displays the employee's desired travel status from the Employee Application page.

Competencies, Tests, Job Titles, and Lines of Business

The system displays any competencies and tests from the employee's Employee Qualifications page.

References

The system displays any references from the employee's Employee References page.

History Details

User ID	The user ID of the person assigned to the agenda item and derived from the "Assigned To" value.
Description	The description of the agenda item and derived from the "Event Type" value.
Customer Name	The customer name associated with the agenda item. Click to view the customer details.
Contact Name	The contact name associated with the agenda item. Click to view the contact details.
Date	The date on which the agenda item was scheduled.
Actual End Date	Indicates the date on which the agenda item was completed.
Order	The order associated with the agenda item.
Line	The line number (resource request) on the order associated with the agenda item.
 (History icon)	Click to view the Review Agenda/History page for the specific agenda item.

See also [Understanding the Agenda and History Functions in PeopleSoft Staffing Front Office](#)

Applicant Overview Page

Use the Applicant Overview page (FO_APPL_OVW) to view applicant order, assignment, and task history. You can also view all orders to which an applicant has applied and view current order and status information.

Navigation

Staffing >Resources >Applicants >Applicant Overview. Alternatively, click the Candidate Overview link from the Employees, Applicants, or Assignment pages.

The Applicant Overview page is an exact replica of the Employee Overview page including all fields and functions. For a description of these, see [Employee Overview Page](#).

Chapter 7

Creating Records for Customers and Contacts

Understanding Customer and Contact Information

Oracle's PeopleSoft Staffing Front Office enables you to retrieve and update customer and contact information. You set up customers and contacts using the customer and contact pages described in the *PeopleSoft Order to Cash Common Information* product documentation. You enter basic identifying information, such as the customer's name and address, as well as information about credit profiles and billing profiles.

Pages specific to PeopleSoft Staffing Front Office enable you to enter other important information, such as:

- Target qualifications that are most commonly sought after by your customers and contacts.
- Target job titles for which your customers and contacts typically need staffing help.
- Peak recruiting seasons and other sales data.

Use the data that you enter on these pages to match applicants and employees with customers and contacts.

Related Links

"Adding General Customer Information" (PeopleSoft FSCM 9.2: Order to Cash Common Information)

Entering Customer Contact Information

In PeopleSoft Staffing Front Office, contacts are the people with whom you maintain relationships. Depending on the size and locations of a customer, you may have one or dozens of people listed as your contacts.

You set up contacts using the Customers component, which is described in the "Maintaining Contacts" topic of the *Working with Customers and Orders* product documentation.

See "Setting Up Customer Support Personnel" (PeopleSoft FSCM 9.2: Order to Cash Common Information).

Entering Customer Feedback Information

This topic provides an overview of customer feedback information and discusses how to enter customer feedback information.

Page Used to Enter Customer Feedback Information

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
<u>Customer Feedback Page</u>	FO_CUST_QUAL_FDBK	Enter feedback about the customer's experiences with your employees. Collect information about a specific placement and the quality of an employee's work.

Understanding Customer Feedback Information

Depending on your organization's business rules and preferences, you can use the Customer Feedback page to store information about the success of a placement and the quality of an employee's work.

Before you enter information on this page, your implementation team must set up a single form or a group of forms with specific questions that address the information that you want to collect.

For example, you might want to set up a form with the following questions:

- How satisfied were you with the placement?
- Did the employee meet your expectations?
- Did this assignment meet your expectations?

Before you can access this page, you must have assigned an employee to a job order with the customer.

Customers can provide feedback any time during the assignment, not just at the end. Because feedback can be provided many times during an assignment, you can add as many rows of data as needed for the same assignment record.

Customer Feedback Page

Use the Customer Feedback page (FO_CUST_QUAL_FDBK) to enter feedback about the customer's experiences with your employees.

Collect information about a specific placement and the quality of an employee's work.

Navigation

Staffing > Customers and Contacts > Provide Customer Feedback

To add feedback information, select an assignment from the search page and insert a new row. You can also delete rows.

To enter customer feedback information:

1. Select the SetID from the list of available entries.
2. Select the date of entry on which you are entering the information.
3. Select the Qualified Match check box if the person who filled the order was qualified for the assignment.
4. Select the form type that you want to use to enter feedback information.
5. Select the specific form that you want to use from the Form Code field.

The system re-displays the page with a set of fields that you can then fill in. Each form has a different set of questions or fields. Your organization decides what information these forms contain.

6. Complete all the fields for which you have information and click Save.

Viewing Customer History

This topic discusses how to view customer history.

Pages Used to View Customer History

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
<u>Review Customer History Page</u>	FO_HISTORY	Review the most recent history items logged about a customer.
<u>History Detail Page</u>	FO_HISTORY_DTL	View details of a customer history item.

Review Customer History Page

Use the Review History page (FO_HISTORY) to review the most recent history items logged about a customer.

Navigation

Staffing > Customers and Contacts > Review Customer History

The Review Customer History page contains a record of the critical interactions that have transpired between you and your customers. It includes data primarily from the agenda and assignment pages because these pages generate the most transactions between your customers and your staffing service. However, you can save many other types of records and events to the database and retrieve them using the normal search process.

The system generates a history item when a user completes an agenda item or clicks the Add History button.

To access the History Detail page and view additional detail for a particular item, click the View History Detail link that is associated with the item.

History Detail Page

Use the History Detail page (FO_HISTORY_DTL) to view details of a customer history item.

Navigation

Staffing > Customers and Contacts > Review Customer History. Click the View History Detail icon.

The layout of the History Detail page is the same for all types of history records.

Related Links

[Review Agenda/History - History Details Page](#)

Viewing Contact History

This topic discusses how to view contact history.

Pages Used to View Contact History

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
Review Contact History Page	FO_HISTORY	View all of the history items that are associated with a particular contact.
Contact History Detail Page	FO_HISTORY_DTL	View details of a contact history transaction.

Review Contact History Page

Use the Review Contact History page (FO_HISTORY) to view all of the history items that are associated with a particular contact.

Navigation

Staffing > Customers and Contacts > Review Contact History

The Review Contact History page contains a record of the critical interactions that have transpired between you and your contacts. It includes data primarily from the Agenda and Assignment pages, because these pages generate the most transactions between your contacts and your staffing service. However, you can save other types of records and events to the database and retrieve them using the normal search process.

The system generates history items when agenda items are completed or a user clicks the Add History button.

To access the History Detail page and view additional detail for a particular transaction, click the View History Detail link that is associated with the item.

Contact History Detail Page

Use the Contact History Detail page (FO_HISTORY_DTL) to view details of a contact history transaction.

Navigation

Staffing > Customers and Contacts > Review Contact History >View History Detail

The layout of the history page is the same for all types of history records. Blank fields do not have any association to the history event.

Related Links

[Review Agenda/History - History Details Page](#)

Reviewing Recent Calls

This topic discusses how to review recent calls to customers and contacts.

Page Used to Review Recent Calls

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
Recent Call Report - Recent Calls Page	FO_RECENT_CALL_RPT	Review recent calls to customers and contacts.

Recent Call Report - Recent Calls Page

Use the Recent Call Report - Recent Calls page (FO_RECENT_CALL_RPT) to review recent calls to customers and contacts.

Navigation

Staffing > Customers and Contacts > Review Recent Calls

Use this read-only page to review recent calls to customers and contacts.

Chapter 8

Creating and Managing Orders and Assignments

Understanding Orders

An order is a request for temporary or permanent workers. The processing of orders for these two types of workers is similar.

Setup tables (which are configured during implementation) define the values for many of the fields on the order pages. In addition, the setup of customers, employees, and applicants is essential to the creation of orders.

To create an order, your implementation team must configure setup tables properly. Users then select the proper values when entering information in the prompt fields on the Order pages. If table setup is not correct, you cannot enter data in some required fields or save the information to your database.

Oracle's PeopleSoft Staffing Front Office shares the Order and Assignment tables with PeopleSoft Pay/Bill Management, providing seamless integration between these two applications.

PeopleSoft Staffing Front Office also shares the Order, Assignment, and Resource Calendar tables with PeopleSoft Resource Management. Sharing information in these tables facilitates availability information exchange when a resource is assigned using either application. However, orders and assignments added in PeopleSoft Staffing Front Office are not visible in the PeopleSoft Resource Management components, and vice versa.

Common Elements Used in Creating and Managing Orders and Assignments

Assignment	The result of a candidate being placed on a resource request in order to perform a task temporarily or permanently as requested in an order.
Job Code	The type of position for which the customer is being billed.
Order	A request by a customer of a staffing agency to find one or more people to perform work at the client site in a temporary or permanent capacity.
Pay Grade	Part of the job code configuration. The pay grade defines the pay and bill rates typically associated with a job code. It can be used as a guideline when negotiating the assignment rates with your customer and your employee.

PeopleMatch

Feature of the PeopleSoft Staffing Front Office application used to search for available candidates and to match those candidates to open orders.

Sales Operator

An individual who is responsible for the customer who is placing an order with your staffing organization. You define the sales operator in the setup of the customer. The sales operator can be overridden in the job order.

Service Operator

Customer service representative on a specific order responsible for order fulfillment and other aspects of customer service. You define the service operator in the setup of the customer. The service operator can be overridden in the job order.

Creating Orders for Career and Temporary Placements

This topic provides an overview of career and temporary orders.

Pages Used to Create Orders

Page Name	Definition Name	Usage
<u>Order Page</u>	FO_ORDER_HDR	Record general information about a job order for a permanent or a temporary employee.
<u>Resource Request Page</u>	FO_ORDER_REQ	Enter resource request (order line) information.
<u>Change Quantity/View History Page</u>	FO_ORDER_REQ_HIST	Change resource quantities or view a history of resource quantity changes for an order.
<u>Replacement Detail Page</u>	FO_ASGN_REPL_DTL	View assignment replacement information.
<u>Sales Tax Page</u>	FO_ORDER_TAX	Enter sales tax information to be used as defaults when creating the order assignments.
<u>Salary and Billing Page</u>	FO_ORDER_CAR_BILL	Enter career placement information. This page only appears for career order types.
<u>Billing Page</u>	FO_ORDER_TEMP_BILL	Enter temporary placement information. This page is only applicable to temporary order types.

Page Name	Definition Name	Usage
PeopleMatch Page	FO_ORDER_MATCH	This page captures the resource request target qualifications and the search criteria to match the skills of available candidates with the needs of your customers and fill open job orders.
Attachments Page	FO_SO_ATTACH	Add and view attachments for orders.
History Page	FO_ORDER_HISTORY	View history items associated with the job order.
Order – Change Tracking Page	FO_SO_HIST_SEC	View and enter changes related to billing comments, service order priority, and service order status.
Forms Page	FO_SO_TEMPLTS	View a list of the forms associated with the order, drill down to the form details, and associate a new form with the order.
Forms Page	FO_SO_TMPLT_DTL	Enter details for the order forms. Forms Page
Job Opening Page	FO_ORDER_JOBOPEN	Enter information about the order for posting to job boards.

Understanding Career and Temporary Orders

When you add an order in PeopleSoft Staffing Front Office, you must select the user-defined order type that describes the transaction. Because user-defined order types map to one of two system-defined order types, a temporary order is really a user-defined order type that's mapped to a *temporary* system order type, and a career order is a user-defined order type that's mapped to a *career* system order type.

Career orders are requests for one or more people to perform work in a permanent capacity at a client of the staffing organization as an employee of that organization. Creating a new career order is similar to creating a temporary order, except for specific fields that pertain to the career aspects of the position, such as salary and prospective fees.

Temporary orders are requests for contingent workers for whom the client has no need for permanent positions. The customer can request one or more resources on the same order. Creating a new temporary order is similar to creating a career order, except for specific fields that pertain to the billing and payroll aspects of the position.

Career placement information applies to career and converted temp-to-hire orders, but not to temporary orders.

The same order may include several resource requests (order lines) specifying a distinct set of qualifications for the different types of resources needed by the customer.

Note: Many fields on these pages appear by default from the Staffing - Job Data page (Set Up Financials/ Supply Chain, Common Definitions, User Preferences, Define User Preferences and click the Staffing - Job Data link).

Order Page

Use the Order page (FO_ORDER_HDR) to record general information about a job order for a permanent or a temporary employee.

Navigation

Staffing > Orders and Assignments > Add/Update Orders

Image: Order page (1 of 2)

This example illustrates the fields and controls on the Order page (1 of 2). You can find definitions for the fields and controls later on this page.

Order

Resource RequestSales TaxBillingPeopleMatchAttachmentsHistoryFormsJob Opening

PC Business Unit US004Branch CA001Order RF01Order Type Staffing Temporary Order

Order

'Description' RF Nurses

Start Date 11/16/2009

Order Status Unfilled

'Sales Operator' VP1

Department 10500

Copy Order

'Estimated End Date' 11/15/2011

Priority

'Assigned To' VP1

Approval Status Approved

Currency Code USD

'Order Contact' 0037 Maurice Jenkins

Caller Name

Customer Fields Definition

Event List: NURSE

Force Dependency

Recruiting Funnel Summaries

Staffing Hot List

Bill To Customer

Customer ID 0000050037

Location 1

1800 Santa Rita Rd

Pleasanton, CA 94588

USA

Bill To Contact

Reporting/Agenda Management

Order Event Group

Order Reason

Industry

Service Order Source Direct Contact

Line of Business HEALTH Health

Ending

Actual End Date

End Reason

End Comment

Cross-Reference

Project

Contracts Business Unit

Contract NEXT

Audit

Entered by SAMPLE

Last Update User ID SAMPLE

Date Created 09/14/2009

Last Update Date/Time 09/14/09 12:22:32PM

Add Agenda

Add History

Employee Feedback

Customer Feedback

Past Orders

Add Contact

Note: When you add an order, the system provides the order status of *Draft* by default. Use this status while the contractual stipulations for the service have not yet been finalized with your customer. Most fields in the Order component can be changed when the order has this status. However, you cannot create assignments for draft orders. Once you confirm the contractual terms of the service with your customer, change the order status to *Unfilled*. If you have installed PeopleSoft Staffing Front Office with PeopleSoft Pay/Bill Management, once an order is saved with an *Unfilled* status, the system automatically creates a project and a contract and associates them with the order. At that point, several fields will no longer be enterable within the Order component. For example, note that you cannot change the Bill To Customer information after the status has changed to *Unfilled* and the order has been saved.

PC Business Unit (PeopleSoft Project Costing business unit) Displays the PeopleSoft Project Costing (PC) business unit associated with the order. Every PeopleSoft Staffing Front Office order must be associated with a PC business unit even when the PC module is not used. When you add an order,

you must specify which staffing branch owns the transaction. PeopleSoft Staffing Front Office uses the staffing branch configuration to automatically determine the PC business unit to which the staffing branch belongs and associates the PC business unit with the order.

Branch	Displays the PeopleSoft Staffing Front Office branch associated with the order.
Order	Displays the order ID number.
Order Type	Displays the user-defined order type that you selected when you initiated the order. PeopleSoft Staffing Front Office has user-defined order types and system-defined order types. When adding an order, you enter only the user-defined order type. The system associates user-defined order types with their system-defined order type. The two system-defined order types are: temporary and career. You can create as many user-defined order types as you need, each always mapping to either a temporary or a career system-defined order type. When you add an order, depending on the user-defined type you choose and its associated system-defined type, the application captures different data elements and different system behaviors and validations occur.
Assigned To	Enter the ID of the person, or team, that is most closely related to, and responsible for, servicing the customer's needs.
Staffing Hot List	Select this option to add the order to the Order Hot List pagelet.
Order	
Description	Enter a description to represent the services being provided through the job order. If you installed PeopleSoft Staffing Front Office with PeopleSoft Pay/Bill Management, the order description is also used as the description of the project automatically created by PeopleSoft Pay/Bill Management. The description can also default from the job opening field on the order.
Copy Order	Click this button to duplicate the order displayed and to create a new transaction. Update the information on the pages in the component, and then click the Save button.
Start Date	Select the date when you anticipate the resource contract to start or when the customer authorized it to start.
Order Status	Select a value that represents the state of the order: • <i>Draft</i>: Indicates an interest in placing an order. Use this status while contractual agreements have not been finalized

or the customer has not officially confirmed the service request. This is the default status.

- *Ended*: Indicates that you have closed the order due to completion of all assignments or due to cancellation. An order cannot be closed if it has open assignments.
- *Unfilled*: Indicates that you have placed the order but not filled it. If PeopleSoft Pay/Bill Management is installed, the system automatically creates a project and a contract when the order is first saved with an *Unfilled* status. From that point on, a number of fields will no longer be editable.

Note: You can only create assignments against *Unfilled* orders.

- *Filled*: Indicates that you have placed the order, found all needed resources, and created all the necessary assignments. This status is given to an order automatically when all resource requests for the order have assignments created for them.

Priority

Select a priority for the order as defined through system configuration. Examples of order priorities that you may want to configure in the system include: *CRITICAL*, *HIGH*, *LOW*, and *MEDIUM*.

Sales Operator

Enter the ID of the person most closely related to and responsible for acquiring the customer.

Service Operator

Enter the ID of the person most closely related to and responsible for servicing the customer's needs.

Department

Enter the department within your staffing organization for which the candidate would be working. Note that this value is not the department within the customer's organization.

Note: When PeopleSoft Pay/Bill Management is installed, users have the option of using the PeopleSoft Project Costing Organizations feature to generate accounting entries. The order department, as well as the PeopleSoft General Ledger business unit associated with the order's contracts business unit, are used to create the project owning organization.

Approval Status

Select a status for the order: *Approved*, *Denied*, or *Pending*. Order approval security is granted through the staffing user preferences. Orders that have not been approved can only be saved with a *Draft* status.

Customer ID

Enter the Bill To Customer ID of the customer who will be billed for the services provided in the order.

Location	Enter the billing location of the Bill To Customer. The available selections are customer addresses that are also designated as both bill to and sold to locations.
Currency Code	Captures the currency in which the customer will be billed for the services provided through the order.
Bill To Contact	Enter the ID of the contact in the customer organization who will be the "attention to" person in the client's invoice.
Order Contact	Enter the ID of the contact in the customer organization responsible for the order. Customers are connected to contacts when the contacts are set up. The system displays the IDs of these contacts when you click the Lookup button. To view details for the contact, click the contact's name.
Caller Name	Enter the ID of the contact who initiated the order. You can either select an ID from the list of contacts associated with the customer or enter a new name in the field.
Customer Fields Definition	This field is only available to customers who license PeopleSoft Pay/Bill Management. It captures the customer fields template to be used when capturing additional billing information for the job order. The system only displays those definitions that have been associated with the bill to customer in the customer setup.
Event List	When creating a new order for a customer with the required information set up, the default event list for a customer will pre-populate. If the customer has the Allow Recruiting Funnel List check box selected on the Default Customer Event Lists page , then the user will be able to choose a different event list from a drop down list box of available event lists. Users can not change the event list once the order has been saved by the user.
Force Dependency	Select this check box to force dependency so that in the Recruiting Funnel, the status icons are only clickable when the previous event is complete. Note: This value may be set at the event level, at the customer event list, or at the order level. There is a hierarchy beginning with the event level. The value will be carried over to the customer event list. The value at the customer event list level will be carried over to the order level. You can overwrite the value defaulted from the previous level in the hierarchy.
Staffing Hot List	Select to indicate that this order should appear on the Order Hot List pagelet.

Reporting/Agenda Management

Order Event Group	Enter the type of agenda items that you want to automatically add to your agenda when assignments are made.
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Service Order Source	Enter the method by which you received the order.
Order Reason	Enter the reason for originating the order.
Line of Business	Enter the code that represents the line of business in which the candidate would be working.
Industry	Enter the code that best represents the industry in which the customer operates.

Ending

Use this group box to enter information about the date an order ended, as well as the circumstance that led to the ending of the order.

Note: This information should be entered along with changing the order status to *Ended*. .

Actual End Date	Select the date the order ended.
End Reason	Enter the reason the order ended.
End Comment	Enter any comments you have about the ending of the order.
	Click the spell check button to check the spelling in the End Comment field.

Cross-Reference

These fields appear only when PeopleSoft Pay/Bill Management is installed. They display information about the project and contract automatically created by PeopleSoft Pay/Bill Management and associated with the order

Project	Displays the ID of the project that PeopleSoft Pay/Bill Management automatically created for the job order.
Contracts Business Unit	Displays the business unit of the contract that Pay/Bill Management automatically created for the job order.
Contract	Displays the Contract ID of the contract that PeopleSoft Pay/Bill Management automatically created for the job order.

Audit

Entered By, Date Created, Last Update User ID, and Last Update Date/Time	These are display-only fields that provide the user an audit record of who added and last updated the order, and when that occurred.
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Resource Request Page

Use the Resource Request page (FO_ORDER_REQ) to enter resource request (order line) information.

Navigation

Staffing > Orders and Assignments > Add/Update Orders > Resource Request

Image: Resource Request page

This example illustrates the fields and controls on the Resource Request page. You can find definitions for the fields and controls later on this page.

The screenshot displays the 'Resource Request' page within a staffing management application. At the top, there are tabs for 'Order', 'Resource Request', 'Sales Tax', 'Billing', 'PeopleMatch', 'Attachments', 'History', 'Forms', and 'Job Opening'. Below these, the page header shows 'PC Business Unit US004', 'Branch CA001', 'Order RF01', and 'Order Type Staffing Temporary Order'. The main section is titled 'Resource Request' and includes a 'Find | View All' link and a pagination control 'First 1 of 3 Last'. The 'Line Number' is 1, and the 'Date Opened' is 09/14/2009. The 'Worksite Customer' section shows 'Customer ID 0000050037' and 'Location 1' with details for 'Mercy Medical Center of Pleasanton' at '1800 Santa Rita Rd, Pleasanton, CA 94588, USA'. The 'Requisition Status' is 'Unfilled'. The 'Report To' field is empty. The 'Description' field is empty. The 'Job Code' is '660015' and the 'Job Supplement' is 'Nurse-Registered'. The 'Quantity Requested' is 4, 'Assigned' is 0, and 'Pending Replacement' is 0. There are links for 'Change Quantity/View History' and 'View Replacement Detail'. A 'Temp To Hire' checkbox is present. The 'Customer Fields' section shows a table with 'Customer Field Name' and 'Description' columns. The 'Notes' section is empty. The 'Weekly hours' field is empty, and there are checkboxes for 'Minimum Hours Waived', 'Show in Self-service', and 'Partial Days Acceptable'. The 'Start Date' is 11/16/2009, 'Estimated End Date' is 11/15/2011, 'Start Time' is 8:00AM, and 'End Time' is 5:00PM. The 'Assignments' section shows a table with 'Candidate Name', 'Assignment ID', 'Start Date', and 'Assignment Status' columns. The bottom of the page has links for 'Add Agenda', 'Add History', 'Employee Feedback', 'Customer Feedback', 'Past Orders', and 'Add Contact'.

Note: An order may have multiple resource requests. Resource requests are the equivalent of order lines. Each may have its own stipulations in terms of resource qualifications, start and end dates, and work location. Some fields on this page appear conditionally, depending on the order type and whether you have PeopleSoft Staffing Front Office installed, PeopleSoft Pay/Bill Management installed, or both.

Resource Request

Line Number

Displays the order line number associated with the resource request.

Requisition Status

Displays where the individual resource request is in the process of being fulfilled. The system automatically updates the status based on fulfillment progress. When you submit an order, the resource request status is *Unfilled*. This field is visible only after you submit an order. Other valid statuses are *Ended* and *Filled*.

Date Opened

Enter the date that the customer made the specific resource request. This information can be used in custom reports to track the time it takes to fill an order.

Report To	Enter the ID of the contact in the customer organization who is responsible for this resource request.
Description	Enter a description for the request.
Job Code	Enter a code to define the resource's main function.
Job Supplement	Select the job supplement that pertains to the order. Job supplements, which can contain information about the requirements of the job, are entered through the use of forms, and are attached to customers.
Quantity Requested	Enter the number of resources needed by this particular resource request. For example, an order may have two requests: the first for a single administrator and the second for three programmers.
Assigned	Displays the number of assignments already created for the resource request. If the active count is equal to the quantity requested, the resource request has a <i>Filled</i> status. If the active count is less than the quantity requested, the request has an <i>Unfilled</i> status.
Pending Replacement	Number of canceled assignments for an order that have not been replaced.
View Replacement Detail	Click this link to view assignment replacement details for this order.
Change Quantity/View History	Click this link to change the resource requested quantity or to view a history of resource quantity changes.
Quantity Needed	This field displays the difference between the quantity of resources requested and the number of active assignments. It corresponds to the number of assignments that still need to be created to fill the request.
Never Filled	Quantity requested minus the number of non-canceled assignments.
Temp To Hire	For temporary orders only. Select this check box if the order is a temporary position that could become a permanent position.
	Note: This field only appears on temporary orders. This check box must be selected for the Permanent Hire button to appear on the Assignment Header page.
Worksite Customer	
Customer ID	Enter the ID of the customer where the work will be performed.
Location	Enter the customer's location where the work will be performed.

Customer Fields

Definition ID

This field appears only when your system is integrated with Pay/Bill Management. Select the customer fields definition that you want to use for this order. If a default definition was established for the customer, it automatically appears. The system displays the customer fields that you should enter for the order. Enter values according to the rules established on the definition. The customer field values entered on the resource request default to the assignment.

Note: Customer field definitions integrate with PeopleSoft Billing only for temporary orders.

Customer Field Name

Displays the field name as defined by the customer fields template definition.

Description

Displays the values of each field as defined in the customer fields template definition.

Notes

Enter any additional notes about this request.

Weekly Hours

Enter the number of hours that the customer requires from this resource per week.

Minimum Hours Waived

Select this check box to waive any requirement for minimum weekly hours.

Show in Self-service

Select this check box to have this resource request appear in the self-service Open Resource Requests component. Candidates can search for open resource requests that have this check box selected.

Partial Days Acceptable

Select this check box to indicate that the customer will accept a resource who works partial days.

Start Date and End Date

Select the work dates for the request.

Note: The End Date field only appears on temporary orders.

Start Time and End Time

Enter the start and end times for this request.

Assignments

This group box displays all the assignments created for this resource request. If no assignments have been created, the group box is empty.

Candidate Name

Name of the candidate assigned to the resource request.

Assignment ID

The ID of the assignment associated with the resource request.

Start Date

The date that the assignment starts.

Assignment Status

The status of the assignment.

Change Quantity/View History Page

Use the Change Quantity/View History page (FO_ORDER_REQ_HIST) to change resource quantities or view a history of resource quantity changes for an order.

Navigation

Click the Change Quantity/View History link on the Resource Request page.

Old Quantity	Displays the quantity last requested.
New Quantity	Enter the new quantity requested.
Request Date	Enter the date the customer requested this change.

Note: This date cannot be in the future.

Change Reason	Select a reason for the change from the drop-down list box.
Comments	Enter any additional comments.

Quantity Change History

This section displays a history of changes for this resource request.

Replacement Detail Page

Use the Replacement Detail page (FO_ASGN_REPL_DTL) to view assignment replacement information.

This page displays a history of assignment replacement information for this order.

Navigation

Click the View Replacement Detail link on the Resource Request page.

Sales Tax Page

Use the Sales Tax page (FO_ORDER_TAX) to enter sales tax information to be used as defaults when creating the order assignments.

Navigation

Staffing > Orders and Assignments > Add/Update Orders > Tax

Image: Sales Tax page

This example illustrates the fields and controls on the Sales Tax page. You can find definitions for the fields and controls later on this page.

Order

Resource Request

Sales Tax

Billing

PeopleMatch

Attachments

History

Forms

Job Opening

PC Business Unit US004 Branch CA001 Order 0000000031 Order Type Staffing Temporary Order

Sales Tax Defaults

Find | View All

First 1 of 2 Last

Line Number 1

Ship From Location

☐ Tax Exemption License Exists

Exemption Certificate

Tax Code CA

Tax Group

Transaction Type

Transaction Sub Type

Physical Nature Services

Product ID CONS_GENERAL_01

Add Agenda

Add History

Employee Feedback

Customer Feedback

Past Orders

Add Contact

Note: This page is only available when Pay/Bill Management is installed.

Line Number	Displays the resource request line number.
Ship From Location	Enter the staffing branch location from which the request is originating.
Tax Exemption License Exists	Select this check box to indicate that a tax exemption certificate exists for this customer.
Exemption Certificate	Enter the exemption certificate number.
Tax Code and Tax Group	Enter a tax code and group for this request.
Transaction Type and Transaction Sub Type	Enter a type to describe the nature of the transaction, such as <i>Service</i> , and a sub type, such as <i>Service</i> or <i>Misc</i> .
Physical Nature	Select a value to indicate whether the request involves services or goods.
Product ID	Enter an ID for this request. This information will be provided by default from the contract profile. Only rate-based products can be selected for temporary orders, and only amount-based products can be selected for career orders.

Note: Product kits are excluded from the look up.

Billing Page

Use the Billing page (FO_ORDER_TEMP_BILL) to enter temporary placement information.

Navigation

Staffing > Orders and Assignments > Add/Update Orders > Billing

Image: Billing Page

This example illustrates the fields and controls on the Billing Page. You can find definitions for the fields and controls later on this page.

Note: This page is only available for temporary order types. For career orders, you enter billing information in the Salary and Billing page instead.

Line Number	This field displays the number for this temporary order.
Job Code	This field displays the job code that describes the work to be performed in this temporary order.
Pay Rate A, B, C and Bill Rate A, B, C	Defined as part of the job code, pay and bill rates are purely informative. They provide the user with guidance for the normal payroll and billing bands for the job code specified.
Workers Comp Rate (workers' compensation rate)	This field displays the workers' compensation rate associated with the job code in the state where the work is to be performed. This field is used by U.S. customers only.
Workers Comp Code (workers' compensation code)	Displays the workers' compensation code that is associated with the job code and state of the site location for the order. This field is used by U.S. customers only.
Unemployment Comp State (unemployment compensation state)	Displays the state in which unemployment compensation is determined.
Target Margin	Enter the margin percent that your organization would like to achieve with the assignments associated with this resource request. It reflects the bill rate less the pay rate and any additional costs over the bill rate.
Pay Rate	Enter the amount per hour you will pay employees for the work they perform at your customer's site for this request.
Apply Rate	Click this button to calculate the bill or pay rate, depending on information entered. If rates are adjusted, you may click

this button to apply the new rates to the margin and markup calculations that follow.

Bill Rate

Enter or view the amount per hour you will bill your customer for the work your employees perform at your customer's site for this order.

Note: The Pay Rate and Bill Rate fields are used for calculation and estimation purposes. Actual assignment rates are determined at the time of the assignment.

Markup

Displays, as a percentage, the difference between the pay rate and the bill rate. The calculation is:

$$(\text{Bill Rate} - \text{Pay Rate}) / \text{Pay Rate}$$

Margin

Displays, as a percentage, the difference between the pay rate plus costs and the bill rate. The calculation is:

$$((\text{Bill Rate} - (\text{Pay Rate} + \text{Additional Costs})) / \text{Bill Rate}) \Rightarrow * 100$$

Note: Two types of costs are included in *additional costs*. These costs are general overhead or fixed costs established in the staffing branch configuration and workers' compensation costs associated with the job code and state.

Margin Goal

Displays the margin goal established by your organization for the job code.

Adjust Bill Rate to

If you do not meet margin goals, the system recommends adjusting the bill rate to a higher level to meet the margin requirements for the position. You can adjust the pay rate downward exclusive of, or in addition to, the upward adjustment of the bill rate.

Non-Compliance Reason

This field displays upon save if the values for the bill rate or markup percentage exceed the defined maximum values defined on the Master Contract Rates page for this customer. A message explaining the overage will also be displayed when the order is saved.

Related Links

[Candidate Events Page](#)

"Setting Up Customer Field Definitions" (PeopleSoft 9.2: Pay/Bill Management)

Salary and Billing Page

Use the Salary and Billing page (FO_ORDER_CAR_BILL) to enter career placement information.

Navigation

Staffing > Orders and Assignments > Add/Update Orders > Salary and Billing

Image: Salary and Billing page

This example illustrates the fields and controls on the Salary and Billing page. You can find definitions for the fields and controls later on this page.

OrderResource RequestSales TaxSalary and BillingPeopleMatchAttachmentsHistoryFormsJob Opening

PC Business Unit US004Branch CA001Order 0000000032Order Type Staffing Career Order

Career PlacementFind | View AllFirst1 of 1Last

Line 1

Salary Range From65000.00To85000.00Additional Compensation5000.00

First Review08/01/06Renewal % Increase

Fee ScheduleSTANDARD

Fee Schedule Sent05/25/2006Fee Schedule Sign05/30/2006Guarantee Days30

Calculate

Minimum Potential Income	Maximum Potential Income
Fee Percentage20.00	Fee Percentage20.50
Total Compensation70000.00	Total Compensation90000.00
Potential Income14000.00	Potential Income18450.00

Send Resume to46Mark Hegenberger

1st Interview

2nd Interview

3rd Interview

Other Recruiters

Reference Check ByCustomer

Extend OfferRecruiter

☐ CO-OP Order☐ Confidential Order☐ Company Will Relocate Employee

Add AgendaAdd HistoryEmployee FeedbackCustomer FeedbackPast OrdersAdd Contact

Note: You enter salary and billing information for career order types on this page rather than the Billing page.

Career Placement

- Salary Range From and To

Enter the salary range for the placement. This amount is what the customer is willing to pay for the position. This amount is not necessarily the salary range for the position in the marketplace.
- Additional Compensation

If the pay for the position includes a base salary plus any additional monetary compensation or its equivalent, enter the value of that additional compensation.
- First Review

Enter the date when the first candidate performance review is expected.
- Renewal % Increase

Enter the percent of salary increase the candidate receives at review time.
- Fee Schedule

Enter the fee schedule code to indicate how fees will be calculated based on the candidate's salary.
- Fee Schedule Sent

Select the date the fee schedule was sent to the customer.
- Fee Schedule Sign

Select the date the fee schedule was signed by the customer.

Guarantee Days	Enter the number of days that the customer is entitled to fee reimbursement in case the candidate is terminated or resigns.
Calculate	Click this button to calculate the minimum and maximum potential incomes and display them on the page.
Fee Percentage	Displays the minimum and maximum fee percentage that your organization will bill from the order.
Total Compensation	Displays the minimum and maximum salary range that you entered and adds to that number the amount (if any) you entered in the Additional Compensation field.
Potential Income	Displays the minimum and maximum potential income range associated with the resource request. The system calculates potential income as a percentage of the total compensation granted to the employee who fills the order. The system determines the percentage by the fee schedule specified on the resource request. For instance, the Salary Range might be <i>40,000 USD</i> to <i>50,000 USD</i>. Assuming a fee percentage of 12 percent, the low end of the potential income range is 4,800 USD and the high end is 6,000 USD.
Send Resume to	Enter the contact in the customer organization who should receive candidate resumes.
1st Interview	Enter the contact in the customer organization who will conduct the first candidate interview. Do the same for 2nd Interview and 3rd Interview if applicable.
Other Recruiters	Enter the name of the individual or organization also doing recruiting work.
Reference Check By	Select the party responsible for verifying the candidate's references: <i>Customer</i> , <i>Recruiter</i> , or <i>Th. Party</i> (third party).
Extend Offer	Select an entity that will extend the job offer to the candidate: <i>Customer</i> , <i>Recruiter</i> , or <i>Th. Party</i> (third party).
CO-OP Order	Select this check box to indicate that your organization will fill the order in cooperation with another staffing organization.
Confidential Order	Select this check box to indicate that the order should remain confidential.
Company Will Relocate Employee	Select this check box to indicate that the customer is offering a paid relocation package with this position.

PeopleMatch Page

Use the PeopleMatch page (FO_ORDER_MATCH) to capture the resource request target qualifications and the search criteria to match the skills of available candidates with the needs of your customers and fill open job orders.

Navigation

Staffing > Orders and Assignments > Add/Update Orders > PeopleMatch

Image: PeopleMatch page

This example illustrates the fields and controls on the PeopleMatch page. You can find definitions for the fields and controls later on this page.

Order | Resource Request | Sales Tax | Billing | **PeopleMatch** | Attachments | History | Forms | Job Opening

PC Business Unit US004 Branch CA001 Order 0000000031 Order Type Staffing Temporary Order

PeopleMatch Find | View All First 1 of 2 Last

Job Title Knowledge Level Line 1

Qualifications Other Search Criteria

Type	Description	Importance	Years of Work Experience	Proficiency	Major	Search Also in Resume
1 Competency	Analytical thinking	Desired		3-Good		☒
2 Competency	Ability to manage own time	Desired		3-Good		☒
3 Competency	Understands decision process	Desired		3-Good		☒

Add Qualifications from Profile List Competency Tree

Keyword Search

Resource Group ID Add Resource Groups Candidates per Page 10

Qualifications 3 - Important Preferences 3 - Important

Availability 3 - Important Resume

Search

Search Results Personalize

Score	Avail.	Candidate	Type	Name	Per Status	Status	Phone	City	State	Distance	Pay Frequency	Branch	User ID
☐ Score	Avail.			Name									

☒ Select All ☐ Deselect All ☒ Add Selected ☒ from Search Results ☒ from Candidate Overview ☒ from Job Scorecard

Email Candidate Propose Candidate Add Agenda

Selected Candidates Personalize Find | View All First 1-2 of 2 Last

Type	Candidate ID	Name	Status	Offer Result	Telephone	Order Manager	Assign	Hire
☐ Employee	KUX135	Davis, Steven	Employee	Assigned				
☐ Employee	KUX137	Bookout, Ryan	Employee	Assigned				

☒ Select All ☐ Deselect All

Add Candidate to List Email Candidate Propose Candidate Add Agenda Refresh Personal Status

Add Agenda Add History Employee Feedback Customer Feedback Past Orders Add Contact

PeopleMatch searches are identical for temporary and career orders.

Note: You can search for applicants but you cannot create temporary assignments until the applicant is hired as an employee or non-employee. If you installed PeopleSoft Pay/Bill Management, the system sends a message to PeopleSoft HCM to retrieve an employee ID (EMPLID). Because a delay may occur in the time the databases receive and respond to the message, the employee record is set to pending within the PeopleMatch search results. Once you complete the hire process, the system changes the personnel status to *Employee* or *Non-Employee*. You can then complete the assignment process. Career assignments may be filled by either applicants or employees.

You must run the Index Creation process to incorporate any changes to employees and applicants that can affect matching.

PeopleMatch

Job Title

Enter the job title code that best describes the work to be performed by the candidate.

Note: The job title entered in this field is not used by the system as search criteria. To search based on job title, include this field in the PeopleMatch search configuration and enter the job title value as search criteria on the Configurable Fields tab.

Knowledge Level

Select a knowledge level required for the job title: *Advanced*, *Beginner*, *Intermed* (intermediate), or *Not Invest* (not investigated). The system does not use the information entered in this field as automatic search criteria.

The functionality of the buttons, fields, and destination pages on the Qualifications and Other Search Criteria tabs and in the Search Results group box is the same as those you use when adding customers to the system and when searching for applicants, employees, and contractors who possess particular qualifications.

See [PeopleSearch Page](#).

See "Adding General Customer Information" (PeopleSoft FSCM 9.2: Order to Cash Common Information).

Selected Candidates

This group box contains those candidates who are being considered for placement.

You can move resources to the Selected Candidates group box by:

- Selecting the check box to the left of the resource's name in the Search Results grid, and then clicking the Add Selected link.
- Adding an individual candidate who is not in the Search Results grid by inserting a row in the Selected Candidates group box using the Add Candidate to List button.
- Using the Job Scorecard page to view scoring information, selecting the candidate, selecting the From Scorecard check box, and then clicking the Add Selected link.
- Using the Candidate Overview page to view candidate information, selecting the candidate, selecting the From Candidate Overview check box, and then clicking the Add Selected link.

Type	Select <i>Appl</i> (applicant) or <i>Empl</i> (employee).
Candidate ID	Enter the candidate's applicant or employee ID.
Name	Displays the name of the candidate. Click a candidate name link in this column to access the Candidate Overview page. This page provides basic personal data about the candidate, as well as job-related information such as skills, references, and previous assignments. To view the candidate's resume, click View Resume. To view the candidate's employee data, click View Candidate Details.
Status	Indicates the resource's status if they are an applicant, or whether they are an employee or non-employee. The valid values are: <i>Active</i> , <i>Hire Pending</i> , <i>Invalid</i> , <i>Pending</i> , <i>Employee</i> , and <i>Non Employee</i> .
Offer Result	Displays the candidate's offer status for the resource request, such as <i>Considering</i> , <i>Declined</i> , <i>Other</i> , <i>Accepted</i> , or <i>Assigned</i> .
Telephone	Displays the candidate's main telephone number.
	Click the Go To Order Manager icon to make an offer, add and view agenda items, and add or view historic event information about the open order for a selected candidate.
	Click the Express Assignment icon to create an assignment for this candidate without using Order Manager.
	Click the Hire Candidate icon to hire an applicant before placing him or her on a temporary assignment. Only employees and non-employees can be placed in temporary assignments.
Considering	Select to consider this candidate. This field appears only if the customer has enabled RF event lists. Note: Once you select this check box, you cannot change it. In effect, you are adding the candidate to the Recruiting Funnel.
Disqualify	Select to disqualify this candidate from the job. This field appears only if the customer has enabled RF event lists. Note: For a candidate: If the Considering check box is deselected, then the Disqualify check box is read only and not selected. If you check the Considering check box, then the Disqualify check box is editable. If you select the Disqualify check box, then the Considering check box is read only.
Completed	Displays the number of completed events.

Note: The assignment event is not taken into account when calculating the number of completed events.

Email Candidate

Click this button to send an email to selected candidates in the Search Results group box.

Propose Candidate

Click this button to send an email to the contact about a candidate.

Add Agenda

Click the Add Agenda button to add a reminder in your agenda about a candidate.

Add Candidate to List

Click this button to add another row in the Selected Candidates group box.

Refresh Personal Status

Click this button to refresh the applicant and employee status. For example, let's say a candidate is an applicant and not an employee and you want to place the person in a temporary assignment. However, only employees and non-employees can be assigned to temporary orders (applicants cannot). Thus, even though you hire the person, that person still appears as an applicant. Clicking the Refresh Personal Status button will change the person's candidate type from Applicant to Employee and the Candidate ID from Applicant ID to Employee ID.

Related Links

[Review Agenda/History Page](#)

[Understanding the Search Framework](#)

Attachments Page

Use the Attachments page (FO_SO_ATTACH) to add and view attachments for orders.

Navigation

Staffing > Orders and Assignments > Add/Update Orders > Attachments

Image: Attachments page

This example illustrates the fields and controls on the Attachments page. You can find definitions for the fields and controls later on this page.

Order	Resource Request	Sales Tax	Billing	PeopleMatch	Attachments	History	Forms	Job Opening
PC Business Unit US004		Branch CA001		Order 0000000031		Order Type Staffing Temporary Order		
Attachments				Personalize Find View All 		First  1 of 1  Last		
Attachment Id	Attached File	*Attachment Type	Description	Add	View			
				Add	View	 		
Add Agenda	Add History	Employee Feedback	Customer Feedback	Past Orders	Add Contact			

Attachment ID	Displays the ID that the system automatically derived for the file attachment.
Attached File	Displays the name of the file attached to the order.
Attachment Type	Attachment types are defined through system configuration. Attachments can include resumes, letters of reference, order-related documents, notes related to the order, signed fee schedules, and so on. Enter the type that best categorizes the file attachment.
Description	Enter a description indicating the contents of the file attachment.
Add and View	Click the respective buttons to add the Attachment to the order, or to view the attachment. If you click Add, you can then browse, open, and upload an attachment to add to the order.

History Page

Use the History page (FO_ORDER_HISTORY) to view history items associated with the job order.

Navigation

Staffing > Orders and Assignments > Add/Update Orders > History

Note: This page displays all history items that reference this job order. If no history items were added for the order, the History Transactions group box will not have data.

Change Tracking Details	Click this link to view and enter change tracking details for billing, service order priority, and service order status information.
--------------------------------	--

To access the Order History Detail page and view additional detail for a particular transaction, click the View History link associated with the item.

Order – Change Tracking Page

Use the Order - Change Tracking page (FO_SO_HIST_SEC) to view and enter changes related to billing comments, service order priority, and service order status.

Navigation

Click the Change Tracking Details link on the History page.

Image: Order – Change Tracking Page

This example illustrates the fields and controls on the Order – Change Tracking Page. You can find definitions for the fields and controls later on this page.

Change Tracking

Comments/Billing Information

Last Upd DtTm	Name	Comments
05/31/2006 10:35:55AM	Monroe,Theresa	

Order Priority

Last Upd DtTm	Name	Priority	Description
05/31/2006 10:38:58AM	Monroe,Theresa	HIGH	

Order Status

Last Upd DtTm	Name	Order Status	Description
05/31/2006 10:38:58AM	Monroe,Theresa	Draft	

OK Cancel

Forms Page

Use the Forms page (FO_SO_TEMPLTS) to view a list of the forms associated with the order, drill down to the form details, and associate a new form with the order.

Navigation

Staffing > Orders and Assignments > Add/Update Orders > Forms

Image: Forms page

This example illustrates the fields and controls on the Forms page. You can find definitions for the fields and controls later on this page.

Order | Resource Request | Sales Tax | Billing | PeopleMatch | Attachments | History | **Forms** | Job Opening

PC Business Unit US004 Branch CA001 Order 0000000031 Order Type Staffing Temporary Order

Forms Personalize | Find | First 1 of 1 Last

Form Code	Description	View Form
		View Form

Add New Form

Add Agenda Add History Employee Feedback Customer Feedback Past Orders Add Contact

Add New Form

Click this button to add a new form to the order.

Form Type

The system provides the value of *ORDR* (order form) by default in this field.

Form Code

In the Form Details group box, enter the specific template that you want to use.

The system re-displays the page with a set of fields that you can then complete. Each template has a different set of questions or fields. Your organization decides what information should be contained in these forms.

Note: Your implementation team sets up forms during implementation of the system. To make any changes to the list of available forms or to the content of the forms, contact your system administrator.

Sequence	Displays the sequence number that the system associates with each form added to the job order.
Insert Row	Click this button to add another form having the same form code but a different sequence number.
Form Summary	Click this link to view a summary of the forms added to your job order.
View Form	Click this link to view details of a particular form attached to the order.

Form Details Page

Use the Forms page (FO_SO_TMPLT_DTL) to enter details for the order forms.

Navigation

Click the Add New Form button or a View Form link on the Forms page.

Job Opening Page

Use the Job Opening page (FO_ORDER_JOBOPEN) to publish individual job postings to internal and external job boards. This page can be created from a resource request.

Navigation

Staffing > Orders and Assignments > Add/Update Orders > Select the Job Opening tab.

Image: Job Opening page

This example illustrates the fields and controls on the Job Opening page. You can find definitions for the fields and controls later on this page.

The screenshot displays the 'Job Opening' page within a web application. The top navigation bar includes tabs for Order, Resource Request, Sales Tax, Billing, PeopleMatch, Attachments, History, Forms, and Job Opening. The main header shows 'PC Business Unit US004', 'Branch CA001', 'Order 0000000030', and 'Order Type Staffing Temporary Order'.

The 'Resource Request' section is active, showing 'Line Number 1' and 'Date Opened 05/31/2006'. It includes a 'Workspace Customer' box with details: 'Customer ID 0000050035', 'Location 1', 'Staffing Customer', '2201 Main St.', 'Pleasanton, CA 94588', and 'USA'. To the right, 'Requisition Status' is 'Unfilled', 'Report To' is '46 Mark Hegenberger', 'Description' is 'Accounting Clerk', 'Job Code' is '290000 Clerk', 'Job Supplement' is 'CLERICAL JOBS', 'Quantity Requested' is '3', 'Assigned' is '0', and 'Quantity Needed' is '3'.

The 'Job Opening' section is also active, showing 'Job Opening Line 1' and 'Job Opening ID'. It includes fields for 'Job Status' (Draft), 'Position Title', 'Industry', 'Start Date', 'Last End Date', 'Posted' (10/22/2012), and 'Job Description'. There are also fields for 'Contact Method' (Apply Online URL), 'Full/Part-Time', 'Shift', 'Salary Range', 'Maximum Salary', and 'Pay Rate'. A 'Load Default Values' button is present. At the bottom, there is an 'Action' dropdown set to 'Publish' and a 'Publish' button.

The bottom of the page features a navigation bar with links: Add Agenda, Add History, Employee Feedback, Customer Feedback, Past Orders, and Add Contact.

Job Opening

The fields in this section reflect the fields that may appear on a job board. Multiple job openings can be created for the order using the *add a new row* icon.

Job Status

Select an option that reflected where this job opening is in the posting process. Values include:

- *Draft*: Save action will only store the Job Posting.
- *Published*: Save action will publish the Job Posting to the internal and external job boards.
- *Removed*: Save action will remove the existing job posting from the internal and external job boards.

Load Default Values

The existing Job Order structure will be used to leverage the Job Opening information. When the "Load Default Values" button is

clicked, the following structure of pages will be used to extract the information needed for the Job Opening page.

Shift	Enter free text that defines whether the opening is for a specific shift, such as a night shift or a day shift. This information is used when publishing additional information for the job opening.
Confidential Order	Select to indicate to the job board distributor that the customer info should not be displayed when posting the job.
Position Title	This field is populated by default from the job code description entered on the Resource Request page when you click the Load Default Values button.
Industry	This field is populated by default from the industry value entered on the Job Order header when you click the Load Default Values button.
Start Date	This field is populated by default from the start date entered on the Resource Request page when you click the Load Default Values button.
Last End Date	This field is populated by default from the end date entered on the Resource Request page when you click the Load Default Values button.
Posted	This field is automatically populated when the user clicks the Publish button or selects a job status of <i>Published</i> and clicks the Save button.
Contact Method	Select the contact method candidates should use for responding to this job opening. Select <i>Apply Online URL</i> , <i>Email</i> , <i>In-Person</i> , <i>In-Writing</i> , <i>Telephone Call</i> , or <i>Verbal</i> .
Load Default Values	The existing Job Order structure will be used to leverage the Job Opening information. When the “Load Default Values” button is clicked, the following structure of pages will be used to extract the information needed for the Job Opening page
Full/Part-Time	Select a value to be used when posting to job boards. Select either <i>Either</i> , <i>Full-Time</i> , or <i>Part-Time</i> .
Shift	Enter the shift that the candidate would work.
Job Description	Enter a description to be used when posting to job boards. This field is automatically populated from filters for the defined in PeopleMatch when the Load Default Values button is clicked. The importance and years of experience are also brought and arranged into the description
Long Description	If the Job Board Distributor allows, this field can be used to publish a Job Opening to social networking sites.

The short description can be used for social networking. The long description is used when publishing to job boards.

Action

Select one of these options:

Delete – Use this option after a job posting is published. If you want to remove the posting, this option submits a deletion request to the job board distributor for all job boards. This option automatically deletes the posting on internal job boards.

Publish – Use this option to publish a job posting to a job board distributor. This option automatically adds the job posting to internal job boards.

Update – Use this option after a job posting is published. If you want to update a posting, this option submits an update request to the job board distributor for all job boards. This option automatically updates the posting on internal job boards.

The fields that can be updated or changed on a job posting are:

- Industry
- Position Title
- Contact Method
- Job Status
- Salary Range or Pay Rate
- Job Description
- Long Job Description
- Start Date
- Last End Date
- Posted

Publish

Click to publish this job posting to the job board distributor. The job board distributor is defined on the Installation Options – Staffing page.

This button is active only when the Job Board Distributor Provider check box is selected and a Job Board Distributor is selected on the Installation Options – Staffing Installation page.

See [Understanding the Job Posting Process](#).

Save

Click this button to save the job opening and publish it to your internal job board.

If the Job Board Distributor Provider check box is selected and a Job Board Distributor is selected on the Installation Options

– Staffing Installation page, the system also publishes the job opening to the external distributor.

Salary Range

Use this section to enter a salary range for career orders and enter a pay rate for temporary orders.

Salary Range

If the order type is Career, this field is available.

If the order type is Temporary, this field is not available.

Pay Rate

If the order type is Career, this field is not available.

If the order type is Temporary, this field is available.

Maximum Salary

If the order type is Career, this field is available.

If the order type is Temporary, this field is not available.

Links

Add Agenda

Click to access the Agenda Detail page where you can add an agenda item.

Add History

Click to access the Staffing FO History page where you can add a history items.

Employee Feedback

Click to access the Provide Employee Feedback page where you can register employee feedback.

Customer Feedback

Click to access the Customer Feedback page where you can register customer feedback.

Past Orders

Click to access the Past Orders page for the business unit, branch, and customer ID.

Add Contact

Click to access the Contact Information – Maintain Contacts page where you can add a new contact.

Viewing Recruiting Funnel Summaries

Pages used to View Recruiting Funnel Summaries

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
<u>Resource Request Page</u>	FO_FUN_MAIN	View a summary of the resource request.
<u>Event Summary Page</u>	FO_FUN_EVT	View event summary information.

Page Name	Definition Name	Usage
<u>Candidate Summary Page</u>	FO_FUN_CAN	View a grid of candidate summary event statuses.
<u>Mass Update Page</u>	FO_RF_MASS	Update multiple statuses on one candidate or on multiple candidate's records.
<u>Applicant Overview Page</u>	FO_APPL_OVW	View overview information on selected applicants.
<u>Employee Overview Page</u>	FO_EMPL_OVW	View overview information on selected employees.
<u>Recruiting Funnel by Customer - Resource Request</u>	FO_FUN_MAIN2	View a summary of resource requests for one customer.
<u>Recruiting Funnel By Customer - Event Summary Page</u>	FO_FUN_EVT2	View how many candidates are in each status of an event, for all orders and resource requests, for one customer. The event is displayed in the event type column.
<u>Recruiting Funnel By Customer – Candidate Summary Page</u>	FO_FUN_CAN2	Review the candidate's statuses for any event for a single customer's orders and resource requests.
<u>Recruiting Funnel by Contact - Resource Request</u>	FO_FUN_MAIN3	View a summary of resource requests for one contact.
<u>Recruiting Funnel By Contact – Event Summary Page</u>	FO_FUN_EVT3	View of all events for this service order for a specific contact.
<u>Recruiting Funnel By Contact – Candidate Summary Page</u>	FO_FUN_CAN3	Review the candidate's statuses for any event for a single contact's orders and resource requests.

Understanding How to Set Up the Recruiting Funnel

In order to use the Recruiting Funnel, you must set up the system to do so. These are the options that you must set up:

- Select at least one field to update on the Customer Event List page; doing so enables the Recruiting Funnel. See the "Default Customer Event Lists Page" (PeopleSoft FSCM 9.2: Order to Cash Common Information).
- (Optional) Select the check box "Allow Recruiting Funnel List" option on the Default Customer Event List page. See "Default Customer Event Lists Page" (PeopleSoft FSCM 9.2: Order to Cash Common Information) This option enables the user, when creating a new order, to select an event list that is not the default.
- Attach the appropriate event list to the order on the Order page. See Order Page.

Note: If the option “Allow Recruiting Funnel List” is not checked, then users will not be able to attach an event list to the order, they must accept the default event list. In this case the event list field in the order will be read only.

- Set the order status to “unfilled” on the Order page.
- Assign at least one candidate to the resource request and mark the candidate as “considering” on the PeopleMatch page. See [PeopleMatch Page](#).

Resource Request Page

Use the Resource Request Summary page (FO_FUN_MAIN) to view a summary of the resource request.

Navigation

Staffing > Recruiting Funnel > Recruiting Funnel Summaries.

If an order is eligible to use the Recruiting Funnel process, this page will be available.

Image: Resource Request page - Resource Request Summary tab

This example illustrates the fields and controls on the Resource Request page - Resource Request Summary tab. You can find definitions for the fields and controls later on this page.

Resource Request

Event Summary

Candidate Summary

Service Order ID 0000000040

Customer Mercy Medical Center of Pleasanton

Resource Request Summary ?

Personalize | Find |  

First 1-2 of 2 Last

Resource Request Summary

Contact Details 

	Line	Requested	Considering	Assigned	Needed	Pay Rate	Bill Rate	Job Title	Start Date
☒	1	3	4	2	1	30.00	36.00	Nurse-Hea	09/01/2012
☐	2	8	3	1	7	25.00	30.00	Nurse-Reg	09/01/2012

Select All

Deselect All

Event Summary

Resource Request Summary

Line	Displays the line number of the resource request.
Requested	Displays the number of resources who were requested to fulfill the resource request.
Considering	Displays the number of resources marked as “considering” in the peplematch page of the order component.
Assigned	Displays the number of resources for whom assignments were created.
Needed	Displays the difference between the quantity of resources requested and the number of active assignments. It corresponds

to the number of assignments that still need to be created to fill the request.

Pay Rate

Displays the pay rate from the Billing page on the order.

Bill Rate

Displays the bill rate from the Billing page on the order.

Job Title

Displays the job title from the order.

Start Date

Displays the start date from the order.

Contact Details

Image: Resource Request page - Contact Details tab

This example illustrates the fields and controls on the Resource Request page - Contact Details tab. You can find definitions for the fields and controls later on this page.

Resource Request

Service Order ID 0000000040 Customer Mercy Medical Center of Pleasanton

Resource Request Summary ? Personalize | Find | 1-2 of 2 First Last

Resource Request Summary Contact Details

	Line	Address	City	State	Country	Contact
☐	1	1800 Santa Rita Rd	Pleasanton	CA	USA	Maurice Jenkins
☐	2	1800 Santa Rita Rd	Pleasanton	CA	USA	Maurice Jenkins

Select All Deselect All Event Summary

Address, City, State, and Country

Displays the address information of the customer on the order.

Contact

Displays the contact information from the order.

Event Summary Page

Use the Event Summary page (FO_FUN_EVT) to view details about all of the events for this request.

Navigation

From the Resource Request page, select one of the candidates and click the Event Summary button.

Image: Event Summary page

This example illustrates the fields and controls on the Event Summary page. You can find definitions for the fields and controls later on this page.

Resource Request | **Event Summary**

Service Order ID 0000000037 Customer Mercy Medical Center of Pleasanton

Event Summary ? Personalize | Find | [?] | [] First 1-5 of 5 Last

	Line	Event Type	Event Description	Completed	Pending	In Progress	Partially Complete
☐	1	BCKGRND	Background Check	4	2	0	1
☐	1	CALL	Call	0	7	0	0
☐	1	HIPDB	Healthcare Integrity&Protect.	0	3	4	0
☐	1	INT	Interview	5	1	1	0
☐	1	OFFER	Offer Letter	0	7	0	0

Select All Deselect All

Show Candidates Currently at Selected Events Show All Candidates

Only the selected order lines from the previous page will appear here.

The event summary only summarizes main events.

Event Type

Displays the event type from the event.

Event Description

Displays the event description from the event.

Completed

Displays the number of candidates for which this particular event has a status equal to complete.

Pending

Displays the number of candidates for which this particular event has a status equal to pending.

In Progress

Displays the number of candidates for which this particular event has a status equal to in progress.

Partially Complete

Displays the number of candidates for which this particular event has a status equal to partially complete.

Show Candidates Currently at Selected Events

This option will show only candidates whose current event is the selected one. Within the Recruiting Funnel process, a candidate may have a current event. This option forces the next page (Candidate Summary) to show only the candidates whose current event matches the selected event.

Show All Candidates

Click this button to show all candidates at any event.

Candidate Summary Page

Use the Candidate Summary page (FO_FUN_CAN) to view a grid of candidate summary event statuses.

Navigation

Select one of the candidates on the Event Summary page and click the Show Candidates Currently at Selected Events button or click the Show All Candidates button.

Image: Candidate Summary page

This example illustrates the fields and controls on the Candidate Summary page. You can find definitions for the fields and controls later on this page.

Resource Request

Event Summary

Candidate Summary

Order ID: 0000000040

Customer: Mercy Medical Center of Pleasanton

Show Disqualified

Candidate Summary

Line	Candidate Name	Contact	Current Event	INT	BCKGRND	HIPDB	CALL	OFFER	Disqualify	Job Title	Start Date	Address	City	State	Country
☐	1	Quennie Reynolds	Maurice Jenkins		☐	☐	☐	☐	☐	☐	Nurse-Hca	09/01/2012	1800 Santa Rita Rd	Pleasanton	CA USA
☐	1	Steven Davis	Maurice Jenkins		☐	☐	☐	☐	☐	☐	Nurse-Hca	09/01/2012	1800 Santa Rita Rd	Pleasanton	CA USA
☐	1	Eric Gonzales	Maurice Jenkins		☐	☐	☐	☐	☐	☐	Nurse-Hca	09/01/2012	1800 Santa Rita Rd	Pleasanton	CA USA
☐	1	Orlando Neri	Maurice Jenkins		☐	☐	☐	☐	☐	☐	Nurse-Hca	09/01/2012	1800 Santa Rita Rd	Pleasanton	CA USA

Select All

Deselect All

Mass Update Candidates

Legend

☒ Completed

☐ No Event Entry

☐ INT

Interview

☒ In Progress

☒ Hire Event

☐ BCKGRND

Background Check

☐ Pending

☐ Assignment Event

☐ HIPDB

Healthcare Integrity&Protect.

☒ Partially Complete

☐ CALL

Call

☐ OFFER

Offer Letter

Once a candidate is assigned to the order they will no longer appear in this grid. Their count will display on the Resource Request Summary grid.

From this page, you can automatically create an assignment or hire an applicant by clicking the appropriate buttons (such as “ASGN” for an assignment or “HIRE” for a hire.)

Note: Users can setup a special event for hire and a special event for assignment (installation options), such as “ASGN” and “HIRE”. Once users click an event that has been referenced via installation as a hire or as an assignment event, then the hire or assignment component is invoked. See "Installation Options - Staffing Installation Page" (PeopleSoft FSCM 9.2: Application Fundamentals)

Note: The event list determines which options you see on this screen such as “INT”, “CALL”, “ASGN”, and “HIRE”.

Show Disqualified

Click this button to display also the candidates that have been disqualified.

Candidate Name

Click a candidate name to access the Applicant Overview page.

Contact

Click a contact name to view or update contact information.

INT

Click this button to display or update the Recruiting Funnel information the INT event in the unified Agenda page.

BCKGRND

Click this button to display or update the Recruiting Funnel information for the BCKGRND event in the unified Agenda page.

HIPDB

Click this button to display or update the Recruiting Funnel information for the HIPDB event in the unified Agenda page.

CALL

Click this button to display or update the Recruiting Funnel information for the CALL event in the unified Agenda page.

OFFER	Click this button to display or update the Recruiting Funnel information for the OFFER event in the unified Agenda page.
ASGN	Click this button to access the Assignment Header page to complete the assignment. See "Installation Options - Staffing Installation Page" (PeopleSoft FSCM 9.2: Application Fundamentals).
Hire	Click this button to access the Applicant – Contact Information page to complete the hire. See "Installation Options - Staffing Installation Page" (PeopleSoft FSCM 9.2: Application Fundamentals).
Disqualify	Select this check box to disqualify the candidate from consideration. This action moves the row to the bottom of the grid and the row becomes read-only except for the disqualify option. Deselect the check box to re-qualify the candidate. This action returns the row to its former place and makes the row editable again.
Job Title, Start Date, Address, City, State, Country	Displays these values from the resource request.
Mass Update Candidates	Select at least one candidate and click this button to update multiple statuses at once.

Note: The columns that represent events on this page differ depending upon the event being displayed.

Note: If force dependency is selected on the job order, the status icons are only clickable when the previous event is complete

Mass Update Page

Use the Mass Update page (FO_RF_MASS) to update multiple statuses on one candidate's or on multiple candidates' records.

Navigation

Select one or more candidates and click the Mass Update Candidates button.

Image: Mass Update Page

This example illustrates the fields and controls on the Mass Update Page. You can find definitions for the fields and controls later on this page.

The screenshot shows the 'Mass Update' page. At the top, there is a 'Date' field set to '12/17/2015' and a 'Notes' text area. Below these is a table titled 'Event List Items'. The table has columns for 'Event', 'Description', 'Sub Event', 'Description', 'Current Status', 'Status', and 'Notes'. The table contains several rows of data, including 'INT' (Interview), 'BCKGRND' (Background Check), 'DRUG' (Drug Screening), 'CREDIT' (Credit Check), 'CRIME' (Criminal Check), 'PROF' (Professional License Check), 'REFER' (Reference Check), 'ACAD' (Academic Check), 'PHONE' (Phone Screening), 'HIPDB' (Healthcare Integrity&Protect.), 'CALL' (Call), and 'OFFER' (Offer Letter). Each row has a 'Current Status' and a 'Status' dropdown menu.

Event	Description	Sub Event	Description	Current Status	Status	Notes
1 INT	Interview			In Progress	In Progress	
2 BCKGRND	Background Check			Pending	Pending	
BCKGRND	Background Check	DRUG	Drug Screening	Pending	Pending	
BCKGRND	Background Check	CREDIT	Credit Check	Pending	Pending	
BCKGRND	Background Check	CRIME	Criminal Check	Pending	Pending	
BCKGRND	Background Check	PROF	Professional License Check	Pending	Pending	
BCKGRND	Background Check	REFER	Reference Check	Pending	Pending	
BCKGRND	Background Check	ACAD	Academic Check	Pending	Pending	
BCKGRND	Background Check	PHONE	Phone Screening	Pending	Pending	
3 HIPDB	Healthcare Integrity&Protect.			Pending		
4 CALL	Call			Pending		
5 OFFER	Offer Letter			Pending		

Date

The system automatically displays the current date by default.

Notes

Enter free form text to provide details for the change.

The text entered in this box is considered only if there is no text (or notes) entered in the Notes column for the individual events. This note reflects on all the individual events for which an action was taken using the Status column.

Current Status

Displays the present status of the individual event or sub events.

Note: The Mass Update page displays the Current Status column only if a single candidate is selected from the Candidate Summary page. If two or more candidates are selected, the Current Status column is not displayed.

Status

Select an option of (blank), Completed, In Progress, or Pending.

Notes

Enter free form text to provide details for the individual event or sub event items. This Notes column is available only when you select an option from the Status column.

Any notes entered against the individual events is preferred over the notes entered in the Notes box located outside the grid (header level).

If you change a process event status, then the system also changes the related sub event statuses for all selected candidates. The system displays a warning message regarding this change.

Note: The system applies logic to the event statuses in this way if the updates are to sub events:

- If all sub events are at an “in progress” status, then the system sets the process event to “in progress”.
- If all sub events are at a “completed” status, then the system sets the process event to “completed”.

- If all sub events are at a “pending” status, then the system sets the process event to “pending”.
- If at least one sub event is at an “in progress” status, then the system sets the process event to “in progress”.

Note: If some subevents are complete, but not all, and if there is no “in progress” sub event, then the process event is “partially complete”.

Applicant Overview Page

Use the Applicant Overview page (FO_APPL_OVW) to review details about the applicant’s statuses, orders, qualifications, availability, competencies, references, job titles, and history.

Navigation

From the Recruiting Funnel Summaries page, click the Candidate Name link.

Note: If the candidate is an applicant, the Applicant Overview page appears. If the candidate is an employee, the Employee Overview page appears.

See [Applicant Overview Page](#).

Image: Applicant Overview page (1 of 2)

This example illustrates the fields and controls on the Applicant Overview page (1 of 2). You can find definitions for the fields and controls later on this page.

Applicant Overview

App ID 0000000011

Name Gonzales, Eric [Other Phone Numbers](#) [Other E-mail Addresses](#) [View Resume Text](#) [View Notes](#)

Order Summary

Filter Option Filter Criteria

Start Date End Date

Status Information

Under consideration
Assignment
Recently Applied
Current Status

Order Details [Personalize](#) [Find](#) [View All](#) [First](#) 1-3 of 6 [Last](#)

Main **Others** [PDF](#)

	Status	Order Number	Line	Customer Name	Assignment ID	Job Code	Current Event	Start Date	End Date	End Reason
1		0000000037	1	Mercy Medical Center of Pleasanton	No Assignment ID	660005	Background Check	12/01/2012	12/31/2013	
2		0000000038	1	Delta Systems	No Assignment ID	140080	Basic Background Check	09/01/2012	10/15/2014	
3		0000000039	1	Mercy Medical Center of Pleasanton	No Assignment ID	660005	Background Check	01/01/2013	12/31/2014	

Image: Applicant Overview page (2 of 2)

This example illustrates the fields and controls on the Applicant Overview page (2 of 2). You can find definitions for the fields and controls later on this page.

Qualification Details

Availability
View All
First 1 of 1 Last

Placement Desire Temp
Annual Salary
Desired Hours Per Week

Full/Part-Time
☐ Willing to Commute
☐ Willing to Travel

Competencies
Personalize | View All | First 1 of 1 Last

Description	Rel Work Exper	Proficiency

Tests
Personalize | View All | First 1 of 1 Last

Description	Test Date	Test Score	Passed
			N

References
Personalize | View All | First 1 of 1 Last

Employer	Reference Name	Title	Telephone	Reference Check By	Date Contacted

Job Titles
Personalize | View All | First 1 of 1 Last

Description

Lines of Business
Personalize | View All | First 1 of 1 Last

Description

History Details
Personalize | Find | View All | First 1-3 of 64 Last

User ID	Description	Customer Name	Contact Name	Date	Actual End Date	Order	Line	
SAMPLE	Interview	Delta Systems	Susan Miller	09/14/2009		RF03	1	
SAMPLE	Basic Background Check	Delta Systems	Susan Miller	09/14/2009		RF03	1	
SAMPLE	Basic Background Check	Delta Systems	Susan Miller	09/14/2009		RF03	1	

Return to Recruiting Funnel Summaries

Filter Option

Select a filter option to narrow the information displayed.

Filter Criteria

Select a filter option first, then select a value to further narrow the information displayed.

Employee Overview Page

Use the Employee Overview page (FO_EMPL_OVW) to review details about the employee's statuses, orders, qualifications, availability, competencies, references, job titles, and history.

Navigation

From the Recruiting Funnel Summaries page, click the Candidate Name link.

Note: If the candidate is an employee, the Employee Overview page appears. If the candidate is an applicant, the Applicant Overview page appears.

See [Employee Overview Page](#).

Recruiting Funnel by Customer - Resource Request

Use the Resource Request page (FO_FUN_MAIN2) to review all resource requests for a single customer on one page.

Navigation

Staffing > Recruiting Funnel > Recruiting Funnel by Customer.

Image: Recruiting Funnel By Customer - Resource Request Page

This example illustrates the fields and controls on the Recruiting Funnel By Customer - Resource Request Page. You can find definitions for the fields and controls later on this page.

Resource Request

Customer ID 0000050037

Mercy Medical Center of Pleasanton

Resource Request Summary ?

Personalize | Find | 1-10 of 10 | Last

Resource Request Summary | Contact Details

Business Unit	Order ID	Resource Request Description	Line	Quantity Requested	Considering	Assigned	Needed	Pay Rate	Bill Rate	Job Title	Description	Start Date
☐ US004	0000000037	New Hospital Ward	1	8	7	0	8	30.00	36.00	Nurse-Hea	Nurse-Head	12/01/2012
☐ US004	0000000037	New Hospital Ward	2	15	6	0	15	25.00	30.00	Nurse-Reg	Nurse-Registered	12/01/2012
☐ US004	0000000039	Pediatrics Ward	1	3	3	0	3	30.00	36.00	Nurse-Hea	Nurse-Head (Pediatrics)	01/01/2013
☐ US004	0000000039	Pediatrics Ward	2	8	1	0	8	25.00	30.00	Nurse-Reg	Nurse-Registered (Pediatrics)	01/01/2013
☐ US004	0000000040	Orthopedics Ward	1	3	4	2	1	30.00	36.00	Nurse-Hea	Nurse-Head (Orthopedics)	09/01/2012
☐ US004	0000000040	Orthopedics Ward	2	8	3	1	7	25.00	30.00	Nurse-Reg	Nurse-Registered (Orthopedics)	09/01/2012
☐ US004	RF01	RF Nurses	1	4	5	0	4	25.00	30.00	Nurse-Reg		11/16/2008
☐ US004	RF01	RF Nurses	2	2	3	0	2	34.00	40.80	Nurse-Hea		11/16/2008
☐ US004	RF01	RF Nurses	3	2	2	0	2	32.00	42.00	Registere		11/16/2008
☐ US004	RF02	RF Doctors	1	2	2	0	2	0.00	0.00	Medical D	General Practitioner	10/05/2008

Select All

Deselect All

Event Summary

Order ID

Displays the order identification for all orders pertaining to the customer.

For a description of the other fields, see [Resource Request Page](#)

Recruiting Funnel By Customer - Event Summary Page

Use the Recruiting Funnel By Customer - Event Summary Page (FO_FUN_EVT2) to display how many candidates are in each status of an event, for all orders and resource requests for one customer.

Navigation

Staffing > Recruiting Funnel > Recruiting Funnel By Customer. From the Resource Request page, select one or more of the orders and click the Event Summary button.

Note: The event is displayed in the event type column. Event types are grouped into event lists and event lists are attached to an order or resource request.

Image: Recruiting Funnel By Customer - Event Summary Page

This example illustrates the fields and controls on the Recruiting Funnel By Customer - Event Summary Page. You can find definitions for the fields and controls later on this page.

Resource Request

Event Summary

Customer ID 0000050037

Mercy Medical Center of Pleasanton

Event Summary

Personalize

Find

First 1-5 of 5 Last

	Business Unit	Service Order ID	Line Number	Event Type	Event Description	Completed	Pending	In Progress	Partially Complete
☐	US004	0000000039	1	BCKGRND	Background Check	0	3	0	
☐	US004	0000000039	1	CALL	Call	0	3	0	
☐	US004	0000000039	1	HIPDB	Healthcare Integrity&Protect.	0	3	0	
☐	US004	0000000039	1	INT	Interview	0	3	0	
☐	US004	0000000039	1	OFFER	Offer Letter	0	3	0	

Select All

Deselect All

Show Candidates Currently at Selected Events

Show All Candidates

Business Unit Displays the business unit associated with the order.

Service Order ID Displays the order number.

For a list of field descriptions, see [Event Summary Page](#)

Recruiting Funnel By Customer – Candidate Summary Page

Use the Recruiting Funnel By Customer – Candidate Summary page (FO_FUN_CAN2) to review the candidate's statuses for any event for a single customer's orders and resource requests.

Navigation

From the Event Summary page, select one or more of the events and click the Show Candidates at Selected Events button or click the Show All Candidates button.

Image: Recruiting Funnel By Customer – Candidate Summary Page

This example illustrates the fields and controls on the Recruiting Funnel By Customer – Candidate Summary Page. You can find definitions for the fields and controls later on this page.

Resource Request		Event Summary		Candidate Summary	
Customer ID 0000050037		Mercy Medical Center of Pleasanton		☐ Show Disqualified	
Business Unit US004		Order ID 0000000039			
▶ Candidate Summary					
▼ Legend					
✓ Completed		□ No Event Entry			
● In Progress		👤 Hire Event			
○ Pending		👤 Assignment Event			
📌 Partially Complete					

Recruiting Funnel by Contact - Resource Request

Use the Resource Request page to review all resource requests for a single contact on one page.

Navigation

Staffing > Recruiting Funnel > Recruiting Funnel by Contact.

Image: Recruiting Funnel by Contact - Resource Request

This example illustrates the fields and controls on the Recruiting Funnel by Contact - Resource Request. You can find definitions for the fields and controls later on this page.

Resource Request

Contact 0037Maurice Jenkins

Resource Request Summary

Personalize | Find | 1-10 of 10 | Last

Resource Request Summary

Contact Details

	Business Unit	Order ID	Resource Request Description	Line Number	Quantity Requested	Considering	Assigned	Needed	Pay Rate	Bill Rate	Job Title Code	Description	Start
☐	US004	0000000037	New Hospital Ward	1	8	7	0	8	30.00	36.00	Nurse-Hea	Nurse-Head	12/01
☐	US004	0000000037	New Hospital Ward	2	15	6	0	15	0.000000	0.000000	Nurse-Reg	Nurse-Registered	12/01
☐	US004	0000000039	Pediatrics Ward	1	3	3	0	3	0.000000	0.000000	Nurse-Hea	Nurse-Head (Pediatrics)	01/01
☐	US004	0000000039	Pediatrics Ward	2	8	1	0	8	0.000000	0.000000	Nurse-Reg	Nurse-Registered (Pediatrics)	01/01
☐	US004	0000000040	Orthopedics Ward	1	3	4	2	1	0.000000	0.000000	Nurse-Hea	Nurse-Head (Orthopedics)	09/01
☐	US004	0000000040	Orthopedics Ward	2	8	3	1	7	0.000000	0.000000	Nurse-Reg	Nurse-Registered (Orthopedics)	09/01
☐	US004	RF01	RF Nurses	1	4	5	0	4	0.000000	0.000000	Nurse-Reg		11/16
☐	US004	RF01	RF Nurses	2	2	3	0	2	0.000000	0.000000	Nurse-Hea		11/16
☐	US004	RF01	RF Nurses	3	2	2	0	2	0.000000	0.000000	Registere		11/16
☐	US004	RF02	RF Doctors	1	2	2	0	2	0.000000	0.000000	Medical D	General Practitioner	10/05

<

Order ID

Displays the order identification for all orders pertaining to the customer.

For a description of the other fields, see [Resource Request Page](#)

Recruiting Funnel By Contact – Event Summary Page

Use the Recruiting Funnel By Contact – Event Summary page (FO_FUN_EVT3) to review all events for this service order for a specific contact. This page also provides a count of the tasks that have been, or need to be, completed.

Navigation

Staffing > Recruiting Funnel > Recruiting Funnel By Contact. On the Resource Request page, select one or more of the orders and click the Event Summary button.

Image: Recruiting Funnel By Contact – Event Summary Page

This example illustrates the fields and controls on the Recruiting Funnel By Contact – Event Summary Page. You can find definitions for the fields and controls later on this page.

Resource Request

Event Summary

Contact 0037

Maurice Jenkins

Event Summary ?

Personalize | Find | |

First 1-5 of 5 Last

	Business Unit	Service Order ID	Line Number	Event Type	Event Description	Completed	Pending	In Progress	Partially Complete
☐	US004	0000000037	1	BCKGRND	Background Check	4	2	0	
☐	US004	0000000037	1	CALL	Call	0	7	0	
☐	US004	0000000037	1	OFFER	Offer Letter	0	7	0	
☐	US004	0000000037	1	INT	Interview	5	1	1	
☐	US004	0000000037	1	HIPDB	Healthcare Integrity&Protect.	0	3	4	

Select All

Deselect All

Show Candidates Currently at Selected Events

Show All Candidates

For a full list of field descriptions, see [Event Summary Page](#)

Recruiting Funnel By Contact – Candidate Summary Page

Use the Recruiting Funnel By Contact – Candidate Summary page to (FO_FUN_CAN3) to review the candidate's statuses for any event for a single contact's orders and resource requests.

Navigation

From the Event Summary page, select one or more of the events and click the Show Candidates at Selected Events button or click the Show All Candidates button.

Image: Recruiting Funnel By Contact – Candidate Summary Page

This example illustrates the fields and controls on the Recruiting Funnel By Contact – Candidate Summary Page. You can find definitions for the fields and controls later on this page.

Resource Request

Event Summary

Candidate Summary

Contact 0037

Maurice Jenkins

☐ Show Disqualified

Business Unit US004

Order ID 0000000037

Candidate Summary

Legend

 Completed

 In Progress

 Pending

 Partially Complete

 No Event Entry

 Hire Event

 Assignment Event

Making and Scheduling Offers to Candidates

The assignment process involves selecting a candidate from your PeopleMatch results, offering him or her the position defined on the resource request, and the candidate accepting the offer. The Candidate Events page details the agenda items associated with the offer, including the date and time the offer was extended as well as when it was accepted or rejected. The Contact Events page details the agenda items associated with the acceptance as they relate to the order contact person. The information on this page is display-only.

Pages Used to Enter Event Information and Make Offers

Page Name	Definition Name	Usage
<u>Candidate Events Page</u>	FO_ORDR_MGR_CNDTE	Review and enter candidate information related to an open job order.
<u>Candidate Overview Page</u>	FO_EMPL_OVW	View a candidate's personal data and job related information.
<u>Make Offer to Candidate Page</u>	FO_MAKE_OFFER	Make an offer to a candidate.
<u>Contact Events Page</u>	FO_ORDR_MGR_CNTCT	Review contact information related to an open job order.

Candidate Events Page

Use the Candidate Events page (FO_ORDR_MGR_CNDTE) to review and enter candidate information related to an open job order.

Navigation

Click the Order Manager button on the PeopleMatch page.

Image: Candidate Events Page

This example illustrates the fields and controls on the Candidate Events page. You can find definitions for the fields and controls later on this page.

Candidate Events

Contact Events

Branch

CA001

Order

0000000040

Line

1

Order Type

Staffing Temporary Order

Company Name

Mercy Medical Center of Pleasanton

Contact Name

Maurice Jenkins

Candidate

Employee

KUX135

Davis, Steven

Phone

415/865-9959

Other Phone Numbers

Email

sdavis@hotmail.com

Other E-mail Addresses

View Resume

View Candidate Overview

View Candidate Details

Make Offer

Assign

Add Agenda

Add History

Email Candidate

Propose Candidate

☒ This Order Only

☐ All Orders

Agenda

Personalize | Find | View All |

First 1-5 of 12 Last

Start Date	Start Time	Event Type	Comments	Completed	
09/01/12	8:00AM	Interview		☐	
09/01/12	8:00AM	Background Check		☐	
09/01/12	8:00AM	Background Check		☐	
09/01/12	8:00AM	Background Check		☐	
09/01/12	8:00AM	Background Check		☐	

Show Completed Agenda Items

☒ This Order Only

☐ All Orders

History

Personalize | Find | View All |

First 1-5 of 12 Last

Start Date	Event Type	Offer Result	Comments	
09/01/2012	Interview			
09/01/2012	Background Check			
09/01/2012	Background Check			
09/01/2012	Background Check			
09/01/2012	Background Check			

Branch, Order, Line, and Order Type

Displays order information.

Candidate

Displays candidate information.

Cust. Name (customer name) and Contact Name

Displays the customer and the contact for this order.

View Other Phone Numbers and View Other Email Addresses

Click these links to view the candidate's contact information.

View Resume

Click this link to view the candidate's resume.

	Note: The resume must have been previously uploaded through the Applicant or Employee component.
View Candidate Overview	Click this link to view the candidate's personal data, competencies, and job-related information.
View Candidate Details	Click this link to view the candidate's applicant or employee data.
Make Offer	Click this button to make an offer to the candidate.
	Note: This button becomes the Update Offer button if the candidate is considering the offer.
Assign	Click this button to assign the candidate to the resource request.
	Note: The candidate must have accepted the offer and be hired before he or she can be assigned to a temporary order. Candidates do not need to be hired to be assigned to a career order.
Add Agenda	Click this button to add an agenda item.
Add History	Click this button to add history items to an order.
Email Candidate	Click this button to send an email to the candidate about the resource request.
Propose Candidate	Click this button to send an email to the contact about the candidate.
This Order Only and All Orders	Select the respective option to view agenda or history events for the current order or for all orders associated with this candidate.
Show Completed Agenda Items and Hide Completed Agenda Items	Click the respective button to display or hide agenda items that have been marked complete for the order.
	Click this icon to access the Agenda Detail page and add an agenda item.
	Click this icon to access the History Details page and add a history item.

Candidate Overview Page

Use the Candidate Overview page (FO_EMPL_OVW) to View a candidate's personal data and job related information.

Navigation

Click the View Candidate Overview link on the Candidate Events page.

Here you can view details about the candidate's Availability, Competencies, Tests, References, Assignments, Job Titles, Lines of Business, and Recruiting Funnel Data. Each section is expandable.

Make Offer to Candidate Page

Use the Make Offer to Candidate page (FO_MAKE_OFFER) to make an offer to a candidate.

Navigation

Click the Make Offer button on the Candidate Events page.

Start On Date and Start Time

Select the date and enter the time of day the candidate is to start the job.

Offer Result

Select the candidate's response to the offer: *Accepted*, *Considering*, *Declined*, or *Other*.

If the candidate *Accepted* the offer, when you click OK the system transfers you to the assignment pages to enter the details of the assignment.

Note: For temporary orders, candidates must be hired before they can be placed in assignments.

Comment Text

Enter any comments about the offer or the job.

Note: You can also use the *Other* status when an offer is made to a candidate, but it is neither accepted nor declined. When you select the *Other* status, the system displays the Other Reason field. You can then select a reason such as *Phone Busy* or *No Answer*. The system records the *Other* status along with the reason as a history item.

Contact Events Page

Use the Contact Events page (FO_ORDR_MGR_CNTCT) to review contact information related to an open job order.

Navigation

Click the Order Manager button on the PeopleMatch page.

Select the Contact Events tab.

Use the Contact Events page to view history and agenda items associated with the acceptance or rejection of an assignment as they relate to the contact person on the order.

To view agenda or history events for all orders associated with the contact person, select the All Orders option in the appropriate section.

Approving Orders

The Order Approval page lists all orders for a specific staffing branch that need approval. It gives managers the ability to approve multiple orders that users have entered into the system. Orders are visible on the Approve Orders page, ready to be approved or denied, when the approval status is *Pending*.

Order approval authority is granted through the user preferences configuration. Users who do not have order approval authority can only save orders with approval status of *Pending*. Orders with approval status of *Pending* can only be saved with *Draft* or *Ended* order status. Users who have order approval authority can approve orders in the Order component itself or in the Order Approval component.

This topic discusses how to approve orders.

Page Used to Approve Orders

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
<u>Approve Orders Page</u>	FO_ORDR_APRVL_INQ	Approve orders.

Approve Orders Page

Use the Approve Orders page (FO_ORDR_APRVL_INQ) to approve orders.

Navigation

Staffing > Orders and Assignments > Approve Orders

Approval Status

Select a value that represents the approval status:

- *Approved*: The order is dropped from the list once you save the page and navigate to another page.
- *Denied*: The order is dropped from the list once you save the page and navigate to another page.
- *Pending*: The order remains on the list.

Order ID

Displays the ID associated with the order. Click the link to go to the pages associated with the order.

Customer

Displays the customer's ID number.

Viewing Order History

The Order History page contains a record of the interactions that have occurred between you and your customers and that you have previously logged in the system. The system generates a history item when a user completes an agenda item and when the user clicks the Add History buttons and links throughout the application. Only the history items that reference the current order ID appear on this page.

This topic discusses how to view order history.

Pages Used to View Order History

Page Name	Definition Name	Usage
Review History Page	FO_HISTORY	View a summary of past events related to an order that were saved automatically by the system or manually by a user.
History Detail Page	FO_HISTORY_DTL	View details of an order history transaction.

Review History Page

Use the Review History page (FO_HISTORY) to view a summary of past events related to an order that were saved automatically by the system or manually by a user.

Navigation

Staffing > Orders and Assignments > Review Order History

Use this page to view the transactions associated with a particular order.

Click the View History button at the end of a row to view history details for the item.

History Detail Page

Use the History Detail page (FO_HISTORY_DTL) to view details of an order history transaction.

Navigation

Staffing > Orders and Assignments > Review Order History > History Detail

The layout of the history page is the same for all types of history records.

Related Links

[Review Agenda/History - History Details Page](#)

Placing Candidates in Assignments

Use the Assignment pages to capture the details required to place candidates in an assignment.

Staffing organizations often provide a number of guarantee days associated with career assignments. When the candidate resigns or is terminated within this guarantee period, the customer may be entitled to a credit or a refund due to what the industry calls a *fall off*.

The billing schedule is used with career assignments only. The total amount included in schedules must equal the placement fee agreed upon with the customer.

Having the system create additional jobs is applicable only when you have PeopleSoft Pay/Bill Management installed with PeopleSoft Staffing Front Office. If only PeopleSoft Staffing Front Office is installed, the concept of additional jobs is not used, and all assignments are created with EMPL_RCD zero.

Note: To enable multiple jobs for PeopleSoft Staffing Front Office, select the Multiple Jobs Allowed check box on the PeopleTools Options page in the General Options group box. Refer to the Setting Installation Options for PeopleSoft Applications topic in the *PeopleSoft Application Fundamentals documentation*.

To locate suitable candidates quickly and easily, use the Employee or Applicant Overview pages to review relevant history details on one page including current order status information, order history, assignment history, and application history.

See [Viewing Employee and Applicant History](#)

Pages Used to Place Candidates on Assignments

Page Name	Definition Name	Usage
Assignment Header Page	FO_ASGN_HDR	Enter the details required to place a candidate in an assignment.
Change Dates/View History Page	FO_ASGN_CHANGE_DT	View date change information.
Fall Off Page	FO_ASGN_FALL_SEC	Enter fall off information for the candidate. Fall offs apply to career assignments only.
Assignments - Initial Payroll Setup Page	FO_ASGN_HCM	Enter payroll information for the assignment. This information applies to temporary assignments only.
Assignments - Billing Page	FO_ASGN_BILLING	Enter billing information that is specific to the assignment. You can view and enter customer-specific fields based on the definition established in the order.
Assignments - Cross Reference Page	FO_ASGN_XREF	Access and view PeopleSoft Project Costing and PeopleSoft Contracts cross-reference information. This information applies only when Pay/Bill Management is installed.

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
<u>Assignments - Additional Jobs Page</u>	FO_ASGN_ADDTL	Enables power users to force the system to create an additional job for an assignment. This information applies only for temporary assignments and when PeopleSoft Pay/Bill Management is installed.
<u>Assignments - Commissions Page</u>	FO_ASGN_COMMISSION	Enter commission information.
<u>Assignments - Forms Page</u>	FO_ASGN_TMPLTS	Enter additional information that you want to track about the assignment using the assignment forms that you defined through system configuration.
<u>Assignments - Tax Information Page</u>	FO_ASGN_SALES_TAX	Enter sales tax information for the assignment.
<u>Assignments - Attachments Page</u>	FO_ASGN_ATTACH	Attach files to the assignment.

Assignment Header Page

Use the Assignment Header page (FO_ASGN_HDR) to enter the details required to place a candidate in an assignment.

Navigation

- Staffing > Orders and Assignments > Assignments
- Click Assign on the Candidate Events page after a candidate has accepted an offer.
- Click the Express Assignment button on the PeopleMatch page for an order.

Image: Assignment Header page (1 of 2)

This example illustrates the fields and controls on the Assignment Header page (1 of 2). You can find definitions for the fields and controls later on this page.

Assignment Header		Initial Payroll Setup		Billing		Cross Reference		Commissions		Forms		Tax Information		Attachments		
PC Business Unit:	US004	Branch:	CA001	Assignment ID:				0000000232								
Order:	0000000033	Order Type:	STFTM	Temporary Order				Res Req #:				1				
Candidate Overview																
*Description:	Clerk															
*Status:	Open															
Name:	Gordon, Jennifer				Candidate Type:	Employee				Permanent Hire						
Empl ID:	KJX136				Per Status:	Employee				Add Agenda Add History View History						
Empl Rec #:	0				Job Status:	Active				View Monthly Schedule						
Work Site								Assignment Details								
Customer ID:	0000050036				Location:	1				Currency:	USD US Dollar					
We Ship Express								Job Code:	290000 Clerk							
917 Johnson Dr Pleasanton, CA 94588								WC Code:	8810							
Contact:	48 Bernice Rodrigues				Assigned To:				VP2							
Replacement Detail																
Replacement For:																
Replaced By:																
Replacement Status:																
Estimated Time Find View All First 1 of 1 Last																
Start Date:	07/20/2006				End Date:	08/25/2006				Change Dates/View History						
Hours:	9.0000				Start Time:	8:00:00AM				End Time:	5:00PM					
☐ Extension																
Comments:																
☒ Monday ☒ Tuesday ☒ Wednesday ☒ Thursday ☒ Friday ☐ Saturday ☐ Sunday																
Exceptions Find View All First 1 of 1 Last																
Start Date:					End Date:											
Hours:					Start Time:											
Comments:																

Image: Assignment Header page (2 of 2)

This example illustrates the fields and controls on the Assignment Header page (2 of 2).

The screenshot displays the 'Assignment Header page (2 of 2)' with three main sections: Rates, Ending, and Audit.

Rates Section:

- Effective Date: 07/20/2006
- Last Upd User: SAMPLE
- Last Upd DtTm: 07/20/2006 2:53:07PM
- Applies to: ☒ Bill Rate ☐ Pay Rate
- Buttons: Insert Rate, Apply Rate, Apply Margin
- Default Rate: []
- Target Margin: []
- Legend:
 - Markup %: Bill Rate less Pay Rate as % of Pay Rate
 - Margin %: Bill Rate less Pay Rate & Costs as % of Bill Rate
 - Acceptable Margin Achieved (Green dot)
 - Margin below Normal Levels (Yellow triangle)
 - Unacceptable Margin (Red square)

Table:

Detail No	Rate Element	Description	Pay Rate	Bill Rate	Target Bill Rate	Markup %	Margin %	Margin Target
1	NHERG	North Amer Hourly EE Regular	20.00	25.45	30.00	27.25	17	■
2	NHEOT	North Amer Hrlly Ee Overtime	30.00	38.18	45.00	27.27	18	■
3	NHEDT	North Amer Hrlly Ee Double Time	39.99	50.90	59.99	27.28	18	■
4	NHEVC	NA Hrlly Ee No Bill Vacation						
5	NAEXP	North Amer T&L Expenses		1.050000				
6	APEXP	Billable AP Expenses		1.050000				

Ending Section:

- Actual End Date: []
- End Reason: []
- Replacement Request Date: []
- Replacement Start Date: []
- Comment: []
- Start Time: []

Audit Section:

- Entered by: SAMPLE
- Date Time Entered: 07/20/2006 2:53:04PM
- Last Upd User: SAMPLE
- Last Update Date/Time: 07/20/2006 2:53:04PM

A majority of the information on this page is populated automatically from the order.

Note: The assignment start date is provided by default from the Start On Date field on the Make Offer to Candidate page.

PC Business Unit

The PeopleSoft Projects business unit that owns the order. In PeopleSoft Staffing Front Office, assignments can only be created for preexisting orders.

Branch

The staffing office that manages the assignment.

Assignment ID

The unique identifier of the assignment record.

Order

The order ID to which the assignment belongs. In PeopleSoft Staffing Front Office, assignments can only be created for preexisting orders.

Order Type

The user-defined order type associated with the order according to the options defined through system configuration. For example, *TMP* (temporary) or *CAR* (career).

Res Req # (resource request number)

The order line number for which the assignment is being created.

Description	Enter a description to reflect the type of assignment, such as <i>Facilities Manager</i> .
Status	Select a status for the assignment: <i>Canceled</i> , <i>Ended</i> , or <i>Open</i> .
Name	The name of the resource placed for the assignment.
Candidate Type	The type of candidate: <i>Employee</i> or <i>Applicant</i> .
	Note: The candidate type of <i>Employee</i> is used to distinguish from non-hired resources (applicants). It includes both employees and non-employees.
EmplID (employee ID)	The ID number of the employee.
Per Status (personnel status)	Indicates whether the person is an employee or a non-employee.
Empl Rec # (employee record number)	PeopleSoft HCM allows employees to have multiple jobs with the same company. In those situations, the person has a single employee ID but has multiple employee record numbers, one for each job. PeopleSoft Staffing Front Office—when used in conjunction with PeopleSoft Pay/Bill Management—leverages this functionality. This field on the Assignment page indicates which employee job record number is being used to pay the employee for this assignment. When PeopleSoft Pay/Bill Management is not installed, all assignments are created using employee record number 0 (zero). This field only appears for temporary orders.
Job Status	Current status of the job. Possible values include <i>Active</i>, <i>Leave of Absence</i>, <i>Terminated</i>, and so on. Note: Refer to the PeopleSoft HCM documentation for a complete list of all possible job status codes.
View Monthly Schedule	Click this link to open a new page to view the schedule for the employee.
Permanent Hire	This field only appears for temporary orders when Temp to Hire is selected on the corresponding resource request line. Click to convert the transaction from a temporary to a career assignment. This feature can be used when the client permanently hires an employee who was originally placed on a temporary basis. Clicking this button causes the system to create a new assignment record that captures the salary and placement fee information. The system maintains the cross-reference between the temporary and career assignments.

Work Site

Customer ID

The work (ship to) customer ID associated with the assignment. The work location affects sales and payroll taxes, workers' compensation, and unemployment insurance.

Location

The customer address sequence number where the work will be performed. The work location affects taxation. The system does not automatically determine the tax codes. However, tracking the work location in addition to the billing address provides you with the information needed to manually enter the most appropriate tax codes.

Contact

The individual within the customer organization designated as the main contact for the assignment.

Assignment Details

Currency

The currency in which the customer will be billed for the services.

Job Code

Select the job code that is most appropriate for the assignment.

WC Code (workers' compensation code)

The workers' compensation code that applies to this assignment based on the job code and work state.

Assigned To

Enter the user ID assigned to manage the assignment.

Replacement Detail

Replacement For

Enter the assignment ID that this assignment replaces. The replaced assignment must be in a *canceled* status before a replacement can be entered. After the page is saved, the assignment ID becomes a link to the assignment.

Replaced By

This field is automatically populated with a link to the new assignment ID when the Replacement For field is completed on the new assignment.

Replacement Status

The status of the replacement resource. Possible values include:

- Replaced
- Pending Replacement

Estimated Time

Start Date and End Date

Select the start date and estimated end date for the employee to begin and end work. The estimated End Date appears only for temporary orders.

Note: For career orders, only the Start Date field appears.

Hours	Enter the expected number of hours that the employee will work each day.
Start Time and End Time	Enter the start and end work time, if known. End Time appears only for temporary orders.
Extension	Select this check box to indicate the work date range specified is an extension of the work date range originally planned. If the Enable Date Tracking field is selected on the Staffing Installation Options page, this field becomes hidden.
Change Dates/View History	Click this link to view a history of date changes. This link is only available if the Enable Date Tracking field is selected on the Staffing Installation Options page.
Comments	Enter any comments related to the assignment.

For each day of the week, select the respective check box to indicate that the employee will be working on the assignment that day.

Exceptions

This group box displays the same information as the Estimated Time group box, but it applies only to date ranges within the assignment period when the resource will not be working.

Note: In the staffing installation options, you can specify whether or not to populate the resource calendar when assignments are created. If you choose this option, once the assignment is saved entries will be created for the date ranges specified and the week days selected. Entries will not be created for the date ranges specified in the Exceptions group box. Using the resource calendar will enable the system to compute resource availability scores in PeopleMatch and PeopleSearch.

Rates

The system displays this group box for temporary orders only.

After you enter the required pay and bill rates, the system displays your profitability or margin for the assignment.

Note: When creating an assignment the system provides the rate elements that appear here by default from the rate profile configuration. When PeopleSoft Pay/Bill Management is not installed, only four profiles can be configured in the system per SetID depending on the type of employee being placed: North America Payroll Hourly Employee, North America Payroll Salaried Employee, Global Payroll Employee, or Non-Employee. Based on the person being assigned, the system retrieves the proper profile and displays its default rate elements on the page. When PeopleSoft Pay/Bill Management is installed, the system displays the default rate elements based on the rate profile specified in the Contract profile for the type of employee being placed.

Effective Date	Select the date when the rates are to be effective. The first effective date must not be after the start of the assignment.
Last Upd User (last update user)	Displays the ID of the last user who updated the page.

Last Upd DtTm (last update date and time)	Displays the date and time the last user updated the page.
Applies to, Pay Rate, Bill Rate, Default Rate, and Apply Rate	Depending on which Applies to option you select (Bill Rate or Pay Rate), enter either the bill rate or the pay rate in the Default Rate field, and then click the Apply Rate button. The system calculates the selected rates in the rates grid based on the standard multipliers established on the rate element configuration. You may recalculate rates as many times as you want. After you enter data in the Pay Rate and Bill Rate fields, the system fills in the Target Bill Rate, Markup %, Margin %, and Caution fields. For the system to display the Caution field correctly, your implementation team must define margin caution in the job code.
Insert Rate	Click this button to add another type of rate in the Main tab. Click the Delete row button to delete any rate not necessary for the assignment.
Target Margin and Apply Margin	Enter the percent of margin that you want to achieve, and then click the Apply Margin button. Based on your selections for bill rate or pay rate, the system calculates the other set of rates in the fields in the Main tab according to the margin specified. You may recalculate margins as many times as you want.
Detail No (detail number)	Displays an auto-sequenced number for each type of rate captured for the assignment. This field is informational only.
Rate Element	Displays the rate element code that corresponds to the type of rate being captured. Rate elements are defined through system configuration. For example, you may define pay and bill rate elements to capture regular time rates for North American Hourly Employees, bill-only rate elements to capture bill rates for North American Salaried Employees, and markup rate elements to capture markup factors to apply to miscellaneous expense reimbursements.
Pay Rate	Enter the amount per hour you will pay employees for the work they are performing at the customer's site for the assignment. This field is only available for rate elements configured with a rate action of Pay and Bill or Pay Only.
Bill Rate	For Pay and Bill or Bill Only rate elements, enter the amount per hour you will bill your customer for the work the employee is performing at the customer's site for the assignment. For markup rate elements, enter the markup factor to apply to expense items needed before billing the client. The markup factor defaults from the rate element configuration, but it can be overridden at the assignment level.

	This field is only available for rate elements configured with a rate action of Pay and Bill or Bill Only or Markup.
Target Bill Rate	Displays the bill rate that you should target to meet margin requirements for the assignment.
Markup % (markup percentage)	Displays, as a percentage, the difference between the pay rate and the bill rate: $((\text{Bill Rate} - \text{Pay Rate}) / \text{Pay Rate}) * 100$
Margin % (margin percentage)	Displays, as a percentage, the difference between the pay rate plus costs and the bill rate: $((\text{Bill Rate} - (\text{Pay Rate} + \text{Additional Costs})) / \text{Bill Rate}) \Rightarrow * 100$ Note: Two types of costs are included in additional costs. They are general overhead or fixed costs established at the staffing branch level and workers' compensation costs associated with the job code and state in the workers' compensation configuration tables.
Margin Target	When margin rates are within or outside acceptable levels, the system uses the following indicators to tell you whether you are achieving acceptable or unacceptable margin rates: • <i>Acceptable Margin Achieved:</i> If you meet margin requirements, the system displays a green circle next to this field. • <i>Margin below Normal Levels:</i> If the margin falls below the caution margin established for the job code, the system displays a yellow triangle next to this field. • <i>Unacceptable Margin:</i> If the margin falls below the critical margin established for the job code, the system displays a red square next to this field. Your implementation team configures the values that the system uses in margin calculation. Your organization bases these calculations on the costs associated with filling a position, as well as the expected profit that is generated when you fill the order. You can save an order with any of these indicators.
Rate Purpose	Displays the general purpose of the rate element: • <i>R:</i> Regular time. • <i>O:</i> Overtime, which is also used for double time. • <i>T:</i> Other, such as miscellaneous expense reimbursements, bonuses, drug-screening costs, background checking costs, and so on.

The rate purpose is used by PeopleSoft Pay/Bill Management to determine how overtime pay rates should be handled according to Fair Labor Standards Act (FLSA) stipulations. For PeopleSoft Payroll for North America employees who are non-exempt and belong to pay groups configured as FLSA-required, the overtime pay rates captured are only an estimate. PeopleSoft Pay/Bill Management will rely on PeopleSoft Payroll for North America to apply the earnings code multiplier factors to the regular time pay rate to compute the overtime premium.

Rate Action

Displays how this type of rate should be captured:

- *A* (Pay and Bill): Capture both pay and bill rates.
- *B* (Bill only): Capture only bill rates.
- *P* (Pay only): Capture only pay rates.
- *M*: Capture markup factors.

Time Reporting Code

Displays the time reporting code (TRC) that is used in PeopleSoft Time and Labor to determine the rules that apply to the hours, as well as the earnings codes used in payroll.

Salary

The system displays this group box for career assignments only or for temp-to-hire assignments that have been converted.

Fee Schedule

Select the fee schedule that applies to the assignment. A default fee schedule appears if it is defined in the Career Master page on the customer record or on the Salary and Billing page on the order's resource request.

Guarantee Days

Starting from the date a candidate first begins a new position, enter the total number of days after which you will no longer offer a refund of the placement fee or a credit. Your organization's business processes dictate how to use this field.

Schedule Sent

Select the date you sent the fee schedule to the customer.

Schedule Sign

Select the date the customer signed the fee schedule.

Base Salary

Enter the actual salary that the candidate accepted.

Default Fee Pct (default fee percentage)

The default fee percentage is calculated based on the fee schedule selected and the salary that was entered.

Additional Compensation

Enter any additional compensation for which the candidate may be eligible, such as a bonus plan.

Override Pct (override percentage)

To override the default fee percentage, enter a percentage here. To recalculate the placement fee, click Calculate.

Total Compensation

Displays the sum of the Base Salary and the Additional Compensation.

Calculate

Click to calculate your staffing organization's fee for placing the candidate with the customer.

Career Placement

The system displays this group box for career orders only.

Placement Fee

Displays the fee your staffing organization will receive from the placement based on the candidate's compensation and the fee percentage you established with the customer.

Career Rev Department (career revenue department)

Displays the department that will receive the revenue associated with the career placement fee. When Pay/Bill Management is installed, this information is used to generate accounting entries in the Contracts module.

Fall Off

Select this check box to indicate that the candidate resigned or was terminated before the expiration of the guarantee period. Fall off functionality is only available when PeopleSoft Pay/Bill Management is installed in addition to PeopleSoft Staffing Front Office.

Fall offs are for career order assignments or converted temp-to-hire assignments only. You use the Fall Off page to enter billing information and determine how much the customer is due.

Fall Off

Click this button to enter fall off information in case the candidate is terminated or resigns before the expiration of the guarantee period. Once the fall off information is entered, the system automatically selects the Fall Off check box to document the occurrence of that event and to prevent fall offs, credit, and refund information from being entered twice.

Ending

Use this section to document when an assignment has ended. Set the Status field at the top of the page to *Ended* when an assignment has ended.

Actual End Date

Select the date that the assignment actually ended. Do not populate this field ahead of time based on an estimated end date.

End Reason

Select a reason why the assignment ended, such as *Credit* or *Filled*.

End Comment

Enter any comments associated with the ending of the assignment.

Audit

Expand this section.

Entered by	Displays the ID of the user who created the assignment.
Date Time Entered	Displays the date and time the assignment was created.
Last Upd User (last update user)	Displays the ID of the last user to update the page.
Last Update Date/Time	Displays the date and time the last user updated the page.

Related Links

"Setting Up Project Profiles" (PeopleSoft 9.2: Pay/Bill Management)

Change Dates/View History Page

Use the Change Dates/View History page (FO_ASGN_CHANGE_DT) to view date change information.

Navigation

Click the Change Dates/View History link on the Assignment Header page.

Old Start Date and Old End Date	Displays the previous start and end dates.
New Start Date and New End Date	Enter the new start and end dates.
Request Date	Enter the date the change was requested.
Change Reason	Enter a reason for the date change.
Comments	Enter any comments.

Note: The start date of the first range of dates cannot be changed, but the start date thereafter can.

Date Change History

This section displays a history of date changes.

Fall Off Page

Use the Fall Off page (FO_ASGN_FALL_SEC) to enter fall off information for the candidate. This page is only available when PeopleSoft Pay/Bill Management is installed in addition to PeopleSoft Staffing Front Office.

Navigation

Click the Fall Off button on the Assignment Header page.

Fall Off Code	Select the code that best describes the fall off reason, such as <i>Q</i> (quit).
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Placement Fee	Displays the fee the customer paid your staffing organization for the placement.
Guarantee Days	The number of days your staffing company guaranteed the placement. The guarantee days determine how long your staffing company guarantees the placement.
Days Worked	Enter the number of days the candidate worked for the customer on the assignment.
Pct (percent)	The percentage of the placement fee that your staffing organization is returning to the customer.
Calculate	Click this button to calculate the amount your staffing organization will refund the customer for the fall off.
Fall Off Amount	Displays the amount your staffing organization should return to the customer. For the system to calculate the return amount, you must enter values in the Fall Off Code, Guarantee Days, Placement Fee, and Days Worked fields. Guarantee days and placement fee are provided by default from the Assignment page.
Fall Off Credit Date	Enter the date to be used in the credit transaction being generated for the customer. Once you click the OK button, PeopleSoft Pay/Bill Management will automatically generate a credit for the customer in the PeopleSoft Billing application.

Assignments - Billing Page

Use the Assignments - Billing page (FO_ASGN_BILLING) to enter billing information that is specific to the assignment.

Navigation

Staffing > Orders and Assignments > Assignments > Billing

Define Events By

This group box appears for career assignments or converted temp-to-hire assignments only.

Amount and Percent	Select an option by which the system will define events: • Amount: If you select Amount, you will enter the amounts to be billed for each installment. • Percent: If you select Percent, the system will enable you to split the placement fee to be billed to the client in installments by entering the percentage of the total fee to be billed in each installment.
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Billing Schedule

This group box appears for career assignments or converted temp-to-hire assignments only.

Event Occurrence	Displays an auto-generated sequence number for each billing installment.
Event Date	Select the dates you would like to bill the customer for the placement fee.
Percentage	Enter the percentage or amount of the placement fee to be billed for each date.
Comments	Enter any comments you have regarding the billing of this assignment.

Purchase Order

This group box appears for temporary orders only.

Note: This information is sent to PeopleSoft Pay/Bill Management for use with PeopleSoft Billing to expedite payment of your bills. The purchase order tracking feature is used with temporary orders only when PeopleSoft Pay/Bill Management is installed.

Business Unit	This field is only editable if you select the Use PO Tracking check box. Enter the PeopleSoft Contracts business unit of the customer purchase order against which this assignment should be billed.
Use PO Tracking (use purchase order tracking)	Select this check box in order to have the system use purchase order balance tracking for this assignment. If you are tracking your billing activity against customer purchase orders, you may associate a purchase order number to the assignment. If this check box is not selected, you can still enter a customer purchase order ID in the free form Customer PO field, but the system will not track the purchase order balance as the customer is billed for hours posted against this assignment.
PO Tracking ID (purchase order tracking ID)	This field is only editable if you select the Use PO Tracking check box. Enter the tracking ID of the customer purchase order against which hours for this assignment should be billed. The system will track the balance of the purchase order as the customer is billed. The purchase order tracking functionality is only available for temporary assignments.
Customer PO (customer purchase order)	This field is only editable if you do not select the Use PO Tracking check box. Enter the customer's purchase order number for this assignment. Purchase order information entered in this manner does not allow or require purchase order balance tracking.

Customer Fields

This group box only appears when Pay/Bill Management is installed.

Effective Date	Enter an effective date for each Definition ID template you specify.
Definition ID	Displays the customer definition template ID associated with the assignment. This field is provided by default from the order and cannot be overridden.
Customer Field Name and Description	Each Customer Field Name is automatically populated by the system from the customer fields definition template as defined in PeopleSoft Pay/Bill Management configuration. Examples include <i>Customer Cost Center</i> and <i>Customer Supervisor Name</i>. Enter the value of each customer field in the Description field. For example, if the Customer Field Name is equal to <i>Customer Supervisor Name</i>, you can enter <i>Carol Smith</i> in the Description field. For temporary assignments, PeopleSoft Pay/Bill Management passes the values of these fields to the Billing application, where they can be used for invoice printing or reporting purposes.
Pre Approval Flag	This check box is only available when PeopleSoft Pay/Bill Management is installed. Select this check box to indicate whether a billing worksheet should be generated and approved before charges are sent to the Billing application.

Assignments - Initial Payroll Setup Page

Use the Assignments - Initial Payroll Setup page (FO_ASGN_HCM) to enter payroll information for the assignment.

Navigation

Staffing > Orders and Assignments > Assignments > Initial Payroll Setup

This page appears for temporary assignments only. It captures information specifying how an employee should be paid for this assignment. When PeopleSoft Pay/Bill Management is installed, the system uses this information to decide whether or not an additional job record should be created in PeopleSoft HCM for this assignment.

Company	Select the HR company that will pay the employee for hours worked in this assignment. If the selected department is associated with a company, the company will be populated by default and will be display-only.
Department	Select the HR department that will pay the employee for hours worked in this assignment. The department may appear by default from the employee or the order, depending on the project profile configuration.

Pay Group	Select the pay group from which the employee should be paid for hours worked in this assignment. The pay group prompt is dynamic depending on the pay system definition on the employee job record (North America or Global Payroll). Entries in this field appear by default from the employee or from the user preferences, depending on the setup of the project profile.
Workgroup and Taskgroup	These fields are only available when PeopleSoft Pay/Bill Management is installed. Select a value for each to indicate how you want to process the employee within PeopleSoft Time and Labor. Entries in these fields appear by default from the employee or from the user preferences, depending on the setup specified in the project profile.
Location Code	Enter a location code associated with the staffing branch for this assignment.
Business Unit HR	Enter the human resources business unit that will pay for the hours worked by the employee in this assignment.
Tax Location Code	Select a value to indicate the North America payroll taxing jurisdictions that apply to this assignment.

Note: You cannot change any of the fields on this page in PeopleSoft Pay/Bill Management after you create the assignment. However, you can change these fields directly in the PeopleSoft HCM and PeopleSoft Time and Labor systems.

Assignments - Cross Reference Page

Use the Assignments - Cross Reference page (FO_ASGN_XREF) to access and view PeopleSoft Project Costing and PeopleSoft Contracts cross-reference information.

Navigation

Staffing > Orders and Assignments > Assignments > Cross Reference

Cross-Reference

PC Business Unit (Project Costing business unit)	Displays the Project Costing business unit for this assignment. The system obtains this value from the Branch Mapping table.
Project	When PeopleSoft Pay/Bill Management is installed, this field displays the ID of the project that was automatically created when the order was saved. Click to access the associated project in the Project Costing application.
Activity	When PeopleSoft Pay/Bill Management is installed, this field displays the ID of the activity that was automatically created when the assignment was saved. Click to access the associated activity in the PeopleSoft Project Costing application.

Contracts Business Unit	Displays the PeopleSoft Contracts business unit for this assignment. The system obtains this value from the Branch Mapping table.
Contract	When PeopleSoft Pay/Bill Management is installed, this field displays the number of the contract that was automatically created when the order is saved. Click to access the associated contract in the PeopleSoft Contracts application.
Contract Line	When PeopleSoft Pay/Bill Management is installed, this field displays the contract line number that was automatically created when the assignment is saved. Click to access the associated contract line in the PeopleSoft Contracts application.

Assignments - Commissions Page

Use the Assignments - Commissions page (FO_ASGN_COMMISION) to enter commission information.

Navigation

Staffing > Orders and Assignments > Assignments > Commissions

User ID	Select the ID of the person who is receiving a commission for the placement.
Percentage	Enter the percent of the commission the person is receiving. If more than one person is receiving a commission for the placement, enter a new row, add his or her User ID, and then enter a Percentage. The total combined percentage for all commissions on the assignment must be equal to 0 or 100.

Assignments - Additional Jobs Page

Use the Assignments - Additional Jobs page (FO_ASGN_ADDTL) to enables power users to force the system to create an additional job for an assignment.

Navigation

Staffing > Orders and Assignments > Assignments > Additional Jobs

This page appears for temporary orders only and is only available when PeopleSoft Pay/Bill Management is installed and the Allow forcing additional jobs check box is selected on the Staffing - Job Data page.

Select the Force Additional Job Creation check box to have the system always create an additional job record each time a new assignment is created. This selection will override the system logic that reuses job records across assignments.

Assignments - Forms Page

Use the Assignments - Forms page (FO_ASGN_TMPLTS) to enter additional information that you want to track about the assignment using the assignment forms that you defined through system configuration.

Navigation

Staffing > Orders and Assignments > Assignments > Forms

The functionality of this page is identical to that of the Forms page in the Order component.

See , in this topic, Collecting Additional Information Using Forms.

Assignments - Tax Information Page

Use the Assignments - Tax Information page (FO_ASGN_SALES_TAX) to enter sales tax information for the assignment.

Navigation

Staffing > Orders and Assignments > Assignments > Tax Information

The functionality of this page is identical to that of the Tax page in the Order component.

See [Sales Tax Page](#).

Assignments - Attachments Page

Use the Assignments - Attachments page (FO_ASGN_ATTACH) to attach files to the assignment.

Navigation

Staffing > Orders and Assignments > Assignments > Attachments

The functionality of this page is identical to that of the Attachments page in the Order component.

See [Attachments Page](#).

Viewing Assignment History

You can view records of the critical events that occurred and events that you logged in association with each assignment. The system generates a history item when a user completes an agenda item or when the user clicks the Add History button on several components throughout the application. Only the history items associated with this assignment show on this page.

This topic lists the pages used to view assignment history.

Pages Used to View Assignment History

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
Review History Page	FO_HISTORY	Review the most recent events logged and associated with a particular assignment.
History Detail Page	FO_HISTORY_DTL	View details of assignment history events.

Related Links

[Review Agenda/History - History Details Page](#)

Viewing the Compliance and Exception Report

A real-time audit report is required that identifies active assignments where the pay and bill rates are not in compliance with contract rates that have been negotiated. This report should easily and quickly identify any orders or assignments where the pay and/or bill rates fall outside the range as agreed upon with the customer, along with the reason entered by the Staffing Coordinator. This inquiry displays any order or assignment that has exceeded the maximum values defined in a Master Contract.

This topic lists the page used to view the Compliance and Exception report.

Page Used to View the Compliance and Exception Report

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
Compliance And Exception Report	FO_MCR_EXC	View compliance and exception information.

Chapter 9

Understanding How to Load Job Opening Default Values

Understanding How to Load Job Opening Default Values

When accessing the Job Opening page, if you click the Load Default Values button, the system follows this page structure to extract information for the page:

Field Description	Job Opening Field
Position Title	FO_JOBOPEN_HDR.POSITION_DESC
Job Description • Competencies • Degree • Licenses • Languages • Memberships	FO_JOBOPEN_HDR.DESCRLONG
Industry	FO_JOBOPEN_HDR.INDUSTRY_STANDARD
Career Order – Salary Range Temporary Order – Pay Rate	Career Order • FO_JOBOPEN_HDR.SALARY_RANGE_MIN • FO_JOBOPEN_HDR.SALARY_RANGE_MAX Temporary Order – FO_JOBOPEN_HDR. REG_PAY_RATE
Job Start Date	FO_JOBOPEN_HDR. START_DT
Job End Date	FO_JOBOPEN_HDR. END_DT
Placement Type (Job Order Based)	FO_JOBOPEN_HDR. PLACEMENT_TYPE
Work Schedule	FO_JOBOPEN_HDR. DESIRED_FULL_PART
Shift	
Location	FO_JOBOPEN_HDR.LOCATION_DESCR

Field Description	Job Opening Field
Company Information - Name - Address - Phone	FO_JOBOPEN_HDR.CUST_ID
Confidential Post (Hide company name)	FO_JOBOPEN_HDR.CONFIDENTIAL
# of positions available	FO_JOBOPEN_HDR.QTY_INTEGER
Job Posting Status	FO_JOBOPEN_HDR.FO_JOBOPEN_STATUS
Recruiter Contact/Team - Name - Email - Phone	
Contact Method - Email - Phone - Apply Online URL	
	Job Post Start Date
Apply Online URL (Hidden)	FO_JOBOPEN_HDR.APPLY_ONLINE_URL
Job Board Distributor URL	

Note: Use caution when clicking the Load Default Values button. If you have updated any field, and then click the Load Default Values button, the system may override your changes. These default values can be changed as well.

Understanding the Job Posting Process

Follow these steps when posting jobs to external job boards, before the posting is released and visible to candidates:

1. Create the job posting using the Job Opening page.
2. Submit the job posting to the job board distributor by selecting the *Publish* option in the Action field on the Job Opening Page
3. Click the Publish button.
4. Review and update the job posting fields using the job board distributor site.

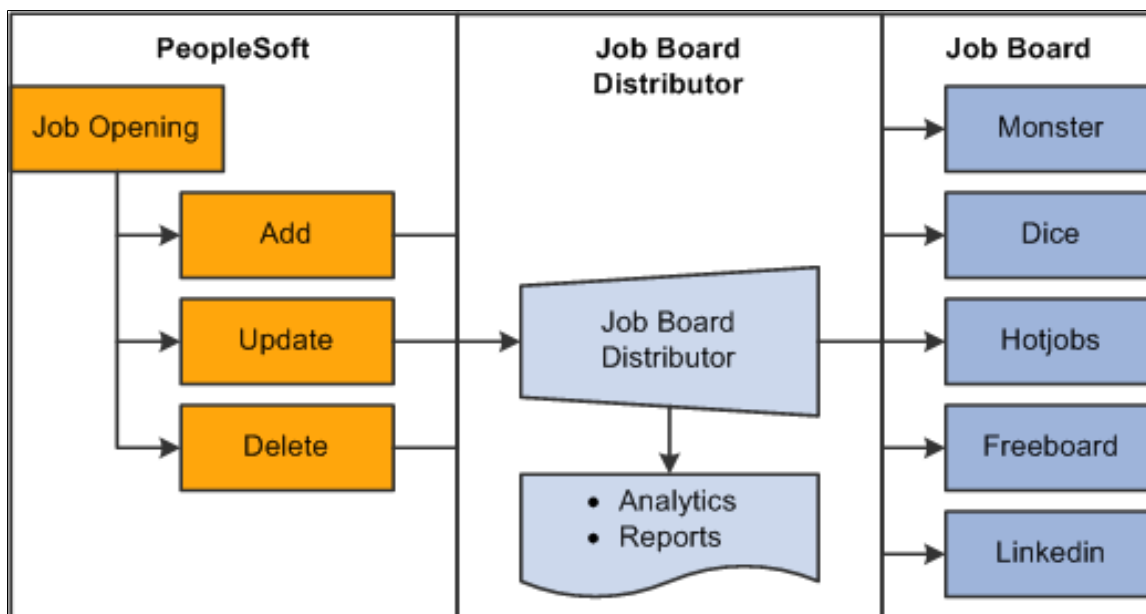
5. Select the job boards to which you want the job posting to appear using the job board distributor site.
6. Add job board-specific information using the job board distributor site.
7. Publish to the select job boards using the job board distributor site.

Understanding the Job Posting Publication Process

This diagram illustrates the flow of the job posting publication process:

Image: Diagram of the Job Posting Publication Process

Diagram of the Job Posting Publication Process



The steps to the job posting publication process flow are:

1. A recruiter creates a job opening, which is loaded to the Staffing – Order: Job Opening page when you select the Load Default Values button.
2. When you click the Publish button, the xml file is sent to the Job Board Distributor.
3. The PeopleSoft user accesses the job board distributor interface and selects the job boards to which they want to post the job opening. The PeopleSoft user can also add or change information if needed depending on the job board distributor being used.
4. Some job boards may require additional information, therefore, the PeopleSoft user will have to access these pages, in the job board distributor interface, and complete these fields.
5. The job board distributor sends the job information to the job boards.

This information can be an Add, Update, or Delete message.

Understanding the Job Posting Status Retrieval Process

When the job board distributor sends job board responses to PeopleSoft Staffing:

- Published jobs are performed using the GetJobList webservice and returns this information:
 - Job Board Name (ID)
 - Publication Date
 - Expiration Date
 - Removal Date
 - Publication Status
 - Job Posting URL
- If there are jobs received from the GetJobList webservice that need to be updated in the PeopleSoft system, then the UpdateJobStatus web service will update the job opening header record (FO_JOBOPEN_HDR) and insert rows in the job opening detail record (FO_JOBOPEN_DTL).

This only occurs when the job opening status is *Published* on the job opening header.

Understanding Job Board Integration Setup

It is important to perform the high-level steps in this order:

1. Define recruiting sources.
2. Create a source category for recruiting.
3. Create a cross-reference.
4. Create setup values for mapping.

Defining Recruiting Sources

To define recruiting sources:

1. Access the Recruiting Sources page
Set Up Financials/Supply Chain >Product Related >Staffing >Resources >Recruiting Sources
2. Select the Add a New Value tab.
3. Select *Job* in the Recruit Source Category field.
4. Enter the names of job boards to which you want to integrate.
5. Click the Savebutton.

Creating a Source Category for Recruiting

To create a source category for recruiting:

1. Access the Recruiting Source Category page . Set Up Financials/Supply Chain >Product Related >Staffing >Resources >Recruiting Source Categories
2. Select the Add a New Value tab.
3. Enter *Job* in the Recruit Source Category field.
4. Enter a description and short description.
5. Click the Save button.

Creating a Cross-Reference

To create a new cross-reference for job boards:

1. Access the Define Value Maps – Elements page Enterprise Components >Integration Definitions >Transformation Framework >Define Value Maps.
2. Select the Add a New Value tab.
3. Enter *JOBBOARD_XREF* in the Map Name field.

Note: *JOBBOARD_XREF* is a suggested map name.

4. Select Cross-reference (dynamic) in the Map Type field.
5. Click the Add button.
6. On the Elements page, in the Assign Elements to Maps section, enter the element names from the source domain system (Job Board Distributor) and the Target domain System (PSFT
7. Select the Domains tab.
8. In the Assign Elements to the Domain section specify the element names under each domain name to map from the source domain to the target domain.
9. Click the Savebutton.

See additional documentation for: "Defining Value Maps" (PeopleSoft 9.2: Application Integration Framework)

Creating Setup Values for Mapping

To create setup values for mapping:

1. Access the Open Integration Framework – Mapping Setup Values page (Set Up Financials/Supply Chain >Product Related >Staffing >Integration Suppliers >Mapping Values).
2. Select the *JOBBOARD_XREF* map in the search field.

3. In the Mapping Setup section enter these values:

<i>Recruiting Source</i>	<i>Description</i>
001	Monster
002	Dice
003	Infojobs

Managing External Job Postings

Pages Used to Manage External Job Postings

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
<u>Job Posting Administration Page</u>	FO_JOBBOARD_ADM	Search for job postings, delete or update job postings, open external links for the job posting and analytics, and view the job opening status from the job board.

Job Posting Administration Page

Use the Job Posting Administration page (FO_JOBBOARD_ADM) to search for job postings, delete or update job postings, open external links for the job posting and analytics, and view the job opening status from the job board.

Navigation

Staffing >Orders and Assignments >Job Posting Administration

Image: Job Posting Administration Page

This example illustrates the fields and controls on the Job Posting Administration Page. You can find definitions for the fields and controls later on this page.

Results Grid



Select to access the [Job Opening Page](#) where you can change some fields for the job posting.



Select to access analytical charts on the job board distributor's website.

Job Opening Status

Displays the status of the job opening from the job board.

Job Opening Action

Select an action. Options include:

Delete: To notify your job board distributor that you want to delete the job opening.

Update: To notify your job board distributor that you want to update the job opening.

Publish

Click to publish deletions or updates when selecting an option in the Job Opening Action field.

Job Posting Status

The Job Posting Status is the status of a posting from each job board distributor. For example, job ID 001 was created on the Job Opening page and published to three job boards. When the job board sends an updated status, this section is updated.

Job Board Status

Displays the status of the job posting for each job board selected on the job board distributor's user interface page.

Valid statuses are:

- *In process*: The job posting is being processed from the job board distributor to the job boards.
- *Published*: The job posting has been published to the job boards.
- *Removed*: The job board distributor has successfully received the job opening information.



Select to view the job that is posted on a website.

Chapter 10

Using the Agenda and History Functions and Sending Emails

Understanding the Agenda and History Functions in PeopleSoft Staffing Front Office

Use the agenda to organize future tasks. In the course of a day, you are likely to access many different applicant, employee, customer, order, and assignment records. In doing so, you might have to contact several individuals. The agenda helps track what you need to do in the immediate and near future and helps you manage time, contacts, and future work.

The agenda is your personal to-do list. Agenda items can be added to your list a number of ways:

- You can manually place items on your agenda from many pages in the application by using the Add Agenda link.
- The system can automatically place items such as the confirmation call, arrival call, and follow-up call on the agenda when a candidate accepts an offer.

Working with Your Agenda and History

This topic discusses how to work with Agenda and History.

Pages Used to Work with Your Agenda and History

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
<u>Review Agenda/History - Details Page</u>	FO_AGN_HIST_PG	Track action items that you want to schedule for completions on a specific day and view a history of action items that have been taken.
<u>Agenda Detail Page</u>	FO_AGENDA_DETAIL	Add, modify, or view an agenda event to an order.
<u>History Details Page</u>	FO_HISTORY_DTL	View or update transactions that have already occurred.

Review Agenda/History Page

Use the Review Agenda/History page (FO_AGN_HIST_CMP) to track action items to be scheduled and completed on a specific day, and to view a history of action items that have been taken.

You can access this page using multiple navigation paths. Depending on the path that you take, some sections may be expanded or collapsed.

Navigation

- Staffing > Agenda and History > Review Agenda/History.
- From the Agenda pagelet, click an individual item.
- From the Recruiting Funnel, click an individual item.

Image: Review Agenda/History page

This example illustrates the fields and controls on the Review Agenda/History page (1 of 2).

Review Agenda/History

Saved Search: Save Search Parameters Delete Search

Search Criteria

Start Date From	Start Date To
End Date From	End Date To
Customer SetID	Customer ID
Contact SetID	Contact ID
Staffing Branch CA001 San Francisco Branch	Order ID 0000000031 Analysts
Resource Request	Assignment ID
Candidate	Assigned To
Event Category	Event Type
Priority	☐ Show Completed Items
* Search Type All	Max Rows 300

Search

Add Agenda Add History

Search Results

Legend Agenda Recruiting Funnel History

Results Personalize Find View All First 1-9 of 9 Last

Select	Type	Start Date	End Date	Team/Individual	Assigned To	Candidate Type	Candidate Name	Event Type	Sub Event	Status
				SAMPLE	SAMPLE	Employee	Davis, Steven			
				SAMPLE	SAMPLE	Employee	Bookout, Ryan			
				SAMPLE	SAMPLE	Employee	James, Karen			
☐		11/15/2011	11/15/2011	AMS2	AMS2	Employee	Davis, Steven	Call		Pending
☐		11/15/2011	11/15/2011	ABROWN	ABROWN	Employee	Bookout, Ryan	Call		Pending
☐		11/15/2011	11/15/2011	VP2	VP2	Employee	James, Karen	Call		Pending
☐		08/15/2012	08/20/2012	VP1	VP1			Offer Letter		Pending
☐		08/15/2012	08/28/2012	DVP1	DVP1			Call		Pending
☐		08/15/2012	09/03/2012	DVP1	DVP1	Applicant	Smith, Bernard	Call		Pending

Select All Deselect All

Available Actions for Selected Rows

☐ Mark Complete

Postpone Start Date by days

Postpone End Date by days

Change Assigned To

Change Priority

Perform Action(s)

This page displays agenda items, recruiting funnel tasks and history item, and history items base on the search criteria. Events on the Agenda are directly assigned to a team member and an e-mail notification is sent to the team member for performing the task.

Saved Search

Select search parameters that you previously saved.

You can save each inquiry's criteria as a unique name to be accessed at a later time. For example, you can save an inquiry that you want to run each week.

Search Criteria

To search for agenda or history items, on the top part of the page, enter the field values for which you want the system to search. The more information that you enter the more specific the search is. To view details for an item, click the detail icon at the end of the item's row.

Start Date From / Start Date To	Enter the duration of a start date
End Date From / End Date To	Enter the duration of a end date
Customer SetID	Enter the SetID the of the customer who is associated with this agenda item.
Contact SetID	Enter the SetID the of the contact who is associated with this agenda item.
Staffing Branch	Enter the branch with which the agenda is associated.
Candidate	Select Appl (applicant) or Empl (employee or non-employee) to designate the status of the candidate who is associated with this agenda item (if applicable), and then enter the person's ID in the adjacent field.
Event Category	Select an event category to be associated to each event type.
Priority	Indicate the priority level of the item: High, Low, or Medium. This is useful when you are sorting through long lists of items on the Agenda page.
Search Type	Select a Search Type.
Customer ID	Enter the ID the of the customer who is associated with this agenda item.
Contact ID	Enter the ID the of the contact who is associated with this agenda item.
Assigned To	Enter the ID of an Individual user or a Team for which the Agenda or History item is assigned. Select an option from the drop-down list: • <Blank> : Lists all the agendas or history that are assigned directly to a team member (not through the team). • Assigned under a Team: Lists all the agendas or history items assigned to a team member under a team. • Individual and Teams: Lists all the agenda or history items assigned to a team member directly, as well as those assigned through the team.
Add Agenda	Click to access the Agenda Detail Page .
Add History	Click to access the History Details Page .

Search Results

(Check box)

Select the check box next to an agenda or recruiting funnel row to perform a change that is available in the Available Actions for Select Rows section.



Type

Displays an icon that corresponds to one of these rows: Agenda, History, and Recruiting Funnel.

Click the Agenda Details Icon to view agenda details in the Details section.

Click the History Details Icon to view history details in the Details section.

Click the Recruiting Funnel Events Icon to access Recruiting Funnel Events.

Type

Displays an icon that corresponds to one of these rows: Agenda, History, and Recruiting Funnel. Click the icon to access the corresponding information in the Details section.

Mark Complete, Postpone Start Date, Postpone End Date, Change Assigned To, and Change Priority

Click the check box or enter the information you want to change, and click the Perform Actions button.

When you click the Save Changes button, the system performs the requested action.

Perform Action(s)

Click this button to perform the selected actions on the selected rows.

You can make more than one change at the same time. For example, you can select multiple rows in the Search Results section, select the Mark Complete check box, change the Priority, and then click the Perform Action(s) button. This reduces the need to perform multiple actions individually.

Details

The Details section changes depending on whether you select the Agenda Events or the History Events icon in the Type column of the Search Results section. For more information about this section, see [Review Agenda/History - Details Page](#) [Review Agenda/History - History Details Page](#).

Review Agenda/History - Details Page

Use the Review Agenda/History page (FO_AGN_HIST_PG) to view or update additional information for an existing agenda event.

Navigation

Staffing > Agenda and History > Review Agenda/History. From the Review Agenda/History page, select the Agenda Events icon in the Search Results section.

Image: Agenda/History Details - Details Page

This example illustrates the fields and controls on the Review Agenda/History - Details Page.

The screenshot shows a 'Details' page for an agenda item. At the top, there's a 'Details' header with a question mark icon. Below it, the 'Start Date/Time' is 11/15/2011 9:00AM and 'End Date/Time' is 11/15/2011 9:30AM. The 'Duration' is 30 Minutes. A 'Recurring Event' checkbox is checked. The 'Next Auto Planned Date' is empty. The 'Assigned To' field shows 'VP1'. The 'Contact Method' is 'Telephone Call' and 'Previous User ID Assigned' is 'SAMPLE'. There's a 'Mark Complete' checkbox. Below these, the 'Event Type' is 'Call'. The 'Customer SetID' is 'SHARE', 'Contact SetID' is 'SHARE', and 'Staffing Branch' is 'CA001'. There are fields for 'Order' and 'Assignment ID'. The 'Candidate' field has a dropdown arrow. The 'Priority' is 'Medium'. The 'Last Updated' timestamp is '05/17/2006 10:29:50.000000AM' and 'Last Updated By' is empty. A 'Comments' field contains the text 'Call to see if there is any resource needs.' and has a small icon in the bottom right corner.

Start Date/Time and End Date/Time Enter the date and time on which the item is scheduled. The system will calculate the duration based on the values entered here.

Recurring Event

Select to have the system schedule the item for a future date after this occurrence has been completed.

On the Contact component, Staffing Information page, you can specify a default number of recurring event days. When you create an agenda item, you can set the item to be recurring. When you complete the item, the system creates a new item for the specified number of days after the original.

Note: To trigger the creation of the next item, you must first complete the current item. The system then displays the Next Event Date field.

Next Auto Planned Date

If the event is a recurring event, when the event is complete, this date represents is the date that the system uses to create the new, recurring, agenda entry.

Duration

The system calculates the duration of the item based on the start and end time values.

Mark Complete

Select this check box when you complete the item. After you do so and save the record, you can hide the item.

This option is replaced by a status display field if the entry is from the recruiting funnel.

Assigned To

Displays the user, or team, for which the Agenda or History item is assigned.

Contact Method	Enter the method of contact for the item: <i>Call, Email, In-Person, Verbal, or Written.</i>
Previous User ID Assigned	Displays the user ID of the previous person who was assigned to this agenda item.
Event Type and Event Status	Displays the type of event and its status that is associated with the agenda item, such as <i>Availability</i> or <i>Call</i> . You define event types as part of your Staffing Front Office configuration.
Sub Event and Sub Event Status	Displays the type of sub event and its status that is associated with the agenda item,
Customer SetID and Customer ID	Enter the SetID and ID of the customer who is associated with this agenda item (if applicable). Click the adjacent customer name link to open and view the customer's information on the Customer General Information page in a new page.
Contact SetID and Contact ID	Enter the SetID and ID of the contact who is associated with this agenda item (if applicable).
Staffing Branch, Order, and Assignment ID	Enter the branch with which the agenda is associated and, if applicable, the order, and assignment IDs.
Candidate	Select <i>Appl</i> (applicant) or <i>Empl</i> (employee or non-employee) to designate the status of the candidate who is associated with this agenda item (if applicable), and then enter the person's ID in the adjacent field.
Priority	Indicate the priority level of the item: <i>High, Low, or Medium</i> . This is useful when you are sorting through long lists of items on the Agenda page.
Last Updated and Last Updated By	Displays the date, time, and user ID that the agenda detail was last updated.
Comments	Enter additional information about the agenda item.

Review Agenda/History - History Details Page

Use the Review Agenda/History page (FO_AGN_HIST_PG) to view or update transactions that have already occurred.

Navigation

Staffing > Agenda and History > Review Agenda/History. From the Review Agenda/History page, select the History Events icon in the Search Results section.

Use the history functions in PeopleSoft Staffing Front Office to help keep track of tasks that you completed in the past.

In PeopleSoft Staffing Front Office, you can view, update, and save information about transactions or conversations that have already occurred. These include many of the events in which an employee has been involved, such as past orders and assignments. The system automatically saves some events to history. However, you can add other items at your discretion.

To add history, use the Add History link that is found on many pages in the application. No limit exists to the number of history rows that you can add to a record. However, you may periodically have to purge history records to reduce volume, increase storage capacity, and improve your system performance.

Image: Review Agenda/History History Details Page

This example illustrates the fields and controls on the Review Agenda/History History Details Page.

The screenshot displays the 'Details' page for a history item. At the top, there are fields for 'Start Date', 'End Date', 'Assigned To' (with a dropdown showing 'SAMPLE'), and 'Contact Method' (with a dropdown showing '*Date' and '09/14/2009'). Below these, the 'Event Type' is 'Basic Background Check' and 'SubEvent' is 'CREDIT'. The 'Event Status' is 'Completed'. Further down, there are fields for 'Customer SetID' (SHARE), 'Contact SetID' (SHARE), '*Business Unit' (US004), 'Order' (MARC01), 'Assignment ID', 'Candidate' (Employee, 0000000009, Reynolds, Quennie), 'Agenda Priority', 'Decline Reason', 'Offer Result', and 'Other Reason'. The 'Date Time Added' is '09/14/09 12:10:19.000000PM'. A large 'Comment Text' area is at the bottom. A 'Save Changes' button is located at the bottom right.

End Date Indicates the date on which the history item was completed.

Contact Method Indicates the method of contact for the item, such as *Call* or *Verbal*.

Date Displays the date for which the history item was scheduled.

Event Status Displays the status if the item is part of an event list.

Customer SetID, Customer ID, Contact SetID, Contact ID, Order, and Assignment ID These elements enable you to cross-reference history items with customers, contacts, orders, and assignments.

Line Displays the line number.

Agenda Priority Indicates the priority of the item when it was scheduled in the agenda. Priority is useful when you are sorting long lists of agenda items.

Offer Result Enter a candidate's decision to take or not take an assignment to further narrow your search, such as *Accept*, *Assign*, *Consider*, *Decline*, or *Other*.

Decline Reason	Enter a candidate's reason for declining an assignment to further narrow your search, such as <i>Benefits</i> , <i>Hours</i> , or <i>Pay</i> .
Other Reason	Enter the other reason status, such as <i>No Answer</i> , or <i>Phone Busy</i> .
Date Time Added	Indicates the date and time that a user added the history record.
Comment Text	Enter additional information about the history item.

Agenda Detail Page

Use the Agenda Detail page (FO_AGENDA_DETAIL) to add agenda event to an order.

Navigation

- Staffing, >Orders and Assignments, >Add/Update Orders. Select the PeopleMatch tab. From the PeopleMatch page, click the Order Manager button. From the Candidate Events page, click the Add Agenda button.
- Click the Add Agenda link on the Review Agenda/History page.
- Click the Add Agenda icon on the Candidate Events page.

Image: Agenda Detail Page

This example illustrates the fields and controls on the Agenda Detail Page.

The screenshot shows the 'Agenda Detail' form with the following fields and controls:

- Start Date/Time:** 08/15/2012 (calendar icon)
- End Date/Time:** 08/15/2012 (calendar icon)
- *Assigned To:** (text field with search icon)
- Recurring Event:** ☐
- Next Auto Planned Date:** (text field with calendar icon)
- Duration:** (text field)
- Day:** (text field)
- Hour:** (text field)
- Minutes:** (text field)
- Mark Complete:** ☐
- Contact Method:** (dropdown menu)
- Previous User ID Assigned:** (text field)
- *Event Type:** (dropdown menu)
- Customer SetID:** (text field with search icon)
- Contact SetID:** (text field with search icon)
- Staffing Branch:** (text field with search icon)
- Order:** (text field with search icon)
- Assignment ID:** (text field with search icon)
- Candidate:** (dropdown menu)
- Priority:** Medium (dropdown menu)
- Customer ID:** (text field with search icon)
- Contact ID:** (text field with search icon)
- Last Updated:** 08/15/2012 1:10:38.000000PM
- Last Updated By:** (text field)
- Comments:** (large text area)
- Buttons:** Save, Cancel

Fields and definitions are the same as those on the [Review Agenda/History - Details Page](#)

Fill in all the fields that apply to the event you are adding. If an agenda item is completed, select the Mark Complete check box.

When you click the Save button, the system returns you to the previous page. If you are returning to the Candidate Events page, the system displays the agenda item in the Agenda group box.

When agenda items are created (manually or automatically), e-mail notifications are sent to team members if the Send Notifications check box is selected on the [Manage Teams Page](#).

History Details Page

Use the History Details page (FO_HISTORY_DTL) to view, update, and save records of transactions that have already occurred.

Navigation

- Click the Add History link on the Review History page.
- Click the History icon on the Candidate Events page.

Image: History Details Page

This example illustrates the fields and controls on the History Details Page.

The screenshot shows the 'History Details' page with the following fields and controls:

- Start Date:** 08/15/2012 (with a calendar icon)
- End Date:** 08/15/2012 (with a calendar icon)
- Assigned To:** DVP1 (with a magnifying glass icon)
- Contact Method:** (dropdown menu)
- *Date:** 08/15/2012 (with a calendar icon)
- Event Type:** (dropdown menu)
- Customer SetID:** (text field with a magnifying glass icon)
- Customer ID:** (text field with a magnifying glass icon)
- Contact SetID:** (text field with a magnifying glass icon)
- Contact ID:** (text field with a magnifying glass icon)
- *Business Unit:** (text field with a magnifying glass icon)
- Order:** (text field with a magnifying glass icon)
- Line:** (text field with a magnifying glass icon)
- Assignment ID:** (text field with a magnifying glass icon)
- Candidate:** (dropdown menu)
- Offer Result:** (dropdown menu)
- Agenda Priority:** (dropdown menu)
- Other Reason:** (dropdown menu)
- Decline Reason:** (dropdown menu)
- DateTime Added:** 08/15/12 1:10:18.000000PM
- Email ID:** 0
- Comment Text:** (large text area)
- Buttons:** Save, Cancel

End Date

Indicates the date on which the history item was completed.

Contact Method

Indicates the method of contact for the item, such as *Call* or *Verbal*.

Date

Displays the date for which the history item was scheduled.

Customer SetID, Customer ID, Contact SetID, Contact ID, Order, and Assignment ID

These elements enable you to cross-reference history items with customers, contacts, orders, and assignments.

Agenda Priority

Indicates the priority of the item when it was scheduled in the agenda. Priority is useful when you are sorting long lists of agenda items.

Email ID

Click to access the Sent Email page.

Offer Result

This field applies only to history items that are associated with the creation of assignments. It indicates the result that best represents why the applicant or employee accepted or declined a position.

Decline Reason

This field only applies to history items that are associated with the creation of assignments. It indicates the reason why the employee declined the position or assignment.

Other Reason

This field applies only to history items that are associated with the creation of assignments. It indicates the reason for an offer result of *Other*.

Date Time Added

Indicates the date and time that a user added the history record.

Comment Text

Enter additional information about the history item.

Sending and Reviewing Emails

This topic describes how to send and review emails.

Pages Used to Send and Review Emails

Page Name	Definition Name	Usage
Compose Mail Page	FO_SND_EMAIL	Send an email to the applicant.
Applicants for Attachment Page	FO_RES_ATTACH	Search for candidates with resumes uploaded to the database and attach the resumes to the email. Compose Mail Page
Customer Information for Attachment Page	FO_CUST_SNDMAIL	Add customer related information to the email. Compose Mail Page
Applicants Page	FO_PROFILE_APP	Enter an applicant ID and the desired placement. When you click the Upload Profile button, the system runs the Generate Candidates Resume process (FO_APP006) and the generated profile is then attached to the email. Compose Mail Page
Review Sent Email Page	FO_SNDEMAIL_INQ	Review sent emails.
Sent Email Detail Page	FO_SNDEMAIL_DTL	Review sent emails.

Understanding Delivered Email Templates

Oracle delivers several email templates that are available to different roles, based on the page used to access the Compose Mail page. There are several email icons available throughout the transaction pages. The templates available on the Compose Mail page depend on the user role and the place on the page where the Send Email button is clicked.

These tables provide templates that are based on these user roles or pages:

Template	Staffing Coordinator Role	CSR Role	CSR Role	Employee page	Applicant page	Add/Update Order page	Pending Applicants pagelet
Assignment Contact	X	Y	Y				
Bill-To Contact	X	Y	Y			Y	
Candidate Events Email Candidate	X						
Candidate Events Propose Candidate	X						
Contact Applicant	X				Y		
Email Contact	X	Y	Y				
Email Employee	X			Y	Y		
Email Multiple Candidates	Y					Y	
Email Order Contact	X	Y	Y			Y	
Email PM Candidate	X					Y	
Email Single Candidate	X					Y	
Invalid Pending Applicants							Y
Order Caller Name	X	Y	Y			Y	
Order Contact	Y	Y	Y			Y	
PeopleSoft Search Email Select Candidate	X					Y	

Template	Staffing Coordinator Role	CSR Role	CSR Role	Employee page	Applicant page	Add/Update Order page	Pending Applicants pagelet
PeopleSoft Search Propose Select Candidate	X					Y	
Propose Candidate	X			Y	Y		
Propose Candidate PM Search	X					Y	
Propose PeopleSoft Search Candidates	X						
Propose PeopleSoft Search Single Candidate	X						
Report to Contact	X	Y	Y				
Valid Pending Applicants							Y

*CSR = Customer Service Representative

Compose Mail Page

Use the Compose Mail page (FO_SND_EMAIL) to send an email to the applicant.

Navigation

Click the email button on several Staffing pages.

Image: Compose Mail page

This example illustrates the fields and controls on the Compose Mail page. You can find definitions for the fields and controls later on this page.

The screenshot shows the 'Compose Mail' interface. At the top, there's a 'Template' dropdown set to 'Order Contact' and an 'Apply' button. Below this are fields for 'From' (change_me@oracle.com), 'To', 'CC', and 'BCC'. The 'Subject' field is set to 'Order Inquiry'. The 'Message Text' area contains a rich text editor with a toolbar and the following text: 'Dear Maurice Jenkins, It's been a while since I heard from you. I was wondering if you had any open positions to fill? I'm looking forward to hearing from you soon. Sincerely,'. At the bottom, there are buttons for 'Add Attachment', 'Attach Resume', 'Add customer info', 'Attach Profile', 'Cancel', and 'Send Email'. Below these is an 'Attachments' section with a table showing 'Personalize | Find | View All' and a list of attachments with 'View' buttons.

Understanding Delivered Email Templates

Template

Select the template to apply to the email. The templates available depend upon the place in the system from where the Compose mail page is accessed.

Apply

Click to apply the chosen template to the page. The system will replace the template variables with the appropriate values from the transaction page.

Add Attachment

Click to add an attachment to the email.

Attach Resume

Click to access the Applicants for Attachment page and search for candidates with resumes uploaded to the database and attach the resumes to the email.

Add Customer Info

Click to access the Customer Information for Attachment page and add customer related information to the email.

Attach Profile

Click to access the Applicants page where you enter an applicant ID and the desired placement. The system generates a profile that can be attached to the email.

When you click the Upload Profile button, the system generates a profile for the applicant and attaches it to the email. The profile that is generated by the system includes information about the applicant ID such as applicant qualifications, personal information, and so on.

On the Applicants page, click the OK button to save the information and transfer you back to the Compose Mail page.

Review Sent Email Page

Use the Review Sent Email page (FO_SNDEMAIL_INQ) to review sent emails.

Navigation

Staffing > Agenda and History > Review Sent Email

Image: Review Sent Email page

This example illustrates the fields and controls on the Review Sent Email page. You can find definitions for the fields and controls later on this page.

The screenshot shows the 'Review Sent Email' page. At the top, there's a header 'Inquiry EMAIL'. Below it, a section titled 'Email' contains search filters: 'Date Sent' (with a calendar icon), 'To' (with a calendar icon), 'From' (pre-filled with 'User1@oracle.com'), 'To', 'CC', 'BCC', 'Subject', and 'Message Text' (with a text area and a small icon). A 'Search' button is located below these filters. Below the search filters, there's a 'Search Results' section with a table. The table has columns for 'Datetime Sent', 'Subject', and 'Detail'. The first row of the table is empty, and the 'Detail' column has a small icon. At the bottom right of the table, there's a 'First 1 of 1 Last' navigation bar.

You can enter partial text (for example, %text%) for all fields except the Date Sent field, or leave all fields blank to return all values.

Sent Email Detail Page

Use the Sent Email Detail page (FO_SNDEMAIL_DTL) to review sent emails.

Navigation

Staffing > Agenda and History > Review Sent Email

Click the Show Details button on the Review Sent Email page.

View sent email details, including text or attachments.

Working With Self-Service Functionality

Understanding Self-Service Functionality

Staffing Front Office gives you the ability to make the following self-service functions available to your customers, employees, and applicants:

- Open Resource Requests can be made available to both employees and applicants. These pages give internal employees and prospective applicants a view of currently available positions. Employees and applicants can then use the contact information listed on the page to learn more about positions from the recruiter assigned to the order.
- Apply Online pages in PeopleSoft Staffing Front Office can be made available to applicants over the internet. Authorized users at your staffing organization can then review the record and potentially turn the pending applicant into an active applicant or an employee. Records submitted by the applicant have a personnel status of *Applicant (Pending)*. An authorized user can decide to change the status to *Active* after reviewing the pending record.
- Customer Self Service enables customers to view and create temporary or career orders using the self-service functionality built into PeopleSoft Staffing Front Office. After a customer submits a new order, an authorized user in your staffing organization can review it for missing data or to update existing data.

Searching for Open Resource Requests

Your company can allow others to search for open resource requests and view contact information about how to apply for a job. After someone locates a job, that person can send an email message to the recruiter expressing interest in the job and supply the necessary contact information and resume.

This topic discusses how to search for open resource requests.

Pages Used to Search for Open Resource Requests

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
<u>Open Resource Request Page</u>	FO_ORDER_PUB	View detailed information about open resource requests.
<u>Contact Recruiter Electronically About This Opportunity Page</u>	FO_ORDER_PUBEMAIL2	Send an email message to the recruiter to express an interest in a particular job and to provide contact information and a resume.

Open Resource Request Page

Use the Open Resource Request page (FO_ORDER_PUB) to view detailed information about open resource requests.

Navigation

Employee Self-Service > Open Resource Requests

Contact recruiter electronically about this opportunity	Click this link to enter a message and send an email to a representative within the staffing organization.
Create your Applicant Record	Click this link to begin the online application process.

Contact Recruiter Electronically About This Opportunity Page

Use the Contact recruiter electronically about this opportunity page (FO_ORDER_PUBEMAIL2) to send an email message to the recruiter to express an interest in a particular job and to provide contact information and a resume.

Navigation

Click the Contact recruiter electronically about this opportunity link on the Open Resource Request page.

User Order Type	Displays the type of order.
Job Title Code	Displays the code for the job title associated with the resource request.
Service Order ID	Displays the ID of the order the applicant wants to inquire about.
Line Number	Displays the resource request line number.
Owned By	Displays the owning branch ID.
First Name, Last Name, Address Line 1, City, State, and Postal Code	Enter your name and address information in the appropriate fields.
Telephone	Enter your telephone number, including the area code or international code, if applicable.
Email	Enter your email address.
EmplID (employee ID)	Enter your employee ID, if applicable.
Email Subject	Displays <i>Candidate Inquiry about Open Resource Request</i> .
Comment Text	Enter the email text to accompany the resume that you attach.
Send	Click this button to send your message and any attached files to the recruiter.
Cancel	Click this button to cancel the message.

Add Attachment

Click this button and then click the Browse button to locate your resume file on your local computer. After you locate it, click the Open button. The system displays the file path to your resume. Click the Upload button. Then, click the Send button to upload your resume and send it, along with your cover letter and contact information, to the recruiter.

Understanding Staffing Apply Online Password Control

Staffing Apply Online Password Control enable you to define password requirements such as password strength, whether passwords must expire after a specified time period, whether a secret question must be answered before the system resets a forgotten password, or whether accounts must be locked after a specific number of failed logon attempts.

After you define password requirements, the Staffing system automatically generates a description of the password. Applicants using the Staffing Apply Online account can see this description any time they create a password while registering or resetting a password.

To enable Password Control you must set the User Registration option to Required on the Staffing Apply Online Installation Options page.

Validations for Password Control

A password control is activated when:

- An applicant creates an account or changes the password for an existing account. The system ensures that the new password meets all password requirements.
- A password expires. The applicant must set a new password during the next logon attempt.
- Staffing system generates a new password.
- Staffing system generates password when applicants use the Forgot Password option.

Setting up Password Control

Pages Used to Setup Password Control

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
<u>Password Control Page</u>	FO_PWD_CONFIG	Setup password control.
<u>Setup Password Hints Page</u>	FO_PWD_SECRET_Q	Define questions that can be used to authenticate the user who requests a password reset using the Forgot Password option.

Password Control Page

Use the Password Control page (FO_PWD_CONFIG) to setup password control.

Navigation

Set Up Financials/Supply Chain >Product Related >Staffing >Resources >Setup Password Control

Image: Password Control page

This example illustrates the fields and controls on the Password Control page. You can find definitions for the fields and controls later on this page.

The screenshot displays the 'Setup Password Control' page. At the top, the title 'Setup Password Control' is shown in blue. Below it is a section titled 'Password Control' with a checked 'Enabled' checkbox. This section is divided into four sub-sections: 'Password Strength', 'Password Expiry', 'Account Lock', and 'Secret Question'. 'Password Strength' includes input fields for 'Minimum Length', 'Special Characters', 'Digits', 'Uppercase', and 'Lowercase'. 'Password Expiry' has radio buttons for 'No' (selected) and 'Yes', and a 'Days' input field. 'Account Lock' has a checked 'Enabled' checkbox and a 'Failed Attempts' input field set to '3'. 'Secret Question' has an unchecked 'Enabled' checkbox and a 'Failed Attempts' input field.

Password Control

Enabled

Select this check box to activate the password control. When you deselect this check box, the password control is not applicable and the settings are unavailable.

This check box also controls the Account Lockout settings and Secret Question settings for Forgot Password.

Password Strength

Minimum Length

Enter the minimum number of characters for a password. When you specify the minimum length for a password, you must take into consideration that the password length is inclusive of the special characters, digits, lowercase letters, and uppercase letters.

Special Characters

Enter the minimum number of special characters for a password. You can use these special characters:

! @ # \$ % ^ & * () - _ = + \ | [] { } ; : / ? . > <

Digits

Enter the minimum number of digits (numbers) to include in a password.

Uppercase

Enter the minimum number of uppercase letters to include in a password.

Lowercase

Enter the minimum number of lowercase letters to include in a password.

Password Expiry

No

Select this option if you do not want a password to expire.

Yes

Select to enable password expiry. Enter an expiration period in terms of days.

Account Lock

Enabled

Select to activate the account lock-out feature. This functionality enables you to lock the applicants out of their Staffing Apply Online accounts after a certain number of failed logon attempts, or on incorrect answers to a secret question.

Failed Attempts

Enter a number for failed logon attempts that are allowed before an account is locked. This number must be greater than zero.

Secret Question

Enabled

Select to set a requirement for an applicant to answer a secret question when requesting help with a forgotten password. The applicant must answer the question correctly before the system sends a temporary password.

Failed Attempts

Enter the number for incorrect answers that are allowed before an account is locked. This number must be greater than zero.

Setup Password Hints Page

Use the Setup Password Hints page (FO_PWD_SECRET_Q) to define questions that can be used to authenticate the user who requests a password resent using the Forgot Password option.

Navigation

Set Up Financials/Supply Chain >Product Related >Staffing >Resources >Setup Password Hints

Image: Setup Password Hints page

This example illustrates the fields and controls on the Setup Password Hints page. You can find definitions for the fields and controls later on this page.

Secret Question ID 03

☒ Secret Question Active ?

*Secret Question What is your Pet's Name ?

Secret Question Active?

Select to make the question available to applicants when they choose a secret question. At least one secret question must be active when secret question functionality is enabled.

Deselect to make the question unavailable without deleting it.

Secret Question

Enter the text for a question.

Creating Applicant Records Online

Prospective applicants can log on to your designated staffing website and use the Online Application functionality to enter their personal information directly into the system. The system marks the record as *Applicant (Pending)*. After a staffing representative reviews the record, he or she can change the status of the record from *Applicant (Pending)* to *Active*.

This topic discusses how to create applicant records online.

Pages Used to Create Applicant Records Online

Page Name	Definition Name	Usage
<u>Staffing Apply Online Login Page</u>	FO_SS_LOGIN	Login to the Apply Online application, if your system administrator has enabled registration.
<u>Applicant User Registration Page</u>	FO_SS_USER_REG	Create a user ID and password for logging into the Apply Online Application.

Page Name	Definition Name	Usage
<u>Welcome to our Online Application Page</u>	FO_APP_SS_WELCOME	Begin the process that enables applicants to enter their information.
<u>Resume Page</u>	FO_APP_SS_RESUME	Attach resumes and other files to the applicant record. Alternatively, paste the resume text in the field provided.
<u>Job Opening Detail Page</u>	FO_APP_SS_JOB_DTL	Use the Job Opening Detail page to view internal job details.
<u>Name and Address Page</u>	FO_APP_SELF_SERV	Enter name and address information.
<u>Staffing Branch Page</u>	FO_APP_SS_BRANCH	Select the staffing branch to which you want to apply.
<u>Contact Information Page</u>	FO_APP_SS_CONTACT	Enter contact information, such as telephone, email, and website information.
<u>Availability Page</u>	FO_APP_SS_AVAIL	Enter information about availability, such as desired start date, shift preference, and full-time or part-time status. Applicants use this page to enter information about their availability.
<u>Education Page</u>	FO_APP_SS_EDUC	Enter educational information. Applicants can use this page to enter their primary educational credentials. They can make multiple entries for each school they attended.
<u>Competencies Page</u>	FO_APP_SS_COMPS	Enter information about the candidate competencies, proficiency, and interest level.
<u>Opportunities Page</u>	FO_APP_SS_JTTITLES	Enter information about the candidate lines of business, job titles, and positions of interest. Lines of business are broad categories of job sectors, such as <i>Health Care</i> , <i>Technology</i> , <i>Legal</i> , or <i>Clerical</i> . They are useful for indicating the experience that applicants have in a particular field. Applicants with a work history will have job titles for positions that they have held. Customers will often request the services of employees and use a job title to refer to the work performed.
<u>Submit Information Page</u>	FO_APP_SS_SUBMIT	Submit the application.

Staffing Apply Online Login Page

Use the Staffing Apply Online Login page (FO_SS_LOGIN) to login to the Apply Online application, if your system administrator has enabled registration.

Navigation

Employee Self-Service > Staffing Apply Online Login.

Image: Staffing Apply Online Login page

This example illustrates the fields and controls on the Staffing Apply Online Login page. You can find definitions for the fields and controls later on this page.

If the system has been set up to use applicant registration, the Staffing Apply Online Login page will appear and require you to enter your user ID and password or register, before you will be able to access the Apply Online component.

Note: During implementation, you can modify this page to fit your needs. Applicants must view every page in the series. However, not all pages contain required fields.

Click Next to access the Name and Address page.

Note: No search page exists for this apply online section; only new records may be created. The system automatically generates an applicant ID number.

User Name	Enter the user name for an existing account.
Password	Enter the password for the existing account.
Login	Select to sign in. The system validates the user name and password that the applicant entered.
Register Now	Select to access the Register page to create a new account.
Forgot Password	Select to access the Forgot Password page where an applicant can request a new system-generated password via email. Select the Reset and email Password button to reset and receive the password by email.

If Secret Question for Forgot Password option is enabled on the Password Control page, the applicant must correctly select a question and answer the secret question chosen at registration before the system sends a new password.

When the secret question is not enabled, the applicant receives an email containing a new password after selecting the Reset and email Password button.

Reset Password

Select to reset or change your password. You need your old password before you reset or change your password.

Account Lock-out

An account is locked if an applicant has exceeded the specified number of failed logon attempts set up in the Password Control page.

On every failed logon attempt on the login page, a message displays informing the applicant as to how many attempts remain before the account is locked. An account is locked after a failed final attempt. An account can also be locked when the user is trying to reset the password on the Password Reset page and provides a wrong, old password.

When an account is locked, applicants can use the Forgot Password option to obtain a new system-generated password that will unlock the account. The Forgot Password process sends the applicant a system-generated password. After the applicant successfully logs on with the new password, the account is unlocked.

Secret Questions Lock-out

The secret question option is locked if an applicant has exceeded the specified number of incorrect answers to the secret questions setup in the Password Control page.

When secret question option is enabled in the Password Control page, then, when using the Forgot Password option, the applicant must select a question and then correctly answer the secret question to receive a system-generated password on their registered email. If the answer to the secret question is incorrect, a message displays informing the applicant as to how many attempts remain before the secret question option is locked.

When secret question option is locked due to incorrect answers to secret questions, the applicant can no longer use the Forgot Password option to reset the password. However, if the answer is correct, the system sends an email notification with a new password so that the applicant can log on with the new password.

Applicant User Registration Page

Use the Applicant User Registration page (FO_SS_USER_REG) to create a user ID and password for logging into the Apply Online Application.

Navigation

Select the Register Now link on the Staffing Apply Online Login page.

Welcome to our Online Application Page

Use the Welcome to our Online Application page (FO_APP_SS_WELCOME) to begin the process that enables applicants to enter their information.

Navigation

- Employee Self-Service > Staffing Apply Online
- Click the Create your Applicant Record link on the Open Resource Request page.

Resume Page

Use the Resume page (FO_APP_SS_RESUME) to attach resumes and other files to the applicant record.

Alternatively, paste the resume text in the field provided.

Navigation

Click Next on the Welcome to our Online Application page.

You can either copy and paste your resume text in the box provided, or click the Add Resume Attachment button to attach a copy of your resume. If you are using Resume Parsing, the system will automatically populate several fields in the applicant pages for you when you upload your resume.

Job Opening Detail Page

Use the Job Opening Detail page (FO_APP_SS_JOB_DTL) to view internal job details.

Navigation

From the Apply Online component, navigate through the train stops by clicking the Next button until the system takes you to the Job Opening page. In the Search Results section, click the Detail icon.

Image: Job Opening Detail Page

This example illustrates the fields and controls on the Job Opening Detail Page. You can find definitions for the fields and controls later on this page.

The screenshot shows a web form titled "Job Opening Detail". The form contains the following fields and values:

- Job ID: 3
- Position Title: Clerk
- Industry:
- Full/Part-Time:
- Placement Type: Temporary Order
- State: CA
- City: Pleasanton
- Job Descr:
 - Competencies
 - Forms
 - Microsoft Office
 - Desktop Publishing
- Posted Date: 09/06/2012
- A "Return" button is located at the bottom left.

Name and Address Page

Use the Name and Address page (FO_APP_SELF_SERV) to enter name and address information.

Navigation

Click Next on the Resume page.

Enter your name and address information.

Gender

Select your gender. This field is required.

Country

This value appears by default from the User Preferences table and is specific to the adjacent address. The mailing address can be associated with a different country and still be valid.

Mailing Address

Click this link to enter address information where documents, including paychecks and other payroll correspondence, should be sent.

National ID (Optional)

Country

Enter the country associated with your national ID.

National ID Type	Enter your ID type.
National ID	Enter your national identification number.
Primary ID	Select to identify this ID as your primary ID.

Staffing Branch Page

Use the Staffing Branch page (FO_APP_SS_BRANCH) to select the staffing branch to which you want to apply.

Navigation

Click Next on the Name and Address page.

Select the staffing Branch to which you want to apply.

Contact Information Page

Use the Contact Information page (FO_APP_SS_CONTACT) to enter contact information, such as telephone, email, and website information.

Navigation

Click Next on the Staffing Branch page.

Phone Numbers

Phone Type and Telephone	Enter phone number information, including the type of phone number, such as <i>Business</i> , <i>Cellular</i> , or <i>Home</i> .
---------------------------------	--

Email Addresses

Email Type and Email Address	Enter email address information. You can add additional addresses.
-------------------------------------	--

Web Addresses

Website Type and URL (uniform resource locators)	Enter website information. These can be examples of work, personal home pages, and so on.
---	---

Availability Page

Use the Availability page (FO_APP_SS_AVAIL) to enter information about availability, such as desired start date, shift preference, and full-time or part-time status.

Navigation

Click Next on the Contact Information page.

Image: Availability page (1 of 2)

This example illustrates the fields and controls on the Availability page (1 of 2). You can find definitions for the fields and controls later on this page.

Availability - Step 8 of 9

This section indicates when you are available for assignments and includes some of your assignment preferences.

Availability

*Placement Type: Temp

*Application Date: 12/18/2013

Desired Start Date:

Last Date Available:

Full/Part-Time:

Assignment Duration:

Notice Required:

Desired Hours Per Week:

☐ Overtime OK?

☐ Layoff/Recall

☐ Full-Time Student

Desired Work Days

Monday:

Tuesday:

Wednesday:

Thursday:

Friday:

Saturday:

Sunday:

Geographic Preferences

Location 1:

Location 2:

Geographic Preference:

Image: Availability page (2 of 2)

This example illustrates the fields and controls on the Availability page (2 of 2). You can find definitions for the fields and controls later on this page.

Travel

☐ Willing to Commute

☐ Willing to Relocate

☐ Willing to Travel

☐ Willing to Travel Overnight

Percentage Travel:

Maximum Travel Distance:

Transport Availability:

Restrictions:

Comments:

Travel Minutes:

Home Airport:

☐ Kilometers ☐ Miles

Minimum Acceptable Pay Rate

Amount:

Pay Frequency:

Currency Code:

Annual Rate:

Availability**Placement Type**

Select the placement type you prefer: *Temp & Career*, (temporary and career) *Career*, *Contract*, *Leasing*, *Payrolling*, or *Temp* (temporary).

Application Date, Desired Start Date, and Last Date Available

Enter the date you are applying, and enter availability dates. The availability start and end dates on this page are not affected by assignments created in the system.

Desired Work Days

In addition to each of the days of the week an applicant might be available to work, he or she can select any of the three standard 8-hour shifts during a 24-hour period: *1st Shift*, *2nd Shift*, *3rd Shift*, or *Any*. Your system administrator can change these values to reflect your unique requirements.

Note: To replicate your selection for Monday for the remainder of the work week, click the Replicate button.

Geographic Preferences**Location 1 and Location 2**

Enter specific locations, and enter your more general Geographic Preference as well.

Travel**Willing to Commute, Willing to Relocate, Willing to Travel, and Willing to Travel Overnight**

Select any of these check boxes to indicate your commute and travel preferences.

Restrictions

Enter comments to track limitations on an applicant's travel.

Also enter the Percentage Travel you are comfortable with, your maximum Travel Minutes and Maximum Travel Distance, and your Transportation Availability.

Minimum Acceptable Pay Rate**Amount, Currency Code, and Pay Frequency**

Use these fields to indicate the candidate's minimum desired compensation. Enter the amount of pay, the currency in which the amount should be paid, and the frequency at which you want to calculate the pay rate. The system does not base payroll cycles for temporary staff on the frequency chosen here. Frequency is simply a tool that calculates pay using familiar factors. Often, customers and employees quote pay annually or hourly.

Education Page

Use the Education page (FO_APP_SS_EDUC) to enter educational information.

Applicants can use this page to enter their primary educational credentials. They can make multiple entries for each school they attended.

Navigation

Click Next on the Availability page.

School Education

Country, School Type, and Date Acquired	Enter the country in which the school is located, select the type of school, such as <i>High School</i> , <i>Trade School</i> , or <i>University</i> , and select the date you earned the education.
Average Grade and Completed	Enter your average grade, and select the check box to indicate that you completed your education at the school.
School Code	Select a code from the list of available schools.
School Name	If the school is not available from the School Code field, enter it here.
State	Enter the location of the school.
Area of Study and Grade	Enter the area of concentration and the grade received.

Professional Education

Degree	Select the type of degree obtained at the school.
Date Acquired	Select the date that the school awarded the degree.
Average Grade and Graduated	Enter the average grade point, and select the check box if you graduated.
Major Code and Major	Enter the code and major field of study at the school attended.
School Code and School Name	Enter the code and name of the school attended.
Educator, Country, and State	Enter the name of the primary instructor, and the country and state in which the instruction took place.

Competencies Page

Use the Competencies page (FO_APP_SS_COMPS) to enter information about the candidate competencies, proficiency, and interest level.

Navigation

From the Apply Online component, navigate through the train stops by clicking the Next button until the system takes you to the Competencies page.

Enter information about the candidate competencies, proficiency, and interest level.

Opportunities Page

Use the Opportunities page (FO_APP_SS_JTTITLES) to enter information about the candidate lines of business, job titles, and positions of interest.

Lines of business are broad categories of job sectors, such as Health Care, Technology, Legal, or Clerical. They are useful for indicating the experience that applicants have in a particular field. Applicants with

a work history will have job titles for positions that they have held. Customers will often request the services of employees and use a job title to refer to the work performed.

Navigation

From the Apply Online component, navigate through the train stops by clicking the Next button until the system takes you to the Opportunities page.

Image: Opportunities Page

This example illustrates the fields and controls on the Opportunities Page. You can find definitions for the fields and controls later on this page.

CompetenciesEducationAvailability**Opportunities**Submit Application

PreviousNext

Opportunities - Step 10 of 11

Enter Lines of Business and Job Titles you wish to be associate with your application. Use the plus and minus signs to add and delete entries.

Job Titles

*Job Category	Description	*Job Title Code	Description		
				+	-

Lines of Business

*Line of Business	Description		
		+	-

Positions of Interest

Select	Position Title		
Select	Clerk	+	-

Job Titles

Applicants that have a work history will have job titles for the positions for which they have held. Customers often request the services of employees by using a job title to refer to the work performed.

Job Category

Select a Job Category code that you have had in the past and for which you may be qualified to hold.

Job Title Cose

Select a Job Title code that you have had in the past and for which you may be qualified to hold.

Lines of Business

Line of Business

Select a line of business to indicate a business category with which you have experience. Lines of business are broad categories of job sectors, such as *Health Care*, *Technology*, *Legal*, or *Clerical*. They are useful for indicating the experience that applicants have in a particular field.

Positions of Interest

Position of Interest

Select a position of interest for which you are interested in applying. The options available include job postings (internal and external) that have an *Active* status.

This section can be populated from the select positions on the internal [Apply Online: Job Opening Page](#)

Note: This PeopleSoft application delivers an index of job titles at the time the system is installed. You can delete this list from the database in all or in part, and use a job title index that more closely matches your business requirements.

Submit Information Page

Use the Submit Information page (FO_APP_SS_SUBMIT) to submit the application.

Navigation

Click Next on the Job Titles and Lines of Business page.

Click the Submit button to submit your information and begin the application process.

The system assigns an identification number and displays the following message:

Your application has been submitted. Thank You!

Creating Temporary and Career Orders Online

This topic provides an overview of creating temporary and career orders online and lists the pages used to create temporary and career orders online.

Pages Used to Create Temporary and Career Orders Online

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
Order Page	FO_CST_ORDER_HDR	Enter a new temporary or career order.
Resource Request Page	FO_CST_ORDER_REQ	Enter the general details about each resource request in the order.
Billing Page	FO_CST_ORDER_TEMP	Enter placement information for the order.
PeopleMatch Page	FO_CST_ORDER_MATCH	Enter job title and required knowledge level information for each resource request.
Forms Page	FO_SO_TEMPLTS	Add forms to the new order.

Understanding Creating Temporary and Career Orders Online

Your customers can use the PeopleSoft Staffing Front Office self-service functionality to view and create orders for temporary and career assignments online. After a customer submits a new order, an authorized user at your staffing organization can review the pages and add any missing data or update the existing data.

Note: To access the Customer portal, you may need to first log in and immediately log out. Then, in the URL, replace the word *EMPLOYEE* with *CUSTOMER* and the word *LOGOUT* with *LOGIN*. Then click the Go button on your browser.

You should configure the customer self-service OPRID without order approval security so that self-service individuals can only save orders with a status of *Draft* or *Pending Approval*. A staffing agent with order approval security can then review the order, change its status to *Approved* and from *Draft* to *Unfilled*.

The pages used by your customers to create these orders online in self-service mode are similar to those used to create regular orders.

Refer to the order pages for descriptions of the following pages.

Note: You must configure the default customer for each operator in the security setup. Select PeopleTools > Security > User Profiles > User Profiles. Enter the customer's user ID and then click Search. Select the ID tab. In the ID Type field, select *Customer* and then select values for the SetID and Customer ID fields. These values appear on the Order Self Service page in the customer portal. In addition, associate the SETID and CONTACT_ID with the OPRID.

Related Links

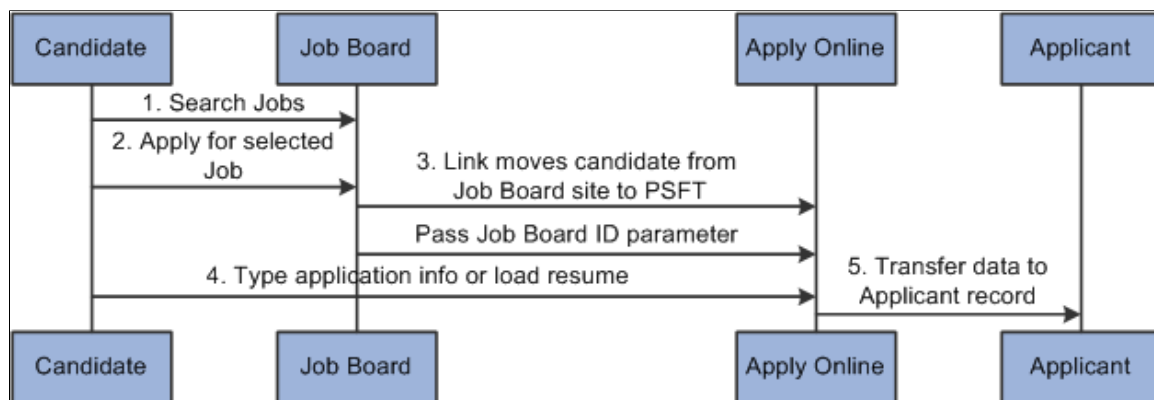
[Creating Orders for Career and Temporary Placements](#)

Understanding the Internal Application Process

This diagram illustrates how candidates apply to a job posting that is on a job board:

Image: Apply to Internal Job Postings on a Job Board

Apply to Internal Job Postings on a Job Board



The steps to applying to a job posting that is on a job board are:

1. The candidate searches for jobs using an external job board page.
2. The candidate selects interested positions and clicks the Apply Now button using the Staffing Job Board page.
3. The system takes the candidate to the Apply Online component.

The system sends the job board ID and parameters to the Apply Online component.

4. The candidate enters or loads application information and resume.
5. The Apply Online component transfers the job and candidate information into PeopleSoft applicant records.

Applying to Internal Job Postings

Apply Online: Job Opening Page

Use the Apply Online: Job Opening page (FO_APP_SS_JOBBOARD) to search for and view a summary of job openings that are posted to the internal job board. This page is intended for internal employees who want to review job openings. Only job openings that have a status of *Active* are displayed. Users can select the job openings for which they want to apply and continue to the next page in the process.

The internal Staffing Job Opening page allows you to display your organizational job board over the internet so that internal candidates can access them.

Navigation

From the Job Board webpage, click the Apply Now button to access the Apply Online page.

From the Apply Online component, navigate through the train stops by clicking the Next button until the system takes you to the Job Openings page.

Image: Apply Online: Job Opening Page

This example illustrates the fields and controls on the Apply Online: Job Opening Page. You can find definitions for the fields and controls later on this page.

The screenshot displays the 'Job Opening - Step 3 of 11' page. At the top, there are tabs for 'Resume', 'Job Opening' (active), 'Personal Information', 'Staffing Branch', and 'Contact Information'. Below the tabs are 'Previous' and 'Next' navigation buttons. The main section is titled 'Search' and contains the following fields:

- Keyword:
- Position Title:
- Industry:
- Placement Type:
- Start Date:
- End Date:

A 'Search' button is located at the bottom right of the search section. Below the search section is a 'Search Results' table with the following columns: Job ID, Position, Industry, State, City, Placement Type, Posted Date, and Detail. The table contains two results:

Job ID	Position	Industry	State	City	Placement Type	Posted Date	Detail
☐	3 Clerk		CA	Pleasanton	Temporary Order	09/06/2012	
☐	4 Analyst-Data		CA	Dublin	Temporary Order	09/06/2012	

At the bottom of the results table, there are links for 'Personalize', 'Find', 'View All', and 'First', '1-2 of 2', and 'Last'.

Results

Select

Select this check box to indicate that you want to apply for this position.

Details

Click this link to access the Job Opening Detail page.[Job Opening Detail Page](#)

Apply Now

Click to apply to the selected positions.

Job Opening Detail Page

Use the Job Opening Detail page (FO_APP_SS_JOB_DTL) to view internal job details.

Navigation

From the Apply Online component, navigate through the train stops by clicking the Next button until the system takes you to the Job Opening Detail page. In the Search Results section, click the Detail icon.

Image: Job Opening Detail Page

This example illustrates the fields and controls on the Job Opening Detail Page. You can find definitions for the fields and controls later on this page.

The screenshot displays the 'Job Opening Detail' page with the following information:

Job ID:	3
Position Title:	Clerk
Industry:	
Full/Part-Time:	
Placement Type:	Temporary Order
State:	CA
City:	Pleasanton
Job Descr:	Competencies - Forms - Microsoft Office - Desktop Publishing
Posted Date:	09/06/2012

At the bottom left, there is a 'Return' button.

Chapter 12

Using the Staffing WorkCenter and Dashboard

Understanding the Staffing WorkCenter and Dashboard

The Staffing WorkCenter is a central navigational component that is designed for the end user. The goal of the WorkCenter is to help an end user become more efficient by accessing frequently used pages and pagelets, and keep multiple pages open while performing daily tasks.

The Staffing WorkCenter is delivered with sample data. It is the responsibility of the system administrator from your organization, to design and create links so that users can view and access specific links, pages, and pagelets.

For information about setting up PeopleTools options for the WorkCenter, see *PeopleTools: Global Technology*

The Staffing WorkCenter can include these primary tabs and sections:

- Main tab:
 - My Work
 - Links
- Reports/Queries tab
 - Queries
 - Reports and Processes

PeopleSoft Classic WorkCenters

WorkCenters are designed for specific roles and provide a central area for users to access key components within Financial and Supply Chain applications. They enable users to access various pages and perform daily tasks without leaving the WorkCenter, thus reducing the time used when navigating through menus.

WorkCenters are delivered as empty components. The system administrator from your organization is responsible for designing and creating links so that users can view and access specific links and pages.



Click to watch a short video about [PeopleSoft WorkCenters](#).

For more information about setting up WorkCenters as a system administrator, see the documentation for "Understanding WorkCenters and Dashboards" (PeopleSoft 9.2: Enterprise Components), "Configuring

Filter Definitions and Values" (PeopleSoft 9.2: Enterprise Components), "Configuring Pagelets" (PeopleSoft 9.2: Enterprise Components).

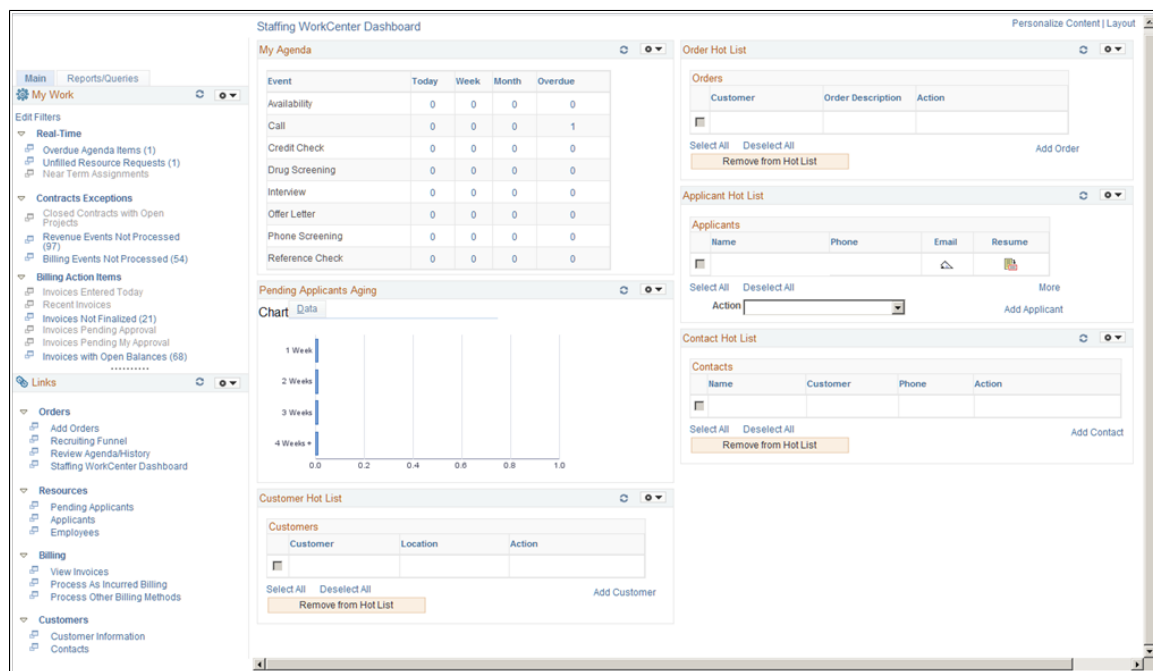
For information about setting up PeopleTools options for the WorkCenter, see *PeopleTools: Portal Technology*.

Example: Staffing WorkCenter

This example illustrates how the Staffing WorkCenter can be set up:

Image: Staffing WorkCenter Dashboard Page

This example illustrates the fields and controls on the Staffing WorkCenter Dashboard Page. You can find definitions for the fields and controls later on this page.



The WorkCenter navigation is located on the left side of the page and includes two main tabs: Main and Reports/Queries. Some WorkCenter pagelets are common to multiple applications, and some pagelets are unique to individual applications.

The right side of the page has been configured as a Dashboard and displays specific pagelets that provide the user with specific information as soon as they access the WorkCenter.

To review more information about the links that appear in each pagelet, see [Understanding the Staffing WorkCenter - My Work](#), [Understanding the Staffing WorkCenter - Links](#), [Understanding the Staffing WorkCenter - Queries](#), and [Understanding the Staffing WorkCenter - Reports and Processes](#).

For more information about setting up WorkCenters as a system administrator, see the "Configure Pagelets - My Work Page" (PeopleSoft 9.2: Enterprise Components), "Configure Pagelets - Links Page" (PeopleSoft 9.2: Enterprise Components), "Configure Pagelets - Queries Page" (PeopleSoft 9.2: Enterprise Components), and "Configure Pagelets - Reports/Processes Page" (PeopleSoft 9.2: Enterprise Components).

Understanding Dashboards and Pagelets

Setting up PeopleSoft Dashboards is similar to setting up WorkCenters because you use the same pages in Enterprise Components. However, Dashboards can display pivot grids that can also be displayed on a users' Home page.

Pivots grids are based on PSQueries and can display the results in a grid format, a chart format, or both. You use the Pivot Grid Wizard (Reporting Tools >Pivot Grid >Pivot Grid Wizard) to design how the page will appear to the user.

Pivot Grids can be added as pagelets (on a user's Home page or in a Dashboard), to the Queries tab in a Classic WorkCenter, and more.



Click to watch short videos about pivot grids: [Pivot Grid Concepts](#) and [PeopleSoft Financial Management 9.2 Pivot Grids](#).

For more information about Dashboards and Pagelets, see "Dashboards and Pivot Grids" (PeopleSoft FSCM 9.2: Application Fundamentals)

For more information about setting up pivot grids, see *PeopleTools: Pivot Grid*

Related Links

"Viewing My Agenda" (PeopleSoft FSCM 9.2: Financials, ESA, ALM, and SCM Portal Packs)

"Viewing the Branch Agenda" (PeopleSoft FSCM 9.2: Financials, ESA, ALM, and SCM Portal Packs)

"Viewing the Team Agenda" (PeopleSoft FSCM 9.2: Financials, ESA, ALM, and SCM Portal Packs)

"Analyzing Branch Agenda" (PeopleSoft FSCM 9.2: Financials, ESA, ALM, and SCM Portal Packs)

"Performing Staffing Searches" (PeopleSoft FSCM 9.2: Financials, ESA, ALM, and SCM Portal Packs)

"Applicant Hot List Pagelet" (PeopleSoft FSCM 9.2: Financials, ESA, ALM, and SCM Portal Packs)

"Viewing Hot Customers, Contacts, and Orders Pagelets" (PeopleSoft FSCM 9.2: Financials, ESA, ALM, and SCM Portal Packs)

"Viewing Pending Applicants" (PeopleSoft FSCM 9.2: Financials, ESA, ALM, and SCM Portal Packs)

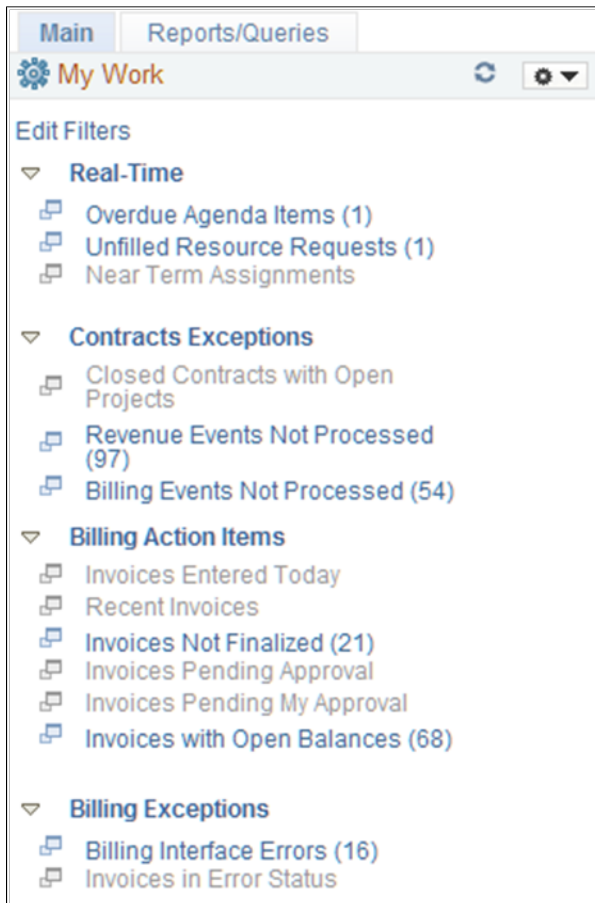
"Viewing Pending Applicants Aging" (PeopleSoft FSCM 9.2: Financials, ESA, ALM, and SCM Portal Packs)

Understanding the Staffing WorkCenter - My Work

This page shot provides an example of how the Staffing WorkCenter – Reports and Processes section can be set up:

Image: Staffing WorkCenter – My Work Page

This example illustrates the fields and controls on the Staffing WorkCenter – My Work Page. You can find definitions for the fields and controls later on this page.



In this example, the My Work section in the Staffing WorkCenter is divided into these groups:

- Real-Time
- Staffing Exceptions
- Billing Action Items
- Billing Exceptions

Common Elements Used on the Staffing WorkCenter - My Work Pagelet

This topic provides common elements used for action options.

Action Options

Change Assigned To

Select to access the Change Assigned To page.

Select the new Assigned To value and click the OK button. The system updates the selected agendas with the new Assigned To value and you receive a message indicating the number of rows that are updated.

The system removes the rows from the grid because they no longer meet the selection criteria.

Change Dates

Select to access the Change Dates page.

Select the new start date and time, the new end date and time, and click the OK button. The system updates the selected agendas with the new dates and times, and you receive a message indicating the number of rows that are updated.

If the end date is greater than the current date, then the system removes the rows from the grid because they no longer meet the selection criteria.

Change Priority

Select to access the Change Priority page.

Select a new priority option and click the OK button. The system updates the selected agendas with the new priority value and you receive a message indicating the number of rows that are updated.

Mark Items Complete

Select to indicate that the status for the selected agendas should change to Complete. You receive a message indicating the number of rows that are updated.

Real-Time

This group contains these exceptions:

Overdue Agenda Items

Use the Overdue Agenda Items pagelet (FO_WC_AGENDA) to view all incomplete agendas for the current user. Agenda items are displayed, where the end date is less than or equal to the current date. Users can select a required agenda and perform one of these actions: Change Assigned To, Change Dates, Change Priority, and Mark Items Completed.

Image: Overdue Agenda Items Page

This example illustrates the fields and controls on the Overdue Agenda Items Page.

Overdue Agenda Items

Overdue Agenda Items

Personalize | Find | View All | | First 1-7 of 7 Last

Agenda

Order Detail

	Event Type	Description	Start Date	Start Time	End Date	End Time	Priority	Customer	Contact	Candidate
☐	INT	Interview	08/15/2012	12:00AM	08/15/2012	12:00AM	Low	Alliance Group	Francine Benedict	Wingrove,Anna
☐	INT	Interview	08/15/2012	12:00AM	08/24/2012	12:00AM	Low	Alliance Group	Kelly Trimble	Gonzales,Eric
☐	AVAIL	Availability	08/15/2012	12:00AM	08/28/2012	12:00AM	Medium	Easy Solutions	Heidi Harrison	Smith,Bernard
☐	CALL	Call	08/15/2012	12:00AM	08/28/2012	12:00AM	High	Apex Systems	Quincy Flynn	
☐	DRUG	Drug Screening	08/15/2012	12:00AM	08/28/2012	12:00AM	Low	Alliance Group	Amy Dent	
☐	INT	Interview	08/01/2012	12:00AM	08/07/2012	12:00AM	High	Apex Systems	Paul Rue	Andreotti,Rita
☐	AVAIL	Availability	08/01/2012	12:00AM	08/06/2012	12:00AM	Medium	Alliance Group	Mary Lewis	Smith,Bernard

Select All

Deselect All

Action

Unfilled Resource Requests

Use the Unfilled Resource Requests pagelet (FO_WC_UNFILL) to view all unfilled resource requests and their respective margins based on certain criteria. An unfilled order is defined as an order or resource request that does not have an assignment, or that all requests do not have assignments.

The criteria is that the requisition status is unfilled on the Resource Request tab, the approval status for the order is approved, the order and resource request status is not Ended, the quantity requested is greater than the quantity assigned, and where the user is the Assigned To on the order, or where the user is the Primary Recruiter of the team, that is entered as the Assigned To.

The system lists the unfilled resource request by priority (high, medium, and low), and then by age (oldest to newest).

Image: Unfilled Resource Requests – General Page

This example illustrates the fields and controls on the Unfilled Resource Requests – General Page.

Unfilled Resource Requests										
Unfilled Resource Requests Personalize Find View All First 1-5 of 5 Last										
General Detail										
Business Unit	Order ID	Line	Description	Customer	Priority	Quantity Requested	Quantity Needed	Start Date	End Date	Margin
US004	0000000030	1	Accounting Clerk	Staffing Customer	HIGH	3		3/05/15/2006	08/31/2006	21.25
US004	0000000031	1	Analyst	Staffing Customer	HIGH	2		1/06/01/2006	09/30/2006	30
US004	0000000033	1		We Ship Express	MEDIUM	3		2/05/01/2006	08/25/2006	17.5
US004	0000000033	2	Branch Clerk	We Ship Express	MEDIUM	2		1/05/01/2006	08/15/2006	17.5
US004	RF02	1	General Practitioner	Mercy Medical Center of Pleasanton	CRITICAL	2		2/10/05/2009		

Near Term Assignments

Use the Near Term Assignments pagelet (FO_WC_NASGN) to view all active and temporary assignments where the end date is greater than or equal to the current date. The criterion is all active

and temporary assignments. It is possible to have more than one row per resource because you can enter multiple end dates. The end date is defined by the user in the search criteria. The system lists the near term assignments by end date so that the assignments that are due to end first are displayed first.

Image: Near Term Assignments Page

This example illustrates the fields and controls on the Near Term Assignments Page. You can find definitions for the fields and controls later on this page.

Near Term Assignments								
Refine Filter Criteria Near Term Assignments Personalize Find View All First 1-7 of 7 Last								
Assignment	Billing Details							
Staffing Branch	Business Unit	Assignment ID	Description	Candidate	Customer	Start Date	End Date	Search Order
CA001	US004	0000000230	Analyst-Business Development	Bookout,Ryan	Staffing Customer	07/25/2006	07/03/2012	Search Order
CA001	US004	0000000231	Administrator	James,Karen	Staffing Customer	07/20/2006	07/03/2012	Search Order
CA001	US004	0000000232	Clerk	Gordon,Jennifer	We Ship Express	07/20/2006	07/03/2012	Search Order
CA001	US004	0000000233	Clerk	Davis,Steven	We Ship Express	07/25/2006	07/03/2012	Search Order
CA001	US004	0000000237	Analyst-Program	Stevenson,Laura	Delta Systems	01/01/2009	07/03/2012	Search Order
CA001	US004	0000000238	Analyst-Program	Reyes,Mark	Delta Systems	01/15/2008	07/03/2012	Search Order
CA001	US004	0000000239	Analyst-Program	Reinolds,Quennie	Delta Systems	06/01/2008	07/03/2012	Search Order

Contracts Exceptions

This group contains these exceptions:

- Closed Contracts with Open Projects
- Revenue Events Not Processes
- Billing Events Not Processes

For more information about Contracts Exceptions, see "Understanding the Contracts WorkCenter" (PeopleSoft FSCM 9.2: Contracts).

Billing Action Items

This group contains these exceptions:

- Invoices Entered Today
- Recent Invoices
- Invoices Not Finalized
- Invoices Pending Approval
- Invoices Pending My Approval
- Invoices with Open Balances

For more information about Billing Action Items, see "Understanding the PeopleSoft Classic Billing WorkCenter - My Work Pagelet" (PeopleSoft FSCM 9.2: Billing).

Billing Exceptions

This group contains these exceptions:

- Billing Interface Errors
- Invoices in Error Status

For more information about Billing Exceptions, see "Understanding the PeopleSoft Classic Billing WorkCenter - My Work Pagelet" (PeopleSoft FSCM 9.2: Billing).

End users use the "Working With and Personalizing the Classic My Work Pagelet As an End User" (PeopleSoft FSCM 9.2: Application Fundamentals) to personalize the My Work pagelet for personal use.

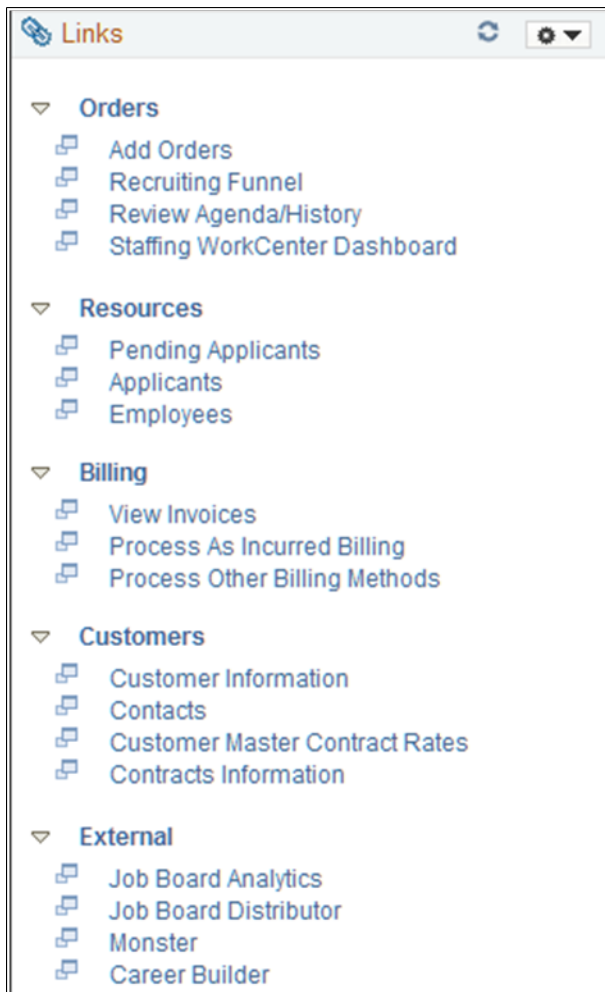
System administrators use the "Configure Pagelets - My Work Page" (PeopleSoft 9.2: Enterprise Components) to set up the WorkCenter My Work pagelet for end users.

Understanding the Staffing WorkCenter - Links

Use the Staffing WorkCenter - Links pagelet (FSPC_LINK_PGLT) to view internal links and external links. The primary purpose of this pagelet is to minimize the number of clicks to access critical path components and pages.

Image: Staffing WorkCenter – Links Page

This example illustrates how the Staffing WorkCenter – Links section can be set up.



System administrators use the "Configure Pagelets - Links Page" (PeopleSoft 9.2: Enterprise Components) to set up the WorkCenter Links pagelet for end users.

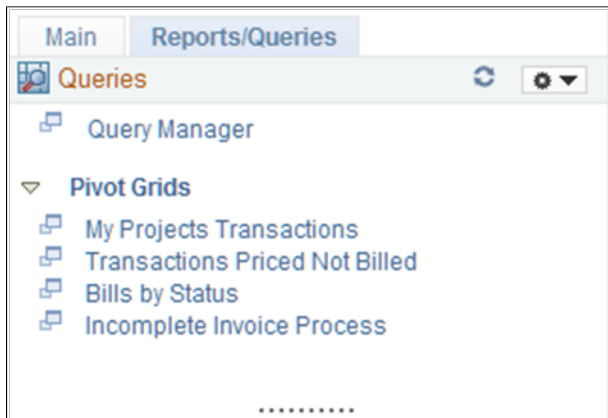
End users use the "Working With and Personalizing the Classic Links Pagelet As an End User" (PeopleSoft FSCM 9.2: Application Fundamentals) to personalize the Links pagelet for personal use.

Understanding the Staffing WorkCenter - Queries

This page shot provides an example of how the Staffing WorkCenter – Queries section can be set up:

Image: Staffing WorkCenter – Reports/Queries Page

This example illustrates the fields and controls on the Staffing WorkCenter – Reports/Queries Page. You can find definitions for the fields and controls later on this page.



The Queries pagelet provides access to public queries, private queries, and Pivot Grids.

System administrators use the "Configure Pagelets – Queries Page" (PeopleSoft 9.2: Enterprise Components) to set up the WorkCenter Queries pagelet for end users.

End users use the "Working With and Personalizing the Classic Queries Pagelet As an End User" (PeopleSoft FSCM 9.2: Application Fundamentals) to personalize the Queries pagelet for personal use.

Understanding the Staffing WorkCenter - Reports and Processes

This page shot provides an example of how the Staffing WorkCenter - Reports and Processes section can be set up:

Image: Staffing WorkCenter – Reports/Processes Page

This example illustrates the fields and controls on the Staffing WorkCenter - Reports/Processes Page. You can find definitions for the fields and controls later on this page.



The Reports/Processes pagelet provides access to system defined reports and processes for which you have access.

System administrators use the "Configure Pagelets – Reports/Processes Page" (PeopleSoft 9.2: Enterprise Components) to set up the WorkCenter Reports/Processes pagelet for end users.

End users use the "Working With and Personalizing the Classic Reports and Processes Pagelet As an End User" (PeopleSoft FSCM 9.2: Application Fundamentals) to personalize the Reports/Processes pagelet for personal use.

Chapter 13

Calculating Margin and Markup

Understanding Margin and Markup

This topic discusses:

- Margin statuses.
- How margin and markup are calculated.
- Determining related costs for margin markup calculations.

Margin Statuses

The following lists the available statuses for margins. These statuses are listed for temporary orders on the Order - Billing page and the Assignment page.



(Green = acceptable)

Acceptable margin achieved. The calculated margin is above the cautionary margin established for the specified job code. If you meet margin requirements, a green circle appears next to the field.



(Yellow = caution)

Margin below normal levels. The calculated margin is above the critical margin, but falls at or below the cautionary margin established for the specified job code. A yellow triangle appears next to the field to indicate that the ratio is not within margin requirements.



(Red = critical)

Unacceptable margin. If the calculated margin falls at or below the critical margin established for the specified job code, a red square appears next to this field.

Note: Margin and markup functionality are applicable to temporary orders only.

How Margin and Markup are Calculated

When bill and pay rates are entered on the order, the margin and markup calculations are dependent upon your prior margin configuration. This topic discusses calculations for margin and markup.

Calculating Margin

The margin calculation on the Order - Billing page subtracts costs from the bill rate and then divides by the bill rate. The costs include the pay rate, overhead costs (fixed cost margin), and workers compensation premiums.

$$\text{Margin} = ((\text{Bill Rate} - \text{Cost}) / \text{Bill Rate}) * 100$$

Calculating Markup

The markup calculation on the Order - Billing page subtracts the pay rate from the bill rate and then divides by the pay rate.

$$\text{Markup} = ((\text{Bill Rate} - \text{Pay Rate}) / \text{Pay Rate}) * 100$$

Related Links

"Setting Up Job Code Margin Indicators" (PeopleSoft 9.2: Pay/Bill Management)

"Defining Assignments" (PeopleSoft 9.2: Pay/Bill Management)

Determining Related Costs for Margin Markup Calculations

This topic discusses how to determine margin and markup calculations for:

- Fixed cost.
- Workers' compensation cost.
- Cost.

Determining Fixed Cost

The fixed cost depends on the fixed cost margin and pay rate. Fixed cost is the additional cost (overhead) that is incurred for every hour of employee pay, excluding workers' compensation.

$$\text{Fixed cost} = \text{Pay Rate} * (\text{Fixed Cost Margin} / 100)$$

Determining Workers' Compensation Cost

The workers' compensation cost is calculated based on the rate type selected on the Workers' Comp Rates page.

If the workers' compensation rate type = *percentage*, then

$$\text{Workers Compensation cost} = \text{Pay Rate} * (\text{Base Rate} / 100) * \text{Modifier}$$

If the workers' compensation rate type = *per hour*, then

$$\text{Workers Compensation cost} = 1 \text{ hour} * (\text{Base Rate})$$

Determining Cost

You must calculate the cost prior to determining the markup or margin.

$$\text{Cost} = \text{Pay Rate} + \text{Fixed Cost} + \text{Workers Compensation Cost}$$

Related Links

"Setting Up Workers' Compensation" (PeopleSoft 9.2: Pay/Bill Management)

Setting Up Margin Indicators

This topic discusses how to set up margin indicators.

Page Used to Establish Margin Indicators

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
Billing Calculation Page	FO_JOB_BILLING	Enter margin indicators.

Billing Calculation Page

Use the Billing Calculation page (FO_JOB_BILLING) to enter margin indicators.

Navigation

Set Up Financials/Supply Chain > Common Definitions > Resources Data > Jobcodes > Billing Calculation

Caution

Enter a margin percentage below which the system triggers a caution warning for an order. This indicates that the margin is below normal levels and changes the order to a *Yellow* status.

Critical

Enter a margin percentage below which the system triggers a critical warning for an order. This indicates that the margin is at an unacceptable level and changes the order to a *Red* status.

Configuring Margin

The margin calculation requires configuration prior to entering orders and calculating margins based on pay and bill rates. Your implementation team configures the values that the system uses in the margin calculation. Your organization bases these calculations on the costs associated with filling a position as well as the expected profit that is generated when you fill the assignment.

This topic discusses how to configure margin.

Page Used to Configure Margin

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
Staffing Branch Page	FO_BRANCH_TBL	Configure margin.

Staffing Branch Page

Use the Staffing Branch page (FO_BRANCH_TBL) to configure margin.

Navigation

Setting Up Financials/Supply Chain > Product Related > Staffing > General > Branch/Business Unit Mapping

Fixed Cost Margin

Enter the margin for the system by branch.

The fixed cost margin is the percentage of cost that is incurred for every hour of employee pay. Enter the figure as a number (not percent) with a maximum of two decimal places. For example, if the burden rate is 12.98 percent, enter the margin estimator at *12.98*.

1. Establish fixed costs by branch.
2. Establish workers' compensation policy and rates.

For PeopleSoft Staffing Front Office standalone (PeopleSoft Pay/Bill Management not installed), select Set Up Financials/Supply Chain > Product Related > Staffing > Payroll. Select either Workers' Comp Company Setup, Workers' Comp State Codes, Workers' Comp State Rates, or Workers' Comp by Job Code.

Note: If you have PeopleSoft Pay/Bill Management installed, you establish workers' compensation policy and rates in PeopleSoft HCM. The information is then synchronized with Financials using application messaging.

Related Links

"Setting Up and Mapping Branches" (PeopleSoft 9.2: Pay/Bill Management)

"Setting Up Workers' Compensation" (PeopleSoft 9.2: Pay/Bill Management)

PeopleSoft Staffing Front Office Web Libraries

Understanding Web Libraries

A web library is a derived or work record whose name starts with WEBLIB_. PeopleSoft embeds all internet scripts (iScripts) in records of this type. An iScript is a specialized PeopleCode function that generates dynamic web content. Administrators must make sure that users have the proper access to web libraries. For example, the default navigation system for PeopleSoft Pure Internet Architecture users is implemented by using a web library. If users do not have the proper authorization to the web library and its associated scripts, then they won't have proper access to the system. If users are not authorized to a particular web library or iScript, then they can't invoke it. After you add a web library, you set the access for each script function individually. Invoking an iScript requires the assembly of a URL. Developers assemble the URL by using PeopleCode.

See the product documentation for:

PeopleTools: PeopleCode API Reference

PeopleTools: Security Administration

PeopleTools: PeopleTools Portal Technologies

Staffing Front Office Web Libraries

This table lists the web libraries that are used and delivered with Staffing Front Office:

Web Library Name	Description
WEBLIB_FO_PB	PeopleSoft Staffing Front Office web library.
WEBLIB_IB	Generates PeopleSoft Integration Broker functions.
WEBLIB_MSGWSDL	This is the record behind the page for the enterprise integration point (EIP) Web Services Description Language (WSDL) generation.

Web Library Name	Description
WEBLIB_PORTAL	Contains the following five fields with FieldFormula iScript PeopleCode, each of which relate to a functional area of the portal: PORTAL_HOMEPAGE: Support for homepage runtime interaction, including the homepage version of the menu navigation. PORTAL_NAV: Main support routines for navigation. PORTAL_HEADER: Support for the header portion of the page and some generic routines. PORTAL_DYN_TEMP: Support for the dynamic template. PORTAL_PGLT_PREV: Support for the pagelet preview functionality.
WEBLIB_PT_NAV	Contains iScripts for the menu pagelet and left-hand navigation for transaction pages.
WEBLIB_RPT	Contains iScript for the Run report to window output option. Supports access to the new page.

Appendix A

PeopleSoft Staffing Front Office Reports

Staffing Front Office Reports: General Descriptions

This table lists the PeopleSoft Staffing Front Office reports, sorted alphanumerically by report ID. This topic includes:

- Customer reports.
- Order reports.
- Assignment reports.
- Agenda reports.
- Employee reports.

See the product documentation for *PeopleTools: Process Scheduler*

Customer Reports

Report ID and Report Name	Description	Navigation	Run Control Page
FOCM001 New Customers	Provides a list of new customers within the range of dates specified. Displays the customer name, address, the date they became a customer, the sales person, and the service person.	Staffing > Reports > Customers > New Customers	RUN_FOCM001
FOCM006 Active Customers	Provides a list of active customers. Displays customer name, address, sales person, and service person.	Staffing > Reports > Customers > Active Customers	RUN_FOCM006
FOCM008 Customer Credit	Details credit information for new customers. Displays customer name, ID, date they became a customer, risk code, credit limit, credit limit date, next credit review date, credit dispute status, and collection status.	Staffing > Reports > Customers > Customer Credit	RUN_FOCM008

Report ID and Report Name	Description	Navigation	Run Control Page
FOCM009 New Customer Accounts	Details projected hours, billing, and career placement fees for new customer accounts within the date range specified. The results are grouped by month, sales user, and SetID	Staffing > Reports > Customers > New Customer Accounts	RUN_FOCM009
FOCM013 Customer Estimated Billing	Provides the customer name, address, and estimated billings for assignments with start dates within the date range specified. The results are grouped by sales user and SetID.	Staffing > Reports > Customers > Customer Estimated Billing	RUN_FOCM013
FOCM014 Customer Sales	Displays the customer name, estimated billings, estimated billing percent, and estimated margin for assignments with start dates within the range of dates specified. The results are grouped by sales user and SetID.	Staffing > Reports > Customers > Customer Sales	RUN_FOCM014
FOCM015 Customer Assignment Mix	Summarizes by service area (line of business) and customer the estimated hours, estimated billings, and career order income for assignments with start dates that fall within the range of dates specified. The results are grouped by sales user and SetID.	Staffing > Reports > Customers > Customer Assignment Mix	RUN_FOCM015
FOCM017 Inactive Customers	Identifies customers who have not placed an order since a specified date. Displays the customer name, address, date of last order, number of orders, sales person, and service person.	Staffing > Reports > Customers > Customers Without Orders	RUN_FOCM017
FOCR001 Call Summary	Details customer communications that are classified as call reports. Displays the customer name, date of the call report, contact name, and contact method. The results are grouped by agenda operator ID.	Staffing > Reports > Customers > Customer Call	RUN_FOCR001

Report ID and Report Name	Description	Navigation	Run Control Page
FOPM003 Quality Assurance	Prints customer quality feedback information for a particular date range. Displays the appraisal information and the specific feedback details. The results are grouped by staffing branch and service user.	Staffing > Reports > Customers > Quality Assurance	RUN_FOPM003
FOQL001 Customer Feedback Survey	Generates survey forms that are sent to customers to evaluate employees.	Staffing > Reports > Customers > Customer Feedback Survey	RUN_FOQL001

Order Reports

Report ID and Report Name	Description	Navigation	Run Control Page
FOOA010 Career Placement Summary	Lists information about the career placements that have an assignment start date within the date range specified. Information printed includes the employee name, customer name, final salary, actual fee percentage and amount, order contact, and the position title. The report is organized by staffing branch, customer ID, and service user.	Staffing > Reports > Orders and Assignments > Career Placement Summary	RUN_FOOA010
FOOM001 Temporary Orders	Lists the order ID, order type, customer name, order start and end dates, total number of assignments, job code, order bill and pay rates, estimated weekly hours, and estimated weekly billings for temporary orders created within a particular date range. The results are grouped by operator ID and staffing branch.	Staffing > Reports > Orders and Assignments > Temporary Orders	RUN_FOOM001

Report ID and Report Name	Description	Navigation	Run Control Page
FOOM004 Unfilled Orders	Lists the customer name, order ID, order duration, quantity of people needed, quantity of people short, job code, estimated total hours, estimated hours short, and estimated lost income for orders that are currently unfilled. The report is organized by staffing branch and by service user. For career orders, total hours and hours short do not apply and will have values of zero. Also, estimated loss for career orders is based on the maximum potential placement fee multiplied by the quantity of people short.	Staffing > Reports > Orders and Assignments > Unfilled Orders	RUN_FOOM004
FOOM005 Last Order Placed	Lists the customer name, count of orders, date last order placed, start date of last order placed, and person who placed the last order. The report is organized by staffing branch and order service user.	Staffing > Reports > Orders and Assignments > Last Order Placed	RUN_FOOM005
FOOM010 Career Orders	Lists the order ID, order type, department, customer name, job title on the order, fee schedule code, date fee scheduled was signed, guarantee days, minimum and maximum salary, and fee information for career orders created within a particular date range. The results are grouped by operator ID and staffing branch. This report only shows career orders that have one or more candidates assigned to it and a fee schedule specified.	Staffing > Reports > Orders and Assignments > Career Orders	RUN_FOOM010

Assignment Reports

Report ID and Report Name	Description	Navigation	Run Control Page
FOAE001 Employee Assignments	Lists the employee name, national ID, address, phone, and total assignment count for employees belonging to the primary staffing branch specified.	Staffing > Reports > Orders and Assignments > Employee Assignments	FO_RUN_CNTL_EA
FOOA003 Completion Reason Analysis	Summarizes by assignment the completion reason code, assignment count, and percentage. Selects all assignments meeting the parameters that have an actual end date between the dates provided. The results are grouped by the service user.	Staffing > Reports > Orders and Assignments > Completion Reason Analysis	RUN_FOOA003
FOOA004 Pending End Dates	Lists employees who are in assignments where the assignment estimated end date is less than or equal to the date parameter provided in the report. Results include customer name, supervisor, supervisor phone, employee name, and estimated assignment end date. The report is organized by staffing branch, customer, and service user.	Staffing > Reports > Orders and Assignments > Pending End Dates	RUN_FOOA004
FOOA005 Active Assignments	Lists the customer ID, name, job code, start and end dates, bill and pay rates, estimated hours, and estimated billings for assignments that have a start date before or equal to the start date parameter and end date greater or equal to the end date parameter. Results are grouped by staffing branch and service user.	Staffing > Reports > Orders and Assignments > Active Assignments	RUN_FOOA005
FOOA009 New Assignment Bill and Hire	Lists all assignments that started within the date range specified. Displays customer name, employee name, estimated billing amount, pay rate, bill rate, estimated weekly hours, and estimated gross profit. The report is organized by staffing branch, customer, and service user.	Staffing > Reports > Orders and Assignments > New Assignment Bill and Hire	RUN_FOOA009

Agenda Reports

Report ID and Report Name	Description	Navigation	Run Control Page
FOAG003 Current Agenda Listing	Lists open agenda items within the date range provided for the specified user. Shows the customer name and phone, contact name and phone, employee name and phone, agenda item date and time, and the agenda event type.	Staffing > Reports > Agenda > Current Agenda Listing	RUN_FOAG003

Employee Reports

Report ID and Report Name	Description	Navigation	Run Control Page
FOEM004 Missing or Expired I-9	Displays the name, emplID (employee ID), national ID, I-9 completed date, employment eligibility proof, and alt. doc. expiration date (alternative documentation expiration date) for applicant and employee records where required I-9 information is either missing or expired as of the date specified. The results are grouped by staffing branch.	Staffing > Reports > Resources > Missing or Expired I-9	RUN_FOEM004
FOEM005 New Employees	Provides the name, address, employee ID, personnel status, recruiting source, and hire date of employees whose records were created within a particular date range. The results are grouped by staffing branch.	Staffing > Reports > Resources > New Employees	RUN_FOEM005
FOEM007 Inactive Employees	Provides the employee ID, name, address, personnel status, and employee status of employees who are classified as inactive. The results are grouped by staffing branch.	Staffing > Reports > Resources > Inactive Employees	RUN_FOEM007
FOEM010 Recruiting Source Analysis	Provides a pie chart plus a list of the total number and percentage of employees, by recruiting source, within a particular date range. The results are grouped by staffing branch.	Staffing > Reports > Resources > Recruiting Source Analysis	RUN_FOEM010

Report ID and Report Name	Description	Navigation	Run Control Page
FOEM011 Active Employees	Provides the name, address, employee ID, country, personnel status, and department of currently active employees and applicants. The results are grouped by staffing branch.	Staffing > Reports > Resources > Active Employees	RUN_FOEM011
FOEM013 Employee Assignment Summary	Lists employees with temporary assignments active as of the date specified. Displays the employees, the count of assignments per employee, the average assignment pay and bill rates for the employee, and the average margin. The results are grouped by staffing branch and operator ID.	Staffing > Reports > Resources > Employee Assignment Summary	RUN_FOEM013
FOEM016 Assignment Count by Department	Lists a count of assignments, assignment percentages, average bill rate, average pay rate, and average margin. The report is organized by employee primary staffing branch, employee primary user ID, and order department.	Staffing > Reports > Resources > Assignment Count by Department	RUN_FOEM016
FOOA008 Employee Availability	Lists the name, employee ID, phone number, and competencies of employees who are available within a particular date range. The results are grouped by staffing branch.	Staffing > Reports > Resources > Employee Availability	RUN_FOOA008
FOQL002 Employee Feedback Survey	Generates the survey forms sent to employees to evaluate customers.	Staffing > Reports > Resources > Employee Feedback Survey	RUN_FOQL002

