
PeopleSoft HCM 9.2: eProfile Manager Desktop

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PeopleSoft HCM 9.2: eProfile Manager Desktop
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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.

Typographical Convention	Description
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

Related Links for PeopleSoft HCM

[Oracle Help Center](#)

[PeopleSoft Information Portal](#)

[My Oracle Support](#)

[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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Chapter 1

Getting Started with eProfile Manager Desktop

eProfile Manager Desktop Overview

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

eProfile Manager Desktop Business Processes

eProfile Manager Desktop supports the following business processes:

- Review employee information.
- Change employees' reporting manager.
- Transfer employees.
- Promote employees.
- Change employees' location.
- Change employees' full-time or part-time status.
- Retire employees.
- Terminate employees.
- Request job changes requiring Works Council approval.
- Review military rank change requests.
- Add and review hires.

(USF) With this application, you can also:

- Reassign employees.
- Separate employees.

The eProfile Manager Desktop also provides managers with this dashboard functionality:

- Review employee talent summary information.

- Review managerial tasks on the Manager Dashboard.

We discuss these business processes in the business process topics in this documentation.

eProfile Manager Desktop Implementation

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

Other Sources of Information

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

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

See the product documentation for *PeopleTools: Setup Manager*.

Related Links

Application Fundamentals

Setting Up Guided Self-Service Transactions for Manager Self-Service

Understanding Guided Self-Service Transactions

In PeopleSoft eProfile Manager Desktop, guided self-service enables you to configure self-service transactions that guide users through managerial processes. You can also use guided self-service to create a single transaction that combines related tasks (for example, a promotion and a salary increase), thus simplifying processes and minimizing change management efforts.

When you configure guided self-service transactions, you choose which pages and fields to present to the manager. You can also present managers with questions about what they want to do and let the answers to the questions control which pages and fields appear. Additional configuration options control how the system processes the request. For example, you can specify an approval process, and for certain transactions you can choose whether to update position data.

With one exception, guided self-service transactions update employee job and compensation data. For employee data changes, configuration options also control which actions and action reasons are used. The delivered *Update Job Details for Group* transaction can update department, location, and supervisor information for multiple employees at a time. The other employee transactions update data for one employee at a time.

The delivered *Clone Position* transaction differs from other transactions because it does not affect employee data. Instead, it create a new position data record. Default position data comes from the position that is being cloned, and configuration options control which fields the manager can view and modify before submitting the transaction.

Oracle delivers these guided self-service transactions for managers:

- Change Full / Part Time or Hours
- Clone Position
- Demote Employee
- Promote Employee
- Request Ad Hoc Salary Change
- Request Location Change
- Request Leave of Absence (used for unpaid leaves of absence)
- Request Paid Leave of Absence
- Request Reporting Change

- Retire Employee
- Terminate Employee
- Transfer Employee
- Update Job Details for Group

Guided self-service transactions are also configured to use workflow and approval capabilities. For more information on manager self-service transactions and using approvals, see [Understanding the Management of Direct Reports](#).

Related Links

[Configuring Guided Self-Service Transactions for Manager Self-Service](#)

[Performing Guided Self-Service Transactions in Manager Self-Service](#)

[Approving Guided Self-Service Transactions](#)

Configuring Guided Self-Service Transactions for Manager Self-Service

To set up guided self-service transactions, use the Transaction Configuration (HR_MSS_CT_CFG) and Clone Transaction (HR_MSS_CT_CLONE) components.

This video provides a demonstration of guided self-service configuration options for regulatory regions and action reasons.



[PeopleSoft HCM 9.2 Image 17 Highlights: Guided Self-Service Enhancements](#)

Related Links

[Understanding Guided Self-Service Transactions](#)

[Performing Guided Self-Service Transactions in Manager Self-Service](#)

Pages Used to Configure Guided Self-Service Transactions

Page Name	Definition Name	Usage
Transaction Configuration - Configuration Page	HR_MSS_CT_CFG	Configure guided self-service transactions for managers.
Clone Transaction Secondary Page	HR_MSS_CT_CLNE_SEC	Create a new row for an existing transaction ID, and specify the effective date and regulatory region for the new row.
Transaction Configuration - Questionnaire Page	HR_MSS_CT_SEQ	Add questions for guided self-service transactions.

Page Name	Definition Name	Usage
<u>Action Reasons Page</u>	HR_MSS_CT_RSN_SEC	Choose the valid action reasons for the job data row that the transaction creates, and choose a default action reason.
<u>Page Fields Page</u>	HR_MSS_CT_FLDS_SEC	Choose which fields to display on the guided self-service transaction, and choose whether those fields are display-only.
<u>Transaction Configuration - Position Data Options Page</u>	HR_MSS_CT_POSN_SEC	Configure position data updates based on guided self-service updates to incumbent data.
<u>Clone Transaction Page</u>	HR_MSS_CT_CLONE	Clone guided self-service transactions for manager self-service.

Understanding Delivered Transactions and Fields for Guided Self-Service

Oracle delivers several preconfigured transactions. Part of the transaction configuration is choosing which fields to include. The available fields are those from records that exist specifically to support guided self-service.

This overview lists the delivered transactions and lists which fields are available to use with guided self-service.

Delivered Transactions

The PeopleSoft application delivers configurations for the following guided self-service transactions:

- HR_DEMOTION (Demote Employee)
- HR_FULL_PART_STATUS (Change Full/Part Time or Hours)
- HR_GROUP_UPDATE (Update Job Details for Group)

Note: The ability to process multiple employees is hard-coded into this transaction. You cannot configure other transactions to support multiple employees.

- HR_LOA_PAID (Request Paid Leave of Absence)
- HR_LOA_UNPAID (Request Leave of Absence)
- HR_LOCATION_CHANGE (Request Location Change)
- HR_POSITION_CLONE (Clone Position)
- HR_PROMOTE_PAY (Promote Employee)
- HR_REPORTING_CHANGE (Request Reporting Change)
- HR_RETIREMENT (Retire Employee)
- HR_TERMINATE (Terminate Employee)

- HR_SALARY_CHANGE (Request Ad Hoc Salary Change)
- HR_TRANSFER_PAY (Transfer Employee)

Types of Delivered Fields

When you configure the fields for a guided self-service transaction, you first choose the page that contains the record and field definitions that you will use.

These are the supported pages:

- HR_MSS_CT_JOB_SBF (Job Details subpage) for job data fields.
- HR_MSS_CT_COMP_SBF (Compensation Details subpage) for compensation data fields.
- HR_MSS_CLPOSN1_SBF (Clone Position subpage) for position data fields.

Oracle also delivers an additional job data subpage, HR_MSS_CT_JOBC_SBF that your organization can modify if you need to add additional fields for guided self-service. As delivered, this page does not include any fields.

Delivered Fields for Job Data

These fields are available on the Job Details subpage HR_MSS_CT_JOB_SBF:

- *Business Unit*
- *Department ID*
- *Expected Return Date*
- *Full/Part Time*
- *Job Title*
- *Last Date Worked*
- *Location Code*
- *Position Number*
- *Reports To* (for employees in positions)
- *Standard Hours*

If the Standard Hours field from the Job Details subpage is made visible, the transaction also displays a read-only FTE (full-time equivalent) field. The value in the FTE fields is automatically updated when the manager changes the employee's standard hours.

- *Supervisor ID* (for employees who are not in positions, or whose Reports To position data has been overridden with a Supervisor ID)

Delivered Fields for Compensation Details

These fields are available on the Compensation Details subpage HR_MSS_CT_COMP_SBF:

- *Annual Rate*

- *Previous Salary*

Delivered Fields for Clone Position

These fields are available on the Clone Position subpage HR_MSS_CLPOSN1_SBF:

- *Title*
- *Short Title*
- *Business Unit*
- *Department*
- *Job Code*
- *Max Head Count*
- *Reports To*
- *Location*
- *Standard Hours*
- *Work Period*
- *Union Code*
- *Regular Shift*
- *Reg/Temp*
- *Full/Part time*
- *Mon*
- *Tue*
- *Wed*
- *Thu*
- *Fri*
- *Sat*
- *Sun*
- *Regulatory Region*
- *Supervisor Level*
- *Long Description*
- *Company*
- *Position Pool ID*

- *Pre-Encumbrance Indicator*
- *Encumber Salary Option*
- *Encumber Salary Amount*
- *Classified Indicator*
- *FTE*
- *Adds to FTE Actual Count*

For the Clone Position subpage, the Standard Hours field and the FTE field are configured independently. This is different from the Job Data subpage, where configuring the Standard Hours field to appear in the transaction automatically causes a display-only FTE field to appear as well.

The Salary Plan, Salary Grade, and Salary Step fields cannot be configured to appear in the transaction. The delivered *Clone Position* transaction automatically copies the original position's salary plan, grade, and step unless the values are cleared because the manager who requests the position clears the Business Unit value while updating data for the new position. An administrator is responsible for verifying that the newly created position has the correct salary information. If administrator approvals are required, this review can be done on the administrator approval page, where the administrator can update the fields before approving the transaction.

You also cannot configure the setting for the Update Incumbents check box on the new position; that check box is always selected in new positions that are created by the delivered *Clone Position* transaction.

For additional important information about the fields in the *Clone Position* transaction, refer to the documentation for the [Clone Position Page](#).

Understanding Updates to Position Data

This overview discusses considerations for employees in positions.

Note: This topic is not relevant to the *Clone Position* transaction, which creates a new position without changing any existing employee information.

Updating Data for an Employee's Position

If you are changing certain information related an employee's current position (rather than changing which position is associated with the employee), you can configure these delivered transactions to update position data:

- Change Full/Part Time or Hours
- Request Location Change
- Request Reporting Change
- Update Job Details for Group

Important! These are the only transactions that support position data updates.

If you enable position data updates, the updates occur only if both of these conditions are met:

- The employee's position data has not been overridden.
- There is a one-to-one relationship between the employee and the position.

When position data updates are enabled and a manager submits a request for an employee who meets both conditions, both managers and approvers see messages stating that position data will be updated as a result of the request. When the system makes automatic database updates, it inserts a new effective-dated row into the position data record. As long as the Update Incumbents check box on the "Position Data - Specific Information Page" (PeopleSoft HCM 9.2: Human Resources Manage Positions) is selected, the new position data row triggers the Update Incumbent process, which adds a corresponding row to the employee's job record.

Important! If you use Guided Self-Service to update positions, make sure that the Update Incumbents check box is selected in the Position Data component so that the position changes can flow through to employee's job data records.

Conditions that Prevent Automatic Position Data Updates

The system does not make position data updates in the following situations:

- Position data updates are not enabled, or the transaction is not one of the ones that supports position data updates.

In these situations, the transaction is always routed to an administrator after any other approvals are complete. The administrator does not have the option to let the system make automatic updates. Instead, the administrator is instructed to update the data manually.

- There is not a one-to-one relationship between the employee and the position.

In this situation, the transaction works as if position data updates were not enabled, so the administrator who processes the transaction must make the database updates manually.

- The employee's position data is overridden in the job data record.

In this situation, the employee is handled like an employee who is not in a position. If administrator approval is required, the administrator still has a choice between allowing automatic updates and making manual updates, but automatic updates are made to the job record rather than to the position data.

- The employee has been given a new supervisor who is not in a position.

This situation is possible only through the *Update Job Details for Group* transaction. The the group action includes a mix of position employees and non-position employees, and the manager chooses to change the employees' supervisor, it is possible to select a new supervisor who is not in a position. The system can assign this new supervisor to the non-position employees, but an administrator must manually update the Reports To field for the position employees.

In this scenario, the *Update Job Details for Group* transaction can still update the department and location for employees in positions.

Changes to Which Position is Associated With an Employee

Position configuration applies only to changes that you make to position data. No configuration is needed to change which position an employee holds. You can change an employee's position using the delivered Promote Employee, Demote Employee, and Transfer Employee transactions.

With partial position management, the system can make automatic database updates only if the employee's position data has not been overridden. Otherwise, an administrator must manually make the change after the transaction has been approved.

Related Links

"Maintaining Position Data" (PeopleSoft HCM 9.2: Human Resources Manage Positions)

Understanding URL Definitions for Guided Self-Service Attachments

When you configure a guided self-service transaction, you choose whether to enable transaction attachments.

File Storage

PeopleTools manages the physical storage locations of file attachments using the URL Maintenance page (PeopleTools, Utilities, Administration, URLs). All guided self-service transactions use the delivered URL Identifier `HR_MSS_CT_FILES`.

As delivered, the `HR_MSS_CT_FILES` URL Identifier is configured to store attachments in a database record. Modify the settings to store attachments on a file server instead.

File Type Restrictions

On the URL Maintenance page in PeopleTools, click the URL Properties link to open a page where you can choose a file extension list that controls the allowable file types. File extension lists are managed on the File Extension List page (PeopleTools, Utilities, Administration, Administer File Processing, File Extension List).

As delivered, the `HR_MSS_CT_FILES` URL Identifier references the delivered `GSS_EXTENSION_LIST`. Note that on phones and tablets, the mobile operating system can additionally restrict user's ability to attach certain types of files. For example, iOS phones allow users to attach photos or videos, but they do not provide access to a full file system where users can select other types of attachments

Transaction Configuration - Configuration Page

Use the Transaction Configuration - Configuration page (`HR_MSS_CT_CFG`) to configure guided self-service transactions for managers.

Navigation

Set Up HCM >Common Definitions > Guided Self Service >Transaction Configuration >Configuration

Image: Transaction Configuration - Configuration Page

This example illustrates the Transaction Configuration - Configuration page.

Configuration Questionnaire

Transaction ID HR_PROMOTE_PAY

Regulatory Region

Transaction Details ? First 1 of 1 Last

*Effective Date 01/01/1900 Clone Transaction + -

*Status Active

*Title Promote Employee

Comments Promote Employee

Approvals ?

*Transaction Name HR_PROMOTE_PAY Promote Employee

Approval Process ID GSSPromoteEmployee Promotion Transaction Approval

Activity Guide ?

Activity Guide ID GSS_SUOW01 Guided Self Service

Attachments ?

Allow Attachments

Help & Support ?

Help Text ID HDR_PROMOTE

Decision Support ?

Sequence	Message Set	Number	Content		
10	18031	1000	Manager Resource Guide	+	-
20	18031	1003	Compensation Guidelines	+	-
30	18031	1002	Career Level Guidelines	+	-
40	18031	1001	Promotion Approval Matrix	+	-
50	18031	1004	FAQ	+	-

Transaction ID

Configuration settings are keyed by effective date and regulatory region as well as by transaction ID, but the transaction ID is the field that identifies the transaction.

For example, all settings with the transaction ID HR_PROMOTE_PAY are for the Promote Employee transaction.

At runtime, when a manager initiates a Promote Employee transaction, the system looks at the effective date and regulatory region values to select the correct row for the HR_PROMOTE_PAY transaction.

Regulatory Region

Displays the regulatory region that you are configuring. For every Transaction ID, there must be a configuration record with no regulatory region defined. This is the default configuration that system uses for employees in regulatory regions that do not have region-specific settings.

Transaction Details**Clone Transaction**

Click to copy the current transaction to create a new configuration row for the transaction.

The newly created row retains the current Transaction ID, but you can enter a new effective date and / or regulatory region to create a modified configuration to support requirements that have changed or that are different for different regulatory regions.

Status

Keep the default value of *Active* for configurations that are currently in use. Select *Inactive* to remove a configuration from use. You cannot inactivate all effective-dated rows for a transaction's default configuration (the configuration with no regulatory region).

Title

Enter a short description for this transaction. At runtime, the system will display this title at the top of the guided self-service pages.

Comments

Enter any additional descriptive information about the transaction.

Approvals**Transaction Name and Approval Process ID**

Enter the workflow transaction name to be used. The system displays the approval process ID that is related to the specified workflow transaction.

The delivered transactions all include delivered approval processes. For a list of the delivered approval processes, see [Understanding Delivered Approval Process IDs for Guided Self-Service Transactions](#).

Activity Guide

Note: This section appears only if you use PeopleTools 8.55 or above. In earlier versions of PeopleTools, guided self-service transactions do not use the Activity Guide framework.

Activity Guide ID

Select the activity guide that renders the transaction steps to end users. Guided self-service transactions that Oracle delivers already include an activity guide ID.

Activity Guides have their own security setup. In the delivered activity guides, the eProfile Manager Fluid role has access to guided self-service transactions. If you set up your own activity guides, or if you use other roles for guided self-service users, use the activity guide security settings to ensure all users have proper access.

The delivered activity guides are *GSS_POSNIL* for the Clone Position transaction and *GSS_SUOW01* for all other delivered transactions. Do not modify these activity guides except to update security. If you need to change other areas of the activity guide configuration, clone the delivered activity guide, make your changes, and then update the transaction to reference the modified activity guide.

Attachments

Allow Attachments

Select this check box to enable requestors to attach supporting documents for this transaction.

When this check box is selected, the Review and Submit page for the transaction includes an attachments section where the requestor can upload attachments related to the request.

Approvers using classic approval pages or Fluid Approvals can review these attachments during the approval process. (Attachments are not supported by the Mobile Approvals Platform (MAP). If you still use MAP, consider switching to Fluid Approvals so that approvers can see attachments.)

For information on configuring attachment storage and allowable file types, see [Understanding URL Definitions for Guided Self-Service Attachments](#).

Help & Support

Help Text ID

Enter the message catalog text ID for the introductory text that appears before the questions on the [Questionnaire Page](#) of the guided transaction. This text gives the user instructions or guidance for answering the questionnaire.

Edit Help Text icon

If a Help Text ID has been entered, you can click the Edit Help Text pencil icon to open a dialog box that displays the specified text catalog entry on the "Maintain Text Catalog Page" (PeopleSoft HCM 9.2: Application Fundamentals). Use the dialog box to view or modify the text catalog entry.

Decision Support

Use this section to list the decision support topics that appear within the Decision Support tab on the Questionnaire page. This information should provide guidance and assist the user in completing the transaction.

Sequence	Enter the order in which the Decision Support tab should display the help topics.
Message Set and Number	Select the message set and number associated with the text that you want to display for Decision Support. The messages will appear as links and text on the Decision Support tab on the Questionnaire Page . Use the PeopleTools message catalog (not the HCM Text Catalog) to define additional decision support content for your organization.
Content	Displays the message text from the specified message catalog entry.

Clone Transaction Secondary Page

Use the Clone Transaction secondary page (HR_MSS_CT_CLNE_SEC) to create a new row for an existing transaction ID, and specify the effective date and regulatory region for the new row.

Navigation

Click the Clone Transaction link on the Transaction Configuration - Configuration page.

Image: Clone Transaction secondary page

This example illustrates the Clone Transaction secondary page.

The screenshot shows a dialog box titled "Clone Transaction". Inside, there is a section titled "Transaction Details" with the following fields:

- Transaction ID: HR_PROMOTE_PAY
- Effective Date: 03/08/2016 (with a calendar icon)
- Regulatory Region: (empty text box with a search icon)
- Title: (empty text box)

At the bottom of the dialog are two buttons: "OK" and "Cancel".

Regulatory Region

Enter the regulatory region for the new row to be created. When a transaction has different configurations for different regulatory regions, the system uses the configuration for the employee who is being processed. If there is not a row for the employee's regulatory region, the system uses the default configuration (the one that does not have any regulatory region specified).

Title The title for the new row appears as the transaction title at runtime.

Transaction Configuration - Questionnaire Page

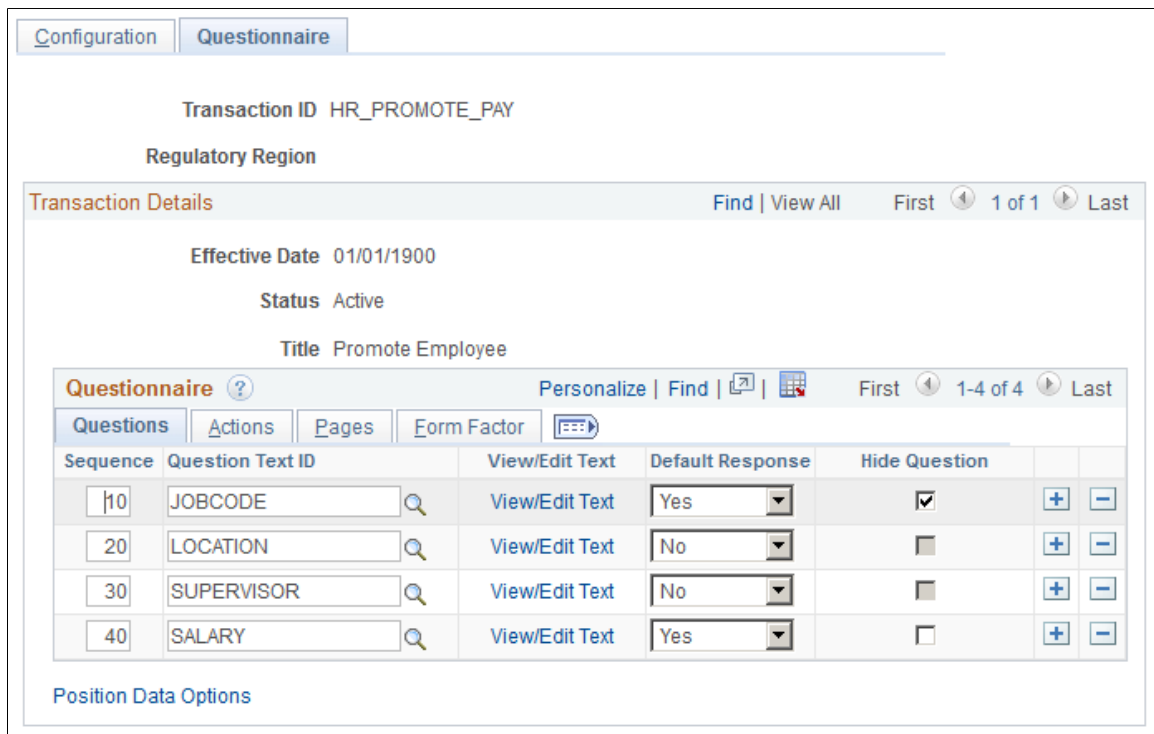
Use the Transaction Configuration - Questionnaire page (HR_MSS_CT_SEQ) to add questions for guided self-service transactions.

Navigation

Set Up HCM >Common Definitions > Guided Self Service >Transaction Configuration >Questionnaire

Image: Transaction Configuration - Questionnaire Page

This example illustrates the Transaction Configuration - Questionnaire page.



The pages and fields that appear in a guided self-service transaction depend on the answers to the questions listed in the Questionnaire grid. All transactions must have at least one question, even if that question is hidden and the end-user never sees it. Questions that are not hidden appear on the Questionnaire Page, which is presented to the end user when the transaction is first invoked.

Questions Tab

Sequence

Enter a sequence number to determine order in which the questions are presented to the end-user on the Questionnaire page.

For the Hide Action/Reason setting on the Actions tab, the sequence also determines which setting is used if different rows

have different settings. Specifically, the system uses the settings from the first question that has a *Yes* answer.

Question Text ID

Enter the text catalog ID for the text of the question. Valid text catalog IDs are those that have the object owner ID of *HELM* (eProfile Manager Desktop) and the sub ID of *CT*.

On the Form Factor tab, you can enter a different text catalog ID for small form factor devices such as phones.

View/Edit Text

If a Question Text ID has been entered, you can click this link to open a dialog box that displays the text catalog entry on the Maintain Text Catalog page. Use the dialog box to view or modify the text catalog entry.

Default Response

Select a default response of *Yes* or *No* to this question. The field defaults to *No*.

Hide Question

Select this check box to hide this question from the end user on the Questionnaire page. This check box is enabled only when the Default Response value is *Yes*.

If all the questions defined for a transaction are hidden, the Questionnaire page is not displayed as part of the guided self-service transaction.

Note: Any fields that are essential to a transaction should be associated with a hidden question. Because this question always has a *Yes* answer, the fields are always included in the transaction, even if the user answers *No* to all other questions.

Actions Tab

Image: Actions tab

This example illustrates the Actions tab from the Questionnaire grid on the Transaction Configuration - Questionnaire page.

Sequence	Action	Action Reasons	Hide Action Reason	Action Reason Required		
10	Promotion	Action Reasons	<input type="checkbox"/>	<input checked="" type="checkbox"/>	+	-
20	Promotion	Action Reasons	<input type="checkbox"/>	<input checked="" type="checkbox"/>	+	-
30	Promotion	Action Reasons	<input type="checkbox"/>	<input checked="" type="checkbox"/>	+	-
40	Pay Rate Change	Action Reasons	<input type="checkbox"/>	<input checked="" type="checkbox"/>	+	-

Note: The fields on this tab relate to the actions and action reasons on the employee’s job record. They are not relevant to the delivered *Clone Position* transaction, which does not affect employee job records.

Action

Select the personnel action code to associate with this question. You can select any active action that is defined on the "Actions

Page" (PeopleSoft HCM 9.2: Human Resources Administer Workforce), with the exception of these actions:

- *Hire*
- *Rehire*
- *Add Contingent Worker or Renewal* (actions for contingent workers).

The system uses this action code in the new Job record row that is created when the transaction is approved. If the same action code is specified for all of the transaction's questions, then the system writes one row to the Job record. If different questions have different action codes, then the system creates multiple rows in the Job record, but the same data, except for the action and action reason, is written to each row.

Note: The manager will not see the Action field on the guided self-service transaction page.

Action Reasons

Click to access the [Action Reasons Page](#), where you can choose valid action reasons for the job data row that the transaction creates and you can choose a default action reason.

Note: Rows that have the same action must also have the same action reason settings. If you change the action reason settings for a row, your changes are automatically applied to any other rows with the same action.

Hide Action Reason

Select this check box to hide the Reason field on the guided self-service transaction pages. This configuration prevents the manager from overriding the default reason.

If you select this check box for some questions but not for others, at runtime the system uses the setting from the first question that has a *Yes* answer. Typically this is the first question in the transaction, which is normally configured as a hidden question with a *Yes* answer.

When you select the Hide Action Reason check box, the Action Reasons link on this configuration page becomes read-only.

Therefore, if you want a default action reason that cannot be changed, click the Action Reasons link and choose a default action reason before you select the Hide Action Reason check box.

Action Reason Required

Select this check box if an action reason is required for the transaction. This check box is available only if the Reason field is visible in the transaction (that is, the Hide Action Reason check box is not selected).

Pages Tab

Image: Pages tab

This example illustrates the Pages tab from the Questionnaire grid on the Transaction Configuration - Questionnaire page.

Sequence	Page Name	Page Fields		
10	HR_MSS_CT_JOB_SBF	Page Fields	+	-
20	HR_MSS_CT_JOB_SBF	Page Fields	+	-
30	HR_MSS_CT_JOB_SBF	Page Fields	+	-
40	HR_MSS_CT_COMP_SBF	Page Fields	+	-

Page Name

Select the page that contains the record and field definitions that are associated with this question. You can associate the same page with more than one question. After choosing a page, click the Page Fields link to access a secondary page where you choose which fields on the page to show to the end user when this question is answered *Yes*.

These are the supported pages:

- HR_MSS_CT_JOB_SBF (Job Details subpage) for job data fields.
- HR_MSS_CT_COMP_SBF (Compensation Details subpage) for compensation data fields.
- HR_MSS_CLPOSN1_SBF (Clone Position subpage) for position data fields.

Oracle also delivers an additional job data subpage, HR_MSS_CT_JOBC_SBF that your organization can modify if you need to add additional fields for guided self-service. As delivered, this page does not include any fields.

For a detailed list of the fields on each page, see [Understanding Delivered Transactions and Fields for Guided Self-Service](#).

Page Fields

Click to access the [Page Fields Page](#) where you choose which fields to show to the end user when this question is answered *Yes*.

Form Factor Tab

Image: Form Factor tab

This example illustrates the Form Factor tab from the Questionnaire grid on the Transaction Configuration - Questionnaire page.

Sequence	Small Form Factor Text ID	View/Edit Text		
10	JOBCODE_SFF	View/Edit Text	+	-
20	LOCATION_SFF	View/Edit Text	+	-
30	SUPERVISOR_SFF	View/Edit Text	+	-
40	SALARY_SFF	View/Edit Text	+	-

Small Form Factor Text ID

Use this field to define alternate question text for small form factors such as phones. This option enables you to shorten questions for the smaller screen. To choose the alternate text, enter the ID of the Text Catalog entry with the appropriate text.

When this field is blank, the regular question text appears on all devices.

View/Edit Text

If a small form factor text ID has been entered, you can click this link to open a dialog box that displays the text catalog entry on the Maintain Text Catalog page. Use the dialog box to view or modify the text catalog entry.

Position Data Options

Position Data Options

If you use position management, click this link to access the [Transaction Configuration - Position Data Options Page](#), where you configure options related to updating the employee's position data.

Note: Position Data settings are valid only for the delivered transactions *Change Full/Part Time or Hours*, *Request Location Change*, *Request Reporting Change*, and *Update Job Details for Group*. Do not set up position options for any other transactions.

This link is not visible for the *Clone Position* transaction, which creates a new position but does not affect existing positions.

Action Reasons Page

Use the Action Reasons page (HR_MSS_CT_RSN_SEC) to choose the valid action reasons for the job data row that the transaction creates and to choose a default action reason.

This page is not relevant to the delivered *Clone Position* transaction.

Navigation

Click the Page Fields link on the Actions tab of the Transaction Configuration - Questionnaire page.

Image: Action Reasons page

This example illustrates the Action Reasons page.

Action Reasons ✕

Transaction ID HR_PROMOTE_PAY

Effective Date 01/01/1900

Regulatory Region

Action Promotion

Action Reasons ?			
Reason Code	Description	Display	Default
AL	Acting (Lacks Qualification)	<input type="checkbox"/>	<input type="checkbox"/>
AP	Acting (Provisional)	<input checked="" type="checkbox"/>	<input type="checkbox"/>
AW	Acting (while so Employed)	<input checked="" type="checkbox"/>	<input type="checkbox"/>
AWU	Acting (while so Empl, Unpaid)	<input checked="" type="checkbox"/>	<input type="checkbox"/>
NCP	Normal Career Progression	<input checked="" type="checkbox"/>	<input type="checkbox"/>
OPR	Outstanding Performance	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
SGA	Salary Grade Advance	<input checked="" type="checkbox"/>	<input type="checkbox"/>
SUB	Substantive	<input checked="" type="checkbox"/>	<input type="checkbox"/>
TMP	Temporary (Emerg-Mobilization)	<input checked="" type="checkbox"/>	<input type="checkbox"/>
TU	Temporary Unpaid	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Important! Rows that have the same action must also have the same action reason settings. If you change the action reason settings for a row, your changes are automatically applied to any other rows with the same action.

The fields at the top of the page identify the transaction and regulatory region you are configuring and the action code for which you are configuring action reasons.

Action Reasons Grid

Reason Code and Description

These fields identify the action reasons that are associated with the action you are configuring. The grid lists all available reasons for the specified action.

Display

Select this check box to make an action reason available for the job data row that gets created for this action. You must select this check box for the default action reason. Also select this check box for all values that you want managers to be able choose manually.

If you configure the transaction to hide the Action Reason field from end users, then the end user cannot override the default and there is no reason to select any rows other than the default.

Default

Select this check box for one row only. The selected reason becomes the default reason for the job row that is created with the specified action. The end user will be able to override the default reason unless you select the Hide Action Reason check box for this action.

If multiple questions have the same action code but different reasons, the system uses the default reason for the first question that has a *Yes* answer. Typically this is the first question in the transaction, which is normally configured as a hidden question with a *Yes* answer.

Page Fields Page

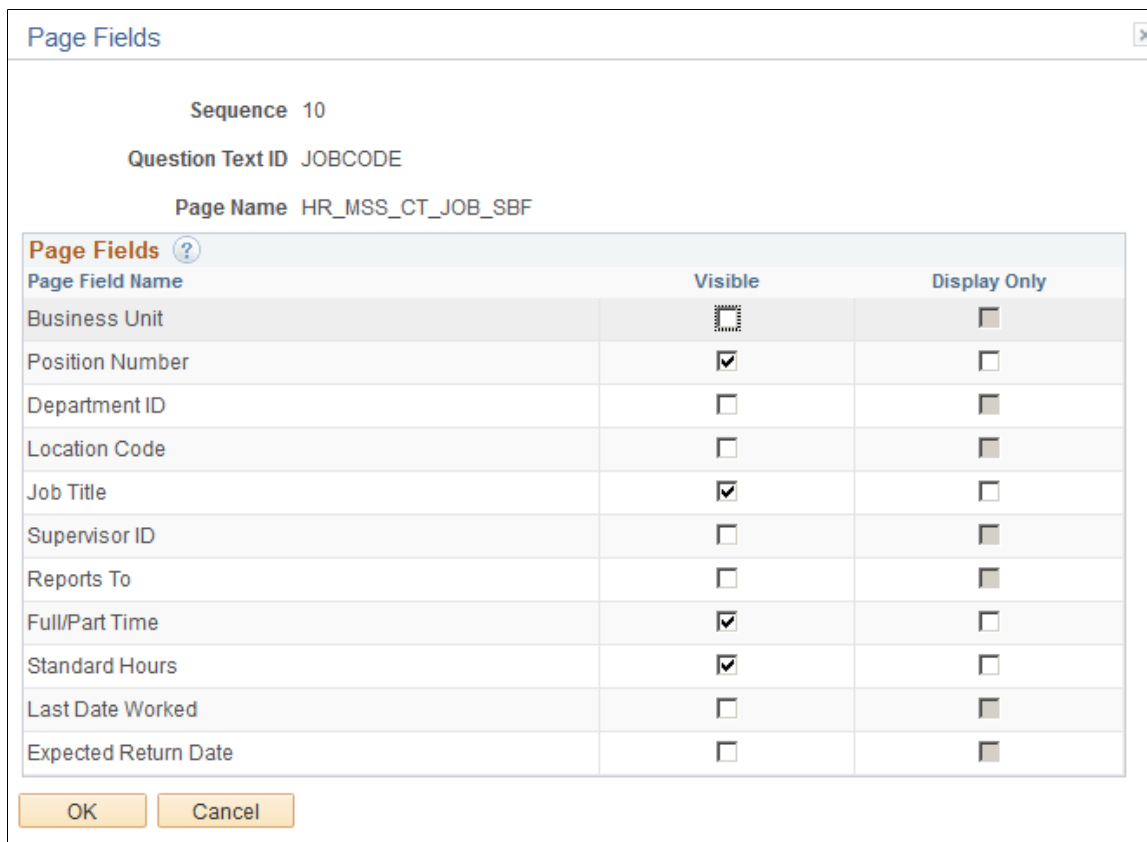
Use the Page Fields page (HR_MSS_CT_FLDS_SEC) to choose which fields to display on the guided self-service transaction and to choose whether those fields are display-only.

Navigation

Click the Page Fields link on the Pages tab of the Transaction Configuration - Questionnaire page.

Image: Page Fields page

This example illustrates the Page Fields page.



The fields at the top of the page identify the question you are configuring and the page that you associated with the question.

Page Fields Grid

Page Field Name

Displays a list of fields that are associated with the Page Name shown at the top of the page.

For a list of the fields that are available for selection, see [Understanding Delivered Transactions and Fields for Guided Self-Service](#) at the beginning of this topic.

When you configure job data fields, use the same settings for the Reports To and Supervisor ID fields. The guided self-service transaction and approval pages include logic to display the correct field depending on the employee data.

For employees in positions, the Reports To field displays the position to which the employee reports rather than the person to whom the employee reports, so if this field is shown, the transaction and approval pages also display a read-only Manager Name field.

Visible

Select this check box to make a specific field visible to the end user on the guided self-service pages.

Note: The *Clone Position* transaction clones data from all of the available fields, including those that are not visible to end users.

Different fields are appropriate for different transactions. For example, the Last Date Worked field is used so that a manager can enter an employee's actual last work day, so this field is appropriate for the Terminate and Retire transactions.

The field is visible if it is marked visible for at least one question with a *Yes* answer, regardless of whether it is marked visible for other questions.

Even if a field is marked as visible for multiple questions, it appears only once on the guided self-service pages.

Visible fields are enterable unless you also select the Display Only check box.

Note: If you make the Business Unit field enterable in a guided self-service transaction, you should also make the Location Code, Department ID, and Job Code fields enterable. This is necessary because if the end user changes the business unit, the system will clear the values for Department, Location and Job Code, and the end user will need to enter new values in those fields.

Display Only

Select this check box if you want a visible field to be read-only on the guided self-service pages. Only fields that are already marked as visible can be made read-only.

If a particular field is marked as read-only for at least one question with a *Yes* answer, the field will be read-only regardless of whether the field is configured as read-only for other questions.

Transaction Configuration - Position Data Options Page

Use the Transaction Configuration - Position Data Options page (HR_MSS_CT_POSN_SEC) to configure position data updates based on guided self-service updates to incumbent data.

Important! Position Data settings are for changing the data associated with a position. The only delivered transactions that support this option are *Change Full/Part Time or Hours*, *Request Location Change*, *Request Reporting Change*, and *Update Job Details for Group*.

This page is not applicable to the *Demote Employee*, *Promote Employee*, and *Transfer Employee* transactions, which assign employees to new positions. Nor is it applicable to the *Clone Position* transaction, which creates a new position without affecting existing position data.

Navigation

Click the Position Data Options link on the Questionnaire page. This link is not available for the *Clone Position* transaction, which never updates an employee's position data.

Image: Transaction Configuration - Position Data Options page

This example illustrates the Transaction Configuration - Position Data Options page.

Update Position Data

Select this check box to allow the system to make automatic updates to position data. The position data change occurs only if both of these conditions are met:

- There is a one-to-one relationship between the employee and the position.
- The employee's position data has not been overridden.

See [Understanding Updates to Position Data](#).

Reason

Select the reason for the position data change. This reason is entered into the new effective-dated row that the system creates in the position data record.

Position Data Fields

This read-only list shows which fields from the guided self-service transaction are included in position data updates:

- For the Request Location Change transaction, the only field in the list is *Location Code*.
- For the Change Full/Part Time or Hours transaction, the only field in the list is *Full/Part Time*.
- For the Request Reporting Change transaction, the only field in the list is *Report To*.
- For the Update Job Details for Group transaction, the fields in the list are *Department ID*, *Location Code*, and *Reports To*.

If you inadvertently access this page for other transactions, additional fields can appear in the list. However, because those other transactions do not support position data updates, you can ignore the field list.

Clone Transaction Page

Use the Clone Transaction page (HR_MSS_CT_CLONE) to clone guided self-service transactions for manager self-service.

Navigation

Set Up HCM >Common Definitions > Guided Self Service >Clone Transaction >Clone Transaction

Image: Clone Transaction Page

This example illustrates the Clone Transaction page.

The screenshot shows the 'Clone Transaction' page. At the top, it displays the following information: Transaction ID HR_PROMOTE_PAY, Effective Date 01/01/1900, Regulatory Region, and Title Promote Employee. Below this, there is a heading 'Enter information for the new transaction.' followed by four input fields: Transaction ID, Effective Date (with a calendar icon), Regulatory Region (with a search icon), and Title.

Select an existing transaction configuration and enter the new transaction ID, effective date, regulatory region, and title. Upon saving, the system will take you to the [Transaction Configuration - Configuration Page](#) where you can modify your newly copied transaction.

Chapter 3

Setting Up eProfile Manager Pagelets for the Dashboards

Dashboards and the Portal Registry

The Manager Dashboard and the Talent Summary dashboards consist of sets of pagelets that enables managers to quickly and easily view and update human resource and talent related information as needed.

Dashboard pages are PeopleSoft pages that aggregate and display pagelets that share common or similar purposes. Dashboards provide quick access to useful information by presenting concise but feature-rich pagelets to the user.

Dashboards are created and maintained in the Portal Registry.

Structure and Content

Administration of the structure and content is accessible in the Portal Registry Structure by navigating to:

1. Select PeopleTools > Portal > Structure and Content.
2. Select the Portal Objects link on the Structure and Content page.
3. Select the Homepage link.
4. Select the Tabs link.
5. Select the Edit link for appropriate dashboard in the Content References grid.
6. Access the Tab Content page (select the Tab Content tab).
7. Use the Tab Content page to select pagelets and define their behavior.
8. Use the Tab Layout page to arrange any required pagelets.

For more information on Portal Registries, see *PeopleTools: Portal Technology*, “Understanding Portal Technology”.

Managing Dashboards

You can also control the pagelet selections and layout for your users by using the Manage Dashboard Pages component in PeopleTools. To make pagelets available for selection and display:

1. Select PeopleTools > Portal > Dashboard > Manage Dashboard Pages.
2. Select the Manager Dashboard or Talent Summary link on the Manage Dashboard Pages page.
3. Select the Pagelets or Properties button for the appropriate dashboard.

4. Use the Content page to select pagelets and define their behavior.
5. Use the Layout page to arrange any required pagelets.

For more information on dashboards, see *PeopleTools: Portal Technology*, “Administering Homepages and Dashboard Pages.”

Understanding Accessing Direct Line Report Information on the Dashboard Pagelets

The Manager Dashboard and Talent Summary dashboards enables managers to view HCM data about each of their direct reports. A manager’s direct and indirect reports are determined by the access type configured in the Direct Reports API. The Direct Reports API is a common HCM data service that obtains a list of employees (including contingent workers and persons of interest) who report to a specific employee job or position number. This data service determines a manager’s row-level security to individual employees and validates that the user has security access to the employee.

Direct Reports UI access types are used for determining who reports to whom. The access type defines the reporting relationship between the user and employees reporting to that user. The system confirms direct reports and security access.

There are seven different access types available:

Access Type	Definition
<i>By Department Manager ID</i>	Defines the reporting relationship based on information in the Manager ID field on the Department Profile page (DEPARTMENT_TBL_GBL).
<i>By Dept Security Tree</i>	Determines person data access using information from the security tree.
<i>By Group ID</i>	Determines data access using the group ID set up in the group build feature.
<i>By Part Posn Mgmt Dept Mgr ID</i>	Defines the reporting relationship by the Reports To field on the Work Location page (JOB_DATA1) and the information in the Manager ID field on the Department Profile page. This is designed for the organizations that use partial position management. The system searches for reporting relationship based on the Reports To field first, and then department Manager ID field.
<i>By Part Posn Mgmt Supervisor</i>	Defines the reporting relationship by both the Reports To and the Supervisor ID fields on the Work Location page. This is designed for the organizations that use partial position management. The system searches for reporting relationship based on Reports To field first, and then the Supervisor ID field.
<i>By Reports To Position</i>	Defines the reporting relationship based on information in the Reports To field on the Work Location page.

Access Type	Definition
<i>By Supervisor ID</i>	Defines the reporting relationship based on information in the Supervisor ID field on the Work Location page.

See "Configuring Direct Reports Functionality" (PeopleSoft HCM 9.2: Application Fundamentals).

See "Setting Up Access to Direct Reports Data" (PeopleSoft HCM 9.2: Application Fundamentals).

For more information about security logic for the HCM Direct Reports API, see *PeopleTools: Portal Technology*, "Developing and Configuring Related Content Services".

Understanding Related Actions and Self Service Transactions

PeopleSoft delivers a number of related actions for Manager Self Service as well as Employee Self Service for different modules. The Manager Dashboard and Talent Summary enables managers to initiate HCM related manager self service actions for an employee through the use of the Actions menu link. This field is located in the header of the Talent Summary page and in the Direct Line Reports pagelet of Manager Dashboard.

PeopleSoft delivers Authorization as a Service (AaaS) framework to provide row level security to different transactions. HCM leverages AaaS framework to secure the different related actions using application classes.

See *PeopleTools: Portal Technology*, "Developing and Configuring Related Content Services".

Delivered Manager Self Service Transactions Available from the Manager Dashboard and Talent Summary Pages

Managers have the ability to access HCM related manager self service transactions using the Actions menu link for his or her subordinates from the Direct Line Reports pagelet of the Manager Dashboard.

This table lists the delivered Manager Self Service menus actions available through the Manager Dashboard:

Manager Self Service Menu	Actions Available from within the Direct Line Reports Pagelet
Time Management	<ul style="list-style-type: none"> • Request Absence • View Absence Balances • View Absence History

Manager Self Service Menu	Actions Available from within the Direct Line Reports Pagelet
Job and Personal Information	<ul style="list-style-type: none"> • View Employee Personal Info • Request Reporting Change • Transfer Employee • Promote Employee • Request Location Change • Change Full/Part Time Status • Retire Employee • Terminate Employee
Compensation and Stock	<ul style="list-style-type: none"> • Request Ad Hoc Salary Change • View Total Rewards • View Compensation History • View Employee Stock Option Summary
Development	<ul style="list-style-type: none"> • View Current Team Profiles • View Team Historical Profiles • View Team Interest Lists
Performance Management	<ul style="list-style-type: none"> • Create Performance Document • Create Development Document • Open Performance Documents • Open Development Documents
Career Planning	<ul style="list-style-type: none"> • Manage Career Plans • View Career Progression Chart
Succession Planning	<ul style="list-style-type: none"> • Manage Succession Plans • View Succession 360

Manager can also use the Actions menu links to navigate to other pages for an employee using these actions:

- View in Talent Summary
- View in Company Directory

The Actions menu items are configured through PeopleSoft Related Content Services. This framework enables developers and subject matter experts to link application pages with contextually relevant collaborative content. When the user clicks the Actions menu drop-down, a list of available related actions appear based on the list of actions registered in Manage Related Content and the access type associated with each action.

Actions are filtered and removed from the list when the logged in manager does not have the correct access type for the Action and employee combination.

Depending on how a transaction's access type is registered, it is possible for the list of available Actions to vary by employee. If only one access type is used for all transactions, the Action lists will be identical for all employees.

Configuring the Manager Dashboard Pagelets

To set up the Manager Dashboard, use the Alerts Pagelet Setup (UX_ALERT_SETUP), Approvals Pagelet Setup (UX_APPR_PLT_CFG), and Direct Reports Pagelet Setup (UX_DIR_PLT_CFG) components.

These topics provide an overview of the Manager Dashboard pagelets and setup, alerts, approvals, Direct Line Report pagelet features, and discuss how to configure the Manager Dashboard pagelets.

Pages Used to Configure the Manager Dashboard Pagelets

Page Name	Definition Name	Usage
Manage Dashboard Pages	PTAL_DASHBD_PAGES	Use this page to access the properties, content, and layout related pages where you can select which pagelets should be available on the Manager Dashboard. For more information on dashboards, see <i>PeopleTools: Portal Technology</i> , "Administering Homepages and Dashboard Pages."
<u>Alerts Pagelet Setup Page</u>	UX_ALERT_SETUP	Set up the Alerts pagelet for Manager Dashboard. Define what options are available to users when setting personal preferences as well as identify the alert levels and number of alerts you want to display in the Alerts pagelet. The Talent Summary, Licenses and Certifications pagelet uses the setup definitions defined for the <i>Expiring Licenses/Certifications</i> row.
<u>Approvals Pagelet Setup Page</u>	UX_APPR_PLT_CFG	Set up the Approvals pagelet by identifying transactions you want to support and defining date notification rules.

Page Name	Definition Name	Usage
<u>Direct Reports Pagelet Setup Page</u>	UX_DIR_PLT_CFG	Set up the Direct Reports pagelet by defining how you want to display information to your managers about their direct reports.
"Define Application Page" (PeopleSoft HCM 9.2: Global Payroll)	GP_ELN_APP	Define application data for the Manager Dashboard attributes. The Application Definition page defines the structure of the absence management data that will be mapped to the columns in the Direct Line Reports pagelet grid. This is used in conjunction with a List Set Definition to associate leave types by country to each of the three columns.
"Define List Set Page" (PeopleSoft HCM 9.2: Global Payroll)	GP_ELN_SET	Define list sets for the Manager Dashboard direct line reports by mapping your element groups to the MGR_DASHBOARD list set. The Application field value must be <i>MGR_DASHBOARD</i> .
"Target Information Page" (PeopleSoft HCM 9.2: Application Fundamentals)	SS_LINK_TBL	Identify access types for the Direct Line Reports pagelet. The employees listed in the Direct Line Reports pagelet are based on the logged in manager and the access type selected for the pagelet component <i>UX_DIRECTS_PLT</i> when using setting up data for Manager Dashboard. As delivered, the Access Type field value is set to <i>By Part Posn Mgmt Supervisor</i> (by partial position management supervisor). See "Setting Up Access to Direct Reports Data" (PeopleSoft HCM 9.2: Application Fundamentals)

Understanding the Manager Dashboard Pagelets and Setup

The Manager Dashboard is a set of pagelets that enables managers to quickly and easily view and update human resource information as needed.

The following pagelets are delivered with the Manager Dashboard:

- Alerts
- Objective Alignment (narrow version of the Business Objective information)
- Business Objective Alignment (wide version of the Business Objective information)
- Pending Approvals
- Direct Line Reports
- Learning

- Company Directory
- My Job Openings
- Quick Links
- My Reports

Understanding Alerts

The PeopleSoft system delivers seven manager alert types that can appear on the Alerts pagelet. Alert types include:

- ePerformance
Checks the document due date for all the performance documents on the Current Documents page that are owned by the manager.
- eCompensation
Alerts the manager that there are compensation cycle activities on the eCompensation Alert homepage.
- Expiring Licenses/Certificates
Alerts the manager about licenses or certifications that are about to expire for his or her direct reports, as seen on the Current Team Profiles component, Qualifications tab.
- Expiring Memberships
Alerts the manager about memberships that are about to expire for his or her direct reports, as seen on the Current Team Profiles component, Qualifications tab.
- Scheduled Training
Notifies the manager of upcoming training for his or her direct reports.
- Birthday Alerts
Checks and generates alert messages for upcoming birthdays for direct reports.
- Anniversary Alerts
Checks and generates alert messages for upcoming anniversaries base on the original hire date.

The Alerts pagelet can display alerts and alert level icons next to an alert if selected to show. Alert levels can be informational (no icon displays next to the alert message), warning alerts, and critical alerts. You configure which alert types and levels display.

Alert Message Generation

The Alert messages are generated based on the existing components and data. Therefore, the system checks the access type for each component when access type security is enforced. This ensures that the system fetches the correct list of direct reports for a user. The alerts are generated base on this information:

- For Expiring Licenses/Certificates Alerts and Expiring Memberships Alerts, the access type of Component - Current Team Profiles (JPM_PERS_PTSEL_MGR) is checked. It has all the direct reports that the manager has access to for information regarding licenses, certifications, and membership information.
- For Scheduled Training Alerts, the access type of Component - Training Summary (CO_PE_MGR_TRAINING) is checked. It has all the direct reports training information that current manager has access to.
- For Birthday Alerts and Anniversary Alerts, the access type of Component - View Employee Personal Info (HR_EE_INF_MGR) is checked. It has all the direct reports personal information that current manager has access to.

Understanding Approvals

Approval workflow is triggered when a requester submits a transaction, such as a promotion, for approval. The application hands the transaction over to the Approval Framework, which finds the appropriate approval process definition and launches the approval workflow.

The system enables you to generate approvals for the following transaction types from the Manager Dashboard:

<i>Manager Self Service Transactions</i>	<i>(USF) Federal Manager Self Service Transactions</i>
<ul style="list-style-type: none"> • Compensation Proposal • Job Offer • Job Opening • Manage Payable Time • Manage Reported Time • Manager Absence Approve • Military Rank Change • Nonperson Profiles • Performance Document • Person Profiles • Promotion • Reporting Change • Transfer 	<ul style="list-style-type: none"> • Federal Employee Addr Change • Federal Employee Mar Change • Federal Employee Name Change • Federal Full Time/Part Time Change • Federal Location Change • Federal Promotion • Federal Reassignment • Federal Reporting Change • Federal Retirement • Federal Separation

Steps to Setting Up the Approvals Pagelet

To ensure that approvals are set up properly for the Manager Dashboard, you will need to perform the following steps to generate approvals:

1. Set up the Approvals Pagelet Setup page (Set Up HCM > Common Definitions > Manager Dashboard > Approvals Pagelet Setup).

- Set the maximum number of approvals large enough or that the transaction sequence priority is set such that the approval type you are generating will appear in the pagelet.
 - Select to include an approval transaction under the Approval Workflow Engine (AWE) Transactions group box.
2. Confirm user profile settings (PeopleTools > Security > User Profiles > User Profiles).
 - Ensure that only one user ID is associated to an employee. When multiple user IDs are linked to an employee, you cannot guarantee to which user ID the approval process will assign approvals. To change the employee associated to a user ID, access the ID page to view or modify the employee ID assignment.
 - Grant page access to the Manager Dashboard by assign the *Manager Dashboard* role to the user on the Roles page.
 3. (USF) Enable Federal functionality on the Installation Table (Set Up HCM > Install > Installation Table > Products).

Select the Federal check box on the Installation Table to generate or approve Federal-based approvals. When you change the settings for this check box, the application server cache must be deleted and all app servers bounced and restarted for changes to take effect.

Related Links

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

Understanding the Direct Line Reports Pagelet Features

The Direct Line Reports pagelet enables managers to view, in a single location, data from across HCM about each of their employees. To manage this large amount of information, the Direct Reports Pagelet Setup page enables you to group the field columns into eight different tab sections in the pagelet grid. The pagelet also enables managers to initiate self service actions for a specific employee through the use of the Actions menu link.

See [Understanding Accessing Direct Line Report Information on the Dashboard Pagelets](#).

This topic discusses the delivered Direct Line Reports pagelet format.

The Delivered Direct Line Reports Pagelet Format

The Direct Line Reports pagelet contains a grid with eight tabs. The labels on the tabs are configurable and you can hide or show fields (columns). The user has the ability to personalize his or her grid by hiding columns and tabs, reordering columns and tabs, and freezing columns of their choice.

This tables list the delivered eight tab names and fields within those tabs for the Direct Line Reports pagelet:

Note: Unless otherwise noted, the fields come delivered on and available.

Summary Tab	Job Details Tab	Contact Tab	Career Plan Tab
Display Name (frozen)	Employee ID	Telephone	Review Date
First Name (off)	Job Code	Email	Relocate?
Last Name (off)	Years in Job	Department (off)	International?
Actions (frozen)	Job Title	Location (off)	Travel?
Potential	Schedule	Instant Message (off)	
Job Title			
Performance Rating Bar			
Compa-Ratio (off)			
Position in Salary Range			

Compensation Tab	Performance Tab	Time Tab	Succession Tab
Annual Salary	Last Rating	Comp Time Balance (from Time & Labor)	Key Position
Salary Currency	Period Begin Date	Vacation Balance (from Time & Labor)(off)	Successors
Salary Range Minimum	Period End Date	Sick Balance (from Time & Labor)(off)	Risk of Leaving
Salary Range Midpoint		Leave Balance 1 (from Absence Management)	Impact of Loss
Salary Range Maximum		Leave Balance 2 (from Absence Management)	
Compa-Ratio		Leave Balance 3 (from Absence Management)(off)	
Quartile			
Percent Range			

Alerts Pagelet Setup Page

Use the Alerts Pagelet Setup page (UX_ALERT_SETUP) to set up the Alerts pagelet for Manager Dashboard.

Define what options are available to users when setting personal preferences as well as identify the alert levels and number of alerts you want to display in the Alerts pagelet.

The Talent Summary - Licenses and Certificate pagelet uses the setup definitions defined for the *Expiring Licenses/Certificates* row.

Navigation

Set Up HCM > Common Definitions > Manager Dashboard > Alerts Pagelet Setup > Alerts Pagelet Setup

Image: Alerts Pagelet Setup page

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

Alerts Pagelet Setup

User Changes Allowed

Allow Changes to Alert Type

Alert Levels

Number of Alerts to Display

Alerts Level to Display

Critical (ⓘ)

Warning (⚠)

Informational

*Number of Alerts

Alert Definitions Personalize Find <input type="text" value=""/> First 1-7 of 7 Last							
*Sequence	Include	Alert Type	Days for Critical Alerts	Days for Warning Alerts	Days for Informational Alerts	Maximum Days to View in Past	Allow to Delete
<input type="text" value="1"/>	<input checked="" type="checkbox"/>	Expiring Memberships	<input type="text" value="10"/>	<input type="text" value="30"/>	<input type="text" value="90"/>	<input type="text" value="30"/>	<input checked="" type="checkbox"/>
<input type="text" value="3"/>	<input checked="" type="checkbox"/>	eCompensation					
<input type="text" value="4"/>	<input checked="" type="checkbox"/>	Expiring Licenses/Certificates	<input type="text" value="10"/>	<input type="text" value="30"/>	<input type="text" value="90"/>	<input type="text" value="30"/>	<input checked="" type="checkbox"/>
<input type="text" value="5"/>	<input checked="" type="checkbox"/>	ePerformance	<input type="text" value="10"/>	<input type="text" value="30"/>	<input type="text" value="90"/>	<input type="text" value="30"/>	<input checked="" type="checkbox"/>
<input type="text" value="6"/>	<input checked="" type="checkbox"/>	Scheduled Training	<input type="text" value="10"/>	<input type="text" value="30"/>	<input type="text" value="90"/>	<input type="text" value="30"/>	<input checked="" type="checkbox"/>
<input type="text" value="9"/>	<input checked="" type="checkbox"/>	Birthday Alerts	<input type="text" value="1"/>	<input type="text" value="3"/>	<input type="text" value="7"/>	<input type="text" value="7"/>	<input checked="" type="checkbox"/>
<input type="text" value="10"/>	<input checked="" type="checkbox"/>	Anniversary Alerts	<input type="text" value="1"/>	<input type="text" value="3"/>	<input type="text" value="7"/>	<input type="text" value="7"/>	<input checked="" type="checkbox"/>

User Changes Allowed

Use this section to indicate the options that should be available to a user on the Personalize Alert page.

Allow Changes to Alert Type

Select to enable the manager to specify specific alert types he or she wants to see on the Alerts pagelet. By selecting this check box, the system will display the Alert Types to Include group box on the Personalize Alerts page for the manager. For a list of alert types, see [Understanding Alerts](#).

Deselect this check box to have all alert types display on the Alerts pagelet and to remove the ability for the manager to select alert types on his or her personalization page.

Alert Levels

Select to have the Alerts Level to Display group box available on the Personalize Alerts page for the user. This enables managers to specify which levels of alerts they want or don't want to see on the Alerts pagelet. Alert types include:

- Critical
- Warning

- Informational

Deselect this check box to hide the Alerts Level to Display group box on the Personalize Alert page for the user, preventing the manager from choosing which alert level he or she wants to display. With this check box deselected, only those alert levels you select in the Alerts Level to Display group box on this page will display on the Alerts pagelet.

Number of Alerts to Display

Select to have the Number of Alerts to Display group box available on the Personalize Alerts page for the user. This enables the user the ability to change the number of alerts that will show on the Alerts pagelet.

Deselect this check box to hide the Number of Alerts to Display group box on the Personalize Alert page for the user and prevent managers from identifying the maximum number of alerts that show display on the Alerts pagelet. Instead, the Alerts pagelet will display up to the number of alerts defined in the Number of Alerts field on this page.

See [Personalize Alerts Page](#).

Alerts Level to Display

Use this section to define the alert levels and the number of alerts that should display on the Alerts pagelet.

Critical

Select to have critical level alerts with the corresponding icon appear on the Alerts pagelet next to the alert type. When you deselect this check box, the Critical alerts option will be unavailable to the user on the Personalize Alerts page and these alerts will not display on the pagelet.

Warning

Select to have warning level alerts with the corresponding icon appear on the Alerts pagelet next to the alert type. When you deselect this check box, the Warning alerts option will be unavailable to the user on the Personalize Alerts page and these alerts will not display on the pagelet.

Informational

Select to have all informational level alerts with the corresponding icon appear on the Alerts pagelet next to the alert type. When you deselect this check box, the Informational alerts option will be unavailable to the user on the Personalize Alerts page and these alerts will not display on the pagelet.

Number of Alerts

Enter the maximum number of alerts that should appear in the Alerts pagelet when user first opens the pagelet. The user can override this number when the Number of Alerts to Display check box is selected on this page. If the number of alerts for the manager exceeds this number, the user can click the View All link on the pagelet to view the additional alerts.

Alert Definitions

Use this section to identify which alert type display priority and behavior definitions.

Note: The Talent Summary - Licenses and Certifications pagelet uses the setup definitions defined for the *Expiring Licenses/Certificates* row. The Talent Summary page does not use the configuration for the other rows or fields on this page.

Sequence	Enter the priority number for the alert type. The alerts on the pagelet are sorted first by alert level, and then by this sequence number.
Include	Select to include this type of alert on the Alerts (Manager Dashboard) and Licenses and Certifications (Talent Summary) pagelets. When an alert type and the Alert Types check box in User Changes Allowed group box of this page is selected, users can choose to include or exclude this alert type on the Manager Dashboard - Alerts pagelet using the Personalize Alerts page.
Alert Type	Displays the name of the alert type. You can define different options for each of the seven alert types.
Days for Critical Alerts	Enter the number of days prior to an event's due date or expiration date to identify when the system should display the alert type as critical.
Days for Warning Alerts	Enter the number of days prior to an event's due date or expirations date to identify when the system should display the alert type as a warning.
Days for Informational Alerts	Enter the number of days prior to a due date of an event for which the system should define the alert as informational for this alert type.
Maximum Days to View in Past	Enter the number of day after the due date of an event that the system should show this alert type. Overdue alerts will appear as critical. Past due alerts that have exceeded the number of days specified here will not display on the Alerts pagelet.
Allow to Delete	Select this check box to enable the user to delete this type of alert from the Alerts pagelet. Deselect this option to hide the delete icon for this type of alert from the Alerts pagelet.

Note: The eCompensation alert definition is not performed on this page. The setup is on the eCompensation administration setup pages. You can access these pages by navigating to Set Up HCM > Product Related > Compensation > Utilities > Compensation Alert Definition and Set Up HCM > Product Related > Compensation > Utilities > Compensation Alert Text.

Approvals Pagelet Setup Page

Use the Approvals Pagelet Setup page (UX_APPR_PLT_CFG) to set up the Approvals pagelet by identifying transactions you want to support and defining date notification rules.

Navigation

Set Up HCM > Common Definitions > Approvals > Approvals Pagelet Setup > Approvals Pagelet Setup

Image: Approvals Pagelet Setup page

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

Approvals Pagelet Setup			
Maximum Number of Approvals			
*Maximum Number of Approvals <input type="text" value="50"/>			
Warnings			
Display Warnings Based On <input type="text" value="Transaction Effective Date"/>			
<input checked="" type="checkbox"/>	Display Overdue Warnings	(🔴)	Display Overdue Warnings <input type="text" value="1"/> days before Transaction Effective Date
<input checked="" type="checkbox"/>	Display Standard Warnings	(🟡)	Display Standard Warnings <input type="text" value="3"/> days before Transaction Effective Date
Approval Workflow Engine (AWE) Transactions			
*Sequence	*Transaction Description	Include	
1	10 Compensation Proposal	<input checked="" type="checkbox"/>	<input type="button" value="+"/> <input type="button" value="-"/>
2	20 Military Rank Change	<input checked="" type="checkbox"/>	<input type="button" value="+"/> <input type="button" value="-"/>
3	30 Nonperson Profile	<input checked="" type="checkbox"/>	<input type="button" value="+"/> <input type="button" value="-"/>
4	40 Performance Document	<input checked="" type="checkbox"/>	<input type="button" value="+"/> <input type="button" value="-"/>
5	50 Person Profile	<input checked="" type="checkbox"/>	<input type="button" value="+"/> <input type="button" value="-"/>
6	60 Promotion	<input checked="" type="checkbox"/>	<input type="button" value="+"/> <input type="button" value="-"/>
7	70 Reporting Change	<input checked="" type="checkbox"/>	<input type="button" value="+"/> <input type="button" value="-"/>
8	80 Transfer	<input checked="" type="checkbox"/>	<input type="button" value="+"/> <input type="button" value="-"/>

Maximum Number of Approvals

Maximum Number of Approvals

Enter the maximum number of approvals that should appear in the Approvals pagelet on the Manager Dashboard.

Warnings

Display Warnings Based On

Chose the method the system should use to notify managers of an upcoming approval that requires their approval. The system uses this information to determine the date to calculate and display the overdue and standard warning icons in the pagelet grid. Valid values are:

- *Approval Receipt Date* - reflects the date the manager received the approval in his or her queue.
- *Transaction Effective Date* - reflects the date on which a transaction becomes effective or occurs. For example, the date on which a promotion will take place.

Display Overdue Warnings 

The value you select here will determine the label text for the overdue and standard warning days fields.

Select this check box to have the Response overdue icon display in the Warning column on the Pending Approvals pagelet. This works in conjunction with the overdue warning days field on this page. These approvals will appear first for each approval type.

Display Overdue Warnings - __ days after Approval Receipt Date

This field is available when you select *Approval Receipt Date* in the Display Warnings Based On field and select the Display Overdue Warnings check box.

Enter the number of days after a manager has received an approval request that the system should mark a pending approval as overdue. For example, you enter 7 in this field.

An employee submits an approval request on October 20. On October 27, and forward, the system will mark this pending approval with the Response overdue icon.

Note: This number should be larger than the number in the Display Standard Warnings __ days after Approval Receipt Date field, if both warnings are selected to display.

Display Overdue Warnings - __ days before Transaction Effective Date

This field is available when you select *Transaction Effective Date* in the Display Warnings Based On field and select the Display Overdue Warnings check box.

Enter the number of days before a transaction is to take place to mark a pending approval as overdue and requiring a response.

For example, you enter 5 in this field. An employee is eligible for a promotion on October 20. On October 15, and forward, the system will mark this pending approval with the Response overdue icon.

Note: This number should be smaller than the number in the Display Standard Warnings __ days before Transaction Effective Date field, if both warnings are selected to display.

Display Standard Warnings 

Select this check box to have the Response due icon display in the Warning column on the Pending Approvals pagelet. This works in conjunction with the standard warning days field on this page. These approvals will appear after approvals with overdue warnings for each approval type.

Display Standard Warnings __ days after Approval Receipt Date

This field is available when you select *Approval Receipt Date* in the Display Warnings Based On field and select the Display Overdue Warnings check box.

Enter the number of days after a manager has received an approval request that the system should mark a pending approval with a standard warning requiring a response. For example, you enter 3 in this field. An employee submits an

approval request on October 20. On October 23 the system will mark this pending approval with the Response due icon and it will remain until the warning days number on this page is reached.

Note: This number should be smaller than the number in the Display Overdue Warnings __ days after Approval Receipt Date field, if both warnings are selected to display.

Display Standard Warnings __ days before Transaction Effective Date

This field is available when you select *Transaction Effective Date* in the Display Warnings Based On field and select the Display Standard Warnings check box.

Enter the number of days before a transaction is to take place to mark a pending approval with a standard warning requiring a response. For example, you enter *10* in this field. An employee is eligible for a promotion on October 20. On October 10 the system will mark this pending approval with the Response due icon and remain until the warning days number is reached.

Note: This number should be larger than the number in the Display Overdue Warnings __ days before Transaction Effective Date field, if both warnings are selected to display.

Approval Workflow Engine (AWE) Transactions

Sequence

Enter a priority number for an approval transaction to determine the order in which the approvals should appear in the Pending Approvals pagelet. The lower the number, the earlier the approvals of that type are displayed in the pagelet grid.

Transaction Description

Select the approval transactions you support in your organization. The descriptions come from the Workflow Transactions registry (Set Up HCM > Common Definitions > Approvals > Workflow Transactions). This is also the description that will appear in the pagelet. AWE transactions are listed in the Understanding Approvals topic of the documentation.

See [Understanding Approvals](#).

Include

Select to have the Pending Approvals pagelet display an approval transaction type. An approval transaction will not display on the pagelet if this check box is deselected.

Related Links

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

Direct Reports Pagelet Setup Page

Use the Direct Reports Pagelet Setup page (UX_DIR_PLT_CFG) to set up the Direct Reports pagelet by defining how you want to display information to your managers about their direct reports.

Navigation

Set Up HCM > Common Definitions > Manager Dashboard > Direct Reports Pagelet Setup > Direct Reports Pagelet Setup

Image: Direct Reports Pagelet Setup page (1 of 2)

This example illustrates the fields and controls on the Direct Reports Pagelet Setup page (1 of 2). You can find definitions for the fields and controls later on this page.

Direct Reports Pagelet Setup

Tab Labels

First Tab <input type="text" value="Summary"/>	Fifth Tab <input type="text" value="Compensation"/>
Second Tab <input type="text" value="Job Details"/>	Sixth Tab <input type="text" value="Performance"/>
Third Tab <input type="text" value="Contact"/>	Seventh Tab <input type="text" value="Time"/>
Fourth Tab <input type="text" value="Career Plan"/>	Eighth Tab <input type="text" value="Succession"/>

Columns

<input checked="" type="checkbox"/> Display Name	<input checked="" type="checkbox"/> Phone	<input checked="" type="checkbox"/> Compa-Ratio
<input type="checkbox"/> First Name	<input checked="" type="checkbox"/> Email	<input checked="" type="checkbox"/> Quartile
<input type="checkbox"/> Last Name	<input type="checkbox"/> Department	<input type="checkbox"/> Percent Range
<input checked="" type="checkbox"/> Actions	<input checked="" type="checkbox"/> Location	<input checked="" type="checkbox"/> Performance Rating
<input checked="" type="checkbox"/> Potential	<input type="checkbox"/> Instant Message	<input checked="" type="checkbox"/> Period Begin Date
<input checked="" type="checkbox"/> Job Title	<input checked="" type="checkbox"/> Plan Review Date	<input checked="" type="checkbox"/> Period End Date
<input checked="" type="checkbox"/> Performance Rating Bar	<input checked="" type="checkbox"/> Willing to Relocate	<input checked="" type="checkbox"/> Comp Time Balance
<input type="checkbox"/> Compa-Ratio	<input checked="" type="checkbox"/> Will Take Global Assignment	<input type="checkbox"/> Vacation Balance
<input checked="" type="checkbox"/> Position in Salary Range	<input checked="" type="checkbox"/> Willing to Travel	<input type="checkbox"/> Sick Time Balance
<input checked="" type="checkbox"/> Employee ID	<input checked="" type="checkbox"/> Annual Salary	<input checked="" type="checkbox"/> Key Position
<input checked="" type="checkbox"/> Job Code	<input checked="" type="checkbox"/> Salary Currency	<input checked="" type="checkbox"/> Successors
<input checked="" type="checkbox"/> Years in Job	<input checked="" type="checkbox"/> Salary Range Minimum	<input checked="" type="checkbox"/> Risk of Leaving
<input checked="" type="checkbox"/> Job Title	<input checked="" type="checkbox"/> Salary Range Midpoint	<input checked="" type="checkbox"/> Risk of Loss
<input checked="" type="checkbox"/> Schedule	<input checked="" type="checkbox"/> Salary Range Maximum	

Image: Direct Reports Pagelet Setup page (2 of 2)

This example illustrates the fields and controls on the Direct Reports Pagelet Setup page (2 of 2). You can find definitions for the fields and controls later on this page.

Field Settings

Show Domain Name In Emails

Allow Empty Position

Document Type

Absence Management

<input checked="" type="checkbox"/> Balance Type 1	Balance Type 1 Label <input type="text" value="Vacation"/>
<input checked="" type="checkbox"/> Balance Type 2	Balance Type 2 Label <input type="text" value="Sick"/>
<input type="checkbox"/> Balance Type 3	Balance Type 3 Label <input type="text" value=""/>

Tab Labels

Use this section to identify the tab names that should appear on the Direct Line Reports pagelet. You can enter up to a total of eight tab names for the grid. If all of the columns under a tab are hidden using this setup page, then the tab label will be hidden as well.

Columns

Select each column (field) name that should be available to the manager when viewing the Direct Line Reports grid. The columns come predefined to map to a tab label, however the user can move or hide these columns on the Direct Line Reports: Personalize page.

Deselect a check box to hide the column from the user on the Direct Line Reports pagelet and on the Personalize page.

The following fields have special considerations:

Actions

Select this check box to make the Action menu drop-down list available in the grid. This enables the user to quickly access the manager self service pages to complete transactions for his or her employees. The Action menu values are configured through PeopleSoft Related Content Services. This framework enables developers and subject matter experts to link application pages with contextually relevant collaborative content.

See [Delivered Manager Self Service Transactions Available from the Manager Dashboard](#).

See [Understanding Related Actions and Self Service Transactions](#).

For more information, see the product documentation *PeopleTools: Portal Technology*, “Developing and Configuring Related Content Services”.

Instant Message

Select this check box to have the grid display IM availability for an employee.

The instant message presence icon must be enabled in the Org Chart Viewer for the *Direct-Line Reports* org view type for the Manager Dashboard to display an IM icon. To activate this functionality for direct line reports, navigate to Set Up HCM > Common Definitions > Org Chart Viewer > Chart and Profile Settings. Access the component for the org view type *Direct-Line Reports*. The Manager Dashboard first checks the Org Chart Content page to see if the Instant Message Presence Icon field is selected and the IM protocol and IM Domain fields are entered. If these options are not defined, then the system checks the Profile Content page for this same information. If none of these IM options are defined in the Org Chart Viewer for *Direct-Line Reports*, the IM column will not be available on the Direct Line Reports pagelet.

When using the XMPP protocol for instant messaging, you will also need to navigate to My System Profile at the root menu and

on the General Profile Information page add the XMPP protocol domain, user ID, and password for the user.

Note: Three additional check boxes related to Absence Management are located in the Absence Management group box on the bottom of this page.

Field Settings

Show Domain Name In Emails

Select this check box to have the domain name appear in the person's email. The domain name is the text that appears after the @ sign in an e-mail address.

Deselect this check box to have the system hide the domain name. This will save space on the page and avoid redundancy, such as when all employees have the same domain name in their business e-mail address.

Document Type

Enter the document type the system should use to retrieve employee performance ratings. The system will retrieve ratings from the last closed document of the document type specified in this field.

If the document type is not specified, or the employee does not have a completed performance rating from the specified document, the performance rating information will not display.

Allow Empty Position

Select to display empty positions on the Direct Line Reports pagelet when using Position Management. Deselect this check box to hide unfilled positions from the manager.

This table indicates whether a person or position will appear in the Direct Line Reports pagelet or My Organization grids:

<i>Type of People or Position</i>	<i>Direct Line Reports Pagelet Grid</i>	<i>My Organization Page H-Grid</i>
Shows direct reports	Yes	Yes
Shows indirect reports	No	Yes
Shows empty position when Allow Empty Position is selected	Yes	Yes
Show empty position when Allow Empty Position is deselected	No	No
Shows inactive employees	No	Yes, but only when needed for drilling purposes.

Balance Type 1, 2, and 3

Select to enable any one of three user configurable Absence Management Leave Balance fields.

The Balance Type 1 and Balance Type 2 options are selected by default and represent vacation and sick leave. To adjust for this, the Time and Labor Vacation Balance and Sick Balance options are deselected in the Columns group box. The default options for the Balance Type 3 are cleared.

Balance Type 1, 2, and 3 Label

Enter the column label that will appear in the column header for each of the three Absence Manager columns in the Direct Line Reports grid.

The system delivers the Balance Type 1 Label field text as *Vacation* by default and the Balance Type 2 Label field text as *Sick* by default.

Note: Additional setup to map Absence Management leave types, such as *Vacation* and *Sick*, to each of these columns is required. Use the existing Global Payroll and Absence Management Element Application component to map leave type elements for each desired country to the three columns.

Related Links

- "Understanding Applications and List Sets" (PeopleSoft HCM 9.2: Global Payroll)
- "Setting Up Applications" (PeopleSoft HCM 9.2: Global Payroll)
- "Setting Up List Sets" (PeopleSoft HCM 9.2: Global Payroll)

Configuring the Talent Summary Pagelets

To set up the Talent Summary page tables, use the Talent Summary Setup (HCTS_SETUP_CMP), Alerts Pagelet Setup (UX_ALERT_SETUP), and Install Defaults (LM_IN_DFLT_CMP) components.

These topics provide an overview of the Talent Summary dashboard setup, self service transactions, and discuss how to configure the Talent Summary pagelets.

Pages Used to Configure the Talent Summary Pagelets

Page Name	Definition Name	Usage
Manage Dashboard Pages	PTAL_DASHBD_PAGES	Use this page to access the properties, content, and layout related pages where you can select which pagelets should be available on the Talent Summary page. For more information on dashboards, see PeopleTools, <i>Portal Technology</i> , "Administering Homepages and Dashboard Pages."
<u>Header Fields Page</u>	HCTS_SETUP	Identify the fields and the order in which they should display in the header of the Talent Summary page.

Page Name	Definition Name	Usage
<u>Header Rate Boxes Page</u>	HCTS_SETUP_RATEBOX	Set up the header ratings boxes for the Talent Summary page.
<u>Other Pagelets Page</u>	HCTS_SETUP_PAGELET	Define setup data for pagelets that appear within the Talent Summary page.
<u>Alerts Pagelet Setup Page</u>	UX_ALERT_SETUP	Set up the alert rules for the Licenses and Certifications pagelet on the Talent Summary page.
Install Defaults - Pagelets Page	LM_IN_DFLT_DASHBRD	<p>Configure the Learning pagelet rules. The Install Defaults - Pagelet page in ELM contains three configuration options pertaining to the Learning pagelet in the HCM product to define the maximum number of rows the system should retrieve as well as define warning status dates for learning plans and learning objectives.</p> <hr/> <p>Note: This page is accessible through the ELM product database only.</p> <hr/> <p>See the <i>PeopleSoft Enterprise Learning Management</i>, "Defining Defaults" documentation for more information.</p>

Understanding the Talent Summary Dashboard Pagelets and Setup

The PeopleSoft HCM Talent Summary page provides a collection of talent management pagelets that you can individually select to appear on the Manager Self Service - Talent Summary page for direct or indirect reports. This table lists the individual pagelets that provide information gathered from various PeopleSoft HCM applications:

<i>HCM Product</i>	<i>Header and Pagelet Content</i>
HR <ul style="list-style-type: none"> • Job Data • Plan Careers • Manage Profiles 	<ul style="list-style-type: none"> • Talent Summary header • Impact of Loss vs Risk of Leaving box in the Talent Summary header • Career History • Career Planning • E&G Special Projects • Education • Honors and Awards • Interest Lists • Job Related Competencies • Licenses and Certifications • Personal Competencies • Responsibilities • Special Projects
Compensation	<ul style="list-style-type: none"> • Base Salary History • Current Salary • Total Rewards
ePerformance	<ul style="list-style-type: none"> • Performance vs Potential Ratings box in the Talent Summary header • Performance History (graphical) • Performance History (grid)
Plan Successions	Succession Options
Enterprise Learning Management (ELM)	Learning

The PeopleSoft system enables you to determine the field content that should appear within the employee header section of the Talent Summary page. The header section on the Talent Summary page displays a photo of the employee, if available, up to two columns of job data related to this person, and up to two ratings boxes associated with a person's performance and career planning.

Image: Example of the header that appears on the Talent Summary page

This example illustrates the fields and controls on the Example of the header that appears on the Talent Summary page. You can find definitions for the fields and controls later on this page.

The screenshot shows the Talent Summary header for Rosanna Channing. It includes a profile picture, a 'Select Another Employee' link, and a list of personal and job-related information. The information is organized into columns:

- Personal Information:** Job Title (Senior Manager-Accounting), Job Code (600135), Address (4500 Corporate Lane, Pleasanton, CA 94588), Work Phone (925.555.1234), Location (Corporation Headquarters), Building (2000), Email (HCMGENUser1@ap6023fems.us.oracle.com), Full/Part Time (Full-Time), Employee ID (KU0046), Birthday (01/04).
- HR Status:** HR Status (Active), Org Relationship (Employee), Talent Category (Achiever ★★★★★), Last Start Date (08/29/1986), Years of Service (26.4), Date in Current Job (11/04/2008), Years in Current Job (4.2), Last Performance Period (Jan 2011 to Dec 2011), Potential Rating (High Potential Candidate), Last Performance Rating (Exceeds Expectations).
- Performance and Risk of Leaving:** Two grid charts. The 'Performance' chart shows a score of 4.2, and the 'Risk of Leaving' chart shows a score of 4.2.

In addition to setting up the header definitions, you will establish specific pagelet rules the system will use when presenting information to a manager.

Prerequisites

Before you use the Talent functionality, you need to perform the tasks of making sure these features are configured and running:

- Set up the Direct Reports API data service of Enterprise
 - See "Configuring Direct Reports Functionality" (PeopleSoft HCM 9.2: Application Fundamentals).
 - See "Setting Up Access to Direct Reports Data" (PeopleSoft HCM 9.2: Application Fundamentals).
- Configure Related Content Services
 - See *PeopleTools: Portal Technology*, "Developing and Configuring Related Content".
- Set up the Org Chart Viewer, Chart and Profile Field Map component to identify fields that you can select for the Talent Summary header.
 - See "Chart and Profile Field Map Page" (PeopleSoft HCM 9.2: Human Resources Administer Workforce).
- Define alerts on the Manager Dashboard, Alerts Pagelet Setup component.
 - See [Alerts Pagelet Setup Page](#).
- Enable instant messaging
 - For the instant messaging icon to display on the Talent Summary page, you will perform additional setup tasks for your direct line report settings in the Org Chart Viewer setup pages.
 - See [Header Fields Page](#).
- Assign security access roles to the users to view Talent Summary and pagelet data.
 - To grant access to the Talent Summary Setup pages, assign the Administer *HR Dashboards* role (permission list *HCCPHR8000*) to your administrators.

- To grant access to the Talent Summary page, assign the *Manager Dashboards* role (permission list *HCCPHR8010*) to your managers.
- To grant access and view the ELM Learning pagelet data, assign the *Manager Dashboard – ELM* role to your manager.

Header Fields Page

Use the Header Fields page (HCTS_SETUP) to identify the fields and the order in which they should display in the header of the Talent Summary page.

Navigation

Set Up HCM > Common Definitions > Talent Summary > Talent Summary Setup > Header Fields.

Image: Header Fields page

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

The screenshot shows the 'Header Fields' page with two columns of display fields and an Instant Messenger section.

Column 1 Display Fields				Column 2 Display Fields			
*Line Number	*Display Field			*Line Number	*Display Field		
1	Job Title	▼	+ -	1	HR Status	▼	+ -
2	Job Code	▼	+ -	2	Organizational Relationship	▼	+ -
3	Address	▼	+ -	3	Talent Category	▼	+ -
4	Work Phone	▼	+ -	4	Last Start Date	▼	+ -
5	Location	▼	+ -	5	Years of Service	▼	+ -
6	Building	▼	+ -	6	Date in Current Job	▼	+ -
7	Email	▼	+ -	7	Years in Current Job	▼	+ -
8	Full Time/Part Time	▼	+ -	8	Last Performance Period	▼	+ -
9	Employee ID	▼	+ -	9	Potential Rating	▼	+ -
10	Birthday	▼	+ -	10	Last Performance Rating	▼	+ -

Instant Messenger

Display IM Icon

The header section on the Talent Summary page contains two field columns. Use the Column 1 Display Fields and Column 2 Display Fields group boxes to identify the column field content as well as the order that the fields should appear in the header on the Talent Summary page.

Line Number

Select the fields in the order you want them to display. If one of the rows is deleted, the line numbers will be automatically re-ordered when the page is saved.

Display Field

Select fields that should appear in the header according to the designated column.

Note: The Talent Summary header fields use the Set Up HCM > Common Definitions > Org Chart Viewer > Chart and Profile Field Map component to define the field mappings in the header. Valid values for the Display Fields are those field mapping IDs that have *General* designated in the Section column.

See "Chart and Profile Field Map Page" (PeopleSoft HCM 9.2: Human Resources Administer Workforce).

Display field values that come from Personal and Job Data are:

- *Address*
- *Birthday*
- *Building*
- *Date in Current Job*
- *Email*
- *Employee ID*
- *Full Time/Part Time*
- *HR Status*
- *Job Code*
- *Job Title*
- *Last Start Date*
- *Location*
- *Organizational Relationship*
- *Reports Count - Total*
- *Work Phone*
- *Years in Current Job*
- *Years of Service*

Display field values that come from Succession Planning are:

- *Talent Category*
- *Potential Rating*

Display field values that come from ePerformance are:

- *Last Performance Period*
- *Last Performance Rating*

Display IM Icon (display instant messenger icon)

Select this check box to display or hide the IM presence icon in the header of the Talent Summary page.

The instant message presence icon must be enabled in the Org Chart Viewer for Direct-Line Reports for the Talent Summary page to display a chat icon. To activate this functionality for direct line reports, navigate to Set Up HCM > Common Definitions > Org Chart Viewer > Chart and Profile Settings. Access the component for the org view type Direct-Line Reports. The Talent Summary page first checks the Org Chart Content page to see if the Instant Message Presence Icon is selected and the IM Protocol and IM Domain fields are entered. If these options are not defined, then the system checks the Profile Content page for this same information. If none of these IM options are defined in the Org Chart Viewer - Chart and Profile Settings page for Direct-Line Reports, the chat icon will not be available on the Talent Summary page header.

See "Org Chart Content Page" (PeopleSoft HCM 9.2: Human Resources Administer Workforce).

See "Chart and Profile Settings - Profile Content Page" (PeopleSoft HCM 9.2: Human Resources Administer Workforce).

When using the *XMPP* protocol for instant messaging, you will also need to navigate to My System Profile at the root menu and on the General Profile Information page add the *XMPP* protocol domain, user ID, and password for the user.

Header Rate Boxes Page

Use the Header Rate Boxes page (HCTS_SETUP_RATEBOX) to set up the header ratings boxes for the Talent Summary page.

Navigation

Set Up HCM > Common Definitions > Talent Summary > Talent Summary Setup > Header Rate Boxes.

Image: Header Rate Boxes page

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

Performance Versus Potential Rating

Display Performance Versus Potential Ratings Box

Performance Document Type:

Performance Rating Axis:

Performance Axis Label:

Potential Rating Axis:

Potential Axis Label:

Performance Rating Model Mapping Find | View All First 1 of 2 Last

Rating Model: Average 5 Level Rating Model

Rating	Description	Rating Box Value
U	Unsatisfac	<input type="text" value="1"/>
N	Needs Impr	<input type="text" value="1"/>
M	Meets	<input type="text" value="2"/>
E	Exceeds	<input type="text" value="3"/>
C	Co Maker	<input type="text" value="3"/>

Potential Rating Mappings

Potential Rating	Rating Box Value
High Potential Candidate	<input type="text" value="3"/>
Lateral Transfer	<input type="text" value="2"/>
Officer Potential	<input type="text" value="2"/>
Promotable	<input type="text" value="2"/>
Currently Well Placed	<input type="text" value="1"/>

Risk of Leaving Versus Impact of Loss

Display Risk of Leaving Versus Impact of Loss Box

Risk Axis Label:

Impact Axis Label:

Performance Versus Potential Rating

Display Performance Versus Potential Ratings Box

Select this box to display the Performance versus Potential ratings box on the header of the Talent Summary page. The Performance versus Potential Ratings box displays the performance rating from the most recently completed performance document and the potential rating from career planning.

When no data is available for the ratings box, the box will not appear and the page will display text that performance or potential rating data does not exist.

Performance Document Type

Select the performance document type that should be used for the Overall Performance Rating for the Performance versus Potential ratings box. These values are defined in the Document Types component by navigating to Set Up HCM > Product Related > ePerformance > Document Structure > Document Types.

Performance Rating Axis

Select an option in this field to configure the maximum value for the x-axis. The values in this drop-down are 1-5. This number defines the ratings box size, along with the y-axis.

Performance Axis Label	Specify the label for the performance x-axis.
Potential Rating Axis	Select an option in this field to configure the maximum value for the y-axis. The values in this drop down are 1-5.
Potential Axis Label	Specify the label for the performance y-axis.

Performance Rating Model Mapping

Use this group box to map one or more rating models to the performance ratings axis defined at the top of this page. To standardize performance ratings you use within your organization, which can potentially have different rating values, map each rating model to line up with the values for the performance rating axis.

Rating Model	Identify the rating models you wish to use in the performance rating axis. Rating models are managed in the Rating Model table by navigating to Set Up HCM > Product Related > Profile Management > Content Catalog > Rating Model.
---------------------	---



(View Detail icon)

Click this icon to open the Review Rating Model Table page and view details about this rating model.

Performance Rating Model Mapping - Rating Box Value	Map a performance rating axis value to each rating within a rating model. The system uses this information to determine where a person's performance rating should display in the ratings box on the header of the Talent Summary page when a rating model may not match the performance rating axis values defined on this page. The values run from 1 to the value defined in the Performance Rating Axis field.
--	--

Potential Rating Mappings

Potential Rating Mappings - Rating Box Value	Map a rating box value to each potential rating type. The system uses this information to determine where a person's potential rating should display in the ratings box on the header of the Talent Summary page. The values run from 1 to the value defined in the Potential Rating Axis field.
---	--

Risk of Leaving Versus Impact of Loss

Display Risk of Leaving Versus Impact of Loss	Select this box to display the Risk of Leaving Versus Impact of Loss ratings box on the header pagelet of the Talent Summary page. When no data is available for the ratings box, the box will not appear and the page will instead display text that risk of leaving or impact of loss data does not exist.
Risk Axis Label	Specify a label for the risk of leaving x-axis.
Impact Axis Label	Specify a label for the impact of leaving y-axis.

Other Pagelets Page

Use the Other Pagelets page (HCTS_SETUP_PAGELET) to define setup data for pagelets that appear within the Talent Summary page.

Navigation

Set Up HCM > Common Definitions > Talent Summary > Talent Summary Setup > Other Pagelets

Image: Other Pagelets page

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

Number of past years to display rated competencies

Enter the number of years the system should go back and show rated competencies. The competency related pagelets will display competencies within the years entered here.

	Note: Regardless of the number of years you enter the pagelet displays only the most current ratings. Limiting the number of years to display data eliminates old data that may no longer be relevant.
Valid Evaluation Types - Instance Qualifier	Identify which evaluation types should appear in the competency pagelets.
Sequence Number	Specify the priority for the evaluation type. If a competency has more than one valid evaluation type, the type with the lowest priority number is considered to have the highest priority.
Include Expired Licenses	Select to show the expired licenses and certifications on the Talent Summary - Licenses and Certifications pagelet. Expired licenses and certificates will display with the critical alert icon. Deselect this check box to hide the expired licenses and certificates from the user in the Licenses and Certifications pagelet.
Configure Alert Icons	Click this link to open the Alert Pagelet Setup page and define how alerts should display in your pagelets. The Alert Pagelet Setup page is also used by the Manager Dashboard.
Number of years since completion to display projects	Enter the number of years the system should display a completed project. This number year applies to the Special Projects and E&G Special Projects pagelets.
Document Type	Select the performance document type that should be used for the graphical or grid Performance History pagelets.
Number of past completed reviews to be displayed	Specify the number of past completed reviews to appear in the graphical or grid Performance History pagelets.
Display Succession Plans for Status	Identify key positions, anticipate organizational bottlenecks, and develop multiple career paths for individuals who are ready for promotion. Values are: <i>Official</i> and <i>Draft</i> . This information is shown in the Succession Options pagelet.

Alerts Pagelet Setup Page

Use the Alerts Pagelet Setup page (UX_ALERT_SETUP) to set up the alert rules for the Licenses and Certifications pagelet on the Talent Summary page.

Navigation

- Click the Configure Alert Icons link on the Other Pagelets page.
- Set Up HCM >Common Definitions >Manager Dashboard >Alerts Pagelet Setup >Alerts Pagelet Setup

Image: Alerts Pagelet Setup page

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

Alerts Pagelet Setup

User Changes Allowed

Allow Changes to Alert Type

Alert Levels

Number of Alerts to Display

Alerts Level to Display

Critical (❶)

Warning (⚠)

Informational

*Number of Alerts

Alert Definitions							
Personalize Find <input type="text" value=""/> <input type="button" value=""/> First 1-7 of 7 Last							
*Sequence	Include	Alert Type	Days for Critical Alerts	Days for Warning Alerts	Days for Informational Alerts	Maximum Days to View in Past	Allow to Delete
1	<input checked="" type="checkbox"/>	Expiring Memberships	<input type="text" value="10"/>	<input type="text" value="30"/>	<input type="text" value="90"/>	<input type="text" value="30"/>	<input checked="" type="checkbox"/>
3	<input checked="" type="checkbox"/>	eCompensation					
4	<input checked="" type="checkbox"/>	Expiring Licenses/Certificates	<input type="text" value="10"/>	<input type="text" value="30"/>	<input type="text" value="90"/>	<input type="text" value="30"/>	<input checked="" type="checkbox"/>
5	<input checked="" type="checkbox"/>	ePerformance	<input type="text" value="10"/>	<input type="text" value="30"/>	<input type="text" value="90"/>	<input type="text" value="30"/>	<input checked="" type="checkbox"/>
6	<input checked="" type="checkbox"/>	Scheduled Training	<input type="text" value="10"/>	<input type="text" value="30"/>	<input type="text" value="90"/>	<input type="text" value="30"/>	<input checked="" type="checkbox"/>
9	<input checked="" type="checkbox"/>	Birthday Alerts	<input type="text" value="1"/>	<input type="text" value="3"/>	<input type="text" value="7"/>	<input type="text" value="7"/>	<input checked="" type="checkbox"/>
10	<input checked="" type="checkbox"/>	Anniversary Alerts	<input type="text" value="1"/>	<input type="text" value="3"/>	<input type="text" value="7"/>	<input type="text" value="7"/>	<input checked="" type="checkbox"/>

Note: This setup page is primarily used for the Alerts Pagelet on the Manager Dashboard. What you change here will be reflected in the Alerts Pagelet on the Manager Dashboard.

The Licenses and Certifications pagelet on the Talent Summary page uses the definition setup defined for the *Expiring Licenses/Certifications* row of the Alert Definitions group box.

Chapter 4

Setting Up Employee Snapshot

Understanding Employee Snapshot Dashboards and Tiles

The Employee Snapshot consists of sets of dashboards, tiles, and pages that enable managers to quickly and easily view human resource and talent related information about an employee. The dashboards aggregate and display tiles that share common or similar purposes and provide quick access to useful information by presenting concise but feature-rich tiles to the user. For information on what data is available on the Employee Snapshot, see [Understanding the Employee Snapshot Content and Layout](#).

This topic provides an understanding of how to add, rename, or delete a dashboard within Employee Snapshot and how to display tiles on an Employee Snapshot dashboard.

Dashboards are created and maintained in the Portal Registry. For more information on Portal and Dashboard technology, see the *PeopleTools: Portal Technology* documentation.

Adding, Renaming, or Deleting a Dashboard from Employee Snapshot Pages

The Employee Snapshot feature provides managers with a way to quickly review and analyze data about an individual employee without having to navigate to various locations throughout the system. Users can access the Employee Snapshot pages by selecting the View Employee Snapshot menu item from the Related Action icon after an employee's name in fluid. Additionally, administrators have the ability to add the Employee Snapshot tile to a fluid homepage as well as modify dashboards and tiles within the fluid self service pages.

Adding a Dashboard to the Employee Snapshot Dashboard Action List

The left panel of the Employee Snapshot displays various dashboards, or business processes, that are available for Employee Snapshot. The PeopleSoft HCM application delivers the Summary and Promotion Readiness dashboards.

To add a new Employee Snapshot dashboard, perform these steps:

1. Navigate to PeopleTools >Portal >Dashboard >Manage Dashboard Pages.
 - a. Access the Fluid Dashboards page.
 - b. Click the Create new dashboard page link at the bottom of the page.
 - c. On the Dashboard Page Administration page, enter the dashboard name and label.
 - d. Enter `CO_MANAGER_SELF_SERVICE` in the Parent Folder field.
 - e. Select *Public Access* for the Security Type.

- f. Save your data.

Important! Creating a new dashboard will create two (2) crefs: one in the folder you specified and a second one in Fluid Structure Content, Fluid Homepages. *Do not* use the Fluid Homepage version; only edit the one in the folder you specified during the dashboard creation.

2. Navigate to PeopleTools >Portal >Structure and Content.
 - a. Click the label link for Manager Self Service.

Note: Do not use the link titled Fluid Homepage.

 - b. In the Content References group box, click the Edit link for the new dashboard you just created.
 - c. In the Content Reference Link Attributes group box, delete the *NAVTOPWIN* row by selecting the delete (-) button.
 - d. Copy the Attribute value text that ends in *_LINK* in the Attribute value field (for example, *PROMOTION_READINESS_LINK*).
 - e. Save the page.
3. Navigate to PeopleTools >Portal >Portal Utilities >Navigation Collections.
 - a. Enter *Employee Snapshot* in the Search By field and click Search.
 - b. Click the Edit link for *Employee Snapshot*.
 - c. Click Add Link button.
 - d. On the Add Link page, select *Local Portal* in the Source Portal field.
 - e. Paste the name that ends in *_LINK* you copied from the previous step into the Menu Item field.
 - f. Click OK, then Save.

Important! If you add a dashboard to Employee Snapshot, remember that other considerations need to be taken into account, such as adding the PeopleCode to select employees on the Person Selector. For more information on creating dashboard, see the *PeopleTools: Portal Technology*, “Administering Homepages and Dashboard Pages” documentation.

Renaming a Dashboard from the Employee Snapshot Dashboard Action List

To rename an Employee Snapshot dashboard, perform these steps:

1. Navigate to PeopleTools >Portal >Dashboard >Manage Dashboard Pages.
2. Access the Fluid Dashboards page.
3. Click on the Properties link for dashboard page you want to update.
4. Enter the new name in the Dashboard Label field.

5. Save.

Removing a Dashboard from the Employee Snapshot Dashboard Action List

To remove a dashboard from the left panel of the Employee Snapshot, perform these steps:

1. Navigate to PeopleTools >Portal >Portal Utilities >Navigation Collections.
2. Enter *Employee Snapshot* in the Search By field and click Search.
3. Click on the Edit link for *Employee Snapshot*.
4. Click the link for the dashboard (business task) that you want to remove.
5. Click on Delete Link button.
6. Save.

Displaying Tiles on an Employee Snapshot Dashboard

After you have created dashboards for the Employee Snapshot, the administrator can add tiles. To modify a dashboard by adding or removing tiles, follow these steps:

1. Navigate to PeopleTools >Portal >Dashboard >Manage Dashboard Pages.
2. Access the Fluid Dashboards page.
3. Click the Tiles button for the dashboard that you want to modify.
4. In the Employee Snapshot group box, select the tiles you want to display on the specified dashboard and select *Required* to ensure that the tile is always shown on that dashboard.
5. Save.

Note: Oracle recommends that you use only tiles delivered for Employee Snapshot. Also, tiles that are delivered for the Employee Snapshot may not work on other pages.

Determining the Sequence Order of Tiles on the Dashboard

When you have added tiles to a dashboard, you can select the order in which you want them to display.

1. Navigate to PeopleTools >Portal >Structure and Content.
2. Click the Fluid Structure Content link.
3. Click the Fluid Pages link.
4. Click the Employee Snapshot link.
5. The Structure and Content page will display the content references associated with the Employee Dashboard. The Sequence number column displays the order in which the pages and tiles will appear in Employee Snapshot. Click the Edit link for the dashboard to update the Sequence number field and save your data.

Image: Structure and Content Page for Employee Snapshot

This example illustrates the sequence numbering for the content references for the Employee Snapshot.

Root > Fluid Structure Content > Fluid Pages > Employee Snapshot

Structure and Content

* Click the folder label to view the child folders and content references for that folder
 * Click the "Edit" link to edit the folder definition

▼ Folders Personalize | Find | View All | [Print] | [Grid] First 1 of 1 Last

Add Folder

* Click the "Edit" link to edit the content reference definition

Content References							
Link	Node Name	Label	Edit	Sequence number	Create Link	Number of links	
<input type="checkbox"/>	HRMS	Banner in the Activity Guide	Edit	100	Create Link	0	[-]
<input type="checkbox"/>	HRMS	View Employee Snapshot	Edit	150	Create Link	0	[-]
<input type="checkbox"/>	HRMS	Summary	Edit	200	Create Link	1	[-]
<input type="checkbox"/>	HRMS	Promotion Readiness	Edit	300	Create Link	1	[-]
<input type="checkbox"/>	HRMS	Job Details	Edit	1000	Create Link	0	[-]
<input type="checkbox"/>	HRMS	Job Details modal	Edit	1050	Create Link	0	[-]
<input type="checkbox"/>	HRMS	Compensation	Edit	1100	Create Link	0	[-]
<input type="checkbox"/>	HRMS	Compensation History modal	Edit	1150	Create Link	0	[-]
<input type="checkbox"/>	HRMS	Job Competencies	Edit	1200	Create Link	0	[-]

For more information on Content References, see the *PeopleTools: Portal Technology*, “Administering Portals” documentation.

Configuring Employee Snapshot

The Employee Snapshot shows managers and administrators a variety of human resources and talent-related information about an employee. The PeopleSoft system enables administrators to determine what items and date ranges to display these items.

These videos demonstrate configuration features for Fluid Employee Snapshot for the talent administrator:



[Image Highlights, PeopleSoft HCM Update Image 22: Fluid Employee Snapshot New Content and Enhancements](#)



[Image Highlights, PeopleSoft HCM Update Image 24: Employee Snapshot Configuration Enhancements](#)



[Image Highlights, PeopleSoft HCM Update Image 28: Employee Snapshot Related Actions and Nav Collection Updates](#)



[Image Highlights, PeopleSoft HCM Update Image 30: Employee Snapshot Multiple Performance Document Type Configuration and Display](#)



[Image Highlights, PeopleSoft HCM Update Image 31: Development Documents for Employee Snapshot](#)



[Image Highlights, PeopleSoft HCM Update Image 32: Configurable Profile Content in Employee Snapshot](#)

To set up the Employee Snapshot, use the Configure Employee Snapshot (HCTS_ESNAP_CFG_FL) component.

Note: When you apply the new configuration pages and component, an AE conversion will run as part of the change package and copy the configuration setup you have defined on the Talent Summary Setup - Other Pagelets Page. After the initial run of the AE process, you can update the Configure Employee Snapshot pages to override the values that came from the Talent Summary Setup component. These setup tables are now unique to their own business processes and updating one will not update the other.

These topics provide an overview of how to display content on configuration profile tiles or pages, discuss the Configure Employee Snapshot page layout, and how to set up Employee Snapshot configuration options.

Related Links

[Understanding the Employee Snapshot Content and Layout](#)

Pages Used to Configure Employee Snapshot

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
Configure Employee Snapshot Tile	HC_HCTS_ESNAP_CFG_FL_GBL (cref of the tile)	Access the configuration pages for Employee Snapshot.

Page Name	Definition Name	Usage
<u>Configure Employee Snapshot Layout</u>	N/A	The Configure Employee Snapshot pages appear in a multi-panel layout. When using a large form factor like a desktop or tablet, the left panel lists the page category items and the main panel displays the content related to that item. When using a small form factor, such as a phone, the page category items will display by default when you select the Configure Employee Snapshot tile. Select a page list item to access that page.
<u>Configure Employee Snapshot - Competencies Page</u>	HCTS_CFG_COMP_FL	Identify the number of years to display competencies for the evaluation types you have defined on this page.
<u>Configure Employee Snapshot - Licenses and Certifications Page</u>	HCTS_CFG_LICRT_FL	Determine if you want to compare the competencies held by a person to their job profile and when to alert a manager of expiring items.
<u>Configure Employee Snapshot - Projects Page</u>	HCTS_CFG_PRJCT_FL	Enter the number of years to display special projects assigned to the employee.
<u>Configure Employee Snapshot - Document History Page</u>	HCTS_CFG_PERF_FL	Identify performance and development document types and the number of reviews to display.
<u>Configure Employee Snapshot - Performance versus Potential Page</u>	HCTS_CFG_PP_BOX_FL	Set up the Performance versus Potential ratings box for the Employee Impact tile.
<u>Rating Model Information Page</u>	HCTS_CFG_RATE2_SCF	Map a performance rating axis value to each rating within a rating model.
<u>Configure Employee Snapshot - Risk versus Loss Page</u>	HCTS_CFG_RL_BOX_FL	Set up the Risk versus Loss ratings box for the Employee Impact tile.
<u>Configure Employee Snapshot - Succession Options Page</u>	HCTS_CFG_SUCC_FL	Select which of the employee's succession plans should display on the Succession Plans tile and page based on the plan's status.
<u>Configure Employee Snapshot - Profile Content Page</u>	HCTS_CFG_CAT_FL	View or add new profile-related tiles to the Employee Snapshot dashboards.
<u>Tile Attributes Page</u>	HCTS_TILE_TBL_SCF HCTS_TILE_TBL2_SCF	Define the attributes and publish profile-related tiles to the Employee Snapshot dashboards.
<u>Dashboard Information Page</u>	HCTS_DASHBOARD_SCF	View tile publish statuses.

Understanding How to Display Content on the Configurable Profile Tiles and Pages

While PeopleSoft eProfile Manager Desktop delivers multiple tiles that appear on the various Employee Snapshot dashboards, the system also enables talent administrators to add configurable profile-related tiles. With this functionality, your organization can display profile data that is not already on a delivered tile, as well as show profile information that you have created yourself. Administrators can easily configure this additional profile content to:

- Display on one or many dashboards.
- Select the order the tiles should appear on a dashboard.
- Indicate whether to display a ratings bar for profile items that may contain ratings data for the employee.

You will use the [Tile Attributes Page](#) to configure and publish this information to the designated dashboards.

Configure Employee Snapshot Tile

Administrators use the Configure Employee Snapshot tile to access the configuration pages for Employee Snapshot.

Navigation

The Configure Employee Snapshot tile is delivered as part of the Talent Administrator home page, but the location can change if you change the delivered home pages or if administrators personalize their home pages.

Image: Configure Employee Snapshot Tile

This example illustrates the Configure Employee Snapshot tile.



Click the Configure Employee Snapshot tile to access the various pages for defining Employee Snapshot configuration options.

The PeopleSoft HCM enables you to configure the Employee Snapshot business process using these pages:

- [Configure Employee Snapshot - Competencies Page](#)

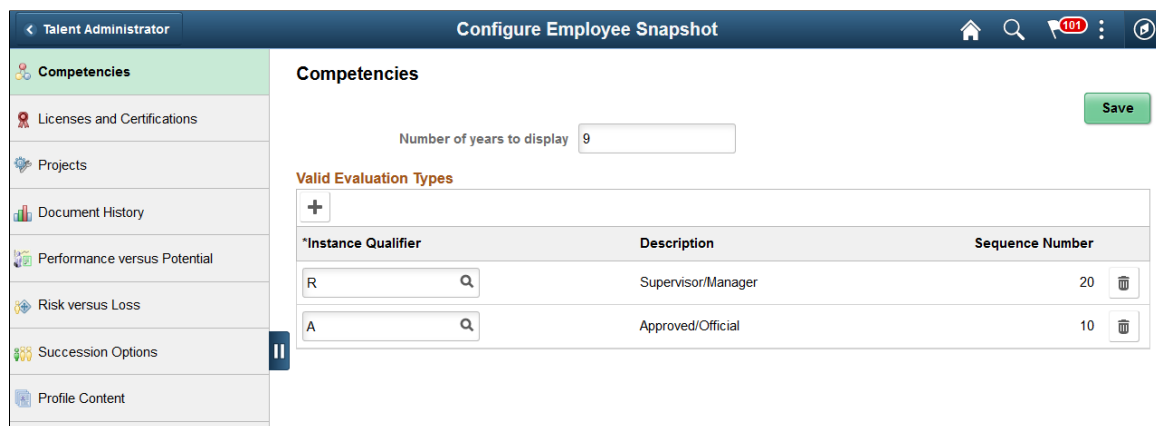
- [Configure Employee Snapshot - Licenses and Certifications Page](#)
- [Configure Employee Snapshot - Projects Page](#)
- [Configure Employee Snapshot - Document History Page](#)
- [Configure Employee Snapshot - Performance versus Potential Page](#)
- [Configure Employee Snapshot - Risk versus Loss Page](#)
- [Configure Employee Snapshot - Succession Options Page](#)
- [Configure Employee Snapshot - Profile Content Page](#)

Configure Employee Snapshot Layout

Like many fluid pages, the Configure Employee Snapshot pages appear in a multi-panel layout. When using a large form factor like a desktop or tablet, the left panel lists the page category items and the main panel displays the content related to that item. Select a page item from the left panel to change the page content view. Click the slider tab when using a large form factor device to hide or display the left panel list.

Image: (Tablet) Configure Employee Snapshot Page Layout

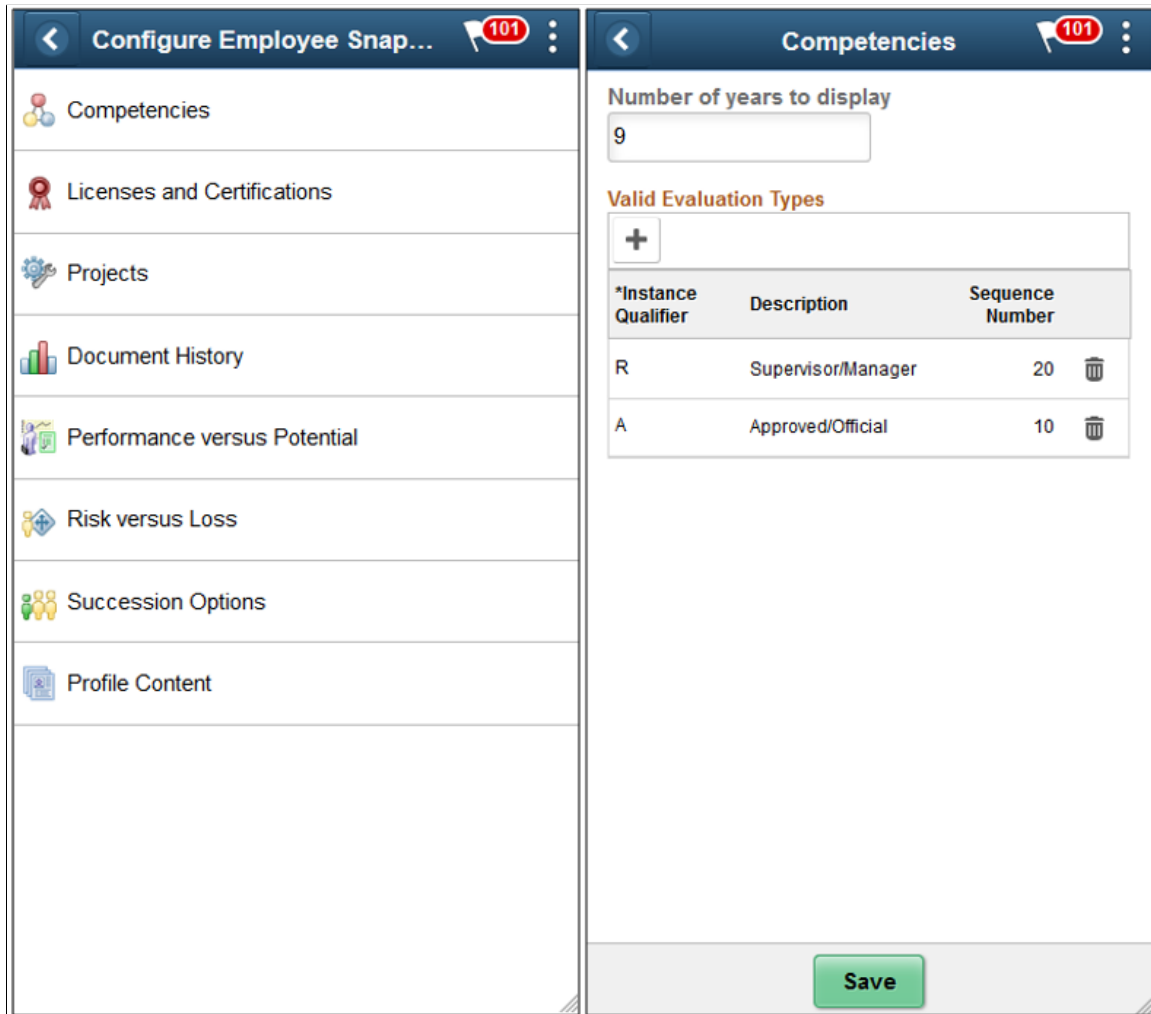
This example illustrates the Configure Employee Snapshot page layout using a large form factor.



When using a small form factor, such as a phone, the page category items will display by default when you select the Configure Employee Snapshot tile. Select a page list item to access that page. To change to another configuration page, click the page Back button in the banner to view the page category items again and select another page.

Image: (Smartphone) Configure Employee Snapshot Page Layout

This example illustrates the Configure Employee Snapshot pages on a small form factor device. In the first image, the page displays the page list items. The second image displays the page item you have selected without the list panel showing. Click the Back arrow button to return to the list items for Configure Employee Snapshot.



Configure Employee Snapshot - Competencies Page

Use the Configure Employee Snapshot - Competencies page (HCTS_CFG_COMP_FL) to identify the number of years to display competencies for the evaluation types you have defined on this page.

Navigation

Select Fluid Home under the main menu. On the page that appears, select *Talent Administrator*. The Configure Employee Snapshot tile is available on the Talent Administrator fluid home page.

Image: Configure Employee Snapshot - Competencies Page

This example illustrates the fields and controls on the Configure Employee Snapshot - Competencies page.

Competencies

Save

Number of years to display

Valid Evaluation Types

+

*Instance Qualifier	Description	Sequence Number	
<input style="width: 80%; border: none;" type="text" value="R"/> Q	Supervisor/Manager	20	🗑
<input style="width: 80%; border: none;" type="text" value="A"/> Q	Approved/Official	10	🗑

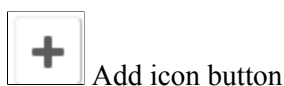
Number of years to display

Enter the number of years the system should show rated competencies. The competency-related tiles and pages for the Employee Snapshot will display competencies within the years entered here.

Note: Regardless of the number of years you enter, the tiles and pages display only the most current competency ratings. Limiting the number of years to display data eliminates old data that may no longer be relevant.

Valid Evaluation Types

Use this section to identify which evaluation types (instance qualifiers) should appear in the competency tiles and pages.



Add icon button

Click to include additional evaluation types that can appear on the competency tiles and pages.

Important! When you do not identify valid evaluation types, the Job Competency tiles and page will display a message that you need to contact the system administrator to configure this view.

Instance Qualifier and Description

Enter instance qualifiers to identify which evaluation types should appear on the competency-related tiles and pages.

Sequence Number

Displays the sequence number for the evaluation type (instance qualifier). These are defined under the *COMPETENCY* content type on the Manage Profiles "Instance Qualifiers Page" (PeopleSoft HCM 9.2: Human Resources Manage Profiles).

Note: When more than one evaluation type exists for an employee, the system will use the evaluation type with the lowest sequence number. For example, if an employee has both an *Approved/Official* evaluation, which has a sequence number of 10, and a *Supervisor/Manager* evaluation, which has a sequence number of 20, the system will display the *Approved/Official* evaluation on the Employee Snapshot pages, since it has the lowest sequence number of 10.

Related Links

"Talent Profile Page (for Employees) or Team Talent Profile Page (for Managers)" (PeopleSoft HCM 9.2: eDevelopment)

"Person Profile Page" (PeopleSoft HCM 9.2: Human Resources Manage Profiles)

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

"Defining Instance Qualifiers" (PeopleSoft HCM 9.2: Human Resources Manage Profiles)

Configure Employee Snapshot - Licenses and Certifications Page

Use the Configure Employee Snapshot - Competencies page (HCTS_CFG_LICRT_FL) to determine if you want to compare the competencies held by a person to their job profile and when to alert a manager of expiring items.

Navigation

Select Fluid Home under the main menu. On the page that appears, select *Talent Administrator*. The Configure Employee Snapshot tile is available on the Talent Administrator fluid home page.

Select the Licenses and Certifications category item from the left panel.

Image: Configure Employee Snapshot - Licenses and Certifications Page

This example illustrates the fields and controls on the Configure Employee Snapshot - Licenses and Certifications page.

Compare Person with Job Profile

Set this option to *Yes* to have the Licenses and Certifications tiles and pages identify which items held by the employee are required by the job versus those that are not required by the job. When enabled, the:

- The summary [Licenses and Certifications \(Summary\) Tile](#) will include missing job required items in the total count with expiring items.
- The non-summary [Licenses and Certifications Tile](#) will display a two box layout. The first box will show the number count of current, expired, and missing items of required items. The second box will show only the number count of additional items held by the employee.
- [Licenses and Certifications Page](#) will display required and additional items on two different page tabs. The first tab of the page will show those items held by the employee that are required for the job, and the second tab of the page will display additional items held by the employee that are not required by the job.

Set this option to *No* to have all licenses and certifications held by the employee grouped together and not separated by those required by the job. The tiles will show a current and expiring count as well as a count for expired items. The page will display all licenses and certifications held by the employee on one page. Missing items will not be identified on the tiles or pages.

Days for Warning Alert

Enter the number of days before a transaction is to expire to indicate that the system should display an expiration warning to the manager. For example, if you entered 60 in this field, and an employee's CPR certification expires on October 30, then from September 1 until the expiration date the system will display an Expiring Soon warning alert icon next to this employee's certification. After this date the icon will switch to an Expired alert icon instead. Expiration dates for licenses and certifications are defined on the Person Profile: Qualifications tab.

Note: When the Compare Person with Job Profile option is enabled on this page, the [Licenses and Certifications Tile](#) will list the number count of required-for-job items that have expired or that are expiring soon. It will not list the number count of additional items that are expired or are expiring soon. Click the <number count> Additional Items box on the tile to view expiring soon or expired items that are not required by the job. However, the [Licenses and Certifications \(Summary\) Tile](#) does not separate out the required versus non-required items, even when the Compare Person with Job Profile option is set to *Yes*.

Related Links

[Licenses and Certifications \(Summary\) Tile](#)

[Licenses and Certifications Tile](#)

[Licenses and Certifications Page](#)

"Talent Profile Page (for Employees) or Team Talent Profile Page (for Managers)" (PeopleSoft HCM 9.2: eDevelopment)

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

Configure Employee Snapshot - Projects Page

Use the Configure Employee Snapshot - Projects page (HCTS_CFG_PRJCT_FL) to enter the number of years to display special projects assigned to the employee.

Navigation

Select Fluid Home under the main menu. On the page that appears, select *Talent Administrator*. The Configure Employee Snapshot tile is available on the Talent Administrator fluid home page.

Select the Projects category item from the left panel.

Image: Configure Employee Snapshot - Projects Page

This example illustrates the fields and controls on the Configure Employee Snapshot - Projects page.



The screenshot shows a web interface for configuring employee snapshot projects. At the top left, the word "Projects" is displayed in a bold, dark font. In the center, there is a text input field with the label "Number of years to display" and the value "15" entered. To the right of the input field is a green button with the text "Save" in white.

The information you enter here impacts which projects will appear on the [Special Projects Tile](#) and [Special Projects Page](#). Only those that fall within the number of years specified here will appear on these tiles and pages.

Configure Employee Snapshot - Document History Page

Use the Configure Employee Snapshot - Document History page (HCTS_CFG_PERF_FL) to identify performance and development document types and the number of reviews to display.

Navigation

Select Fluid Home under the main menu. On the page that appears, select *Talent Administrator*. The Configure Employee Snapshot tile is available on the Talent Administrator fluid home page.

Select the Document History category item from the left panel.

Image: Configure Employee Snapshot - Document History Page

This example illustrates the fields and controls on the Configure Employee Snapshot - Document History page.

Document History

Save

Performance History

Number of reviews to display

Performance Document Types

+

Document Type	Document Description	
<input style="width: 80%;" type="text" value="K0ANNUAL"/> 🔍	Annual Review	🗑️
<input style="width: 80%;" type="text" value="K0PROJEC"/> 🔍	Project Review	🗑️

Development History

Number of reviews to display

Development Document Types

+

Document Type	Document Description	
<input style="width: 80%;" type="text" value="DEVELOP"/> 🔍	Development Evaluation	🗑️
<input style="width: 80%;" type="text" value="K0DEVELP"/> 🔍	Developmental Document	🗑️

Performance History

Number of reviews to display

Enter the maximum number of completed performance reviews the Employee Snapshot tiles and pages should display for an employee.

Performance Document Types

Use this section to identify which performance document types should appear on the performance tiles and pages. The performance tiles and page will display all the document types that an employee holds that meet the criteria specified on this page. More than one document type can appear for an employee.



Add icon button

Click to include additional performance document types that can appear on the Performance History tiles and pages.

Document Type

Select the performance document types that should be used for the overall performance rating for the performance tiles and

pages. These values are defined on the "Document Types Page" (PeopleSoft HCM 9.2: ePerformance).

Important! When you do not identify valid document types, the Performance History tiles and pages will display a message that you need to contact the system administrator to configure this view.

Development History

Number of reviews to display

Enter the maximum number of completed development reviews the Employee Snapshot tiles and pages should display for an employee.

Development Document Types

Use this section to identify which development document types should appear on the development tiles and pages. The development tiles and page will display the most recent development document type that an employee holds that meet the criteria specified on this page. More than one document type can appear for an employee on the [Development History Page](#) if he or she meets the criteria specified on this page and the page is accessed from the non-summary tile.



Add icon button

Click to include development document types that can appear on the Development History tiles and pages.

Document Type

Select the development document types that should be used to display on the development tiles and pages. The tiles and pages will show the completed development documents for the employee. Document types are defined on the "Document Types Page" (PeopleSoft HCM 9.2: ePerformance).

Important! When you do not identify valid document types, the Development tiles and pages will display a message that you need to contact the system administrator to configure this view.

Related Links

[Performance \(Summary\) Tile](#)

[Performance History Tile](#)

[Performance History Page](#)

[Development \(Summary\) Tile](#)

[Development History Tile](#)

[Development History Page](#)

Configure Employee Snapshot - Performance versus Potential Page

Use the Configure Employee Snapshot - Performance versus Potential page (HCTS_CFG_PP_BOX_FL) to set up the Performance versus Potential ratings box for the Employee Impact tile.

Navigation

Select Fluid Home under the main menu. On the page that appears, select *Talent Administrator*. The Configure Employee Snapshot tile is available on the Talent Administrator fluid home page.

Select the Performance versus Potential category item from the left panel.

Image: Configure Employee Snapshot - - Performance versus Potential Page

This example illustrates the fields and controls on the Configure Employee Snapshot - Performance versus Potential page.

Performance versus Potential

Save

Display Ratings Box Chart

Performance Document Type

Performance Rating Axis

Performance Axis Label

Potential Rating Axis

Potential Axis Label

Performance Rating Model Mapping

+

Rating Model	Description
K001	Average 5 Level Rating Model >
PSCM	Competency Management Scale >

Potential Rating Mappings

Potential Rating	Rating Box Value
High Potential Candidate	<input type="text" value="3"/>
Lateral Transfer	<input type="text" value="2"/>
Officer Potential	<input type="text" value="2"/>

Use this page to configure the Performance versus Potential Ratings box for Employee Snapshot. The Performance versus Potential Ratings box displays the performance rating from the most recently completed performance document and the potential rating from career planning.

Display Performance Versus Potential Ratings Box

Swipe to *Yes* if you want this ratings box to appear on the Employee Impact Tile.

If you select *NO*, this ratings box will not appear on the tile and the employee's evaluation for performance and potential will not be viewable on the [Employee Impact Page](#) as well.

Note: If this option and the Display Risk of Leaving Versus Impact of Loss Box option on the [Configure Employee Snapshot - Risk versus Loss Page](#) are set to *NO*, the tile will display a message to contact administrator to configure the view. This also prevents the manager from viewing any of the employee's ratings.

Performance Document Type

Select the performance document type that should be used for the Overall Performance Rating for the Performance versus Potential ratings box. These values are defined in the "Document Types Page" (PeopleSoft HCM 9.2: ePerformance).

Performance Rating Axis

Select an option in this field to configure the maximum value for the x-axis. The values in this drop-down are 1-5. This number defines the ratings box size, along with the y-axis.

Performance Axis Label

Specify the label for the performance x-axis.

Potential Rating Axis

Select an option in this field to configure the maximum value for the y-axis. The values in this drop down are 1-5.

Potential Axis Label

Specify the label for the performance y-axis.

Performance Rating Model Mapping

Use this group box to map one or more rating models to the performance ratings axis defined at the top of this page. To standardize performance ratings you use within your organization, which can potentially have different rating values, map each rating model to line up with the values for the performance rating axis.

Rating Model

Identifies the rating models you wish to use in the performance rating axis. Rating models are managed on the "Rating Model Page" (PeopleSoft HCM 9.2: Human Resources Manage Profiles).

Click the Add (+) button or select a row to access the [Rating Model Information Page](#) and add, view, or manage rating model mappings.

Potential Rating Mappings

Potential Rating

Map a rating box value to each potential rating type. The system uses this information to determine where a person's potential rating should display in the ratings box on the [Employee Impact Tile](#). The values run from 1 to the value defined in the Potential Rating Axis field.

Rating Model Information Page

Use the Rating Model Information page (HCTS_CFG_RATE2_SCF) to map a performance rating axis value to each rating within a rating model.

Navigation

Select the Add (+) button or select a row from the Performance Rating Model Mapping grid on the [Configure Employee Snapshot - Performance versus Potential Page](#).

Image: Rating Model Information Page

This example illustrates the fields and controls on the Rating Model Information page.

Rating Model Information		
Rating Model K001 Average 5 Level Rating Model		
Rating	Description	Rating Box Value
U	Unsatisfac	1
N	Needs Impr	1
M	Meets	2
E	Exceeds	3
C	Co Maker	3

Map a rating box value to the performance rating for this ratings model. The system uses this information to determine where a person’s performance rating should display in the ratings box on [Employee Impact Tile](#) when a rating model may not match the performance rating axis values defined on this page. The values run from 1 to the value defined in the Performance Rating Axis field on the [Configure Employee Snapshot - Performance versus Potential Page](#).

Configure Employee Snapshot - Risk versus Loss Page

Use the Configure Employee Snapshot - Risk versus Loss page (HCTS_CFG_RL_BOX_FL) to set up the Risk versus Loss ratings box for the Employee Impact tile.

Navigation

Select Fluid Home under the main menu. On the page that appears, select *Talent Administrator*. The Configure Employee Snapshot tile is available on the Talent Administrator fluid home page.

Select the Risk versus Loss category item from the left panel.

Image: Configure Employee Snapshot - Risk versus Loss Page

This example illustrates the fields and controls on the Configure Employee Snapshot - Risk versus Loss page.

Display Risk of Leaving Versus Impact of Loss Box

Swipe to *Yes* if you want this ratings box to appear on the [Employee Impact Tile](#). When no data is available for the ratings box, the box will not appear.

If you select *NO*, this ratings box will not appear on the tile and the employee's evaluation for risk of leaving and impact of loss will not be viewable on the [Employee Impact Page](#) as well.

Note: If this option and the Display Performance Versus Potential Ratings Box option on the [Configure Employee Snapshot - Performance versus Potential Page](#) are set to *NO*, the tile will display a message to contact to administrator to configure the view. This also prevents the manager from viewing any of the employee's ratings.

Risk Axis Label

Specify a label for the risk of leaving x-axis.

Impact Axis Label

Specify a label for the impact of leaving y-axis.

Configure Employee Snapshot - Succession Options Page

Use the Configure Employee Snapshot - Succession Options page (HCTS_CFG_SUCC_FL) to select which of the employee's succession plans should display on the Succession Plans tile and page based on the plan's status.

Navigation

Select Fluid Home under the main menu. On the page that appears, select *Talent Administrator*. The Configure Employee Snapshot tile is available on the Talent Administrator fluid home page.

Select the Succession Options category item from the left panel.

Image: Configure Employee Snapshot - Succession Options Page

This example illustrates the fields and controls on the Configure Employee Snapshot - Succession Options page.

The screenshot shows a form titled "Succession Options". At the top right is a green "Save" button. Below the title is a section header "Display Succession Plans for Status". Underneath, there are two rows of toggle switches. The first row is labeled "Official" and has a toggle switch set to "Yes". The second row is labeled "Draft" and also has a toggle switch set to "Yes".

The information you select here determines which succession plans the manager will see for the employee on the [Succession Plans Tile](#) and [Succession Plans Page](#). If both options are set to *NO*, then the tile will display a message to contact the administrator to configure the view.

Note: These settings are for the manager only, they do not apply to the administrator view of the employee's succession plan data.

Configure Employee Snapshot - Profile Content Page

Use the Configure Employee Snapshot - Profile Content page (HCTS_CFG_CAT_FL) to view or add new profile-related tiles to the Employee Snapshot dashboards.

Navigation

Select Fluid Home under the main menu. On the page that appears, select *Talent Administrator*. The Configure Employee Snapshot tile is available on the Talent Administrator fluid home page.

Select the Profile Content category item from the left panel.

Image: Configure Employee Snapshot - Profile Content Page

This example illustrates the fields and controls on the Configure Employee Snapshot - Profile Content page.

Profile Content				
Tile Information				6 rows
+				Q
Content Type	Description	Tile Title	Published	
CRITERIA	Element Criteria	Criteria	✓	>
GEOG_PREF	Geographic Preferences	Geo	✓	>
GOAL	Goals and Objectives	Goals	✓	>
LNG	Language Skills	Languages	✓	>
MEM	Memberships	Memberships	✓	>
RANK	Military Rank	Military Rank	✓	>

Use this page to view a list of profile tiles that you have created for the Employee Snapshot.



Add Content Type

Click to access the [Tile Attributes Page](#) and configure a new profile tile for any of the Employee Snapshot dashboards.

button or  Add icon button

Content Type and Description

Displays the type of content that will be available on the tile and pages. This information comes from Profile Management.

Tile Title

Displays the content name of the tile and page that will display to the user within Employee Snapshot.

Note: This name is represented as <Content Type> or <Content Item> throughout this documentation.

Published

Indicates if a tile has been published to an Employee Snapshot dashboard.

Note: Although a content type may indicate that it has been published, it may not be published to all dashboards you have configured for this content type. The tile only need be published to one dashboard to indicate that it has been published.

To view the dashboard or dashboards to which this tile has been published, click the row to access the [Tile Attributes Page](#).

If this field is blank, the tile has not been published and therefore not accessible from any of the Employee Snapshot dashboards.

Click a row to access the [Tile Attributes Page](#) to view details, update information, or delete a profile tile.

Related Links

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

"Profile Types - Content Page" (PeopleSoft HCM 9.2: Human Resources Manage Profiles)

[Viewing Configurable Profile Content Tiles and Pages](#)

Tile Attributes Page

Use the Tile Attributes page (HCTS_TILE_TBL_SCF or HCTS_TILE_TBL2_SCF) to define the attributes and publish profile-related tiles to the Employee Snapshot dashboards.

Navigation

Select the Add Content Type button, Add (+) button, or select a row on the [Configure Employee Snapshot - Profile Content Page](#).

Image: Tile Attributes Page (1 of 2)

This example illustrates the fields and controls on the Tile Attributes page (1 of 2).

The screenshot shows the 'Tile Attributes' page with the following sections and controls:

- Tile Information:**
 - *Content Type: MEM (Memberships)
 - *Tile Title: Memberships
 - Display Ratings Bar: No
- Define Tile Attributes:** (Empty section)
- Tile Security Roles:**
 - + (Add button)
 - Table with columns: *Role Name, Description, and a delete icon.

*Role Name	Description	
Talent Summary Admin Fluid	Talent Summary Admin Fluid	
Talent Summary Manager Fluid	Talent Summary Manager Fluid	

Image: Tile Attributes Page (2 of 2)

This example illustrates the fields and controls on the Tile Attributes page (2 of 2).

*Dashboard Name	Tile Size	Tile Sequence	Published	Publish Tile
Summary	1x1	999	Yes	Publish Tile
Promotion Readiness	2x2	999	Yes	Publish Tile
Compensation Review	2x2	999	Yes	Publish Tile
Performance Review	2x2	999	Yes	Publish Tile
Career Planning	2x2	999	Yes	Publish Tile

Delete

Use this page to add and publish profile-related tiles to the Employee Snapshot dashboards. This page enables you to create and display profile data you have created for your organization as well as profile data that may not be part of the delivered tiles. For a list of delivered tiles, see those items marked with an asterisk (*) on the [Understanding the Employee Snapshot Content and Layout](#) section of this documentation.

Content Type

Select a content type, which identifies the type of information that will appear on the tile and pages. Content types are defined in Profile Management on the "Content Types Page" (PeopleSoft HCM 9.2: Human Resources Manage Profiles).

Only those content types that do not already have a tile on any of the Employee Snapshot dashboards will be available for selection.

Tile Title

Indicate the name that should appear on the tile and pages. You can enter up to 30 characters.

Note: This name is represented as <Content Type> or <Content Item> throughout this documentation.

Display Ratings Bar

This field is available when the content type you have selected is associated with ratings.

Yes is provided by default when a content type is associated with a rating. Enabled, the tile and pages will display a ratings bar. For example, if this is a *Yes* and you are viewing language profile information, the tile will show the employee's proficiency on a graphical bar. However, a content type like travel preferences is not associated with ratings and therefore this option would not be available for selection.

Swipe to *No* to hide the ratings bar and show only text.

Ratings bars appear differently based on the dashboard you select and the page you are viewing, as shown in this table:

	Tile	<Content Type> Page
Summary Dashboard	Does not show a ratings bar	Displays: <ul style="list-style-type: none"> • (Tablet or desktop) Up to three (3) ratings bars • (Smartphone) The first (1) ratings bar only
<ul style="list-style-type: none"> • Promotion Readiness • Compensation Review • Performance Review • Career Planning 	Displays the first (1) ratings bar only	Displays: <ul style="list-style-type: none"> • (Tablet or desktop) Up to three (3) ratings bars • (Smartphone) The first (1) ratings bar only

Tile Security Roles

Use this section to identify which PeopleTools roles the user should have to access this tile and sub-pages. Insert additional roles by selecting the Add (+) button at the top of the grid or delete roles by selecting the delete (trash can) button.

Note: When identifying roles, consider if you will be granting access to both the manager (Manager Self Service >Employee Snapshot tile) and administrator (Talent Administrator >Employee Snapshot tile) pages. The PeopleSoft application delivers the *Talent Summary Manager Fluid* and *Talent Summary Admin Fluid* roles respectively, or you can use roles you have created. See also [Accessing the Employee Snapshot Pages and Tiles](#).

Publish to Dashboards

Use this section to configure a tile for one or many dashboards. The fields in this section become available when you select a dashboard in the Dashboard Name field.



Add icon button

Select this button to select a new dashboard name and configure the tile.

Dashboard Name

Select the dashboard on which this tile should appear. Valid dashboard values include:

- *Career Planning*
- *Compensation Review*
- *Performance Review*
- *Promotion Readiness*
- *Summary*

You cannot publish a tile to the same dashboard more than once. After you have selected a dashboard for a content type, that dashboard option will no longer appear in the list.



Dashboard Information icon button

Click this icon button to access the [Dashboard Information Page](#) and view all the tiles that have been published to this dashboard. This is useful to help visualize the dashboard layout and order tiles by size.

Tile Size

Select the size of the tile as it should appear on the selected dashboard. The system will provide a default tile size, based on the dashboard and content items available for the content type. You can change this value for non-summary type tiles.

Valid values for the following dashboards include:

- Summary: *1x1*
- Non-summary: *2x2* and *2x1*

Although you can save this page without having a tile size selected, you must select a tile size in order to publish the tile.

To view the order and sizing of other tiles on the dashboard, click the Dashboard Information icon button.

Tile Sequence

Enter the priority order in which the tile should appear on the dashboard, smallest to largest. The system provides *999* by default, making it appear at the end of the tile list, but you can change this. If you have more than one tile with the same sequence number, the dashboard will display those tiles alphabetically.

To view the current order of the tiles on the dashboard, click the Dashboard Information icon button.

Published

Displays *No* by default, indicating that the tile has not yet been published to the indicated dashboard. You must click the Publish Tile button to publish this tile. Saving the page will not publish the tile.

After you have published the tile, the column displays a *Yes* to indicate that this tile has been published to the dashboard.



Click this button to publish the tile to the indicated dashboard. Review the Published field on this page or the [Configure Employee Snapshot - Profile Content Page](#) to see if a tile is published.

Note: By default the *Talent Summary Admin Fluid* role is given access to all new tiles. This gives the administrator user access to add, update, and delete the tiles as needed.

Note: You can make changes to tile without having to republish the tile.



Delete button

Click this button to remove the tile from the indicated dashboard.

Other Page Controls

The page may also contains these other standard buttons.

Cancel

Click to cancel any changes you have made to this content type.

Delete

This button is available when you are updating an existing content type.

Select to remove this content type from your configurable profile content list.

Note: You cannot delete a content type if there are tiles that have been published to any dashboard. You must first delete the published tiles from the dashboards before you can delete a content type.

Save

Click to save your information and have it appear in the configurable profile content list. If you have published a tile, you will need to save your information before you can view the tile on the dashboard.

Related Links

[Viewing Configurable Profile Content Tiles and Pages](#)

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

"Setting Up Profile Types" (PeopleSoft HCM 9.2: Human Resources Manage Profiles)

Dashboard Information Page

Use the Dashboard Information page (HCTS_DASHBOARD_SCF) to view tile publish statuses.

Navigation

Select the Dashboard Information button for select a row on the [Tile Attributes Page](#).

Image: Dashboard Information Page

This example illustrates the fields and controls on the Dashboard Information page.

Dashboard Information ×		
Dashboard Name Career Planning		
Tiles		7 rows
Tile Title	Tile Size	Tile Sequence
Career Plans	2x1	10
Succession Plans	2x1	20
Job Competencies	2x1	30
Employee Impact	2x1	40
Job Interests	2x2	50
Personal Competencies	2x2	50
Memberships	2x2	999

Use this page to view the sequence order of tiles and their sizes. By viewing the order and size, you are more easily able to align tiles on the dashboard with those of similar sizes.

Chapter 5

Managing Direct Reports

Understanding the Management of Direct Reports

These topics provide an overview of eProfile Manager Desktop transactions, the process flow for these transactions, and list prerequisites.

Note: This topic does not discuss guided self-service transactions. To learn about guided self-service transactions, see [Configuring Guided Self-Service Transactions for Manager Self-Service](#) and [Performing Guided Self-Service Transactions in Manager Self-Service](#).

Understanding eProfile Manager Desktop Transactions

Managers can use the following eProfile Manager Desktop transactions to:

- View a direct report's information on one page.
- Change an employee's status to full-time or part-time.
- Change an employee's reporting manager.
- Assign an employee to another work location.
- Promote an employee.
- Initiate the employee retirement process.
- Initiate the employee termination process.
- Transfer an employee.
- Request an employee job change that requires works council approval.
- Review military rank change requests.
- Add employees and contingent workers using templates and view the hire status.

Understanding the Process Flow for Transactions

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

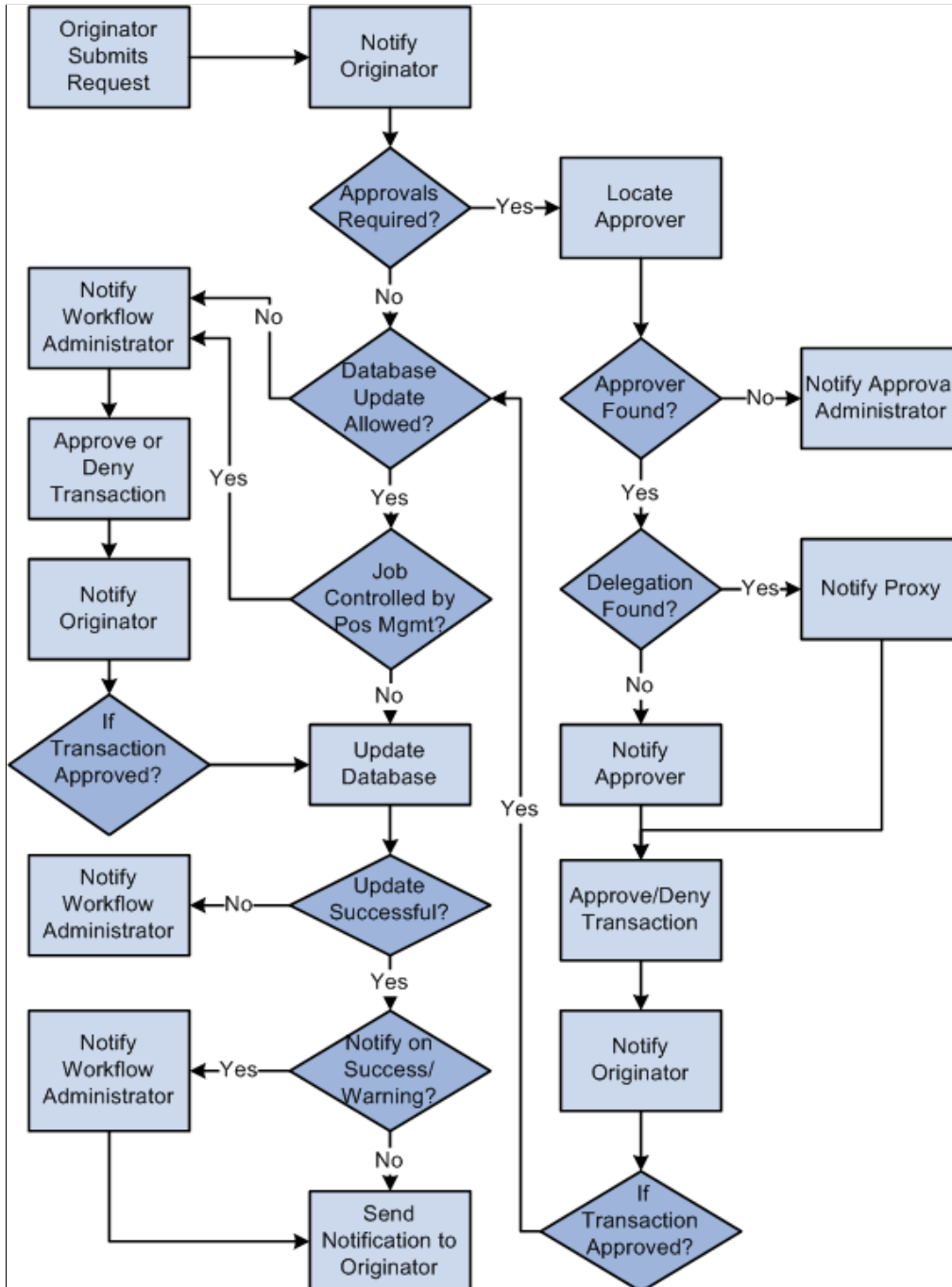
- Use an approval process.
- Automatically update the database.
- Send notifications to an administrator.

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

<i>Transaction</i>	<i>Use Approval Process</i>	<i>Automatic Database Update</i>	<i>Send Notifications</i>
Change Full/Part Time Status	No	Yes	Yes
Change Reporting Managers	Yes	Yes	Handled by approval process.
Change Work Locations	No	Yes	Yes
Promote Employees	Yes	Yes	Handled by approval process.
Retire Employees	No	Yes	Yes
Terminate Employees	No	Yes	Yes
Transfer Employees	Yes	Yes	Handled by approval process.
View Employees' Information	Not Applicable	Not Applicable	Not Applicable
Change Jobs (Works Council)	Not Applicable	Not Applicable	Not Applicable
Military Rank Change	Yes	Yes, based on Military Processing Definition See "Understanding the Military Change Rank and Notification Process" (PeopleSoft HCM 9.2: Human Resources Administer Workforce).	Handled by approval process.
Template-Based Hire	Not Applicable	Yes, based on the Template Create - Configuration See "Understanding Smart HR Templates" (PeopleSoft HCM 9.2: Human Resources Administer Workforce).	Not Applicable

Image: Process flow for self-service transactions with optional approvals, database updates, and notifications

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



There are four main sections to this process flow:

- A request is submitted.
- The request uses an approval process.

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

Request is Submitted

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

Transaction	Criteria	Notification Template
Change Full/Part Time Status Change Location Retire Employee Terminate Employee	Notify User - Entry check box is selected on the System Workflow Rules page.	
Promotion Transfer	Handled by approval process. The email that is sent depends on is determined by the following conditions: <ul style="list-style-type: none"> • Are approvals required? • Are database updates allowed? • Is the changed controlled by position management? 	For requests that: <ul style="list-style-type: none"> • Require an approval process, HR_SUBMIT_SINGLE_EE • Do not require an approval process, allow database updates, and the job is not controlled by position management, HR_TRANSACTION_SAVED_SINGLE_EE. The notification is sent when the transaction is saved successfully to the database. • Do not require an approval process, allow database updates, and the job is controlled by position management, HR_ADMIN_APV_MANUAL_PROC_SINGL. • Do not require an approval process, nor do they allow database updates, HR_SUBMIT_NOAPV_SINGLE_EE

Transaction	Criteria	Notification Template
Reporting Change	<p>Handled by approval process. The email that is sent depends on is determined by the following conditions:</p> <ul style="list-style-type: none"> • Are approvals required? • Are database updates allowed? • Is the changed controlled by position management? 	<p>For requests that:</p> <ul style="list-style-type: none"> • Require an approval process, HR_SUBMIT_MULTI_EE. • Do not require an approval process, allow database updates, and the job is not controlled by position management, HR_TRANSACTION_SAVED_MULTI_EE. The notification is sent when the transaction is saved successfully to the database. • Do not require an approval process, allow database updates, and the job is controlled by position management, HR_ADMIN_MANUAL_PROC_REPCH. • Do not require an approval process, nor do they allow database updates, HR_SUBMIT_NOAPV_REPCHG_EE.

Approval Process Required

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

- ReportingChgEmployee
- PromoteEmployee
- TransferEmployee
- MilitaryRankChange

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

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

field on the Job Information page determines the approving manager. If the method is By Job Title/ Department, the Supervisor ID field on the Job Information page for the new position determines the approving manager.

See "Rank Change MIL - Military Rank Change Page" (PeopleSoft HCM 9.2: Human Resources Administer Workforce), "Military Processing Definition Page" (PeopleSoft HCM 9.2: Human Resources Administer Workforce).

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

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

For	Notification Template
Promote Employee Transfer Employee	HR_APPROVAL_REQUEST_SINGLE_EE
Reporting Change	HR_APPROVAL_REQUEST_MULTI_EE
Military Rank Change	MIL_RANK_CHNG_APPROVAL_REQUEST

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

For	Notification Template
Promote Employee Transfer Employee	HR_STEP_APPROVAL_SINGLE_EE
Reporting Change	HR_STEP_APPROVAL_MULTI_EE

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

For	Notification Template
Promote Employee Transfer Employee	HR_STEP_DENY_SINGLE_EE
Reporting Change	HR_STEP_DENY_REPCHG_EE

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

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

Database Update Not Allowed

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

<i>For</i>	<i>Notification Template</i>
Change Full/Part Status Change Location Retire Employee Terminate Employee	
Promote Employee Transfer Employee	HR_ADMIN_APV_REQ_SINGLE_EE
Reporting Change	HR_ADMIN_APV_REQ_MULTI_EE

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

<i>For</i>	<i>Notification Template</i>
Change Full/Part Status Change Location Retire Employee Terminate Employee	
Promote Employee Transfer Employee	HR_ADMIN_APV_MANUAL_PROC_SINGL
Reporting Change	HR_ADMIN_APV_MANUAL_PROC_REPCH

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

<i>For</i>	<i>Notification Template</i>
Change Full/Part Status Change Location Retire Employee Terminate Employee	

For	Notification Template
Promote Employee Transfer Employee	HR_ADMIN_DENY_SINGLE_EE
Reporting Change	HR_ADMIN_DENY_REP_CHG_EE

Database Updates Allowed

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

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

For	Template
Change Full/Part Status Change Location Retire Employee Terminate Employee	
Promote Employee Transfer Employee	HR_MANUAL_PROC_REQ_SINGLE_EE
Reporting Change	HR_MANUAL_PROC_REQ_REPCHG_EE

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

For	Template
Change Full/Part Status Change Location Retire Employee Terminate Employee	
Promote Employee Transfer Employee	HR_TRANSACTION_SAVED_SINGLE_EE
Reporting Change	HR_TRANSACTION_SAVED_MULTI_EE

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

For	Template
Change Full/Part Status Change Location Retire Employee Terminate Employee	
Promote Employee Transfer Employee	HR_CI_UPDATE_SUCCESS HR_CI_WARNINGS_SINGLE HR_CI_FUTURE_ROWS_EXIST
Reporting Change	HR_CI_UPDATE_SUCCESS_MULT HR_CI_WARNINGS_MULTI HR_CI_FUTURE_ROWS_EXIST_MULTI

Understanding HTML Email Approvals

The PeopleSoft Approval Workflow Engine (AWE) enables you to take action on approval requests directly from an email using the HTML Email Approval functionality.


[PeopleSoft 9.2 HTML Email Approvals](#)

When enabled and a requestor submits a transaction for approval, an email is generated and sent to the approver(s), which contains detailed information about the transaction request. Based on the transaction’s configured actions, an approver can take action directly from the email by clicking a link, such as Approve, Deny, or Pushback, to generate a reply to the request. The email may display requestor comments and, if applicable, view approval history from other approvers.

The HTML Email Approval feature delivers HTML email templates for some of the key PeopleSoft HCM Talent Management transactions. This table lists these transactions, with their corresponding process IDs:

Transaction	Transaction Process ID	Additional Information About the Transaction
Job Opening Job Offer	JobOpening JobOffer	"Approving Job Offers" (PeopleSoft HCM 9.2: Talent Acquisition Manager)

Transaction	Transaction Process ID	Additional Information About the Transaction
Absence Request Extended Absence Request	AbsenceManagement AM_Extended_Abs	"Self Service Pages Used by Managers to Manage Absence Requests" (PeopleSoft HCM 9.2: Absence Management)
Promote Employee Transfer Employee Reporting Change	PromoteEmployee TransferEmployee ReportingChgEmployee	Understanding the Management of Direct Reports
Performance Document	PerformanceManagement	"Working with Approvals and Reviews" (PeopleSoft HCM 9.2: ePerformance)

Note: This feature is dependent on the Approvals Framework delivered by Enterprise Components. Any transactions that do not use the Approvals Framework for approvals will not be generated as HTML emails.

For more information on configuring HTML email approvals, see "Triggering Email Collaboration" (PeopleSoft 9.2: Approval Framework).

Responding to a Request

The approver can act upon an email request by selecting the appropriate action link that appears at the bottom of the email request.

Image: Example of an approval response email

Upon selecting an action, a response email will open. The email includes instructional text to let the user know where to enter comments, if any.

```

Instructions:
1. To add comments put them after emcFieldComments= below
2. Please do not remove or modify any other text
3. Send the email to complete your action

*emcFieldComments=

*emcGuid=50723836599164026989172086120*emcField19=A

*emcQSEnd=true
    
```

The approver can enter comments after the *emcFieldComments* text, but this is not a requirement. Note that any other identifiers should not be removed or modified.

Note: If an approver takes an action from an email for a request that is no longer pending his or her approval, the system will open a similar reply email as previously mentioned. However, upon processing the response email, the system will send an email back to the approver indicating that the action was not applied as the approval request was no longer pending his or her action.

Prerequisites for Managing Direct Reports

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

1. Activate eProfile Manager Desktop on the Installation table.

See "Products Page" (PeopleSoft HCM 9.2: Application Fundamentals).

2. Define position management on the HCM Options page.

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

See "HCM Options Page" (PeopleSoft HCM 9.2: Application Fundamentals).

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

3. Set up security.

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

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

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

See "Understanding PeopleSoft Security" (PeopleSoft HCM 9.2: Application Fundamentals).

4. Define whether a transaction uses an approval process.

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

See "Workflow Configurations Page" (PeopleSoft HCM 9.2: Application Fundamentals).

5. Define if a transaction automatically updates the database.

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

See "Workflow Configurations Page" (PeopleSoft HCM 9.2: Application Fundamentals).

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

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

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

7. Define rules for workflow notifications.

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

See "Admin Notification Setup Page" (PeopleSoft HCM 9.2: Application Fundamentals).

8. Configure and manage HTML email approvals.

The Enterprise Components AWE framework supports the HTML email approvals as delivered. However, you will need to enable HTML email approvals for your transactions and review email templates to ensure they meet your organization's requirements.

See "Triggering Email Collaboration" (PeopleSoft 9.2: Approval Framework)

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

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

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

See "Configuring Direct Reports Functionality" (PeopleSoft HCM 9.2: Application Fundamentals).

Viewing Direct Reports' Personal Information

These topics provide an overview of viewing personal information for direct report and list the pages used to view employees' personal information for those direct reports.

Understanding Viewing Personal Information

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

- Home, mailing, and email addresses.

- Phone numbers.
- Emergency contacts.
- Instant message IDs.
- Profile information.
- Training information.
- Compensation information and history.

Pages Used to View Personal Information

Page Name	Definition Name	Usage
View Employee Personal Information Page	HR_DR_DIRECTREPORT	Select the direct employee whose information you want to review as of a reporting date.
Employee Information Page	HR_EE_INF_HOME	View job information for a specific direct report. To view another employee's information, click the Return to Select Employees link at the bottom of the page. The system displays the View Employee Personal Information page, where you need to enter the as of date you wish to view the employee's information prior to selecting the employee.
Home and Mailing Addresses Page	HR_EE_ADDRESS_MGR	View the employee's home and mailing address information.
Email Addresses Page	HR_EMAIL_ADDRESSES	View the employee's home and mailing address information.
Phone Numbers Page	HR_PERSONAL_PHONE	View the employee's phone numbers.
Emergency Contacts Page	HR_EMERGENCY_CNTCT	View the employee's emergency contact information.
Instant Message IDs Page	HR_IM_CHAT_IDS	View the employee's instant message IDs.
Birthday Page	HR_EE_BIRTHDATE	View the employee's birth date information.
Total Compensation Page	HR_SS_TC_MG_REVIEW	View the employee's total compensation information.
Compensation History Page	HR_SS_MG_COMP_HIST	View the employee's salary, variable cash, and variable noncash information.
Training Summary Page	HR_TRN_SUMMARY	View the employee's internal and professional training information.

Page Name	Definition Name	Usage
Current Person Profile Page	JPM_JP_PROFL2_EMP	View the employee's profile information, such as competencies, education, and so forth.

Changing Full-Time or Part-Time Status

These topics provide an overview of part-time or full-time status changes and list the pages used to change part- or full-time status.

Pages Used to Change Part- or Full-Time Status

Page Name	Definition Name	Usage
Change Full/Part Time Status - Employee Selection Criteria Page	HR_DR_DIRECTREPORT	Enter the employee reporting as of date and select the employee whose status you want to change.
Change Full/Part Time Status Change Page	HR_MGR_FULL_PART	Select a status and initiate the request to change an employee's status to full or part-time.
Submit Confirmation Page	EO_SUBMIT_CONFIRM	Confirms the request was successfully submitted.

Understanding Changing Full-Time or Part-Time Status

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

1. Access the Change Full/Part Time Status page.
2. Enter the effective date for the change and click the Continue button.
3. Select the employee and click the Continue button.

You may select more than one employee.

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

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

See [Understanding the Management of Direct Reports](#).

Changing Reporting Managers

These topics provide an overview of change reporting managers and list the pages used to change reporting managers.

Pages Used to Change Reporting Managers

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
Reporting Change - Employee Selection Criteria Page	HR_DR_DIRECTREPORT	Enter the employee reporting as of date and select the employee whose reporting you want to change.
Request Reporting Change Page	HR_MGR_REPORT_CHNG	Enter the ID of the new manager or supervisor.
Approve Reporting Change - Select a Reporting Change Request Page	HR_MGR_REP_APPR_L	Select the transaction to approve or deny.
Reporting Change Details Page	HR_MGR_REPORT_CHNG	Approve or deny the request. View the status of reporting change requests that you have submitted.
Submit Confirmation Page	HR_REPORT_CONFIRM	Confirms the request was successfully submitted.
Reporting Change Status - Select a Reporting Change Request Page	HR_MGR_REP_VW_L	Select the transaction to view.

Understanding Changing Reporting Managers

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

- Request Reporting Change.
- Approve Reporting Change.
- View Reporting Change Status.

Requesting a Reporting Change

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

1. Access the Reporting Change page.
2. Enter the effective date for the change and click the Continue button.
3. Select the check box next to the name of the employee or employees for which the change is to be made and click the Continue button.
4. Select the new Supervisor or Department ID and click the Submit button.

Approving a Reporting Change

To approve a request:

1. Access the Approve Reporting Change - Select a Reporting Change Request page.
2. Select the reporting change you want to approve.
3. Enter a comment relevant to the approval or denial of the request.
4. Click the Approve or Deny button.

Viewing a Reporting Change Status

To view the status of a reporting change request:

1. Access the Reporting Change Status - Select a Reporting Change Request page.
2. Select the transaction you want to view.

Changing Work Locations

These topics provide an overview of the changing work locations process and list the pages used to change work locations.

Pages Used to Change Locations

Page Name	Definition Name	Usage
Location Change - Employee Selection Criteria Page	HR_DR_DIRECTREPORT	Enter the employee reporting as of date and select an employee or employees whose location you want to change.
Request Location Change Page	HR_MGR_LOCATION	Initiate the request to change the employee's location by entering the new location and clicking Submit.
Submit Confirmation Page	EO_SUBMIT_CONFIRM	Confirms the request was successfully submitted.

Understanding Changing Work Locations

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

1. Access the Change Location page.
2. Enter the effective date for the change and click the Continue button.
3. Select the employee and click the Continue button.

You may select more than one employee.

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

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

See [Understanding the Management of Direct Reports](#).

Promoting Employees

These topics provide an overview of employee promotions, promoting employees, approving promotions, and viewing promotion status, and list the pages used for employee promotions.

Pages Used to Promote Employees

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
Promote Employee - Employee Selection Criteria Page	HR_DR_DIRECTREPORT	Enter the employee reporting as of date and select the employee to promote.
Promote Employee Page	HR_PROMOTE_EE	Request a promotion for one of your direct report employees or approve or deny a promotion request for an employee.
Submit Confirmation Page	HR_PROMOTE_CONFIRM	Confirms the request was successfully submitted.
Approve Promotion Page	HR_PROMOTE_APPR_L	Select an employee that has a promotion transaction request to approve or deny the promotion for that employee.
Select a Transaction - Employee Promotion Requests Page	HR_PROMOTE_VW_L	View the status of an employee's promotion request that you have submitted.

Understanding Employee Promotions

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

- Promote Employees, which enables managers to submit a promotion request.
- Approve Promotion, when enables approving managers to either approve or deny the request.
- View Promotion Status, which enables managers to review where the request stands in the approval process.

Requesting a Promotion

To request an employee's promotion, managers:

1. Access the Promote Employee page.
2. Enter the effective date and click the Continue button.

3. Select the employee or employees to promote and click the Continue button.
4. Enter the reason for the promotion and the promotion method, and click the Submit button.

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

Approving a Promotion

To approve a promotion, the approving manager or proxy:

1. Access the Approve Promotion page.
2. Click the Approve or Deny button.
3. To add an approver, click the (+) plus button and select the approver from the list.
4. Click the Submit button.

Viewing a Promotion Status

To view the status of an employee's promotion:

1. Access the Promotion Status - Select a Transaction page.
2. Select the transaction you want to view.

Retiring Employees

These topics provide an overview of retiring employees and list the pages used to retire employees.

Pages Used to Retire Employees

Page Name	Definition Name	Usage
Retire Employee - Employee Selection Criteria Page	HR_DR_DIRECTREPORT	Enter the employee reporting as of date and select an employee for retirement.
Retire Employee Page	HR_RETIRE_EE	Initiate the retirement process for one of your direct reports.
Submit Confirmation Page	EO_SUBMIT_CONFIRM	Confirms the request was successfully submitted.

Understanding Retiring Employees

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

1. Access the Retire Employee page.

2. Enter the effective date for the retirement and click the Continue button.
3. Select the employee to retire and click the Continue button.
4. Enter the reason for the retirement and click the Submit button.

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

See [Understanding the Management of Direct Reports](#).

Terminating Employees

These topics provide an overview of terminating employees.

Pages Used to Terminate Employees

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
Terminate Employee - Employee Selection Criteria Page	HR_DR_DIRECTREPORT	Enter the employee reporting as of date and select the employee to terminate.
Terminate Employee Page	HR_EE_TERMINATE	Initiate the termination process for one of your direct reports.
Submit Confirmation Page	EO_SUBMIT_CONFIRM	Confirms the request was successfully submitted.

Understanding the Terminating Employees Process

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

1. Access the Terminate Employee page.
2. Enter the effective date for the termination and click the Continue button.
3. Select the employee to terminate and click the Continue button.
4. Enter the reason for the termination and click the Submit button.

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

See [Understanding the Management of Direct Reports](#).

Transferring Employees

These topics provide an overview of transferring employees and list the pages used to transfer employees.

Pages Used to Transfer Employees

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
Transfer Employee - Employee Selection Criteria Page	HR_DR_DIRECTREPORT	Enter an employee reporting as of data and Select the employee to transfer.
Transfer Employee Page Approve Transfer Page Transfer Status Details Page	HR_TRANSFER_EE	Request a transfer for one of your direct report employees. Approve or deny a transfer. View summary information for submitted transfers.
Submit Confirmation Page	HR_TRANSFER_CONFRM	Confirms the request was successfully submitted.
Approve Transfer - Employee Transfer Requests Page	HR_TRANSFER_APPR_L	Select a transaction to approve or deny.
Transfer Status - Employee Transfer Requests Page	HR_TRANSFER_VW_L	Select a transfer transaction to view.

Understanding Transferring Employees

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

- Transfer Employee
- Approve Transfer
- View Transfer Status

Transferring an Employee

To request an employee transfer:

1. Access the Transfer Employee page.
2. Enter the effective date for the transfer and click the Continue button.
3. Select the employee to transfer and click the Continue button.
4. Enter the detail information about the transfer and click the Submit button.

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

Approving a Transfer

To approve an employee transfer:

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

2. Select the transaction you want to approve or deny.
3. Click the Approve or Deny button.

Viewing a Transfer Status

To view an employee transfer:

1. Access the Transfer Status - Select a Transaction page.
2. Select the transaction you want to view.

Changing Jobs Requiring Works Council Approval

These topics provide an overview of requesting job changes requiring Works Council approval and list the pages used to request job changes requiring Works Council approval.

Pages Used to Change Jobs

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
Job Change Request - Select Employee Page	WC_JCR_SEARCH	Enter the required data and initiate the job change request. The Job Change Request page requires different data entry depending on the type of request—either hire, transfer or termination.
Job Change Request Status Page Review My Job Change Request Page	WC_JCR_STATUS_INQ	Review Job Change requests. Enter the search criteria and click Search.
Review My Job Change Request Page	WC_JCR_STATUS2_INQ	Review the status of a job change request requiring Works Councils approval.
Job Change Request Page	WC_JOB_CHG_REQ	Review the status of job change requests requiring Works Councils approval.
Job Change Request Approval Page	WC_JCR_APPR_INQ	Mass-approve job change requests.

Understanding Job Changes

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

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

See "Understanding the Works Councils Approval Business Process" (PeopleSoft HCM 9.2: Manage Labor Administration).

Reviewing Military Rank Change Requests

These topics provide an overview of reviewing military rank change requests.

Page Used to Review Military Rank Change Requests

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
"Review Rank Change Request MIL Page" (PeopleSoft HCM 9.2: Human Resources Administer Workforce)	MIL_RANK_CHNG_APPR	Review, approve, or deny a rank change request. View the status monitor of the approval chain.

Reviewing Military Rank Change Requests

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

See "Managing Military Rank Change Requests" (PeopleSoft HCM 9.2: Human Resources Administer Workforce).

Adding and Reviewing Hires

These topics provide an overview of adding and reviewing hires, personal data, job data, or profile transactions..

Page Used to Add and Review Hires, Personal Data, Job Data, or Profile Transactions

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
"Smart HR Transactions Page" (PeopleSoft HCM 9.2: Human Resources Administer Workforce)	HR_TBH_EULIST	Select a template or person to process a template-based transaction.
"Enter Transaction Details Page" (PeopleSoft HCM 9.2: Human Resources Administer Workforce)	HR_TBH_ADD	Enter transaction details to start the Smart HR transaction process for a person, such as the persons's job effective date.
"Enter Transaction Information Page" (PeopleSoft HCM 9.2: Human Resources Administer Workforce)	HR_TBH_DATA	Enter worker information details for the person for whom you are performing a transaction. Only the fields that have been defined on the template you associated with this employee will display for data entry.

Page Name	Definition Name	Usage
"Person Match Found Page" (PeopleSoft HCM 9.2: Human Resources Administer Workforce)	HR_TBH_SRMATCH	Select an existing person in the database if a match is found on the person, or continue with the transaction. Complete a transaction when a person match is found.
"Select an Action Page" (PeopleSoft HCM 9.2: Human Resources Administer Workforce)	HR_TBH_ACTION	Select an action if a matching person is found in the database.
Confirmation Page Further Processing Required Page	HR_TBH_CONFIRM	Displays the type of confirmation after saving a Smart HR transaction. When the transaction is saved successfully and automatic database updates is turned on, the Contract Data link appears, which enables users with security access to the contract pages to update contract information for a person.
"Transaction Status Page" (PeopleSoft HCM 9.2: Human Resources Administer Workforce)	HR_TBH_STATUS	View the status of a Smart HR transaction of transactions with a pending, cancelled, or processed status.

Adding and Reviewing Hires, Personal Data, Job Data, or Profile Transactions

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

To view a detailed description of the Smart HR Transactions pages, see "Using Smart HR Templates and Transactions" (PeopleSoft HCM 9.2: Human Resources Administer Workforce).

Chapter 6

Using the Fluid User Interface for eProfile Manager Desktop

Configuring the My Team Pages

To configure the Fluid Manager Self Service, My Team pages, use the Configure My Team Pages (HR_TEAM_CONFIG) component .

The My Team pages allow managers to see at a glance a broad range of human resources information for their direct line reports. This set up page enables you to identify the content and order of the information that should appear on the My Team pages.

This topic discusses configuring the Fluid My Team pages.

Pages Used to Configure the My Team Pages

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
<u>Configure My Team Pages Page</u>	HR_TEAM_CONFIG	Specify page properties for the Fluid My Team page by identifying which pages you want to show and the order of the pages.

Configure My Team Pages Page

Use the Configure My Team Pages page (HR_TEAM_CONFIG) to specify page properties for the Fluid My Team page by identifying which pages you want to show and the order of the pages.

Navigation

Set Up HCM > Common Definition > My Team Configuration > Configure My Team Pages > Configure My Team Pages

Image: Configure My Team Pages Page

This example illustrates the fields and controls on the Configure My Team Pages page.

Configure My Team Pages			
Page Properties ?			
Page Order	Page Name	Button Label	Hide Page
<input type="text" value="10"/>	Summary	<input type="text" value="Summary"/>	<input type="checkbox"/>
<input type="text" value="20"/>	Performance	<input type="text" value="Performance"/>	<input type="checkbox"/>
<input type="text" value="30"/>	Compensation	<input type="text" value="Compensation"/>	<input type="checkbox"/>
<input type="text" value="40"/>	Leave Balances	<input type="text" value="Leave Balances"/>	<input type="checkbox"/>
<input type="text" value="50"/>	Configurable Page 1	<input type="text" value="Drop Zone Pg 1"/>	<input checked="" type="checkbox"/>
<input type="text" value="60"/>	Configurable Page 2	<input type="text" value="Drop Zone Pg 3"/>	<input checked="" type="checkbox"/>
<input type="text" value="70"/>	Configurable Page 3	<input type="text" value="Drop Zone Pg 3"/>	<input checked="" type="checkbox"/>
<input type="text" value="80"/>	Configurable Page 4	<input type="text" value="Drop Zone Pg 4"/>	<input checked="" type="checkbox"/>
<input type="text" value="90"/>	Configurable Page 5	<input type="text" value="Drop Zone Pg 5"/>	<input checked="" type="checkbox"/>

Use this page to identify the pages that should appear within the Fluid My Team component.

Page Order

(Tablets or desktops) Identify the order in which the My Team component should display the page buttons to the user. The component displays the page buttons in sequential order, lowest to highest. Valid values of the order are between 1 and 99.

(Smartphone) When viewing the My Team using a small form factor device, like a smartphone, the page names will display in alphabetical order and do not adhere to the page order specified here.

Page Name

Displays the transactional page name.

This page enables you to display up to nine pages on the My Team component, five of which are customizable Drop Zone pages. Drop Zones allow you to add custom content such as editable or display only fields, links, buttons, or text. For more information on Drop Zones, see the product documentation for PeopleTools: *Fluid User Interface Developer's Guide*, "Creating Pages for Fluid Applications," Creating and Configuring Drop Zones.

This video provides an overview of Drop Zones:



Button Label

Enter the text that should appear on the page buttons. You can add up to 30 characters.

Hide Page

Select the check box to hide the button and page information from the user on the My Team page.

Related Links

[Using the PeopleSoft Fluid User Interface to Perform Manager Tasks](#)

[My Team Tile](#)

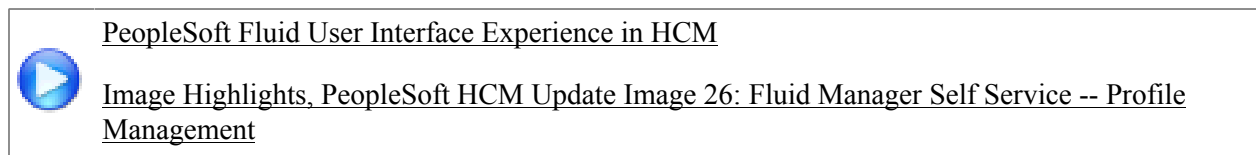
Using the PeopleSoft Fluid User Interface to Perform Manager Tasks

The My Team pages allow managers to see at a glance a broad range of human resources information for their direct line reports, including job information, contact information, leave balances, performance data, and compensation data.

For information about who is considered part of a manager's team, see "Understanding Direct Reports" (PeopleSoft HCM 9.2: Application Fundamentals).

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

The following videos provide an overview and demonstration of the PeopleSoft Fluid User Interface:



This topic provides an overview on how to view manager reporting structures and discusses how managers use the My Team fluid pages to view team information and perform manager actions.

Pages Used to Perform Manager Tasks Using the PeopleSoft Fluid User Interface

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
My Team Tile	HC_HR_DR_TEAM_FLU_GBL (this is the cref for the tile)	Click this tile to access a group of fluid pages that are used to perform manager tasks.

Page Name	Definition Name	Usage
<u>My Team Page Header and Page Views</u>	N/A	View which manager's team information you are accessing, change the manager and team, or select the page content.
<u>Supplementary Panel for the My Team Pages</u>	N/A	Access a supplementary panel that provides access to related information and simplified analytics.
<u>Select Manager Page</u>	HR_MGR_SEL_FLU	Search for and select one of your reporting managers in order to view the summary information for that manager's team.
<u>My Team – Summary Page</u>	HR_DIRTEAM_FLU	View summary information about your teams that report to you directly or indirectly.
<u>My Team – Performance Page</u>	HR_DIRTEAM_EP_FLU	View performance information for a team.
<u>My Team – Compensation Page</u>	HR_DIRTEAM_EC_FLU	See how employees fit into the salary range for their jobs.
<u>My Team – Leave Balances Page</u>	HR_DIRTEAM_AB_FLU	View leave balances for team members.
<u>Leave Balances - View Details Page</u> <u>Leave Balances - View More Balances Page</u>	HR_DT_LEAVE_SCF	View detailed information about leave balances, including the balance and the as-of date for each type of leave.
<u>Performance vs. Compa-Ratio Pivot Grid</u>	PTPG_NUI_VWR	View the performance verses the compensation data for your team.

Note: Additional pages may also be available on the My Team component or some of these pages may be hidden from view.

The order and accessibility of pages will vary based on the [Configure My Team Pages Page](#) settings.

Understanding How to View Other Manager Reporting Structures

The My Team fluid pages enable you to browse reporting team structures by manager.

The PeopleSoft My Team pages enable higher-level managers to view summary information about their direct and indirect reports. When a manager accesses the My Teams pages, the page lists his or her direct reports. When the manager has a direct report that is also a manager, the My Team - Summary page will display the View My Team icon and the number of direct reports for that person, as well as all those that report up to that person, in the Directs/Total column or at the bottom of the card.

A manager can access the reporting structure of other employee's within his or her reporting structure through various means:

- Click the View My Team icon or number link to access that manager's reporting structure.

Note: Available only from the [My Team – Summary Page](#) page.

- Click the Change Team link at the top of the My Team pages.

Note: Available at the top of all My Team pages.



[Image Highlights, PeopleSoft HCM Update Image 17: Manager View As Feature](#)

My Team Tile

Use the My Team tile to access a group of fluid pages that are used to perform manager tasks.

Navigation

Select Fluid Home under the main menu. On the page that appears, select *Manager Self Service*. The My Team tile is available on the Manager Self Service landing page.

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

Image: My Team tile

This example illustrates the My Team tile.



Click the tile to access the My Team page and navigate to these manager self-service transactions easily without using traditional menu navigations:

- View employee summaries
- Review employee performances
- See employee compensation
- Check leave balances
- View related or other information, such as pivot grids analytics.
- Review other drop zone related content.

My Team Page Header and Page Views

User the header and page views to at the top of the My Teams pages to view a manager's team information.

Image: (Tablet or Workstation) My Team Page Header and Touch Point Page Options

This example illustrates the header and touch point page options at the top of the My Team page for the tablet or workstation.

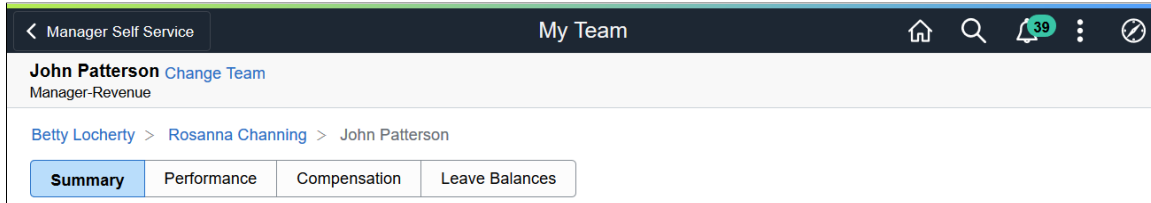
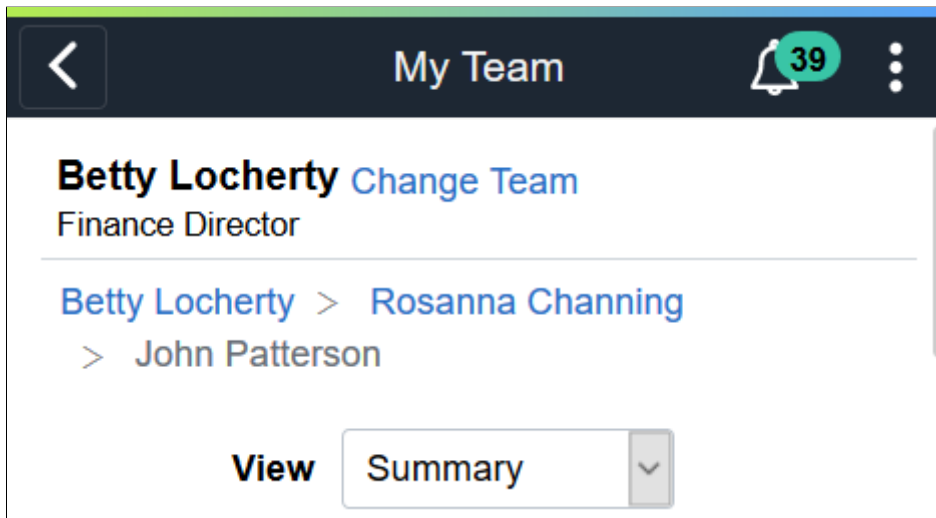


Image: (Smartphone) My Team Page Header and Touch Point Page Options

This example illustrates the header and view page options at the top of the My Team page using a smartphone.



The header displays the name and title of the manager of the team you are viewing regardless of the individual pages you have accessed. Switch the team view by selecting the Change Team link.

When you are viewing the team of one of your reporting managers, breadcrumbs at the top of the page show the reporting hierarchy between you the user and the currently displayed manager's team. Click the user names in the breadcrumbs to view the team of one of the other managers.

Note: You can also click the View My Team icon in the Directs / Total column for team members who have direct reports and drill down into a team. See the [My Team – Summary Page](#) for an explanation of this field icon.

Change Team

Select this link to access the [Select Manager Page](#) and select a manager to change the team view. This allows you to view the team of any of the managers that report up through you.

Summary, Performance, Compensation, and Leave Balances and other page touch points or buttons

(Tablet or Workstation) These buttons are available when the page is viewed with large form factor devices.

Select a touch point button to access the page related content.

View

(Smartphones) This field is applicable when the page is viewed with small form factor devices and works the same as the large form factor touch point page buttons.

Click to select and access a specific My Team page (touch point).

Note: Page touch point buttons and view options may vary based on the settings defined on the [Configure My Team Pages Page](#). The default delivered pages are available for selection are *Summary*, *Compensation*, *Performance*, and *Leave Balances*. The administrator has the ability to hide or display additional content pages as well as change the display order for large form factor devices.

Supplementary Panel for the My Team Pages

If you use PeopleTools 8.57 or later, the My Team pages includes a supplementary panel that provides access to related information and simplified analytics to help managers complete their transactions.

For more information about simplified analytics, see product documentation for *PeopleTools: Pivot Grid*, “Working with Simplified Analytics.”

These videos demonstrate simplified analytics:



[Simplified Analytics - Image Highlights](#)



[PeopleSoft Simplified Analytics](#)

Navigation

Click the Supplementary Panel tab button on any of the My Team pages.

Image: (Tablet) Supplementary Panel for the My Team Pages

This example illustrates the Supplementary Panel content for the My Team pages for the tablet.

Manager Self Service | **My Team**

Rosanna Channing [Change Team](#)
Senior Accounting Manager

Summary | Performance | Compensation | Leave Balances

Name / Title	Directs / Total	Department / Location	Email / Phone
Christelle Stevenson Manager-Accounting	14/14	Accounts Receivable Corporation Headquarters	Christelle.Stevenson@ora 925.694.7920
Daryl Reese Financial Analyst		Corporate Accounting Corporation Headquarters	Daryl.Reese@oraclesamp 925.555.5678
David Ho Senior Financial Analyst		Financial Services Corporation Headquarters	david.ho@oraclesample.c 944.054.3779
Edmund Donahue Manager-Accounting	13/13	Accounts Payable Corporation Headquarters	HCMGENUser1@ap6023f 925.694.7902
John Patterson Manager-Revenue	20/20	Revenue Management Kansas Operations	John.Patterson@oraclesa 973.701.9200
Mei Lee Accountant	11/11	Corporate Accounting Corporation Headquarters	Mei.Lee@oraclesample.c 925.555.5555

Related Information

[Add Analytics](#)

Current Headcount Profile

Bar chart showing counts for various jobcodes: Accountant, Analyst-Bu..., Billing Spec..., Clerk-Acco..., Data Entry..., Finance Sp..., General Le..., Senior Fina...

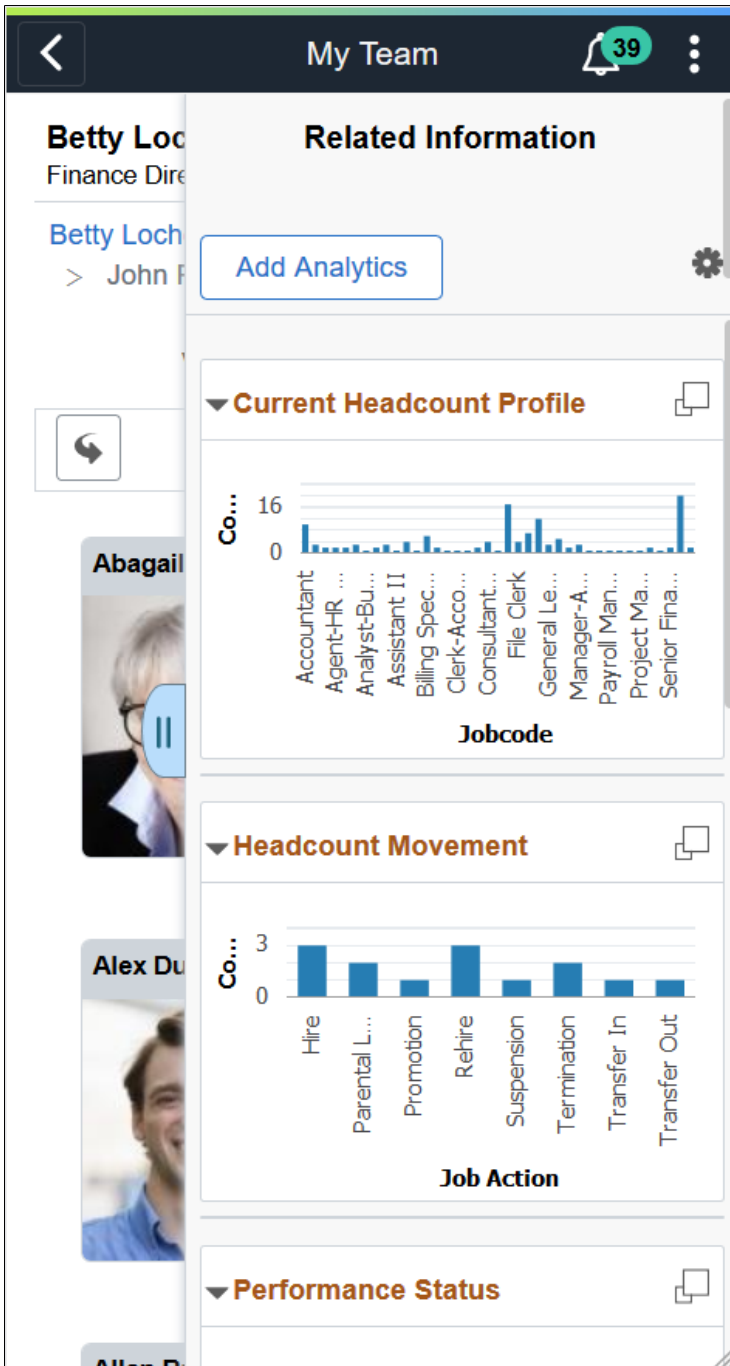
Headcount Movement

Bar chart showing counts for various job actions: Hire, Parental L..., Promotion, Rehire, Suspension, Termination, Transfer In, Transfer Out.

Performance Status

Image: (Smartphone) Supplementary Panel for the My Team Pages

This example illustrates the Supplementary Panel content for the My Team pages for the smartphone.



(Supplementary Panel tab)


Click this tab to open the Related Information panel and view related information.

Add Analytics


Click to create their own helpful charts and graphs, available with PeopleTools 8.55 and later. Click this button to create a new chart. When you select to add a new analytic report, the system opens the Create Analytics page where you will use the

Analytics Wizard to guide you through the process of creating a new report. The system uses templates based on the manager transaction page from which you are creating the new report. Select different My Team touch point pages to select from various template options. The templates determine the fields and prompts in the next step of the wizard.

The delivered role *PivotGridSuperUser* gives users the ability to create and publish reports.

 [Personalize RC (Related Content) icon]

This icon appears at the top of the Related Information panel. Click to open the Personalize page. This page lists the available related content so you can choose whether the Related Information panel shows or hides each item.

 (Display <Related Content Item> in Modal Window icon)

This icon appears at the top of each individual related content item in the Related Information panel. Click to expand the item to open a modal dialog with a larger interactive version of the content.

Related Information

The Related Information panel displays touch friendly and responsive charts and information related to the content on the page. It displays simplified version of existing charts. These include:

- Current Headcount Profile (see "Current Headcount Pivot Grid" (PeopleSoft HCM 9.2: Human Resources Administer Workforce))
- Headcount Movement (see "Headcount Movement Pivot Grid" (PeopleSoft HCM 9.2: Human Resources Administer Workforce))
- Performance Status (see "Team Performance Status Page" (PeopleSoft HCM 9.2: ePerformance))
- Performance vs. Compa-Ratio (see [Performance vs. Compa-Ratio Pivot Grid](#))
- Current Salary Analysis (see "Salary Analysis Page" (PeopleSoft HCM 9.2: eCompensation Manager Desktop))
- Leave Balances by Type (see "Absence Cost Analysis Pagelet" (PeopleSoft HCM 9.2: Absence Management))



[Image Highlights, PeopleSoft HCM Update Image 18: Simplified Analytics](#)

For information on how to use the Related Information tab content and the Simplified Analytics Wizard, see *PeopleTools: Pivot Grid, Viewing Pivot Grid Models, Viewing Pivot Grid Models in Fluid Mode*.

For information on how to use the Related Information panel (also known as the Unified Related Content Analytics pane), see *PeopleTools: Pivot Grid*, “Working with Simplified Analytics,” Accessing Simplified Analytics.

Select Manager Page

Use the Select Manager page (HR_MGR_SEL_FLU) to search for and select one of your reporting managers in order to view the summary information for that manager’s team.

Navigation

Click the Change Team link in the header of any of the My Team pages.

Image: (Tablet) Select Manager page

This example illustrates the Select Manager page for the tablet.





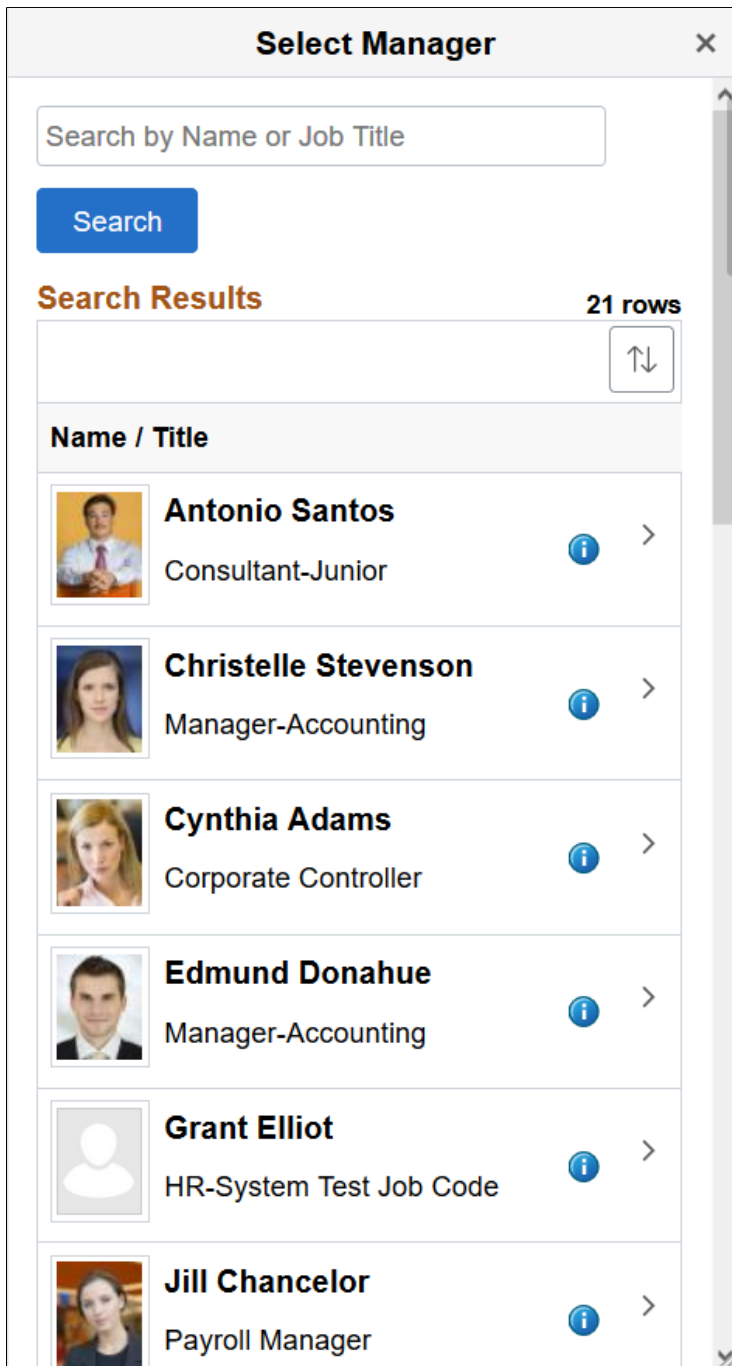
Select Manager			×
Search by Name or Job Title		Search	
Search Results			4 rows
			↕
Name / Title	Reports To	Department / Location	
 Christelle Stevenson Manager-Accounting	Rosanna Channing	Accounts Receivable Corporation Headquarters	>
 Edmund Donahue Manager-Accounting	Rosanna Channing	Accounts Payable Corporation Headquarters	>
 John Patterson Manager-Revenue	Rosanna Channing	Revenue Management Kansas Operations	>
 Mei Lee Accountant	Rosanna Channing	Corporate Accounting Corporation Headquarters	>

Image: (Smartphone) Select Manager page

This example illustrates the Select Manager page for the smartphone.



This page displays a list of all the managers that report up to you. Click a row to change the view to that manager's team.

My Team – Summary Page

Use the My Team – Summary page (HR_DIRTEAM_FLU) to view summary information about your teams that report to you directly or indirectly.

The My Team – Summary page has two viewing modes: a grid view and a card view. The card view displays information in a business card format, with different information on the front and back of the card.

Navigation

Click the My Team tile on the Manager Self Service home page, or click the Summary touch point on the My Team page.

Note: This page may not be available based on the settings on the [Configure My Team Pages Page](#).

Image: (Tablet) My Team - Summary page: grid view

This example illustrates the grid view on the My Team - Summary page for the tablet.

Note: The grid view is not supported on smartphones.

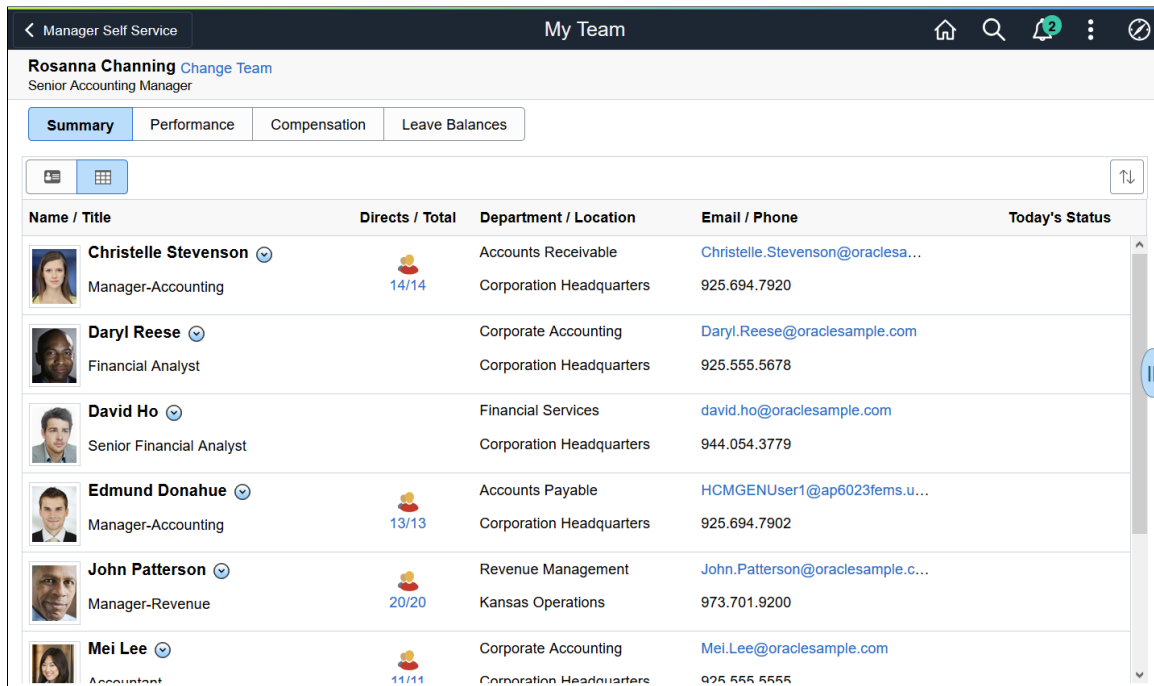


Image: (Tablet) My Team - Summary page: card view

This example illustrates the card view on the My Team - Summary page for the tablet. This example displays the front of the card (with the employee photo and contact information) for some of the employees and the back of the card (with performance and compensation information) for a few other employees.

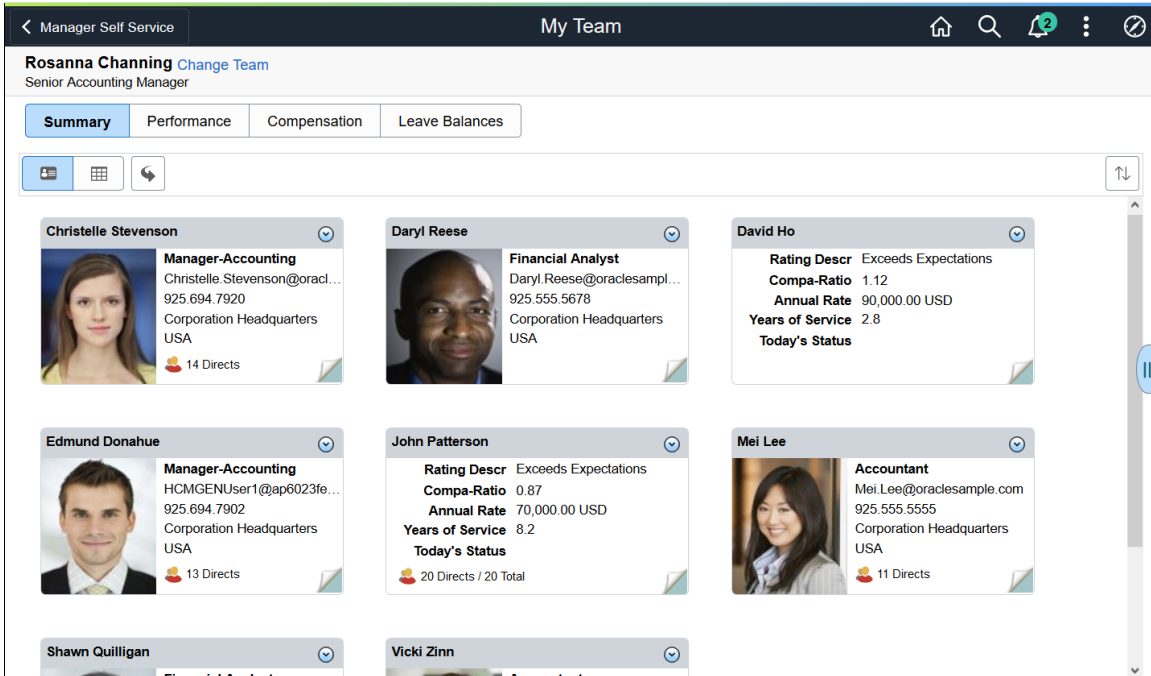
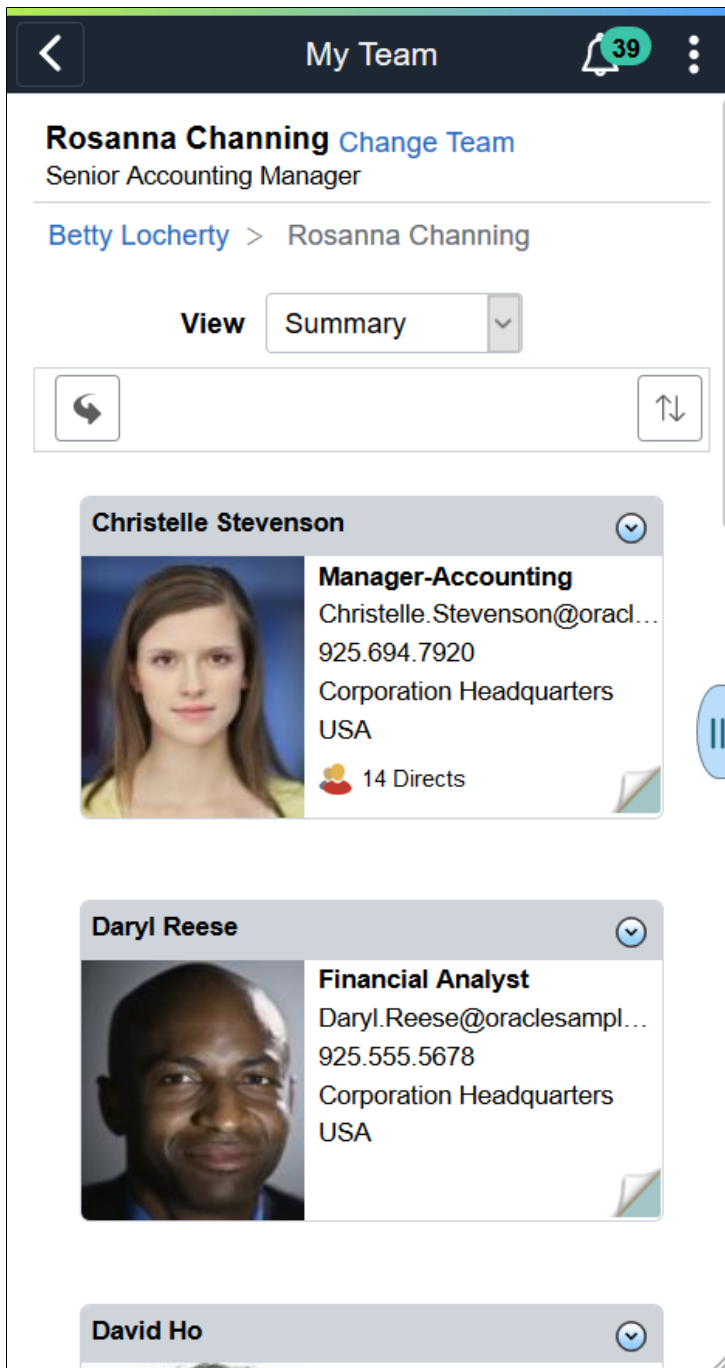


Image: (Smartphone) My Team - Summary page: card view

This example illustrates the card view on the My Team - Summary page for the smartphone.



Note: Information on this page is similar to the information on the [Direct Line Reports Pagelet](#) on the Summary, Contact, and Performance tabs.

Data Sources

PeopleSoft HR Administer Workforce provides most of the information on the My Team - Summary page, including name, contact information, job information, and reporting relationship.

PeopleSoft ePerformance provides the performance-related information that appears on the back of the card view.

Information for the Today's Status column comes from PeopleSoft Absence Management, Time and Labor, HR Administer Training, and Enterprise Learning Management.

Summary Views



(Card View) icon

Click the Card View icon to display team member information in a business card format. The front of the card displays a photo of the team member (if available) along with general information such as name, job title, email address, and phone number, and location. The back of the card displays performance and compensation information and the team member's work status for the day:

The Card View is the default and only mode on small form factor devices (smartphones).



(Grid View) icon

Click the Grid View icon to display team member information in a grid format. The grid shows the same information as the front of the card. It also shows the team member's department and an icon that represents the team member's work status for the day.

The Grid View is the default mode on large form factor devices (tablets, desktops, and laptops).



(More Information All Cards – show back) icon button

When the card view is active, click this icon to show the back of all cards. This icon is not visible from the grid view.



(Main Information All Cards – show front) icon button

When the card view is active, click this icon to show the front of all cards. This icon is not visible from the grid view.



(More Information This Card) icon button

When the card view is active, this icon appears at the bottom right corner of individual cards. Click this icon to flip over the card.



(Sort) icon button

Click this icon to change the sort order of team members. You can sort by any field shown except by direct reports.

Name/Title



Related Actions icon button

Click the related actions menu icon to display a drop-down menu of self-service transactions. These links provide the manager quick access to self service transactional pages.

When using Position Management and you have enabled the system to show empty positions, the Name/Title column will display the text *Empty Position* and the position number.



[Image Highlights, PeopleSoft HCM Update Image 19: Displaying Empty Position within My Teams](#)

Reporting Hierarchy



(View My Team/Organization) icon and link

This icon appears in all views for team members who have direct reports. In all views, the number of direct reports appears next to the icon. The grid view and the back of the card view additionally display the total number of reports in the reporting hierarchy.

Click the icon (or the number of reports) to drill down the reporting hierarchy. As you drill down:

- The page displays the direct reports for the selected person.
- Breadcrumbs at the top of the page show the reporting hierarchy between the user and the currently displayed team.

The user names in the breadcrumbs can be clicked to return to a list of that user's direct reports.

Today's Status

The Today's Status field on the grid view (and on the back of the card) indicate where an employee is today. The column displays only one icon to indicate the employee schedule for the day, even if more than one schedule applies. There are five icons. The system determines which icon to display using this priority sequence:



(planned absence)

Indicates that the employee has a planned absence for today.



(holiday)

Indicates that the employee is on a holiday break today.



(off)

Indicates that the employee is not scheduled to work today based on the employee's holiday schedule in Job Data.



(training)

Indicates that the employee is in training today. Information is obtained from ELM or HR Training.



(no show)

Indicates that the employee did not show up to work today when he or she is scheduled to work.

My Team – Performance Page

Use the My Team – Performance page (HR_DIRTEAM_EP_FLU) to view performance information for a team. The data comes from PeopleSoft ePerformance and HR Careers and Successions.

Navigation

Click the Performance touch point on the My Team page.

Note: This page may not be available based on the settings on the [Configure My Team Pages Page](#).

Image: (Tablet) My Team – Performance page

This example illustrates the My Team – Performance page for the tablet.

The screenshot shows the 'My Team' performance page for Rosanna Channing, Senior Accounting Manager. The page has a dark header with navigation icons and a 'My Team' title. Below the header, there are tabs for 'Summary', 'Performance' (selected), 'Compensation', and 'Leave Balances'. A table lists team members with their performance metrics.







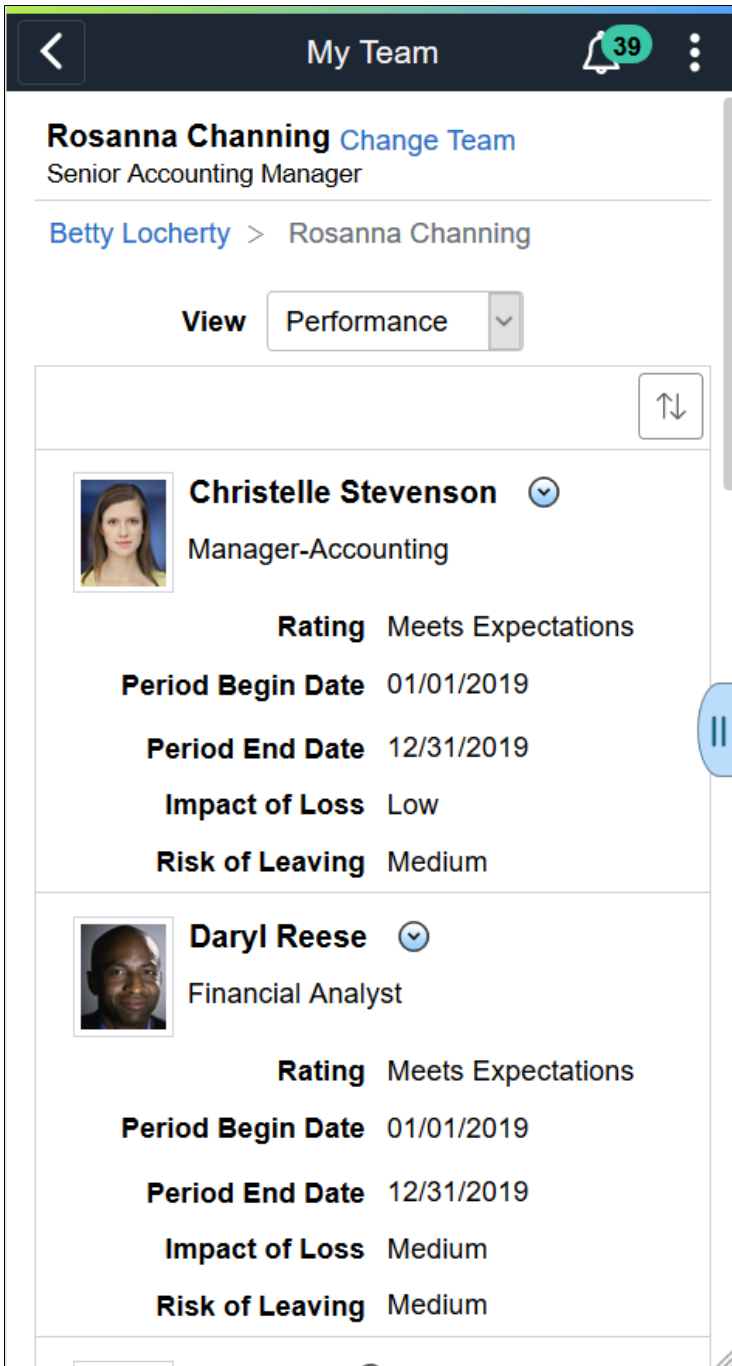
Name / Title	Rating	Period	Impact of Loss	Risk of Leaving
 Christelle Stevenson Manager-Accounting	Meets Expectations	01/01/2019 12/31/2019	Low	Medium
 Daryl Reese Financial Analyst	Meets Expectations	01/01/2019 12/31/2019	Medium	Medium
 David Ho Senior Financial Analyst	Exceeds Expectations	01/01/2019 12/31/2019		
 Edmund Donahue Manager-Accounting	Meets Expectations	01/01/2019 12/31/2019	Medium	Medium
 John Patterson Manager-Revenue	Exceeds Expectations	01/01/2019 12/31/2019	High	High
 Mei Lee	Meets Expectations	01/01/2019 12/31/2019	High	Medium

Image: (Smartphone) My Team – Performance page

This example illustrates the My Team – Performance page for the smartphone.



Note: Information on this page is similar to the information on the Performance tab of the [Direct Line Reports Pagelet](#).

Performance Grid

Impact of Loss and **Risk of Leaving** These columns are visible only if relevant data exists.



Click this icon to change the sort order of team members. You can sort by any field shown

Data Source

Performance data comes from PeopleSoft ePerformance. Specifically, the data is based on the most recent completed document of the type specified on the "Assign Document Defaults Page" (PeopleSoft HCM 9.2: ePerformance). This is also the data shown on the back side of the card on the My Team - Summary page. If a default document type has not been specified, the My Team page does not provide a touch point for accessing the performance data.

Employee ratings are taken from the overall rating section of the performance document. If an employee does not have a completed performance rating from the specified document type, no performance rating information will be displayed in that individual's row.

Use the Performance Document History Page, addressed in the "Viewing Historical Documents" (PeopleSoft HCM 9.2: ePerformance) topic, to view the performance document that contains the employee's last rating.

My Team – Compensation Page

Use the My Team – Compensation page (HR_DIRTEAM_EC_FLU) to see how employees fit into the salary range for their jobs.

Navigation

Click the Compensation touch point on the My Team page.

Note: This page may not be available based on the settings on the [Configure My Team Pages Page](#).

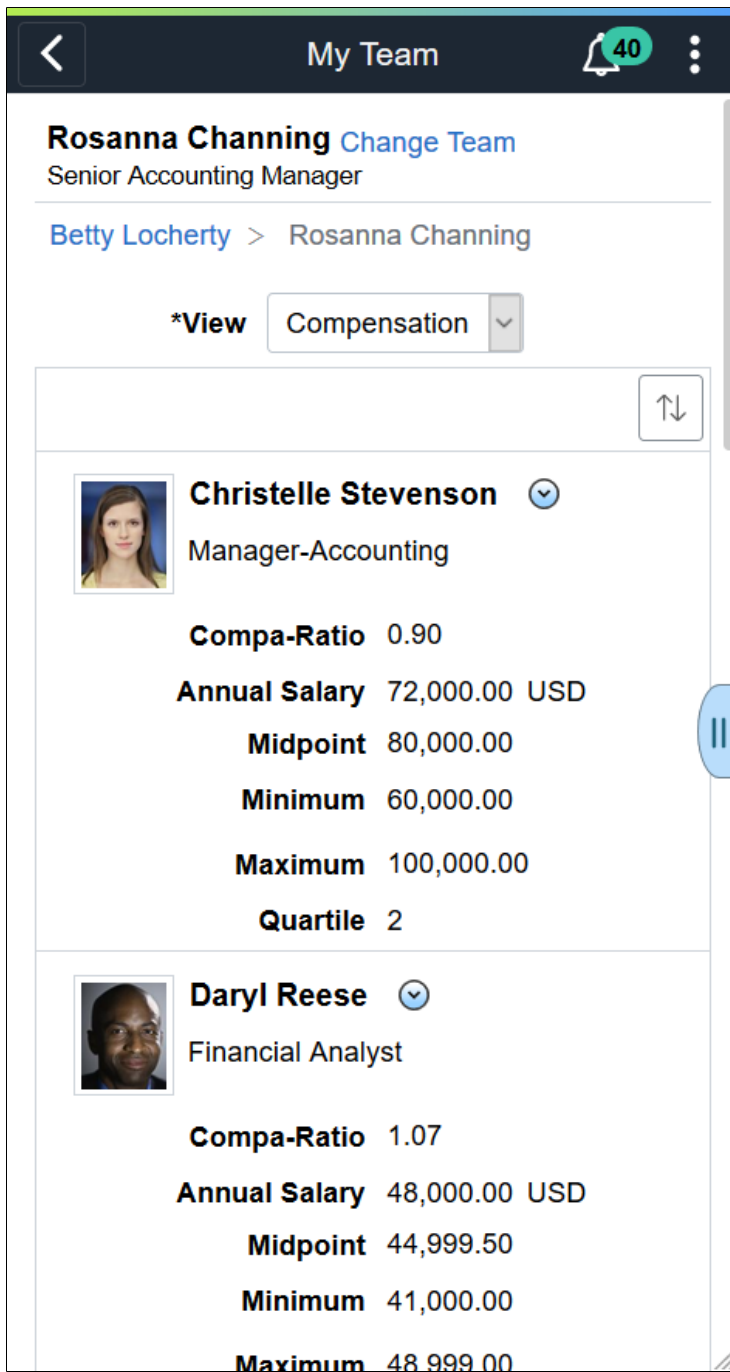
Image: (Tablet) My Team – Compensation page

This example illustrates the My Team – Compensation page for the tablet.

Name / Title	Compa Ratio	Current Salary	Midpoint	Minimum / Maximum	Position in Salary Range	Quartile
Christelle Stevenson Manager-Accounting	0.90	72,000.00 USD	80,000.00	60,000.00 100,000.00		2
Daryl Reese Financial Analyst	1.07	48,000.00 USD	44,999.50	41,000.00 48,999.00		4
David Ho Senior Financial Analyst	1.12	90,000.00 USD	80,000.00	60,000.00 100,000.00		3
Edmund Donahue Manager-Accounting	0.82	66,000.00 USD	80,000.00	60,000.00 100,000.00		1
John Patterson Manager-Revenue	0.87	70,000.00 USD	80,000.00	60,000.00 100,000.00		1
Mei Lee	0.91	49,500.00 USD	54,499.50	49,000.00 59,999.00		1

Image: (Smartphone) My Team - Compensation page

This example illustrates the My Team – Compensation page for the smartphone.



Note: Information on this page is similar to the information on the Compensation tab of the [Direct Line Reports Pagelet](#).

Compensation Grid



(Currency)

Click this icon to open a dialog box where you can choose whether to display salary information in each employee's paid currency or in your own preferred currency (as identified in your user profile).

This icon is visible only if at least one employee is compensated in a currency other than your own preferred currency.



Click this icon to change the sort order of team members. You can sort by any field shown (except by the graphical column that shows the employee's position within the salary range).

Position In Salary Range

Displays a graphical representation of the data appearing in the grid. This column does not appear on the small form factor (phone) or in accessible mode.

Data Sources

Compensation data comes from PeopleSoft HR Administer Workforce. Data for individuals comes from the job data tables, and midpoint data comes from salary plan data table.

My Team – Leave Balances Page

Use the My Team – Leave Balances page (HR_DIRTEAM_AB_FLU) to view leave balances for team members.

Navigation

Click the Leave Balances touch point on the My Team page.

Note: This page may not be available based on the settings on the [Configure My Team Pages Page](#).

Image: (Tablet) My Team – Leave Balances page

This example illustrates the My Team – Leave Balances page for the tablet.







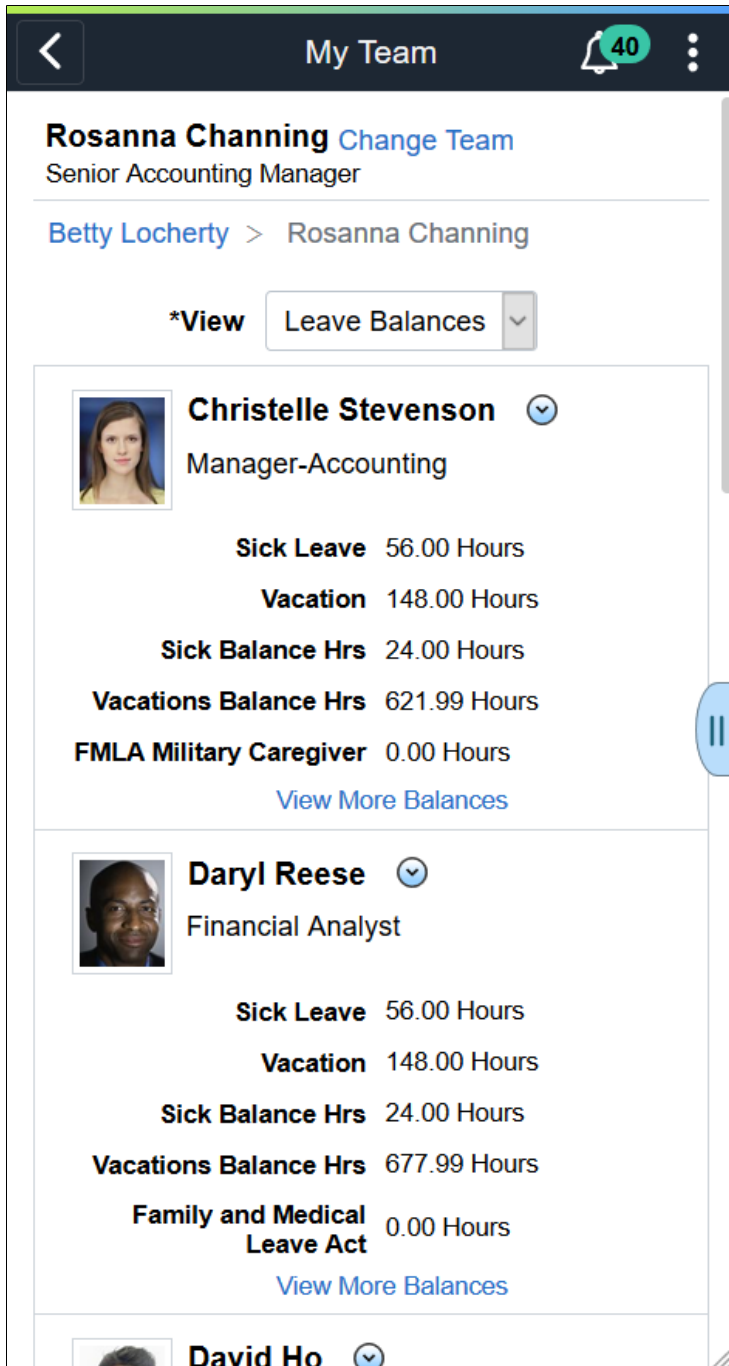
Name / Title	Balances		
Rosanna Channing Change Team Senior Accounting Manager			
<div style="display: flex; justify-content: space-between;"> Summary Performance Compensation Leave Balances </div>			
 Christelle Stevenson ▼ Manager-Accounting	Sick Leave 56.00 Hours	Vacation 148.00 Hours	
	Sick Balance Hrs 24.00 Hours	Vacations Balance Hrs 621.99 Hours	View More Balances
	FMLA Military Caregiver 0.00 Hours		
 Daryl Reese ▼ Financial Analyst	Sick Leave 56.00 Hours	Vacation 148.00 Hours	
	Sick Balance Hrs 24.00 Hours	Vacations Balance Hrs 677.99 Hours	View More Balances
	Family and Medical Leave Act 0.00 Hours		
 David Ho ▼ Senior Financial Analyst	No leave balances exist		
 Edmund Donahue ▼ Manager-Accounting	Sick Leave 56.00 Hours	Vacation 148.00 Hours	
	Sick Balance Hrs 24.00 Hours	Vacations Balance Hrs 617.66 Hours	View More Balances
	Family and Medical Leave Act 0.00 Hours		
 John Patterson ▼ Manager-Revenue	Sick Balance Hrs 22.15 Hours	Vacations Balance Hrs 650.76 Hours	
	Family and Medical Leave Act 0.00 Hours	FMLA Military Caregiver 0.00 Hours	
		FMLA Military Exigency 0.00 Hours	View Details
 Mei Lee ▼	Sick Leave 56.00 Hours	Vacation 148.00 Hours	
	Sick Balance Hrs 24.00 Hours	Vacations Balance Hrs 935.99 Hours	

Image: (Smartphone) My Team – Leave Balances page

This example illustrates the My Team – Leave Balances page for the smartphone.



Note: Information on this page is similar to the information on the Time tab of the [Direct Line Reports Pagelet](#).

The Leave Balances page always sorts employees by name.

Balances Displays up to five leave balances for each team member.

View More Balances or View Details The View More Balances link appears after the fifth leave balance if an employee has more than five leave types. The View Details link appears if the employee has five or fewer leave types.

Click either link to access the Leave Balances - View Details page, which displays all of the employee's leave balances along with the as-of date for each balance.

Data Sources

Leave balances come from PeopleSoft Absence Management.

Data for compensatory time comes from PeopleSoft Time and Labor. An employee must be enrolled in Time and Labor to accrue compensatory time.

Leave Balances - View Details Page

Use the Leave Balances - View Details or View More Balances page (HR_DT_LEAVE_SCF) to view detailed information about leave balances, including the balance and the as-of date for each type of leave.


Navigation

Click the View Details or View More Balances link on the My Team - Compensation page.

Image: Leave Balances - View Details page

This example illustrates the Leave Balances - View Details page for the tablet and smartphone.

View More Balances ✕



Christelle Stevenson
Manager-Accounting

Leave Balances

Type	Balance	Unit	As Of
Sick Leave	56.00	Hours	02/29/2020
Vacation	148.00	Hours	02/29/2020
Sick Balance Hrs	24.00	Hours	09/30/2019
Vacations Balance Hrs	621.99	Hours	09/30/2019
FMLA Military Caregiver	0.00	Hours	09/30/2019

As Of

Displays the end date of the last period of time for which the leave balance was calculated.

Performance vs. Compa-Ratio Pivot Grid

Use the Performance vs. Compa-Ratio page (PTPG_NUI_VWR) to view the Performance v. Compa-Ratio chart and assess the performance and compensation data for your team.

This chart and grid provides managers a quick way to perform the following tasks for their teams:

- Identify outliers within their team (i.e. individuals who are paid too little or too much relative to their performance).
- Perform a manager self-service action on an individual.
- Assess the performance and compensation data.

Navigation

Click the Supplementary Panel tab button on the My Team - Leave Balances page. To open a larger version of the grid in it's own modal, click the Display Performance vs. Compa-Ratio in Modal Window icon.

Image: (Tablet) Performance vs. Compa-Ratio Pivot Grid

This example illustrates the fields and controls on the Performance vs. Compa-Ratio pivot grid for the tablet.

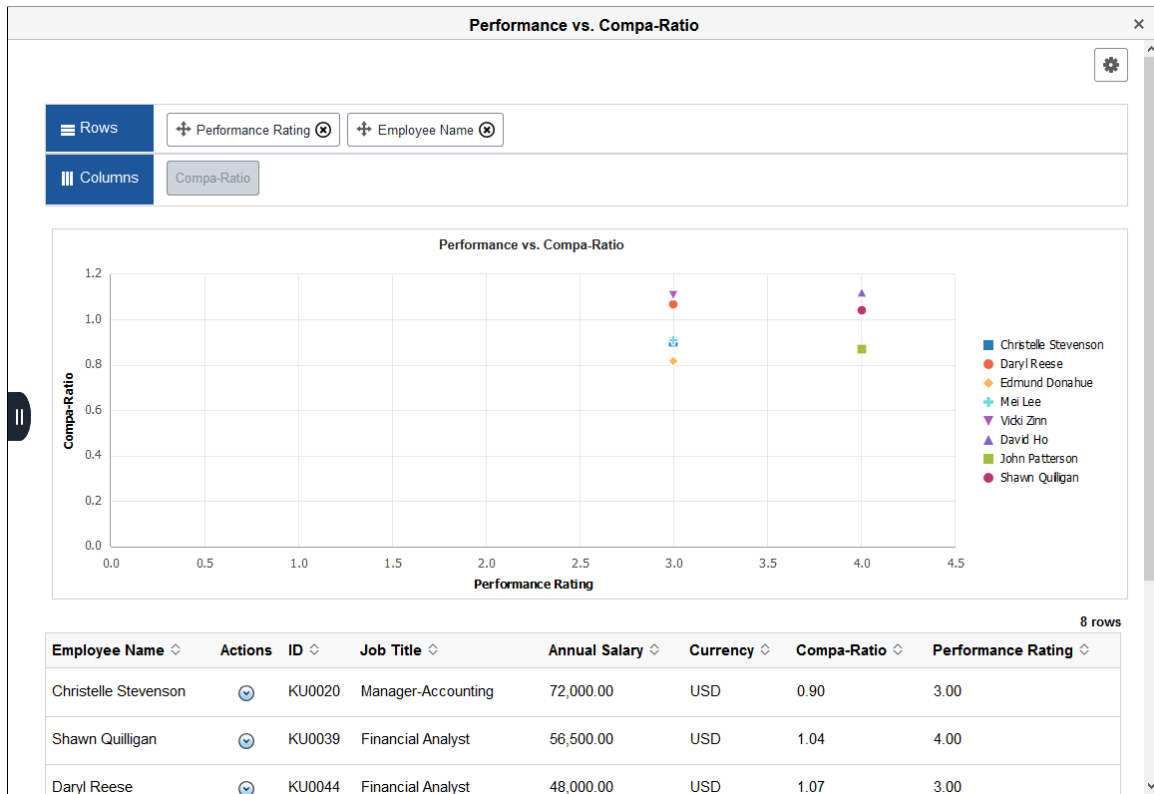
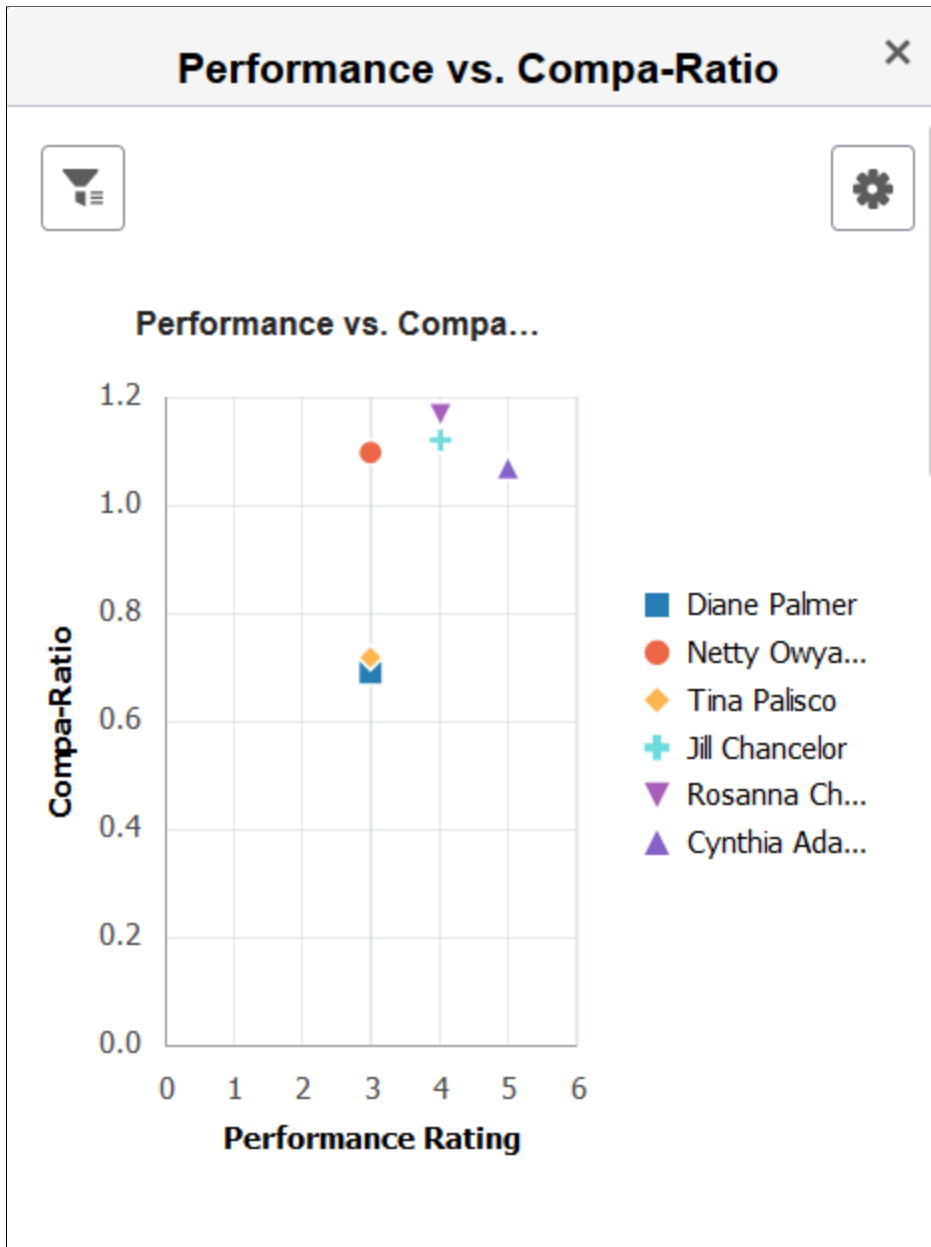


Image: (Smartphone) Performance vs. Compa-Ratio Pivot Grid

This example illustrates the fields and controls on the Performance vs. Compa-Ratio pivot grid for the smartphone.



The PeopleSoft Fluid User Interface provides a scatterplot chart that enables managers to view compensation vs. performance data for their team members. This page populates the scatterplot chart with the current compa-ratio and the current overall performance evaluation rating of your direct reports. Direct reports that do not have a performance evaluations will not appear on this chart.

Note: Employees must have a performance rating that uses the default document type in order to appear on the chart. The system uses the document type linked to the My Team transaction, as specified on the "Assign Document Defaults Page" (PeopleSoft HCM 9.2: ePerformance), when retrieving the most recent performance rating. If the administrator has not associated a document type with the My Team transaction on the Assign Document Defaults page, the My Team page will not display the Analytics tab, since the system will have no way of knowing which document type to look for when retrieving performance documents.

Note: To provide pivot charts with the most up-to-date information, you should periodically access the "Direct Reports Tables Build Page" (PeopleSoft HCM 9.2: Application Fundamentals) to run the direct reports process. This process populates direct report flat tables corresponding to each access type. The pivot chart selects data from flat tables through PSQuery.

This page displays those employees that are part of the reporting structure you selected on the My Team – Summary Page. When a manager has multiple jobs, the system will show direct reports of the selected job record.

Hover over a data point to view the performance rating, name, and compa-ratio associated with the data point.

The grid below the chart displays the following information:

- The employee name and ID.
- The related actions icon, from which you can access and perform manager self-service transactions.
- The employee's current job data, including the department, job code, salary, currency, and compa-ratio.
- The last performance review scores.

Click a data point in the chart to display only that person's data in the detailed grid at the bottom of the page. Click elsewhere on the pivot grid to once again show all employees for that team.

 (Tablet) **Show Filters** or **Hide Filters** tab button or (smartphone)

 **Filters** button

(Tablet) Select the Show Filters tab button to display the filters options on the left side of the page and specify which criteria facets should be included in the graph. Select the Hide Filters tab to close the panel that shows filter options.

(Smartphone) Select the Filters button to open the Filters page and specify which criteria facets should be included in the graph. Select the Done button to close the Filters pages and apply the filters.

Image: (Tablet) Performance vs. Compa-Ratio page showing the filter options

This example illustrates the fields and controls on the Performance vs. Compa-Ratio page showing the filter options for the tablet.

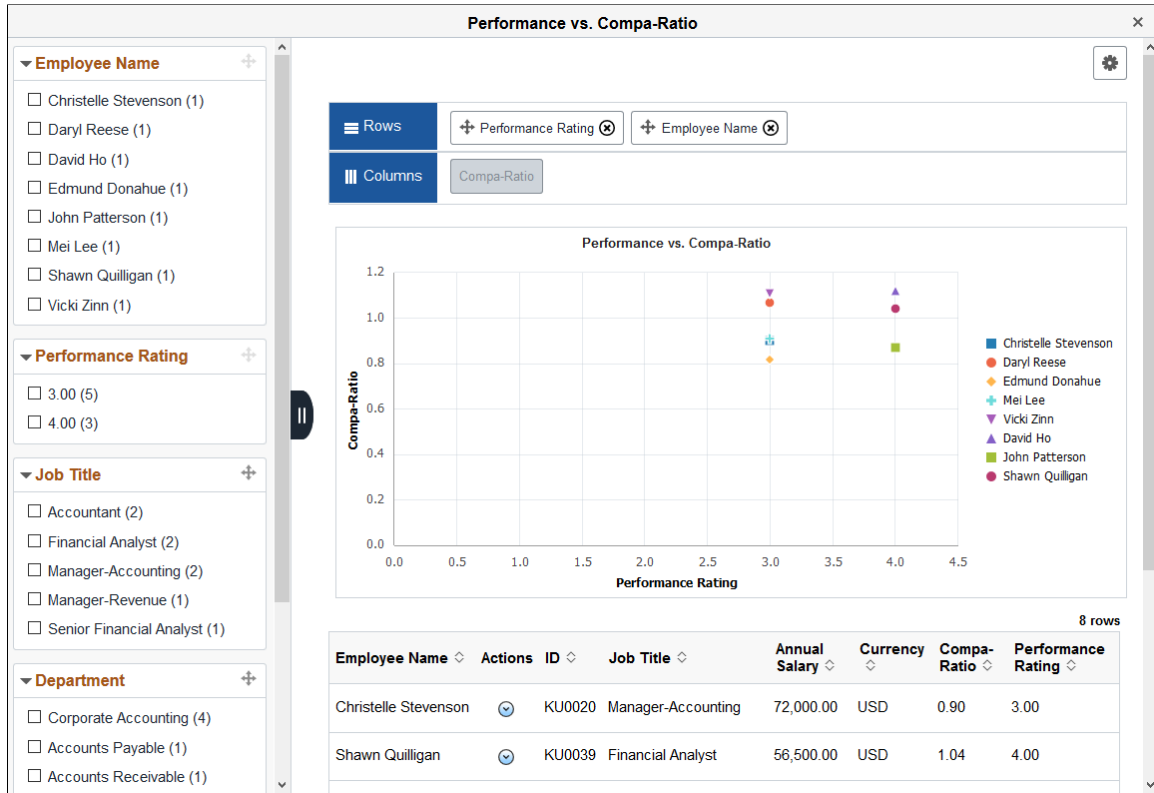


Image: (Smartphone) Performance vs. Compa-Ratio page: Filters panel

This example illustrates the fields and controls on the Performance vs. Compa-Ratio: Filters page for the smartphone.

Filters Done

▼ **Employee Name**

- Cynthia Adams (1)
- Diane Palmer (1)
- Jill Chancelor (1)
- Netty Owyang (1)
- Rosanna Channing (1)
- Tina Palisco (1)

▼ **Performance Rating**

- 3.00 (3)
- 4.00 (2)
- 5.00 (1)

▼ **Job Title**

- Manager-Accounting (2)
- Administrative Assistant (1)
- Corporate Controller (1)
- Payroll Manager (1)
- Senior Accounting Manager (1)

▼ **Department**

- Corporate Accounting (2)

The filter panel displays the various categories reflected in the chart: Employee Name and Performance Rating, as well as Job Code, Location, and Department. When you select the check boxes within the filter categories using a tablet or large form factor, the filter panel, chart, and grid dynamically update to reflect data from the criteria you have selected. When you select the check boxes within the filter categories using a smartphone or small form factor, and select Done, the chart and grid dynamically update to reflect data from the criteria you have selected. The group of direct reports appearing on the chart are restricted to those that match the filter criteria and the filter options are limited to match the criteria of those displayed on the chart. For example, if you select to display just the managers in a team and none of

them have a performance rating of 5.00, then the chart will show only those employees that are managers and the number 5.00 performance rating will not appear within the Performance Rating category filter. If you do not select any check boxes within a filter category, the chart will display all criteria that applies within the category.

Using Fluid Approvals to Approve Self Service Transaction Requests

This topic provides an overview of approvals and discusses how to approve self service transaction requests using Fluid Approvals.

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

The following videos provide an overview and demonstration of the Fluid Attachment framework:



[PeopleSoft Fluid HCM Attachments](#)



[Image Highlights, PeopleSoft HCM Update Image 26: Fluid Attachments -- HR Core](#)



[Image Highlights, PeopleSoft HCM Update Image 27: Fluid HCM Attachments Uptake for Address Transaction](#)

Pages Used to Approve Self Service Transaction Requests Using Fluid Approvals

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
Pending Approvals - <Transaction Name> Page	EOAWMA_TXNHDTL_FL	Review and take action on an eProfile Manager transaction request using Fluid Approvals.
Name Change Details Page	HR_EE_NAME_VW_FL	View the details of a name change request.
Attachments Page	HR_EE_NAME_ATT_SCF HR_EE_ADDR_ATT_SCF	View attachments linked to a name or address change request.

Understanding Approvals for eProfile Manager Desktop

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

Employee Self Service:

- Address Change
- Marital Status Change
- Name Change

Manager Self Service:

- Full/Part Time Status
- Location Change
- Promote Employee
- Reporting Change
- Retire Employee
- Terminate Employee
- Transfer Employee

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

Approvals Process

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

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

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

Pending Approvals - <Transaction Name> Page

Use the Pending Approvals - <Transaction Name> page (EOAWMA_TXNHDTL_FL) to review and take action on an eProfile Manager transaction request using Fluid Approvals. The page title varies and reflects the transaction type.

Note: The transaction name for the page will change based on the transaction type you selected on the Pending Approvals page.

Navigation

Click the Approvals tile on the Manager Self-Service home page or the Notifications button in the Oracle banner to access the Pending Approvals page. Then click an eProfile Manager Desktop transaction entry on the Pending Approvals page.

Image: Pending Approvals - <Transaction Name> Page (1 of 2)

This example illustrates the fields and controls on the Pending Approvals - <Transaction Name> page (1 of 2). This example shows a Name Change transaction.

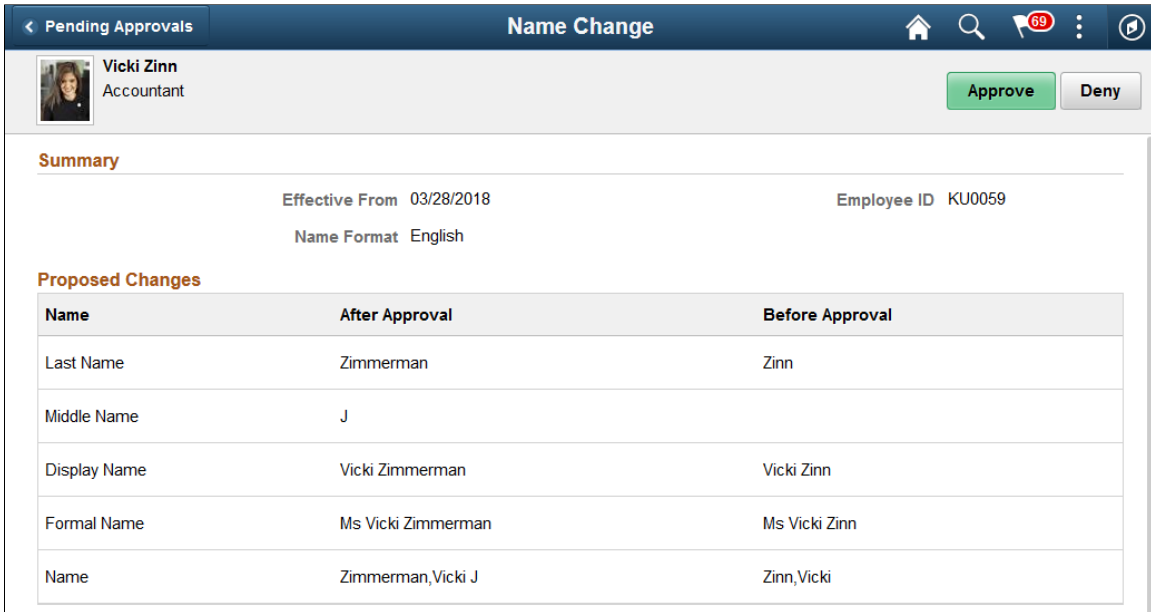
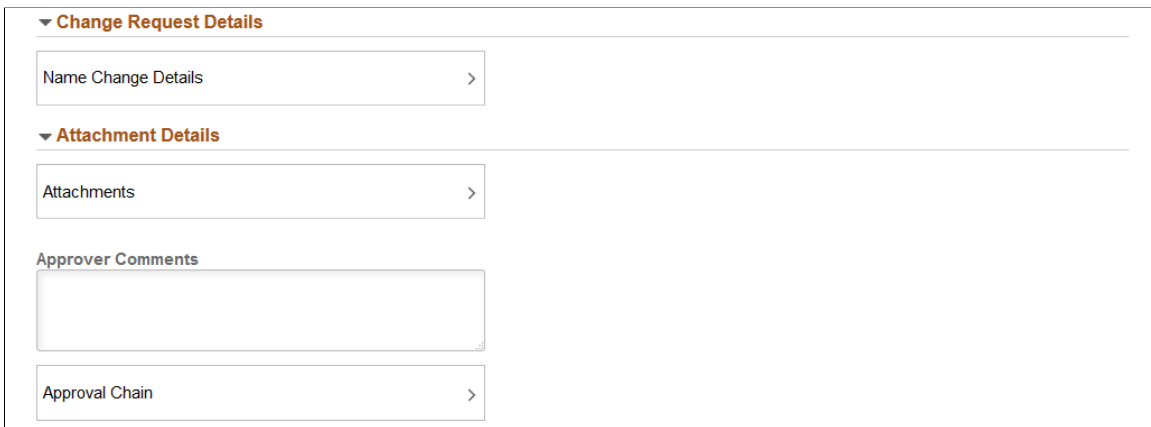


Image: Pending Approvals - <Transaction Name> Page (2 of 2)

This example illustrates the fields and controls on the Pending Approvals - <Transaction Name> page (2 of 2). This example shows a Name Change transaction.



Approval Options

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

Approve and Deny

Use these buttons to take action on the requested approval.

Summary and Details Sections

These sections show a quick summary of who is being impacted by the transaction request and when. The section and field names on the page will vary based upon the transaction type. Some sections and fields may not apply to certain transactions. The preceding screen shot displays an example of a transaction that shows a Summary section.

Date-related fields	Displays the effective date for the transaction (not the date that the transaction was submitted). The field name description will vary based upon the transaction type.
Employee ID	Displays the ID of the employee being affected by this transaction request.
Name Format	For a <i>Name Change</i> request, the page will display the name format used for the employee's name. For example, <i>English</i> or <i>Japanese</i> .
Requester	Displays the name of the manager who submitted the transaction for approval.
Reason	If the transaction specified a reason to use in the new job data row, that reason appears here.

Proposed Changes Section

This section is not shown for the delivered *Reporting Change*, *Retire Employee*, and *Terminate Employee* transactions.

These sections show the proposed changes to the employee's record. The grid lists the specific data changes that are being requested. The fields in this section vary depending on the transaction.

Job Information, Type, Name, or Description	Displays the name of the field to be updated. The Type column applies to the address type that is being updated, such as <i>Home</i> or <i>Mailing</i> . The Name column lists the different types of names for an employee, such as Last Name, First Name, or Display Name.
After Approval	Displays the proposed new value for the specified field.
Before Approval	Displays the current value of the specified field so that you can compare the old data to the proposed change.

Proposed Supervisor and New Direct Reports Sections

These sections appear for the *Reporting Change* transaction and list the newly proposed supervisor and direct reports.

Change Request Details Section

This section appears for the *Name Change* transaction.

Name Change Details

Click this item to open the [Name Change Details Page](#), where you can review the proposed changes for this transaction.

Attachment Details Section

This section appears for the *Name Change* and *Address Change* transactions when an attachment is included with the request.

Attachments

Click this item to open the [Attachments Page](#), where you can review the attachment associated with this transaction.

Additional Information Section

This section appears for the *Full/Part Time Status* transaction and lists the standard hours per week, hourly salary, and annual rate for the employee.

Unchanged Job Information Section

This section appears for the *Promote Employee* and *Transfer Employee* transactions. This section lists additional data that is relevant to the transaction but that is not changing.

Requester Comments Section

This section displays any comments that the requester added before submitting the transaction. For some transactions this section is hidden.

Approver Comments and Approval Chain Sections

Approver Comments

Enter any comments related to the approval action you take.

Approval Chain

Click this item to open the Approval Chain page, where you can review information about all approvers for the transaction.

Name Change Details Page

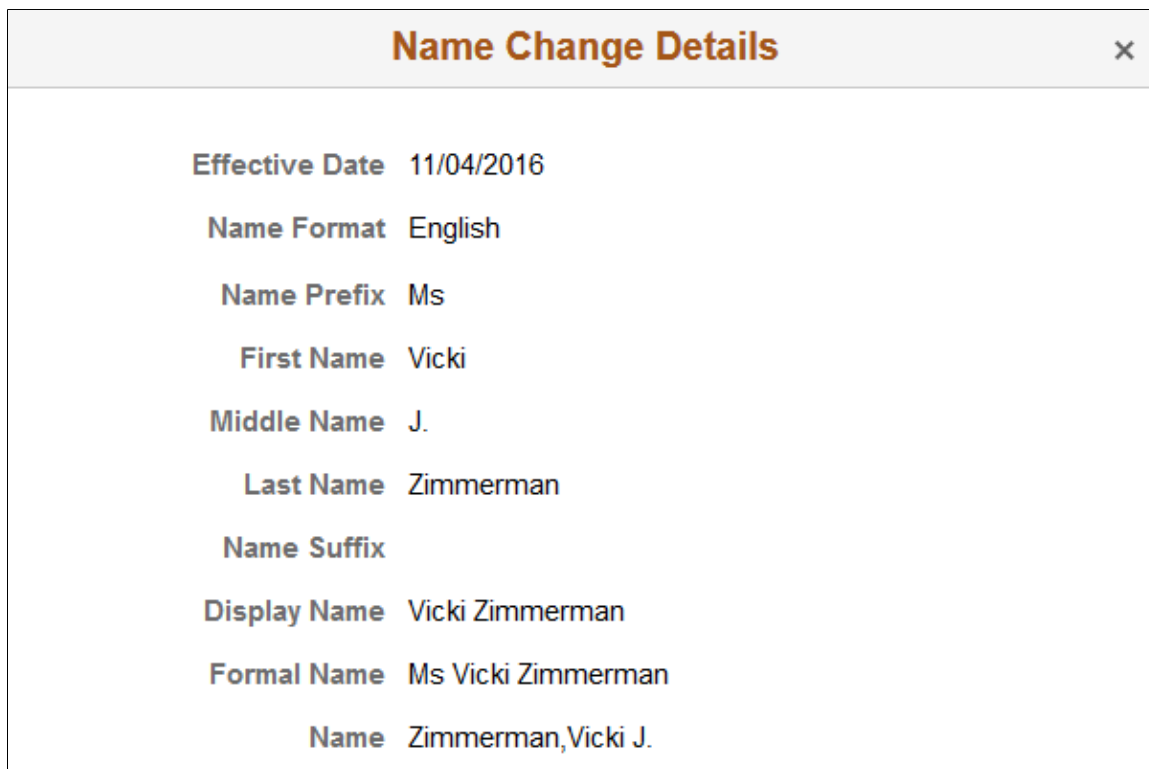
Use the Name Change Details page (HR_EE_NAME_VW_FL) to review the details of a name change request.

Navigation

Click the Name Change Details item row on the Pending Approvals - Name Change page.

Image: Name Change Details Page

This example illustrates the fields and controls on the Name Change Details page.



Attachments Page

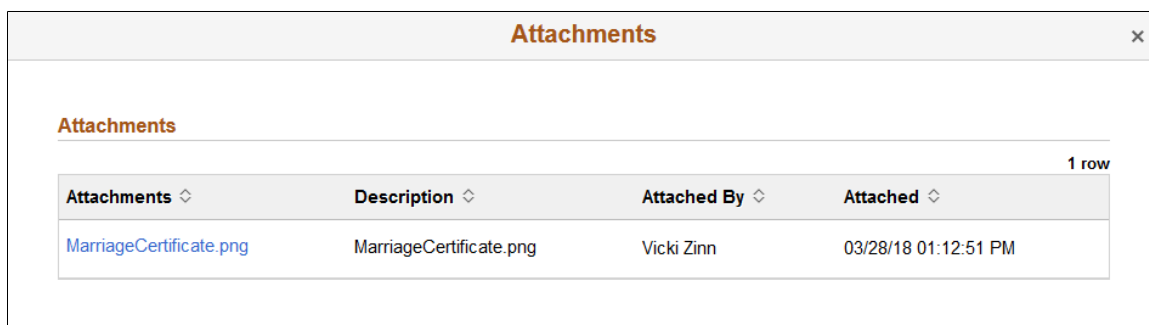
Use the Attachments page (HR_EE_NAME_ATT_SCF or HR_EE_ADDR_ATT_SCF) to view attachments linked to a name or address change request.

Navigation

Click the Attachments item row on the Pending Approvals - Name Change or Pending Approvals - Address Change page.

Image: Attachments Page

This example illustrates the Attachments page.



Click the Attachments link to download and view an attachment using fluid. Note that attachments are not accessible from the classic pages.

Attachments are saved on the PS_HR_ESS_ADDR_ATT table.

The following videos provide an overview and demonstration of the Fluid Attachment framework:



[PeopleSoft Fluid HCM Attachments](#)



[Image Highlights, PeopleSoft HCM Update Image 26: Fluid Attachments -- HR Core](#)



[Image Highlights, PeopleSoft HCM Update Image 27: Fluid HCM Attachments Uptake for Address Transaction](#)

Chapter 7

Using Guided Self-Service Transactions

Performing Guided Self-Service Transactions in Manager Self-Service

This topic provides overviews of guided self-service pages, of how managers access guided self-service transactions, and of administrator approvals for guided self-service transactions. It then discusses the self-service transaction pages.

These videos provide overviews and demonstrations of guided self-service:



[PeopleSoft Fluid HCM Guided Self Service](#)



[PeopleSoft HCM 9.2 Image 17 Highlights: Guided Self-Service \(support for regulatory regions, activity guides, and action reason configuration\)](#)



[PeopleSoft HCM 9.2 Image 20 Highlights: Guided Self-Service \(demotion transaction and attachments support\)](#)



[PeopleSoft HCM 9.2 Image 22 Highlights: Creating a New Position Using Fluid Guided Self-Service](#)



[PeopleSoft HCM 9.2 Image 22 Highlights: Changing Work Schedule Hours Using Fluid Guided Self-Service](#)



[PeopleSoft HCM 9.2 Image 24 Highlights: Guided Self-Service Navigation Collection and Multi-Select Transaction](#)

Related Links

[Understanding Guided Self-Service Transactions](#)

[Configuring Guided Self-Service Transactions for Manager Self-Service](#)

[Approving Guided Self-Service Transactions](#)

Pages Used to Perform Guided Self-Service Transactions in Manager Self-Service

Note: Guided self-service transaction steps are rendered using the PeopleTools Activity Guide framework as long as you have PeopleTools 8.55 or later. As you can see in the following table, sometimes different page definitions are used if you are on an earlier version of PeopleTools, but the pages function the same.

Page Name	Definition Name	Usage
<u>Update Team Information Tile</u>	HC_NAVCOLL_7 (this is the cref for the tile)	Access the Update Team Information page, a navigation collection for initiating guided self-service transactions.
<u>Update Team Information Page</u>	Update Team Information (this is the name of the navigation collection)	Initiate guided self-service transactions.
<u><Transaction Name> Page for Selecting Employees</u>	HR_PSEL_FLU	Select one or more employees for a guided self-service transaction.
<u>Questionnaire Page</u>	HR_MSS_CT_QUES_FL	Answer questions that determine which pages and fields users will see during the guided self-service transaction.
<u>Decision Support Page</u>	HR_MSS_CT_DSUP_FL	View decision support topics that are defined in the transaction configuration. This page appears in PeopleTools 8.55 or later. With earlier versions of PeopleTools, decision support appears in a panel on the Questionnaire page.
<u>Common Header for Guided Self-Service Pages</u>	not applicable	The common header provides navigation buttons and contextual information for the steps in a transaction.
<u>Work and Job Information Page</u>	HR_MSS_CT_PG1_AGFL (PeopleTools 8.55 or later) HR_MSS_CT_PG1_FL (PeopleTools versions before 8.55)	Enter work and job changes for an employee.
<u>Compensation Details Page</u>	HR_MSS_CT_PG2_AGFL (PeopleTools 8.55 or later) HR_MSS_CT_PG2_FL (PeopleTools versions before 8.55)	Enter compensation changes for an employee.
<u>Clone Position Page</u>	HR_MSS_POSN_AGFL	Enter or update position data to create a new position based on an existing one. This page requires PeopleTools 8.55 or later. The Clone Position transaction is not available with earlier versions of PeopleTools.
<u>Review and Submit Page</u>	HR_MSS_CT_SBM_AGFL (for employee transactions using PeopleTools 8.55 or later) HR_MSS_CT_SUBMT_FL (for employee transactions using PeopleTools versions before 8.55) HR_MSS_CT_PSNSB_FL (for the Clone Position transaction)	Review transaction information, add comments, and submit the request.

Page Name	Definition Name	Usage
Transaction Confirmation Page	HR_MSS_CT_CONF_FL	Confirms that the transaction was submitted. If approvals are used, this page also displays the approval chain. This page appears immediately after a transaction is submitted.
<u><Transaction Name> Page for Reviewing Submitted Transactions</u>	HR_MSS_CT_EE	Submitters use this page to review read-only information about a guided self-service transaction that has been submitted for approval.

Understanding Guided Self-Service Transactions

This overview describes how guided self-service transactions work.

Guided Self-Service Pages

The framework for guided self-service transactions displays the pages and fields that are relevant for a specific purpose. All guided self-service transactions use the same pages, but each transaction's configuration determines which pages appear and which fields appear on those pages. To complete a transaction, users step through the pages sequentially.

These are the pages that can appear in a guided self-service transaction that updates employee data:

1. Questionnaire page: this appears only if the transaction is configured with questions that are not hidden.
2. Work and Job Information page: this appears if the transaction is configured to show job data.
3. Compensation Details page: this appears if the transaction is configured to show compensation data.
4. Review and Submit page: this page summarizes the transaction and is always the last step in transactions.

Oracle delivers one transaction, *Clone Position*, that does not update employee data. This transaction is configured using the same framework, but the nature of the transaction means that it does not use the standard employee-related pages. Instead, it uses these pages:

- Clone Position page: this displays position data fields with default values from the position being cloned.
- Review and Submit page: this page summarizes the transaction and is always the last step in transactions.

Special Processing for Employees in Positions

Guided self-service includes the following special processing for employees in positions:

- The fields shown for the *Promote Employee*, *Demote Employee*, and *Transfer Employee* transactions enable a manager to change which position an employee is assigned to.

With partial position management, the system can make automatic database updates only if the employee's position data has not been overridden. Otherwise, an administrator must manually make the change after the transaction has been approved.

- The *Change Full/Part Time or Hours*, *Request Location Change*, *Request Reporting Change*, and *Update Job Details for Group* transactions can be optionally configured to make changes to position data as long as the position has just one incumbent and the incumbent's position data has not been overridden.

The *Update Job Details for Group* transaction enables you to process multiple employees. If you assign a new supervisor to a group that includes a mix of position employees and non-position employees, it is possible to choose a new supervisor who is not in a position. In this scenario, a message indicates that the supervisor cannot be automatically assigned as the manager for the position employees. All position employees in the group are sent to an administrator for processing.

See [Understanding Updates to Position Data](#) for a more detailed description of the position update configuration option, including information about what happens when positions have multiple incumbents and when employee position data has been overridden.

Transaction Summary

The following table lists the delivered guided self-service transaction, identifies the pages that appear during the transaction, and notes which transactions support position-specific processing. The Review and Submit page is part of every transaction and is not listed.

Transaction	Questionnaire Page	Work and Job Information Page	Compensation Details Page	Notes for employees in positions
Demote Employee	Yes	Yes	Depends on questionnaire answer.	Employee is assigned to a new position.
Change Full / Part Time or Hours	No	Yes	No	Can be configured to automatically update position data.
Clone Position This uses the Clone Position page, which is unique to this transaction and does not appear in this table.	No	No	No	Does not impact existing employee position data.
Request Location Change	No	Yes	No	Can be configured to automatically update position data.
Request Leave of Absence	No	Yes	No	No special processing.

Transaction	Questionnaire Page	Work and Job Information Page	Compensation Details Page	Notes for employees in positions
Request Paid Leave of Absence	No	Yes	No	No special processing.
Request Reporting Change	No	Yes	No	Can be configured to automatically update position data.
Promote Employee	Yes	Yes	Depends on questionnaire answer.	Employee is assigned to a new position.
Retire Employee	No	Yes	No	No special processing.
Request Ad Hoc Salary Change	No	No	Yes	No special processing.
Terminate Employee	No	Yes	No	No special processing.
Transfer Employee	Yes	Depends on questionnaire answer.	Depends on questionnaire answer.	Employee is assigned to a new position.
Update Job Details for Group	Yes	Yes	No	Can be configured to automatically update position data. Managers can select a non-position supervisor if the group includes both position and non-position employees, but the system will not assign this supervisor to the position employees. An administrator must manually update supervisor information for those employees.

Understanding How Managers Access Guided Self-Service Transactions

The following table describes the three navigation options for accessing guided self-service transactions.

Navigation Method	Description	Transaction-Specific Details
Update Team Information tile	<p>Click the Update Team Information tile on the Manager Self Service home page.</p> <p>On the Update Team Information page:</p> <ul style="list-style-type: none"> • Use the left frame to select a transaction. • Use the right frame to choose the employee(s) whose data will be updated. 	All transactions are listed in the left frame of the Update Team Information page.
Menu Navigation	<p>Use standard menu navigation to select a specific transaction under the Manager Self-Service menu.</p> <p>The <Transaction Name> Page for <u>Selecting Employees</u> appears. Use this page to select the employee(s) whose data will be updated.</p>	<p>The menu path for most transactions is Manager Self-Service >Job and Personal Information ><Transaction Name>.</p> <p>These are the exceptions:</p> <ul style="list-style-type: none"> • The <i>Clone Position</i> transaction is not available using standard menu navigation. • For the <i>Request Ad Hoc Salary Change</i> transaction, the menu path is Manager Self-Service >Compensation and Stock >Request Ad Hoc Salary Change
Related Actions Menu	<p>Select a specific transaction from the related actions menu that appears next to team member names on various pages including, but not limited to, the <u>My Team – Summary Page</u>.</p> <p>This navigation method identifies both the transaction and the employee up front, so the manager goes directly into the guided self-service transaction.</p> <p>For more information about related actions, see "Related Actions for Manager Self Service Pages" (PeopleSoft HCM 9.2: Application Fundamentals).</p>	<p>The related actions menu path for most transactions is Job and Personal Information ><Transaction Name>.</p> <p>These are the exceptions:</p> <ul style="list-style-type: none"> • The <i>Update Job Details for Group</i> transaction is not available in the related actions menu because related actions always have the context of a single employee. • The <i>Clone Position</i> transaction is available only if the selected employee is in a position. • The <i>Request Ad Hoc Salary Change</i> transaction appears under the menu path Compensation >Request Ad Hoc Salary Change.

Navigation Method	Description	Transaction-Specific Details
Actions List on the My Team page	On the My Team page, click the Actions List icon in the page header, then select <i>Update Job Details for Group</i> .	<p>The <i>Update Job Details for Group</i> transaction is the only guided self-service option under the Actions List menu.</p> <p>On the My Team page, all other guided self-service transactions are available from the employee-specific related actions menus, but the <i>Update Job Details for Group</i> transaction is not because it gives users the option to select multiple employees. Therefore, access to this transaction is through the Actions List menu instead.</p>

Note: The PeopleSoft Classic versions of the Request Location Change and Request Reporting Change transactions allow managers to select multiple employees. However, when you implement guided self-service, conditional navigation redirects users to the guided self-service version of these transactions instead. These support a single employee only. To update information for multiple employees at once, use the *Update Job Details for Group* transaction. This transaction lets you request changes to any combination of department, location, and supervisor.

Update Team Information Tile

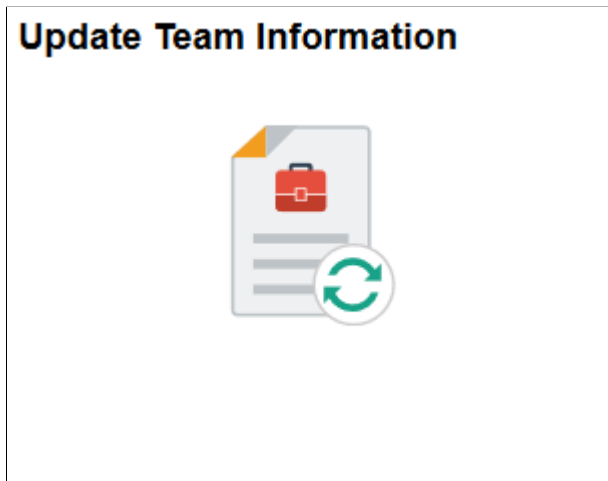
Use the Update Team Information tile (HC_NAVCOLL_7) to access the Update Team Information page, a navigation collection for initiating guided self-service transactions.

Navigation

The Update Team Information tile is on the delivered Manager Self Service home page.

Image: Update Team Information Tile

This example illustrates the Update Team Information tile



Update Team Information Page

The Update Team Information page is a navigation collection where you can initiate a guided self-service transaction.







Navigation

Click the Update Team Information tile.

Image: Update Team Information page

This example illustrates the Update Team Information page.

The screenshot shows the 'Update Team Information' page. On the left is a navigation menu with the following items: Request Reporting Change, Transfer Employee, Promote Employee, Request Ad Hoc Salary Change, Request Location Change, Change Full/Part Time or Hours, Request Leave of Absence, Request Paid Leave of Absence, Retire Employee, Terminate Employee, Demote Employee, Position Clone, and Update Job Details for Group (highlighted). The main content area is titled 'Update Job Details for Group' and contains a search bar with the text 'Search your Employees' and a 'Search' button. Below the search bar is a breadcrumb trail: 'Betty Locherty > Rosanna Channing'. A 'Select Employee' section features a 'Continue' button and a table of employees.

	Name / Title / ID - Record	Directs / Total	Status / Type
<input type="checkbox"/>	 Christelle Stevenson Manager-Accounting KU0020 - 0	 13/13	Active Employee
<input type="checkbox"/>	 Daryl Reese Financial Analyst KU0044 - 0		Active Employee
<input type="checkbox"/>	 David Ho Senior Financial Analyst KU0121 - 0		Active Employee
<input type="checkbox"/>	 Edmund Donahue Manager-Accounting KU0102 - 0	 11/11	Active Employee

On this page:

- The left frame lists the delivered guided self-service transactions.
- The right frame displays the <Transaction Name> Page for Selecting Employees, where you choose employees for the selected transaction.

<Transaction Name> Page for Selecting Employees

Use the <Transaction Name> page (HR_PSEL_FLU) to select one or more employees for a guided self-service transaction. The page name matches the transaction name.

Navigation

This page appears when users access a guided self-service transaction using the Update Team Information tile or using menu navigation.

When you use a related action for an employee to initiate the transaction, the system bypasses this page.

Image: <Transaction Name> page for selecting one employee

This example illustrates the <Transaction Name> page for transactions where you can select only one employee.

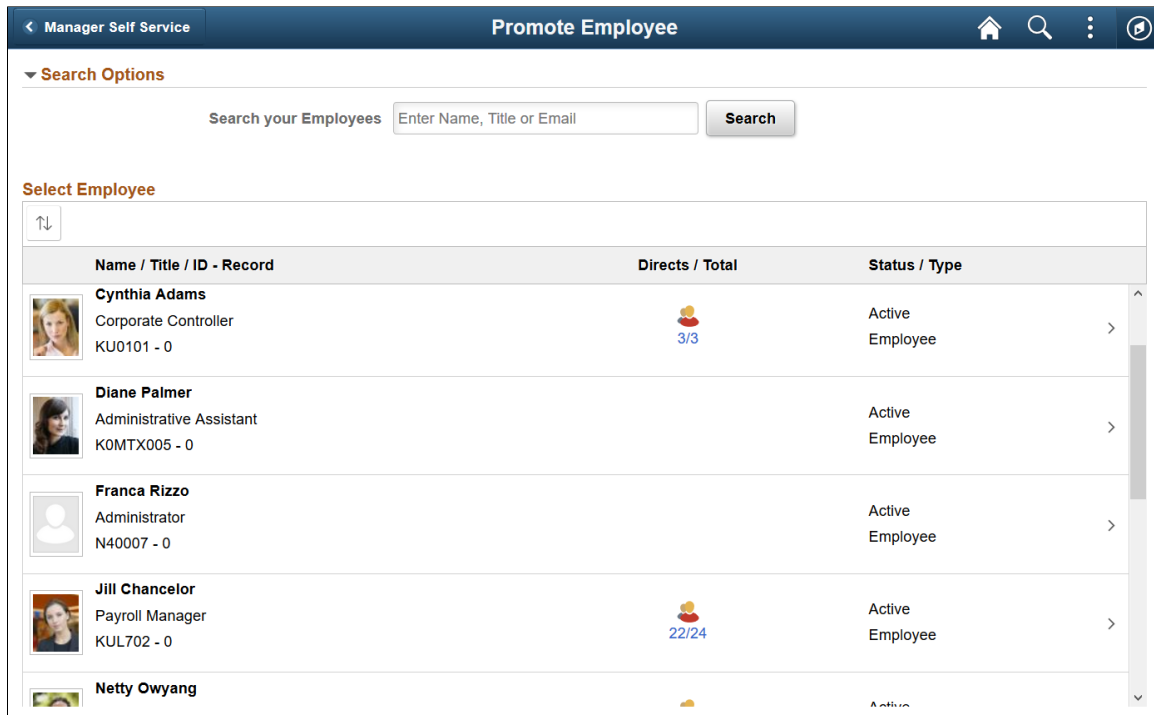
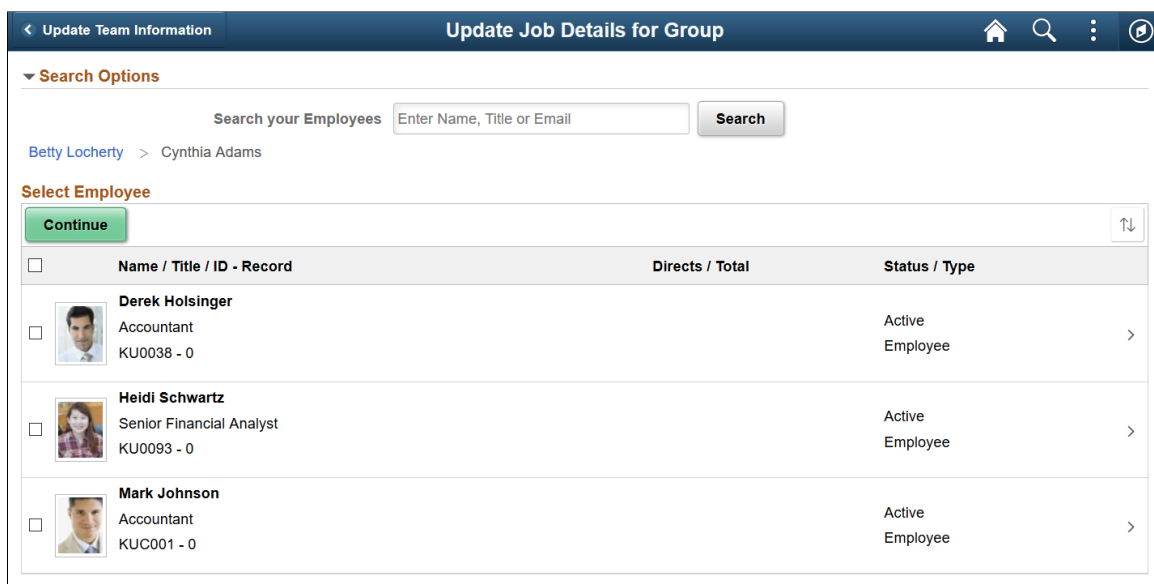


Image: <Transaction Name> page for selecting multiple employees

This example illustrates the following <Transaction Name> page for the *Update Job Details for Group* transaction, which allows you to select multiple employees.

In this example, The user (Betty Locherty) has drilled down in her reporting structure, so the reporting structure for the current list of employees appears above the Select Employee list.



Search Options

Search Your Employees	Enter a name, title, or email address as your employee search criteria.
Search	Click to perform the search.

Select Employee

The employee selector initially shows the user's direct reports. Managers can use the search options or navigate to lower levels in the reporting hierarchy to change the list.

The reporting hierarchy is the same hierarchy that managers see on the [My Team – Summary Page](#).

<Reporting Hierarchy Breadcrumbs>

When managers drill down into the reporting hierarchy, breadcrumbs at the top of the page show the management hierarchy from the user to the currently displayed group of employees.

When managers view their own direct reports, no breadcrumbs appear.

Directs/Total

Displays the number of direct reports and the total number of employees who report to the employee. Click this icon to drill down through the reporting hierarchy.

This column is blank for employees who do not have any direct reports.

Selecting a Single Employee

Employee	For transactions other than <i>Update Job Details for Group</i> , click an employee to initiate the guided self-service process for that employee.
-----------------	--

Selecting Multiple Employees

The *Update Job Details for Group* transaction allows you to select multiple employees, so the employee selection interface is slightly different.

These page elements appear only for the Update Job Details for Group transaction.

Continue	Click this button to start the <i>Update Job Details for Group</i> transaction after you finish selecting employees.
<Select>	Click the check box for an employee to include the employee in the transaction. Selecting an employee does not select that employee's direct reports.

Important! If you change the employee list, either by navigating to a different level of the reporting hierarchy or by performing a search, any previous selection is cleared. This behavior keeps you from losing track of who has been selected—the only selected employees are those who are selected in the currently shown list.

The *Update Job Details for Group* transaction displays the list of selected employees on all guided self-service pages. You can remove employees on the Questionnaire page, but after you continue past the questionnaire, you cannot change your selection except by restarting the transaction.

If you are updating department or location information, make sure all selected employees are in the same business unit.

Otherwise you will not be able to continue past the transaction questionnaire.

Questionnaire Page

Use the Questionnaire page (HR_MSS_CT_QUES_FL) to answer questions that determine which pages and fields appear in the guided self-service transaction.

Note: This page appears only for guided self-service transactions that are configured with at least one non-hidden question. The only delivered transactions that include the Questionnaire page are *Promote Employee*, *Demote Employee*, *Transfer Employee*, and *Update Job Details for Group*.

Navigation

Access a guided self-service transaction that includes a questionnaire.

Image: Questionnaire page for a single employee

This example illustrates the Questionnaire page for the Promote Employee transaction. All transactions except *Update Job Details for Group* are for a single employee, whose information appears at the top of the page.

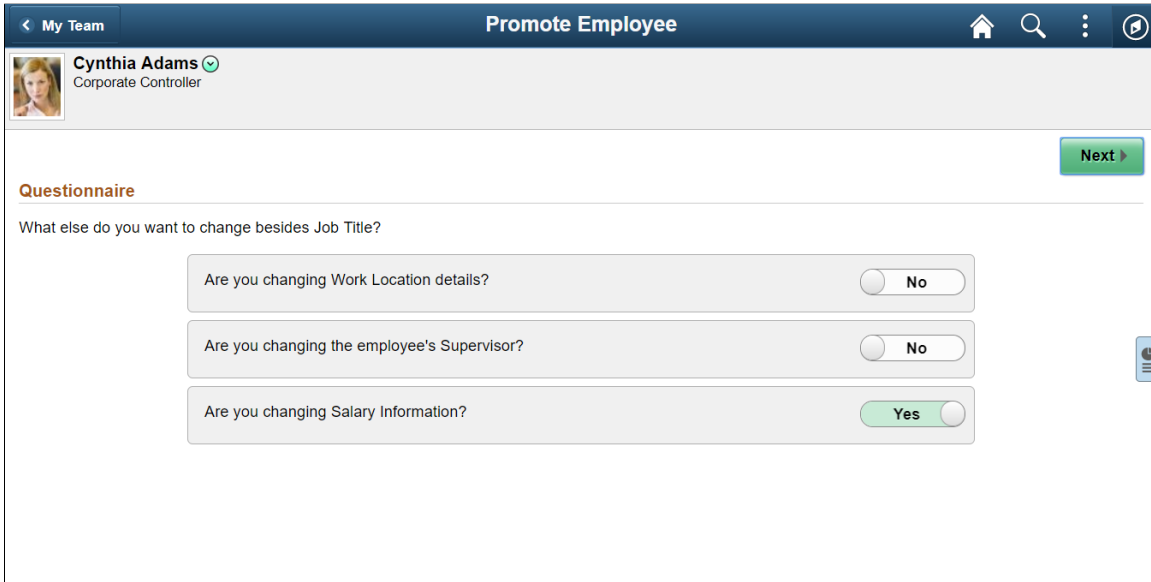
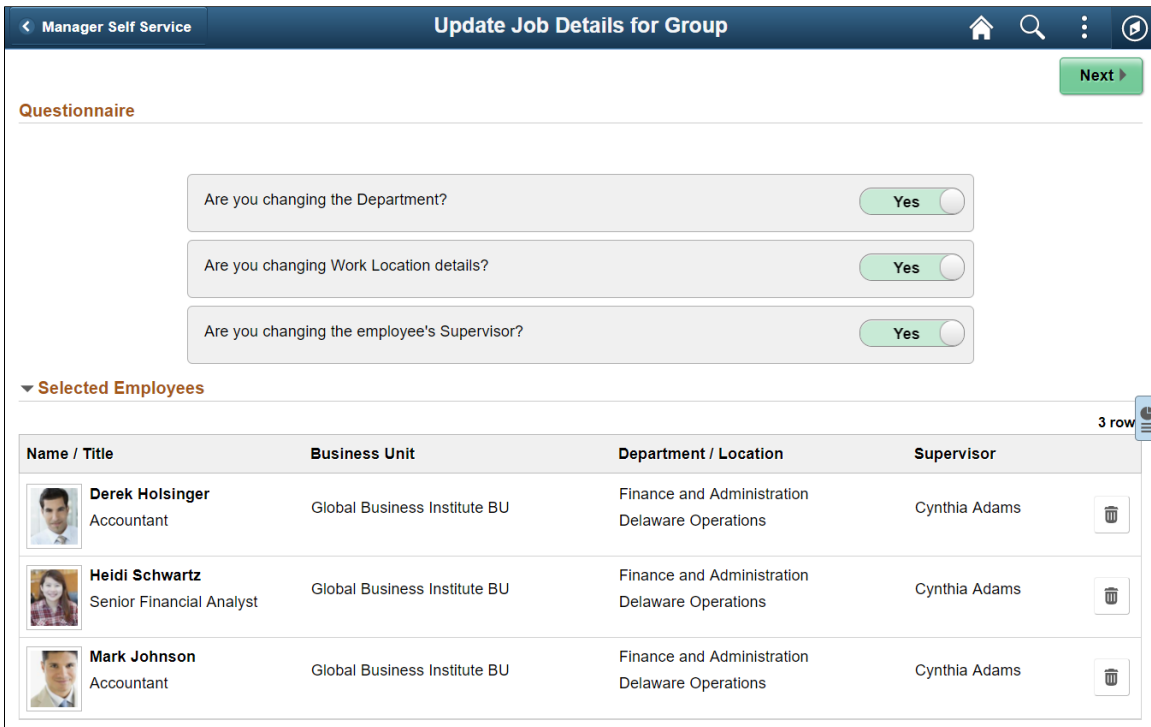


Image: Questionnaire page - Update Job Details for Group transaction

This example illustrates the Questionnaire page for the *Update Job Details for Group* transaction. Because this transaction allows multiple employees, the page displays a Selected Employees list rather than displaying a single employee's information at the top of the page.



Employee Information

For transactions other than *Update Job Details for Group*, the Questionnaire page includes a header with identifying information about the employee whose data is being updated.

Questionnaire

The on-page instructions, the questions that follow the instructions, and the default answers to the questions are all configured on the [Transaction Configuration - Questionnaire Page](#). When you configure questions, you can choose alternate text to use on small form factors.

Yes or No

Swipe a Yes/No slider to answer a question. The selected answers determine the pages and fields that appear in the transaction.

Next

Select this button to move to the next step in the guided self-service transaction.

An error appears if the *Update Job Details for Group* transaction includes employees from multiple business units and your questionnaire answers indicate that you want to change department or work location data.

Selected Employees

This section appears only for the *Update Job Details for Group* transaction. It lists the employees whose data is being updated. The list appears even if the user selects just one employee.



Delete

Click this icon to remove an employee from the *Update Job Details for Group* transaction without going back to the page for selecting employees. If there is only one employee in the list, you cannot delete that employee.

You cannot add employees on this page. To add employees, restart the transaction.

Related Content and Decision Support

Guided self-service transactions include an infrastructure that enables you to provide managers with decision making support and other related content. When you configure the transaction, you list message catalog entries for specific topics that you want managers to be able to access.

If you use PeopleTools 8.55 or later, you can also give managers access to PeopleTools simplified analytics. The delivered role *PivotGridSuperUser* gives users the ability to create and publish reports. Because guided self-service analytics can contain sensitive employee data, users should not publish such reports to the tile repository.

For more information about simplified analytics, see *PeopleTools: Pivot Grid*.

Use these page controls to access related information:



(Supplementary Panel tab button)

This tab appears only in PeopleTools 8.55 or later.

Click this tab to open the Related Content panel. The Related Information pane lists topics that have been configured for the transaction.

Note: This tab appears on the guided self-service pages as well as on the Questionnaire page.

Image: Related content panel for the Questionnaire page in PeopleTools 8.55 and later

This example illustrates the related content panel on the Questionnaire page in PeopleTools 8.55 and later.

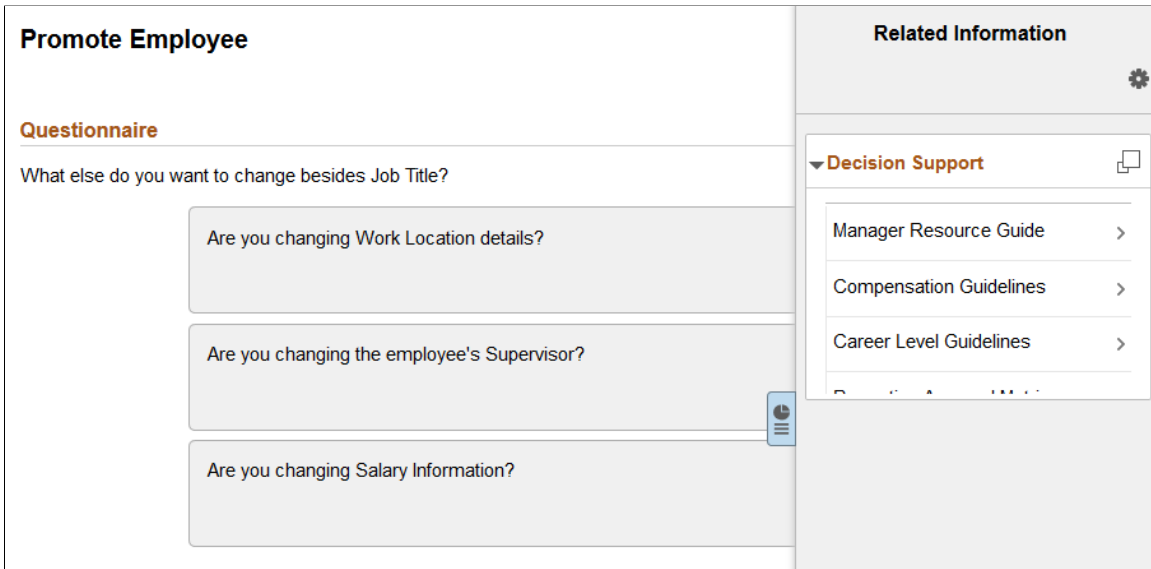
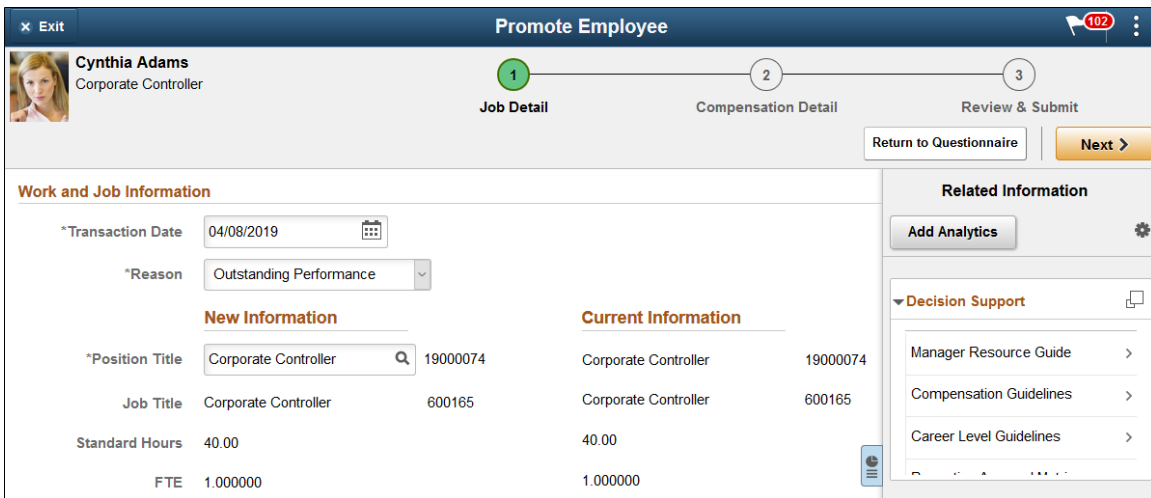


Image: Related content panel for non-Questionnaire guided self service pages in PeopleTools 8.55 and later

This example illustrates the related content panel for non-Questionnaire pages in PeopleTools 8.55 and later.



Add Analytics

This button is not available on the Questionnaire page.

Click to access the simplified analytics capabilities provided by PeopleTools 8.55 and later and create a new chart. When you select to add a new analytic report, the system opens the Create Analytics page where you will use the Analytics Wizard to guide you through the process of creating a new report. The system uses templates based on transaction page from which you are creating the new report. The templates determine the fields and prompts in the next step of the wizard.

The delivered role PivotGridSuperUser gives users the ability to create and publish reports.

For information on how to create simplified analytics, see PeopleTools: Pivot Grid, “Working with Simplified Analytics,” Creating Simplified Analytics.

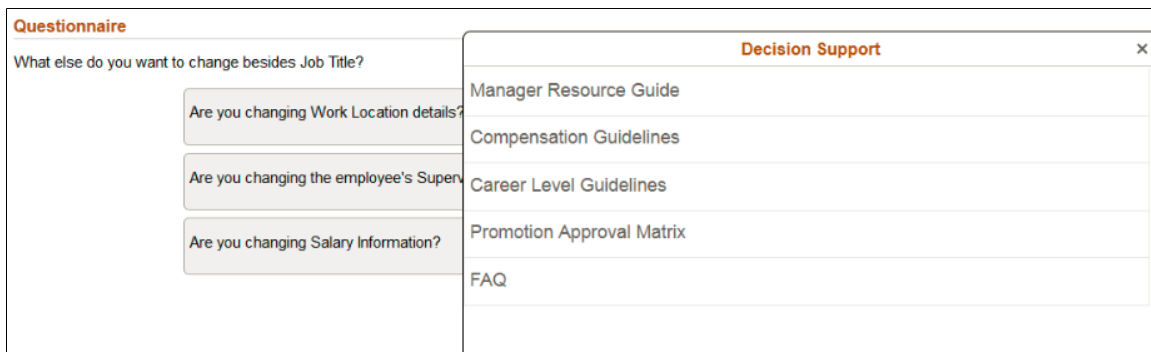


(Display Decision Support in Modal icon)

Click this icon to expand and open the [Decision Support Page](#) in a modal window, where you can view the complete list, text and details of the decision support topics.

Image: Decision Support panel in PeopleTools versions earlier than 8.55

This example illustrates the Decision Support panel in PeopleTools versions older than 8.55



Click the Decision Support button then click an area of interest to view specific content. Use the back arrow buttons or use the Exit icon (X) to return to previous pages.

Decision Support Page

Use the Decision Support page (HR_MSS_CT_DSUP_FL) to view decision support topics that are defined in the transaction configuration.

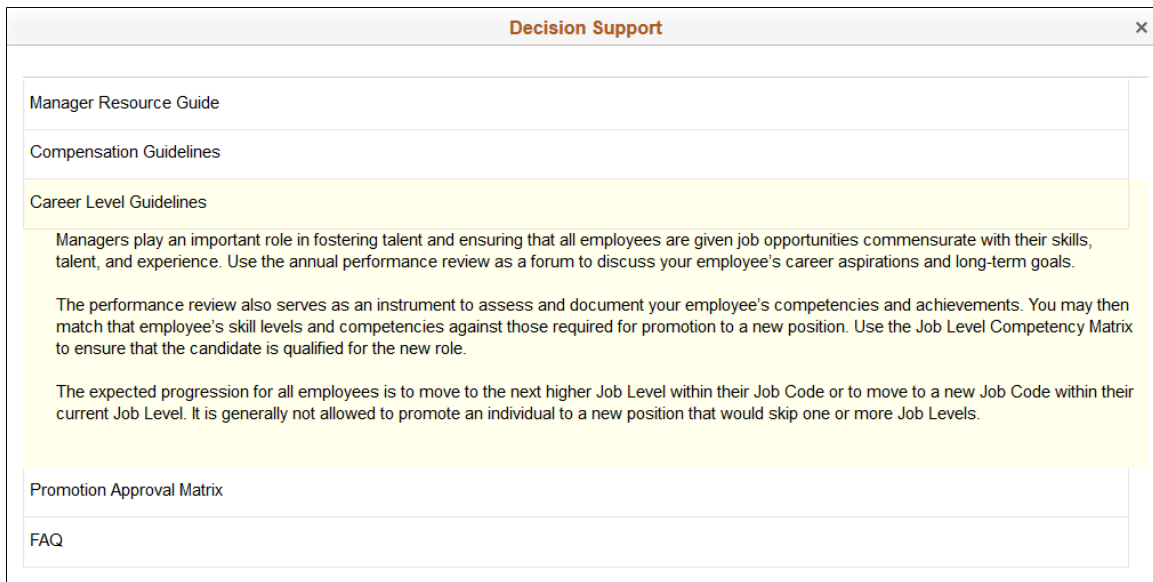
Note: This page appears in PeopleTools 8.55 or later. With earlier versions of PeopleTools, decision support appears in a panel on the Questionnaire page.

Navigation

Open the Related Information panel on the Questionnaire page. On the Decision Support tab, click the Display Decision Support in Modal Window icon (this icon is next to the Decision Support title).

Image: Decision Support page

This example illustrates the Decision Support page.



This page lists the decision support topics that are defined in the transaction configuration. Click a topic title to expand it and view the full text for the topic, then click again to hide the text and return to the list of topics.

Common Header for Guided Self-Service Pages

A common header appears on the pages for each post-questionnaire step in a guided self-service transaction. Use this header for navigation and to provide context.

The header on small form factor devices (phones) differs from the standard header.

Image: Guided self-service page header

This example illustrates the guided self-service header on larger devices.

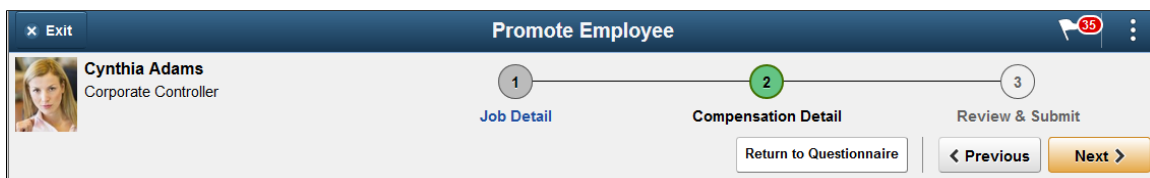
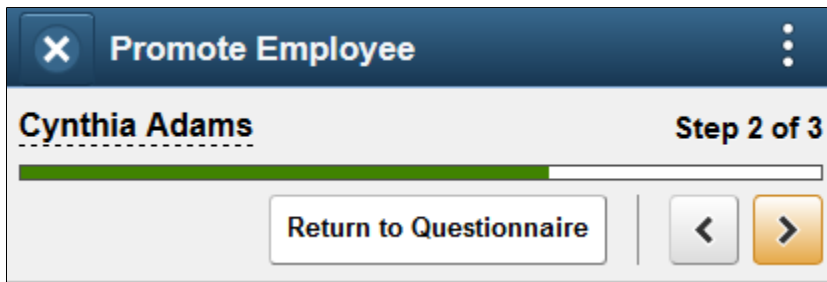


Image: Guided self-service header on small form factors

This example illustrates the guided self-service header on small form factors.



The common header in PeopleTools 8.55 and higher is rendered by the Activity Guide framework and is slightly different from the header that appears with earlier versions of PeopleTools. These differences are pointed out in the following documentation.



or **Exit**

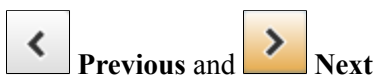
Click to exit the transaction entirely and return to the page where the transaction was invoked.

In pre-Activity Guide systems, users see the standard fluid return button, labeled with the name of the page that will appear when the user exits.

<Standard Banner Icons>

When the common header is rendered by the Activity Guide framework, most of the standard banner icons are hidden, including icons such as Home and Navigator which would lead the user away from the activity. This keeps users focused on completing the steps in this transaction.

The Notifications icon is still available in guided self-service transactions. On larger devices it appears as a banner icon, but on small form factor devices, it appears as an option in the Actions List menu.



Previous and **Next**

Click to navigate to the previous or next step in the transaction.

In pre-Activity Guide systems, these buttons appear below the header area rather than in the header area.



or **Actions List button**

The icon for the Action List button depends on your version of PeopleTools. Click the icon to access a menu with these options:

- **Return to Questionnaire:** this appears only if the transaction includes an end-user questionnaire. When the user returns to the questionnaire, transaction data is not saved, and the user must start the process over.
- **Home:** returns the user to the Fluid Home page.

In pre-Activity Guide systems, the Return to Questionnaire action is not in the actions menu. Instead, a Questionnaire button appears next to the Previous and Next buttons.

<employee information>

For the *Update Job Details for Group* transaction, the page displays a Group Update label and icon along with text stating how many employees are included.

For all other transactions, the page displays the name, job title, and photo for the individual employee whose data will be updated.

On small form factor devices, only the name or the *Group Update* label appears at the top of the page, but users can tap the text to display the additional information.

In pre-Activity Guide systems, a related actions button appears next to an individual employee's name. When the common header is rendered by the Activity Guide framework, this button is hidden to keep users focused on completing the steps in this transaction.

<graphical representation of steps>

On larger devices, the header area includes a graphical representation of the steps in the transaction. This list includes step names and numbers. Users can click a step to go directly there as long as steps are completed sequentially.

On small form factor devices, the header shows an overall progress indicator. The progress indicator does not show step names, but it shows the text *Step n of n* along with a progress bar that gets filled in to indicate the percentage completion. You cannot click this header to navigate to different steps.

Work and Job Information Page

Use the Work and Job Information page (HR_MSS_CT_PG1_AGFL or HR_MSS_CT_PG1_FL) to enter work and job changes for an employee.

Navigation

- For transactions that include the Work and Job Information page but do not include a questionnaire, this page appears immediately when the user navigates to the transaction.
- For transactions that include a questionnaire, select the Next button from the Questionnaire page. (Answers to the questions might control whether the Work and Job Information page appears at all.)
- Select the Work and Job Information step in the graphical map of the steps in the transaction.

Image: Work and Job Information page

This example illustrates the Work and Job Information page, which appears under the Job Detail step in the guided process.

Guided self-service transactions include this page when the transaction includes an update to the job or work location data. The fields on this page vary based on setup and on the answers to the questions on the [Questionnaire Page](#).

Note: Guided Self Service will not update Job Data with blank field values.

Transaction Date

The default transaction date is the current date. This date is used as the effective date of the data changes.

If a transaction has been configured to include the Last Date Worked field, the last date worked must be equal to or earlier than the transaction date. The default last date worked is the day before the transaction date. The Last Date Worked field is normally relevant only to the Terminate Employee and Retire Employee transactions.

Reason

Select an action reason to use for the job data row that will be created when this transaction is submitted and approved. The transaction configuration controls whether this field appears, whether it is required, the list of available values, and the default value.

Position Data Message

If you use the Promote Employee, Demote Employee, or Transfer Employee transaction to change which position an employee holds, a message appears if the position data is overridden in the employee's job data. The message states that job data must be updated manually.

If the employee is in a position and the position data is *not* overridden in the employee's job data, a message appears when you make changes to data that is derived from the position:

- If the system is able to automatically update the position data, the message states that position data will be updated. This is possible only for transactions that have been explicitly configured to update position data.
- If the system is not able to update the position data automatically, the message indicates that the Human Resources department will be notified that the transaction needs to be processed.

See [Understanding Updates to Position Data](#).

New Information

Enter the new data for the employee in this column. The fields that appear on this page depend on the transaction configuration.

If the Standard Hours field appears, a read-only FTE (full-time equivalent) field also appears, and the system updates the FTE value when the user changes the standard hours.

The employee's business unit controls the valid values for fields such as Department and Location that are controlled by setID.

The *Update Job Details for Group* transaction requires that all selected employees have the same business unit.

Some page elements can vary depending on whether the employee is in a position:

- When performing a *Promotion, Demotion, or Transfer* transaction for an employee in a position, the page prompts the user to enter a new position number. If the employee is not assigned to a position, then the page prompts the user to enter a new job code.

To move an employee from a job code to a position, or vice versa, the request should be handled by an HR administrator rather than through guided self-service.

- The Reports To field appears only for employees in positions, while the Supervisor ID appears for employees who are not in positions, or whose Reports To position data has been overridden with a Supervisor ID.

The Reports To field displays the position to which the employee reports rather than the person to whom the employee reports, so if this field is shown, the page also displays a read-only Manager Name field.

- For the *Update Job Details for Group* transaction, the Reports To field appears if all employees are in positions. The Supervisor ID appears if at least one employees is not

in a position. (An employee who reports to a supervisor as the result of a position override is not considered to be in a position.)

If the group includes a mix of employees in positions and employees not in positions, the Supervisor ID field has the following logic:

- If the selected supervisor is not in a position, a message indicates that the supervisor cannot be automatically assigned as the manager for employees who are in positions. All position employees in the group are sent to an administrator for processing
- If the selected supervisor is in a position, a Reports To field displays the supervisor's position.
- If the selected supervisor is in multiple positions, the Reports To field becomes a drop-down list of those positions, and the user must select the position to which the employees in positions will report.

Current Information

This column displays the employee's current data.

With the *Update Job Details for Group* transaction, it is possible for the selected employees to have different current information.

When this occurs, the field indicates that there are multiple values. For example, if the selected employees are currently in different locations, the current information for the Location field is *Multiple Locations*.

Selected Employees

For the *Update Job Details for Group* transaction, this section lists the employees whose data is being updated.

If the list includes position employees whose data cannot be automatically updated, a lock icon appears in the last column of the grid. Additionally, the page includes informational text to explain that an administrator will complete the processing for the position data.

Position data cannot be automatically updated when an employee has a position data override, when a position has multiple incumbents, or when position data is not activated for the *Update Job Details for Group* transaction.

Compensation Details Page

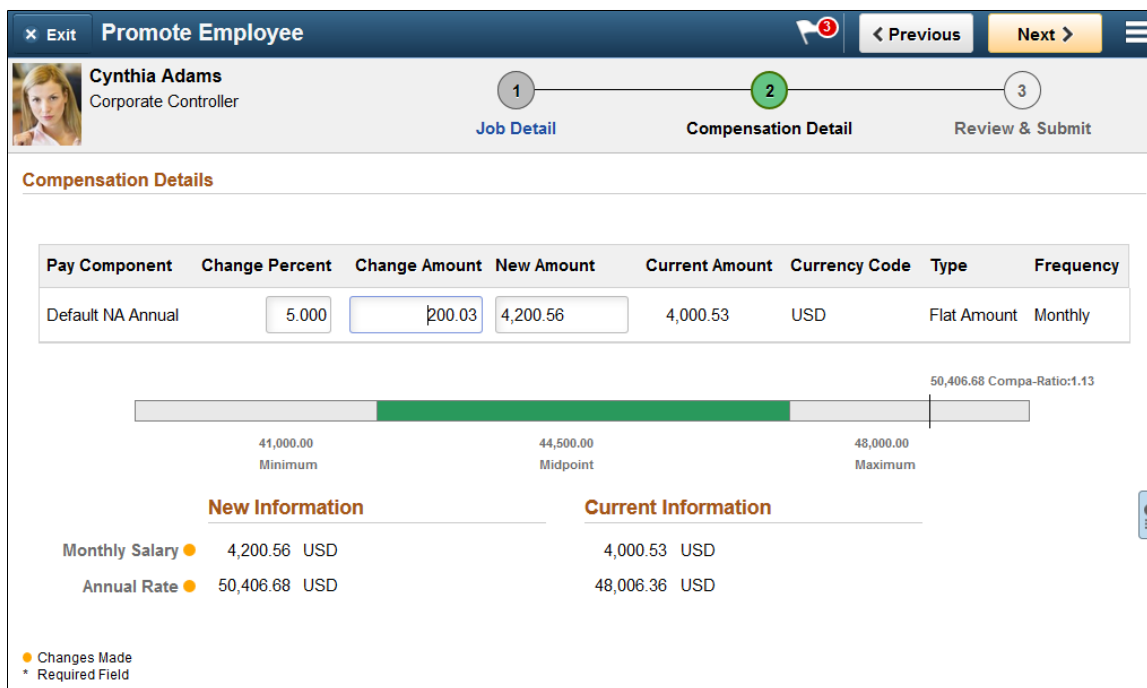
Use the Compensation Details page (HR_MSS_CT_PG2_AGFL or HR_MSS_CT_PG2_FL) to enter compensation changes for an employee.

Navigation

- Select the Next button from the previous page in the guided self-service transaction.
- Select the Compensation Details step in the graphical map of the steps in the transaction.
- For transactions that include the Compensation Details page but do not include a questionnaire or the Work and Job Information page, this page appears immediately when a user navigates to the transaction.

Image: Compensation Details page

This example illustrates the Compensation Details page.



The guided self-service transaction includes this page when the transaction requires an update to the compensation data. The fields on this page vary based on setup and on the answers to the questions on the Questionnaire Page.

Note: Guided Self Service will not update Job Data with blank field values.

The navigation buttons (Questionnaire, Previous, and Next) are the same on this page as on the Work and Job Information page.

Pay Component

For each pay component listed, enter the salary change details. When you enter a number in either the Change Percent, Change Amount, or New Amount fields and move from the field, the system automatically calculates and updates the other fields based on your entry.

Note: To decrease the employee's salary enter a negative adjustment in the Change Percent or Change Amount field. The Demote Employee transaction displays a warning if you enter an adjustment that is not negative.

Salary Range Graphic

The graphical representation of the annual pay range for the employee's job or position provides a helpful visualization of where the new salary amount falls in that range. If this transaction includes a new job or position, the visualization is based on the new pay range.

New Information

Displays the new salary information.

Current Information

Displays the employee's current salary information.

Clone Position Page

Use the Clone Position page (HR_MSS_POSN_AGFL) to enter or update position data to create a new position based on an existing one.

Note: This page is available only with PeopleTools 8.55 or later.

Navigation

Start a Clone Position guided self-service transaction.

Image: Clone Position page (1 of 2)

This is the first of two examples illustrating the Clone Position page.

The screenshot shows the 'Clone Position' page for user Cynthia Adams, Corporate Controller. The page is divided into two main sections: 'Position Details' (indicated by a green circle with '1') and 'Review and Submit' (indicated by a grey circle with '2').

Clone Position

- *Transaction Date: 02/13/2017

Job Information

- *Business Unit: GBIBU (Global Business Institute BU)
- Short Title: Controller
- *Job Code: 600165 (Corporate Controller)
- Long Description: Corporate Controller
- *Title: Corporate Controller
- *Reg/Temp: Regular
- Max Head Count: 1
- *Regular Shift: Not Applicable
- Union Code: [Search]
- *Full/Part Time: Part-Time

Work Location

- *Department: 13110 (Corporate Accounting)
- *Regulatory Region: USA (United States)
- *Location: KUNY00 (Corporation Headquarters)
- *Company: GBI (Global Business In)
- Reports To: 19000230 (Finance Director)
- Supervisor Level: [Search]

Image: Clone Position page (2 of 2)

This is the second of two examples illustrating the Clone Position page.

The screenshot shows the 'Work Information' and 'Encumbrance Information' sections of the Clone Position page.

Work Information

- *Standard Hours: 40.00
- Work Period: W (Weekly)
- Work Schedule:

Mon	Tue	Wed	Thu	Fri	Sat	Sun
8.00	8.00	8.00	8.00	8.00		

Encumbrance Information

- Position Pool ID: [Search]
- Classified/Unclass... Ind: Classified
- Encumbrance Indicator: Encumber Immediately
- FTE: 1.000000
- Encumber Salary Option: Salary Step
- Adds to FTE Actual Count: No

Legend: ● Changes Made, * Required Field

Use the Next button to continue to the Review and Submit page after looking at the position data fields and making any necessary changes.

The position data fields on this page vary based on setup. They correspond to the fields on the "Position Data - Description Page" (PeopleSoft HCM 9.2: Human Resources Manage Positions) and the "Position Data - Specific Information Page" (PeopleSoft HCM 9.2: Human Resources Manage Positions).

The default values in all of the fields come from the position of the employee whose position is being cloned. Unlike other guided self-service transaction, there is no requirement for the user to change any data. However, there is also no requirement to retain any of the data. Managers are free to keep all, some, or none of the default values in the fields that appear on this page.

Here is additional important information about certain fields on this page:

- The Mon through Sun day-of-the-week fields for daily hours are visible only if the work period is *W* (weekly).

When these fields are visible, and the user updates the standard hours, the system automatically updates the Mon through Sun fields by distributing the an equal number of hours across Monday through Friday.

- As delivered, the transaction does not display the Company field. Even when the Company field is hidden, its value can change if the manager selects a Department that is in a different company.
- As delivered, the transaction does not display the encumbrance related fields.

The encumbrance-related fields are Position Pool ID, Encumbrance Indicator, Encumber Salary Option, Classified/Unclassified Ind, FTE, and Adds to FTE Actual Count.

- The clone process copies data from all fields that can be configured to appear, even those that are hidden due to the transaction configuration.
- The clone process also copies the original position's salary plan, grade, and step unless the Business Unit is changed or cleared, in which case the system clears this data for the new position.

The salary-related fields are not part of the transaction configuration, so they are never visible on this page. An administrator is responsible for verifying that the newly created position has the correct salary information. If administrator approvals are required, this review can be done on the administrator approval page, where the administrator can update the fields before approving the transaction.

- If the Business Unit is changed or cleared, the system also clears the Department, Job Code, and Location fields, and the user sees a warning.
- The Update Incumbents check box is always selected in new positions that are created by the delivered *Clone Position* transaction.

Review and Submit Page

Use this Review and Submit page (HR_MSS_CT_SBM_AGFL or HR_MSS_CT_SUBMT_FL) to review transaction information, to add comments, and to submit a request.

Navigation

Select the Next button from the previous page, or select this step in the graphical representation of the transaction steps.

Image: Review and Submit page for an employee transaction

This example illustrates the fields and controls on the Review and Submit page for an employee transaction.

Promote Employee Exit Previous Submit

Cynthia Adams
Corporate Controller

1 Job Detail 2 Compensation Detail 3 **Review & Submit**

Review and Submit

Transaction Date: 11/12/2016
Reason: Outstanding Performance

New Information		Current Information	
Position Title	Human Resource Analyst	10000002	Corporate Controller 19000074
Job Title	Analyst-Human Resources	140065	Corporate Controller 600165
Full/Part Time	Full-Time		Full-Time
Standard Hours	40.00		40.00
Monthly Salary	4,200.56 USD		4,000.53 USD
Annual Rate	50,406.68 USD		48,006.36 USD

Comments

Attachments
No documents have been attached.
[Add Attachment](#)

● Changes Made
* Required Field

Image: Review and Submit page for the Clone Position transaction

This example partially illustrates the Review and Submit page for the *Clone Position* transaction. The Comments and Attachments sections are not shown, but they are the same for the Clone Position transaction as for employee transactions.

The screenshot displays the 'Review and Submit' page for a 'Clone Position' transaction. At the top, there is a navigation bar with 'Exit', 'Clone Position', 'Previous', and 'Submit' buttons. Below this, the user's name 'Cynthia Adams' and title 'Corporate Controller' are shown. A progress indicator shows two steps: 'Position Details' (1) and 'Review and Submit' (2). The main content area is divided into several sections:

- Review and Submit:** Transaction Date: 03/16/2017
- Job Information:**
 - Business Unit: GBIBU, Global Business Institute BU
 - Job Code: 600165, Corporate Controller
 - Title: Corporate Controller
 - Reg/Temp: Regular
 - Regular Shift: Not Applicable
 - Full/Part Time: Full-Time
 - Long Description: Corporate Controller
 - Max Head Count: 1
 - Union Code:
- Work Location:**
 - Department: 13110, Corporate Accounting
 - Location: KUNY00, Corporation Headquarters
 - Reports To: 19000230, Finance Director
 - Regulatory Region: USA, United States
 - Company: GBI, Global Business Institute
 - Supervisor Level:
- Work Information:**
 - Standard Hours: 40.00
 - Work Period: W, Weekly
 - Hours by Day: Mon (8.00), Tue (8.00), Wed (8.00), Thu (8.00), Fri (8.00), Sat, Sun
- Encumbrance Information:**
 - Position Pool ID:
 - Encumbrance Indicator: Encumber Immediately
 - Encumber Salary Option: Salary Step
 - Classified/Unclassified Ind: Classified
 - FTE: 0.500000
 - Adds to FTE Actual Count: No

Note: Guided Self Service will not update Job Data with blank field values.

Submit

Select this button to finalize the transaction and, if approvals are required, to begin the approval process.

If no errors are encountered, the system displays a confirmation page that shows the approval chain. If errors are encountered, the HR administrator is notified.

If approvals are not required, the confirmation page appears after the system makes the related database updates. For the *Update Job Details for Group* transaction, processing time increases with the number of employee records that are being updated.

Transaction Details for Employee Transactions

Transactions other than the *Clone Position* include a Review and Submit area that displays transaction information. The transaction date appears at the top of the page.

Reason	<p>Employee data changes are associated with an action and an action reason. This field displays the action reason for that transaction.</p> <p>The action is never visible, but the transaction configuration determines whether the Reason field is visible.</p>
New Information	<p>This column displays the data that will take effect when the transaction is approved. A yellow dot between the field name and the field value indicates data that is changing.</p> <p>To change a value, return to the appropriate page in the transaction to make the changes.</p>
Current Information	<p>This column displays the employee's current data so that you can easily see the changes that are being requested.</p>
Selected Employees	<p>For the <i>Update Job Details for Group</i> transaction, this section lists the employees whose data is being updated.</p>

Transaction Details for Clone Position

The same sections and fields that appeared on the Clone Transaction page appear on the Review and Submit page for the transaction. The transaction date appears at the top of the page.

Comments

Comments Enter additional comments for the transaction's approvers and reviewers. Comments entered here are visible throughout the approval process.

Attachments

Use the Attachments section of this page to attach supporting documents for a transaction. This section is visible only if the transaction is configured to allow attachments.

The attachments that you add here will appear in all transaction detail pages, including pages for approvers, administrators, and reviewers. The file itself is never duplicated, there are just multiple pointers to the file.

The list of transactions on the fluid Pending Approvals page includes a count of attachments for transactions that have attachments.

Approval-related notifications do not include information about attachments.

After you add an attachment to the transaction, a grid appears in the Attachments area of the page.

Image: Attachments grid on the Review and Submit page

This example illustrates the Attachments grid on the Review and Submit page.

Attachments			
File Name	Description	Date Time Attached	
C_Adams_Promotion_Justification.pdf	Promotion Justification	11/12/16 10:47:09PM	



Add Attachment

Click to open a dialog box where you can select and upload a file. Your device and browser determine the appearance and behavior of this dialog box.

Allowable file types depend on your configuration and can be further restricted by the type of device you use. For example, iOS phones allow you to attach photos or videos, but they do not provide access to a full file system where you can select other types of attachments.

This button has a text label when no attachments have been added yet. If attachments exist, an icon button appears instead.

File Name

Displays the original file name of the attachment. Click the link to open the attachment.

Description

The default description is the file name, but you can modify this to provide more descriptive text.

Date Time Attached

Displays the date and time that the file was uploaded.



Delete

Click to remove the attachment.

<Transaction Name> Page for Reviewing Submitted Transactions

Requestors and reviewers use the <Transaction Name> page (HR_MSS_CT_EE) to review read-only information about a guided self-service transaction that has been submitted for approval.

The page name varies depending on the transaction type.


Navigation

This page is accessible only using an email link. The system sends requestors and reviewers an email with this link after the requestor submits a guided self-service transaction.

Image: <Transaction Name> page for reviewing submitted transactions for employees

This example illustrates the read-only page that submitters and reviewers use to view a guided self-service transaction that updates employee data.

Request Reporting Change



Rosanna Channing
Senior Accounting Manager

Transaction Details

Transaction Date	03/23/2015		
Workflow Status	Administrator is Processing		
Effective Sequence	2		
Requestor	Betty Locherty		

	After Approval		Before Approval
Job Title	Senior Accounting Manager 600135		Senior Accounting Manager 600135
Supervisor	Jean Parsons KU0003		Betty Locherty KU0007

Reporting Chg Approval Chain

⌵ **Approved**
 View/Hide Comments

Reporting Chg Approval Chain

Approved

Jean Parsons
GSS RepChg Appr Selection
03/23/15 - 9:57 AM

Comments

Jean Parsons-HCQAN-HCRUSA at 03/23/15 - 9:57 AM
Approved.


Betty Locherty-PS at 03/23/15 - 9:48 AM
Please approve this request.

Changes Made

Image: Clone Position page for reviewing submitted transactions

This example illustrates the read-only page that submitters and reviewers use to view a *Clone Position* transaction.

Clone Position



Cynthia Adams
Corporate Controller

Transaction Details

Transaction Date	03/16/2017
Workflow Status	
Effective Sequence	3
Requestor	Betty Locherty

New Position Details

Title	Corporate Controller	Short Title	Controller
Business Unit	GBIBU Global Business Institute	Long Description	Corporate Controller
Job Code	600165 BU Corporate Controller	Max Head Count	1
Reg/Temp	Regular	Union Code	
Regular Shift	Not Applicable	Regulatory Region	USA United States
Full/Part Time	Full-Time	Supervisor Level	
Department	13110 Corporate Accounting	Standard Hours	40.00
Location Code	KUNY00 Corporation Headquarters Finance Director		
Reports To	19000230		
Salary Plan	KU01		
Salary Grade	004		
Step			
Work Period	W Weekly		
	Mon Tue Wed Thu Fri Sat Sun		
	8.00 8.00 8.00 8.00 8.00		
Position Pool ID			
Pre-Encumbrance Indicator	Encumber Immediately	Classified Indicator	Classified
Encumber Salary Option	Salary Step	FTE	0.000000
Encumber Salary Amount	0.000	<input type="checkbox"/>	Adds to FTE Actual Count

Note: Guided Self Service will not update Job Data with blank field values.

Approving Guided Self-Service Transactions

This topic provides an overview of approvals for guided self-service transactions and discusses how to approve those transactions.

This topic describes both the fluid approval pages and the classic approval pages for guided self-service. For general information about Fluid Approvals, see "Using PeopleSoft Fluid User Interface Self-Service Approval Transactions" (PeopleSoft HCM 9.2: Application Fundamentals).

Pages Used to Approve Guided Self-Service Transactions

Page Name	Definition Name	Usage
<u>Fluid <Transaction Name> Page for Guided Self-Service Approvals</u>	EOAWMA_TXNHDTL_FL	Review and approve a guided self-service request using Fluid Approvals.
<u>Salary Change Details Page</u>	HR_MSS_CT_MACMP_FL	Review detailed information about proposed changes to an employee's salary.
<u>Salary Grade Information Page</u>	HR_MSS_CT_MAGR_SCF	Review an employee's proposed salary changes in the context of the employee's salary grade.
<u>Attachments Page</u>	HR_MSS_CT_MAATT_FL	View files that the requester attached to a guided self-service transaction.
<u>Classic <Transaction Name> Page for Guided Self-Service Approvals</u>	HR_MSS_CT_APPR	Review and approve a guided self-service request using a classic (non-fluid) page.
<u><Transaction Name> Page for Final Administrator Approval</u>	WF_MSS_CT_EE	Perform an administrator approval action for a guided self-service transaction, and choose whether to make the database updates automatically (if possible) or manually.

Understanding Approvals for Guided Self-Service

This overview discusses the standard approvals for guided self-service transactions and the additional administrator approval that occurs when transactions are configured to require this extra approval.

Standard Approvers

When you configure a guided self-service transaction, you can identify an approval process to use for the transactions. The approval processes, which determines who approves the transaction, is defined using the common Approval Framework. For more information, see "Understanding Approvals" (PeopleSoft HCM 9.2: Application Fundamentals).

Both fluid and classic pages exist for approving guided self-service transactions.

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

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

The following navigation options provide access to classic approval pages, but if the approver has security access to the fluid approval pages, conditional navigation will redirect the user to the fluid Pending Approvals page.

- Access the "Review Transactions Page" (PeopleSoft HCM 9.2: Application Fundamentals), then click the Approve/Deny link for a guided self-service transaction.

- Click the link in the email that the system sends to approvers.

Administrator Approval

The "Workflow Configurations Page" (PeopleSoft HCM 9.2: Application Fundamentals) for self-service transactions includes an Allow DB Update (allow database update) check box. When this check box is selected, the system updates the database immediately after the transaction is approved by the final approver in the regular approval chain. However, if this check box is not selected, an administrator must complete the request

Administrators use the [<Transaction Name> Page for Final Administrator Approval](#) to perform this final step. (Although other types of transactions can receive final administrator approval on the Monitor Approvals page, the Monitor Approvals page is read-only for guided self-service transactions.)

The administrator's approval page lets the administrator choose whether to:

- Approve the transaction and automatically update the database.

This option is not available if the transaction updates a position-controlled field that cannot be automatically updated. Refer to the documentation for the [<Transaction Name> Page for Final Administrator Approval](#) page for additional details about when this occurs.
- Approve the transaction without updating the database. The administrator must then make the updates manually.
- Cancel the transaction

Note: In general, the page for final administrator approval does not permit the administrator to override transaction data. However, the *Clone Position* transaction is an exception, and administrators can edit any of the position data on the page.

Understanding Delivered Approval Process IDs for Guided Self-Service Transactions

Guided self-service approval processes are created using the common Approval Framework.

These are the approval transaction process IDs for the delivered guided self-service transactions:

- *GSSAdhocSalaryChange*
- *GSSDemoteEmployee*
- *GSSFTPTChangeEmployee*
- *GSSGroupUpdate*

Note: The *Update Job Details for Group* transaction creates a separate approval transaction for each employee in the group. This transaction type is enabled for mass approvals. That is, if you filter the Pending Approvals page so it displays only Group Update transactions, the page enables you to select one or more approval requests and act on all of them at once. For more information, see "Pending Approvals Page" (PeopleSoft HCM 9.2: Application Fundamentals).

- *GSSLeaveOfAbsence*

Note: This approval process is used for both paid and unpaid leave of absence transactions. Because the two leave of absence transactions share an approval process, pages that list pending approvals (the fluid Pending Approvals page and the classic Review Transactions page) put paid and unpaid leave requests in the same transaction category.

- *GSSLocationChange*
- *GSSPositionClone*
- *GSSPromoteEmployee*
- *GSSReportingChgEmployee*
- *GSSRetireEmployee*
- *GSSTerminateEmployee*
- *GSSTransferEmployee*

Note: If you create a new transaction or have specific approval requirements, an administrator can create, or clone, additional approval definitions within the same approval process.

Related Links

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

"Configuring Approval Transactions" (PeopleSoft 9.2: Approval Framework)

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

Fluid <Transaction Name> Page for Guided Self-Service Approvals

Use the fluid <Transaction Name> page (EOAWMA_TXNHDTL_FL) to review and approve a guided self-service request. The page title depends on the transaction type.

Navigation

Click the Approvals tile on the Manager Self-Service home page or the Notifications button in the Oracle banner to access the Pending Approvals page. Then click a guided self-service entry on the Pending Approvals page.

Image: Fluid <Transaction Name> page for guided self-service approvals (1 of 2)

This is the first of two examples illustrating the fluid <Transaction Name> page for guided self-service approvals. This example shows a Promote Employee transaction.

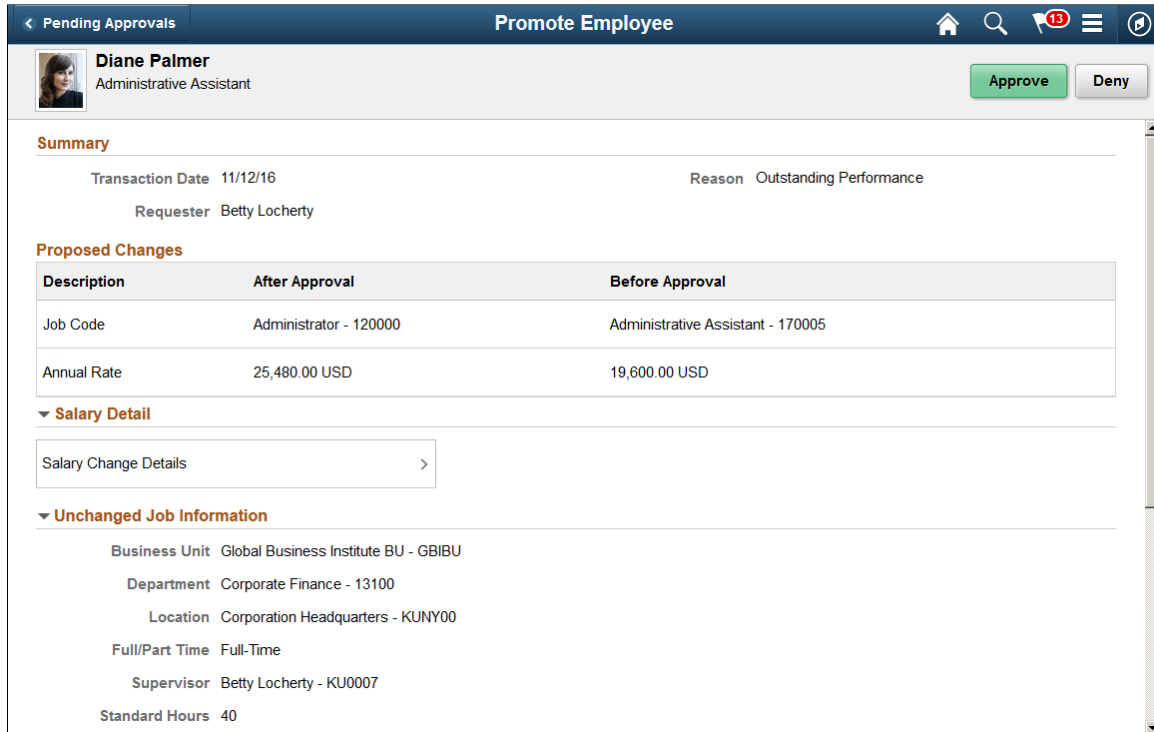


Image: Fluid <Transaction Name> page for guided self-service approvals (2 of 2)

This is the second of two examples illustrating the fluid <Transaction Name> page for guided self-service approvals.



Approval Options

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

Approve and Deny

Use these buttons to take action on the requested approval.

Summary

Transaction Date	Displays the effective date for the transaction (not the date that the transaction was submitted).
Requester	Displays the name of the manager who submitted the transaction for approval.
Reason	If the transaction specified a reason to use in the new job data row, that reason appears here.
Expected Return	This field is visible only for the <i>Request Leave of Absence</i> approval transactions (used for both paid and unpaid leave requests).

Proposed Changes

For transactions that update employee data, this grid lists the specific data changes that are being requested. The fields vary depending on the transaction.

This section is not shown for the delivered *Request Leave of Absence*, *Retire Employee*, or *Terminate Employee* transactions. The leave request transaction doesn't update job data fields other than the Expected Return field, which appears in the Summary section of this page. The retirement and termination transactions don't make any changes to job data fields—they simply insert a new job data row with an action reason to record the retirement or termination.

Description	Displays the name of the field to be updated. If the transaction includes salary changes, a single row in the grid shows the annual salary rate information. To view additional salary information, go to the Salary Detail section of this page and click the Salary Change Details item.
After Approval	Displays the proposed new value for the specified field.
Before Approval	Displays the current value of the specified field so that you can compare the old data to the proposed change.

Note: Guided Self Service will not update Job Data with blank field values.

Salary Detail

For transactions that update employee data, this section provides additional salary details. The section is hidden for transactions that do not change an employee's salary. The delivered transactions that include this section are *Ad Hoc Salary Change*, *Demote Employee*, *Promote Employee*, and *Transfer Employee*.

Salary Change Details	Click this item to open the Salary Change Details Page , where you can review the proposed salary changes for this transaction.
------------------------------	---

Unchanged Job Information

For transactions that update employee data, this section lists additional data that is relevant to the transaction but that is not changing. The fields in this section vary depending on the transaction.

If no fields are shown, the entire section is hidden. The delivered *Ad Hoc Salary Change* and *Full/Part Time Status* approval pages do not show any unchanged job information.

New Position Information

For the *Clone Position* transaction, this section displays the data for the new position that will be created. The transaction configuration controls which fields are visible.

Requester Comments

This section displays any comments that the requester added before submitting the transaction. If the requester did not enter any comments, the word *None* appears.

Attachments

Attachments

Click this item to open the [Attachments Page](#), where you can access files that the requester attached to the request.

Due to limitations on the number of sections that can appear on this page, certain transactions display this item within the Requester Comments section rather than in a separate Attachments sections.

Approver Comments and Approval Chain

Approver Comments

Enter any comments related to the approval action you take.

Approval Chain

Click this item to open the Approval Chain page, where you can review information about all approvers for the transaction.

Salary Change Details Page

Use the Salary Change Details page (HR_MSS_CT_MACMP_FL) to review detailed information about proposed changes to an employee's salary.

Navigation

Click the Salary Change Details item on a guided self-service fluid approval page.

Image: Salary Change Details page

This example illustrates the Salary Change Details page.

Salary Change Details ×				
Proposed Changes				
Salary Information	After Approval	Before Approval	Change Amount	
Monthly Salary	4,800.64 USD	4,000.53 USD	800.11 USD	
Annual Salary	57,607.63 USD	48,006.36 USD	9,601.27 USD	
Compa-Ratio	1.29	1.08	0.21	
Position In Range	120.00	100.00	20.00	
Pay Components				
Component	New Amount	Change Amount	Change Percent	Frequency
Default NA Annual	4,800.64 USD	800.11	20.000	Monthly
Salary Grade >				

Proposed Changes

This grid displays salary information for the employee.

The four rows in the grid display these types of salary information: *Monthly Salary*, *Annual Salary*, *Compa-Ratio*, and *Position in Range*.

For each type of salary information, the grid columns display the value after approval, the value before approval, and the change amount.

Note: Guided Self Service will not update Job Data with blank field values.

Pay Components

This grid displays information about each component of pay in the employee's salary. The grid displays the pay component name and frequency along with before and after information and the change percent.

Salary Grade

Click to access the [Salary Grade Information Page](#) to review an employee’s proposed salary changes in the context of the employee’s salary grade.

Salary Grade Information Page

Use the Salary Grade information page (HR_MSS_CT_MAGR_SCF) to review an employee’s proposed salary changes in the context of the employee’s salary grade.

Navigation

Click the Salary Grade item on the Salary Change Details page.

Image: Salary Grade Information page

This example illustrates the Salary Grade Information page.

Salary Grade Information ×

Summary

Job Title	Corporate Controller-600165
Salary Grade	Standard Pay Grade 4 - 004
Status	Full-Time
Salary Plan	USA Salary Administration Plan - KU01
Salary Step	0
Standard Hours	40.00

Salary Grade

Minimum	41,000.00
Maximum	48,000.00
Midpoint	44,500.00
Market Reference Point	0.00

Proposed Changes

Compa-Ratio	1.29
Annual Salary	57,607.63
Position In Range	120.00

Summary	This section displays the employee's job title; the salary grade, plan, and step; full-time/part-time status; and standard hours.
Salary Grade	This section displays the maximum, minimum, and midpoint salaries for the employee's salary grade.
Proposed Changes	This section displays the compa-ratio, annual salary, and position in range for the salary change that has been requested.

Note: Guided Self Service will not update Job Data with blank field values.

Attachments Page

Use the Attachments page (HR_MSS_CT_MAATT_FL) to view files that the requester attached to the transaction.

Navigation

Click the Attachments item on a guided self-service approval page. This item is visible only if the requester included an attachment with the request.

Image: Attachments page

This example illustrates the Attachments page.

Attachments ×			
Attachments			
File Name	Description	Date Attached	Attached By
C_Adams_Justification.pdf	Transfer with promotion	11/13/2016	Betty Locherty

File Name	Click the file name to open the attachment.
Description	The default description is the file name, but the requester can enter a more meaningful description before submitting the transaction.
Date Attached	Displays the date that the requester uploaded the file to the transaction.
Attached by	Displays the name of the requester who uploaded the file.

Classic <Transaction Name> Page for Guided Self-Service Approvals

Use the classic <Transaction Name> page (HR_MSS_CT_APPR) to review and approve a guided self-service request using a classic (non-fluid) page. The page title depends depending on the transaction type.

If an approver has access to the Fluid Approval pages, then conditional navigation redirects the approver to the Fluid Approval page that displays pending approvals.


Navigation

- Click the link in the email that the system sends to approvers for guided self-service transactions.
- Click the Approve/Deny link for a guided self-service transaction on the "Review Transactions Page" (PeopleSoft HCM 9.2: Application Fundamentals).

Image: Classic <Transaction Name> page for guided self-service approvals (1 of 2)

This is the first of two example illustrating the classic <Transaction Name> page for guided self-service approvals. This example shows the Promote Employee transaction.

Promote Employee



Diane Palmer
Administrative Assistant

▼ **Instructions**
This transaction requires an action on your part. Enter your comments (optional) in the area provided, then select Approve or Deny button to process this request.

Transaction Details

Transaction Date	11/12/2016		
Reason	Outstanding Performance		
Workflow Status	In Approval Process		
Effective Sequence	2		
Requestor	Betty Locherty		

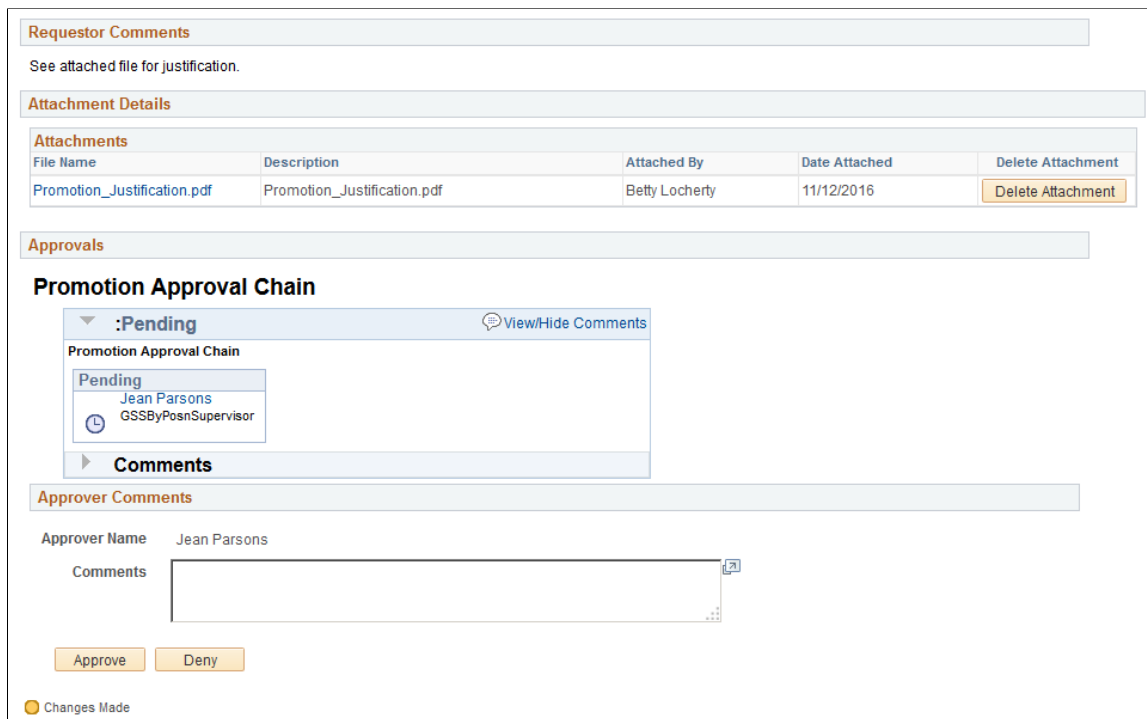
	After Approval		Before Approval	
Business Unit	Global Business Institute BU	GBIBU	Global Business Institute BU	GBIBU
Department	Corporate Finance	13100	Corporate Finance	13100
Location	Corporation Headquarters	KUNY00	Corporation Headquarters	KUNY00
Job Title	Administrator	120000	Administrative Assistant	170005
Full/Part Time	Full-Time		Full-Time	
Standard Hours	40.00		40.00	
Supervisor	Betty Locherty	KU0007	Betty Locherty	KU0007
Monthly Salary	2,123.33 USD		1,633.33 USD	
Annual Rate	25,480.00 USD		19,600.00 USD	

▼ **Salary Change Details**

Compensation Details							
Pay Component	Current Amount	Change Percent	Change Points	Change Amount	New Amount	Type	Frequency
Default NA Annual	19,600.00	30.000	0	5,880.00	25,480.00 USD	Flat Amount	Annual

Image: Classic <Transaction Name> page for guided self-service approvals (2 of 2)

This is the second of two example illustrating the classic <Transaction Name> Page for guided self-service approvals.



Transaction Details

This section of the page provides information about the changes that the user is being asked to approve.

If the transaction affects an employee’s position data, a message provides additional information about the position data changes.

After Approval and Before Approval

For transactions that update an employee’s data, these two columns provide information about the requested updates.

Note: Guided Self Service will not update Job Data with blank field values.

Salary Change Details

For transactions that update an employee’s salary data, a collapsible Salary Details section displays additional details about the proposed changes.

New Position Details

For the *Clone Position* transaction, this section displays the data for the new position that will be created. The transaction configuration controls which fields are visible.

Requestor Comments

Displays any comments that the requestor entered when submitting the transaction.

Attachment Details

Displays a grid with any attachments that the requestor supplied. Click the file name to open the file. The Delete Attachment

button enables you to remove a specific attachment from the transaction.

Approvals

Displays a graphical representation of the approval chain for the transaction. An expandable Comments section displays any comments entered by previous approvers.

Approver Comments

Enter any comments related to the approval action that you take on this page.

Approve and Deny

Use these buttons to approve or deny the request.

<Transaction Name> Page for Final Administrator Approval

Use the <Transaction Name> page (WF_MSS_CT_EE) to perform an administrator approval action for a guided self-service transaction and to choose whether to make the database updates automatically (if possible) or manually.

The page name depends on the transaction type.

Navigation

Workforce Administration >Self Service Transactions >Guided Self Service Requests

The search page for this transaction includes the option to search by employee. For the *Clone Position* transaction, the employee is the person whose position was cloned.

Image: <Transaction Name> page for final administrator approval (1 of 2)


This is the first of two examples that illustrate the <Transaction Name> page for final administrator approval.

Request Location Change

Cynthia Adams
 Administrator action is required for this transaction. Select one of the options under Administrator Actions and then select Save.

Transaction Details

Transaction Date 11/14/2016
 Workflow Status Administrator is Processing
 Effective Sequence 2
 Requestor Betty Locherty

 This employee is in a position controlled by Position Management. Position Data will be updated as a result of this transaction.

After Approval		Before Approval	
Business Unit	Global Business Institute BU	GBIBU	Global Business Institute BU
Department	Corporate Accounting	13110	Corporate Accounting
Location	California Location	KUCA00	Corporation Headquarters
			KUNY00

Attachments


File Name	Description	Attached By	Date Attached
C_Adams_Location_Change.pdf	Cynthia Adams Location Change	Betty Locherty	11/14/2016

Location Change Approval Chain

View/Hide Comments

Location Change Approval Chain

Approved

 **Jean Parsons**
 GSSByPosnSupervisor
 11/14/16 - 3:33 PM

Comments

Jean Parsons-JPARSONS at 11/14/16 - 3:33 PM
 Approved

Betty Locherty-PS at 11/14/16 - 3:23 PM
 See attached file.

Image: <Transaction Name> page for final administrator approval (2 of 2)

This is the second of two examples that illustrate the <Transaction Name> page for final administrator approval.

The screenshot displays a web interface for administrator processing. At the top, a header bar is labeled "Administrator Processing". Below this, the administrator's name is shown as "Administrator Betty Locherty". A "Comment" field is present, which is currently empty. A note below the comment field states "* Required Field".

The main section of the page is titled "Administrator Actions" and contains the following information:

- Current Transaction Status** Administrator Action Required
- Select this option to approve the transaction and automatically update the database.
- Select this option to approve the transaction. You will be required to manually update the database.
- Select this option to cancel the transaction.

At the bottom of the "Administrator Actions" section, there is a "Save" button and three links: "Go To Job", "Go To Position Data", and "Monitor Approvals".

Image: Clone Position page for administrator approval

This example partially illustrates the administrator approval page for the *Clone Position* transaction. The sections for Attachments, the Approval Chain, Administrator Processing, and Administrator Actions are not shown, but they are the same for *Clone Position* as for all other transactions.

Clone Position
 Cynthia Adams
 Administrator action is required for this transaction. Select one of the options under Administrator Actions and then select Save.

Transaction Details

Transaction Date 02/07/2017
 Workflow Status Administrator is Processing
 Effective Sequence 5
 Requestor Betty Locherty

New Position Details

New Position
 *Title
 *Business Unit Company CNA
 *Job Code Additional Appointment
 Max Head Count
 Union Code Construction
 *Department Department 20101 *Regulatory Region United States
 *Location Code Canadian Headquarters Supervisor Level
 Reports To Finance Director *Standard Hours
 Salary Plan
 Salary Grade
 Step
 Work Period Weekly

Mon	Tue	Wed	Thu	Fri	Sat	Sun
8.00		8.00	8.00			

Transaction Details

The Transaction Details section of the page provides information about the original request.

Workflow Status

Displays information about the transaction’s approval status.

The status *Administrator is Processing* indicates that all regular approvals are complete, but the transaction is still awaiting a final administrative approval before the database is updated with the requested changes. For Guided Self Service transactions, the final administrative approval must occur on this page. (Although other types of transactions can receive final administrator approval on the Monitor Approvals page, the Monitor Approvals page is read-only for guided self-service transactions.)

Position Notice

If the transaction affects an employee’s position data, a message provides additional information about the position data changes.

After Approval and Before Approval For transactions that update employee data, these sections provide details of the requested data changes.

In some cases the new values are the same as the current values, but the field is displayed because it is part of the key structure for a field that is changing.

For the *Update Job Details for Group* transactions, all three available fields are always visible, regardless of whether the data changed for the individual employee.

Note: Guided Self Service will not update Job Data with blank field values.

New Position Details

This section is visible only for the *Clone Position* transaction. It displays editable position data fields for the new position.

Note: The *Clone Position* transaction is unique in allowing the administrator to update data before approving the transaction.

This section includes these fields:

- The New Position field

This is for the unique identifier that will be assigned to the new position. If the system is set up to automatically assign position numbers, the administrator should accept the default value *00000000* so that the system can assign the next available number.

- Fields that are configured to be visible for this transaction.

Important! The newly created position will include data from all fields that are available for configuration, even if some fields are not configured to be visible.

- The Salary Plan, Salary Grade, and Salary Step fields, which are not part of the transaction configuration and are therefore never visible to the requestor or approvers.

Because the requesting manager and the approvers cannot see these fields, the administrator should review this data carefully. The data is copied from the position that was cloned, but if the requesting manager changed or cleared the default Business Unit for the transaction, the system cleared the copied data and the three salary-related fields are blank.

Attachments

Displays files that the requester attached to the transaction.

<Transaction Name> Approval Chain

This section of the page provides a graphical representation of the approval process. Any comments entered during the approval process appear here.

When a final administrator approval is required, it occurs after all approvals in the approval chain are complete.

Administrator Processing

Comment

Enter a comment related to the final administrative approval for the transaction.

Administrator Actions

To act on a transaction, select the appropriate radio button and click the Save button. The radio button labels describe your options.

Select this option to approve the transaction and automatically update the database.

For transactions that update employee data, this option is not available if the transaction updates a position-controlled field that cannot be automatically updated. This occurs when:

- The transaction does not support position data updates.
- The transaction can support position data updates, but automatic position data updates are not enabled on the [Transaction Configuration - Position Data Options Page](#).
- The employee's position has multiple incumbents.
- The transaction changes the position for an employee whose original position data was overridden.
- The transaction assigns an employee in a position to a supervisor who is not in a position.

This scenario is possible only if the *Update Job Details for Group* transaction for a group that includes both position and non-position employees specifies a new supervisor who is not in a position.

Note that the *Clone Position* transaction does not update employee data, so this option is always available for that transaction.

Select this option to approve the transaction. You will be required to manually update the database.

An administrator who chooses this option must make the database changes manually. To make job data or position data updates, the administrator can use the links at the bottom of the page.

Select this option to cancel the transaction.

Canceling the transaction is equivalent to denying an approval request. A canceled transaction cannot be resubmitted. Instead, the manager can submit a new transaction.

Links

Go to Job

Click to access the Job Data component for the employee.

Go to Position Data

Click to access the Position Data component for the employee's position. This link appears only if the transaction updates position data.

Monitor Approvals

Click to access the Monitor Approvals page.

Chapter 8

(USF) Managing Direct Reports

Understanding Self-Service Transactions and Approvals

This overview describes:

- Manager self-service transactions.
- Approvals and the Approval Framework
- Work-in-progress statuses for approval steps.
- Personnel Action Request (PAR) defaults for approved transactions

Manager Self-Service Transactions

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

- Change part-time or full-time status.
- Change work location.
- Promote employees.
- Reassign employees.
- Request reporting changes.
- Retire employees.
- Separate employees.

Approvals and the Approval Framework

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

Related Links

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

Work-In-Progress Statuses for Approval Steps

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

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

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

Related Links

"Defining WIP Statuses for Approval Steps" (PeopleSoft HCM 9.2: eProfile)

"Understanding WIP Management System Setup" (PeopleSoft HCM 9.2: Application Fundamentals)

PAR Defaults for Approved Transactions

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

Four of the seven manager self-service transactions are automatically transferred to the PAR system after all approvals are complete. The system uses a component interface for this transfer. To support the push to the PAR system, you must provide default values for certain fields that are required in the PAR tables and that are not normally entered by the employee who originates the self-service request. You provide these defaults in the Transaction Setup component (the same component where you associate approval steps with WIP statuses).

See "Defining PAR Tracking Data" (PeopleSoft HCM 9.2: eProfile), "Understanding WIP Management System Setup" (PeopleSoft HCM 9.2: Application Fundamentals).

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

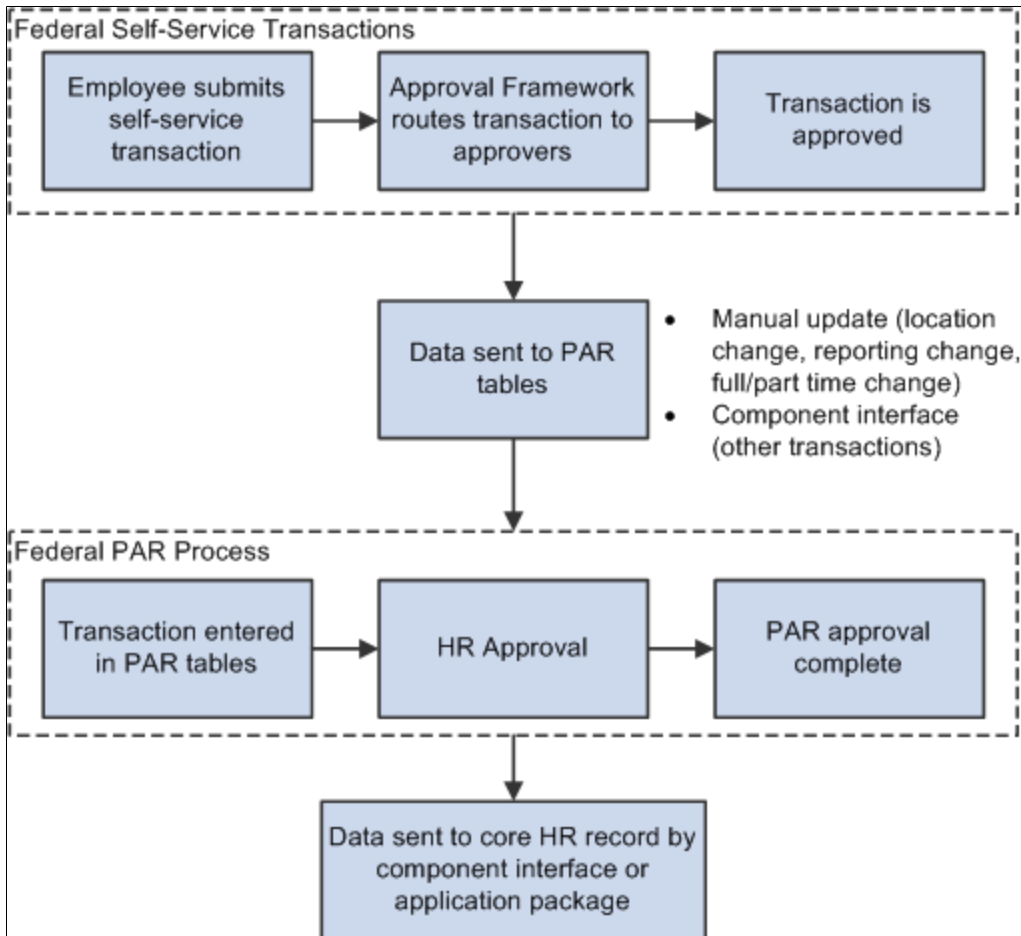
The following table shows which transactions are automatically pushed to the PAR tables and which ones require an administrator to manually enter data into the PAR tables:

<i>PAR Table Update Method</i>	<i>Transactions</i>
Manual (administrator)	<ul style="list-style-type: none"> • Request reporting changes. • Change part-time or full-time status. • Change work location.

PAR Table Update Method	Transactions
Automatic (component interface)	<ul style="list-style-type: none"> • Promote employees. • Reassign employees. • Retire employees. • Separate employees.

Image: Process flow for federal self-service transactions

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



Prerequisites for Managing Direct Reports

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

1. Activate eProfile Manager Desktop on the Installation Table.

See "Products Page" (PeopleSoft HCM 9.2: Application Fundamentals).

2. Define position management on the HCM Options page.

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

See "HCM Options Page" (PeopleSoft HCM 9.2: Application Fundamentals).

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

3. Set up security.

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

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

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

See "Understanding PeopleSoft Security" (PeopleSoft HCM 9.2: Application Fundamentals).

4. Configure the Approval Framework for approval processing.

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

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

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

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

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

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

7. Configure the USFED WIP transaction.

See "Understanding WIP Management System Setup" (PeopleSoft HCM 9.2: Application Fundamentals).

Changing Part-Time or Full-Time Status

These topics provide an overview of the process flow for part-time or full-time status changes.

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

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
Change Full/Part-time Status Page	HR_DR_ADDL_INFO	Enter the effective date for the change.
Change Full/Part-time Status – Select Employee Page	HR_DR_SELECT_EMPS	Select the employee to have the full/part-time status changed.
Full/Part Time Status Change Page	FE_MGR_FULL_PART	Submit a change to the employee's full/part-time status. After you submit the transaction, use this page to confirm that the transaction has been submitted and to review the approval process for the transaction.

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

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

1. Access the Change Full/Part-time Status page.
2. Enter the effective date for the change, and click Continue.
3. Select the employee for whom the change in part-time or full-time status is being requested, and click Continue.

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

4. Enter any relevant comments, and click Submit.

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

Changing Work Location

These topics provide an overview of work location changes.

Pages Used to Change Work Location

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
Location Change Page	HR_DR_ADDL_INFO	Enter the effective date for the change.
Location Change - Select Employees Page	HR_DR_SELECT_EMPS	Select one or more employees requiring a change in their work location.

Page Name	Definition Name	Usage
Location Change - Employee Page	FE_MGR_LOC_CHG	Enter the location and submit the location change request. After you submit the transaction, use this page to confirm that the transaction has been submitted and to review the approval process for the transaction.

Understanding Work Location Changes

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

1. Access the Location Change page.
2. Enter the date that the change in reporting structure goes into effect, and click Continue.
3. Select the employee or employees for whom the change in location is being requested, and click Continue.

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

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

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

Promoting Employees

These topics provide an overview of employee promotions.

Pages Used to Promote Employees

Page Name	Definition Name	Usage
Promote Employee Page	HR_DR_ADDL_INFO	Enter the effective date for the change.
Promote Employee - Select Employee Page	HR_DR_SELECT_EMPS	Select an employee for whom you want to request a promotion.
Promote Employee - Employee Page	FE_MGR_PROMOTE	Submit a promotion request.
Promote Employee - Confirm Page	FE_PROMOTE_CONFIRM	Confirm that the transaction has been submitted and review the approval process for the transaction.

Understanding Employee Promotions

To request a promotion, managers:

1. Access the Promote Employee page.
2. Enter the date that the promotion goes into effect, and click Continue.
3. Click the name of the employee for whom the promotion is being requested.

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

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

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

Reassigning Employees

These topics provide an overview of employee reassignments.

Pages Used to Reassign Employees

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
Reassign Employee Page	HR_DR_ADDL_INFO	Enter the effective date for the change.
Reassign Employee - Select Employee Page	HR_DR_SELECT_EMPS	Select an employee for whom you want to request a reassignment.
Reassign Employee Page	FE_MGR_REASSIGN	Submit a request for reassignment.
Reassign Employee - Employee Page	FE_REASSIGN_CONFRM	Confirm that the transaction has been submitted and review the approval process for the transaction.

Understanding Employee Reassignments

To reassign an employee, managers:

1. Access the Reassign Employee page.
2. Enter the effective date for the reassignment, and click Continue.
3. Select the employee for whom the reassignment is being requested, and click Continue.

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

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

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

Requesting Reporting Changes

These topics provide an overview of reporting changes.

Pages Used to Request Reporting Changes

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
Reporting Change Page	HR_DR_ADDL_INFO	Enter the effective date for the change.
Reporting Change - Select Employees Page	HR_DR_SELECT_EMPS	Select one or several employees for whom you want to request a reporting change.
Reporting Change - Employee Page	FE_MGR_REPORT_CHNG	Submit the request for a reporting change. After you submit the transaction, use this page to confirm that the transaction has been submitted and to review the approval process for the transaction.

Understanding Reporting Changes

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

1. Access the Reporting Change page.
2. Enter the date that the change in reporting structure goes into effect, and click Continue.
3. Select the employee or employees for whom a change in reporting structure is being requested, and click Continue.

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

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

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

Retiring Employees

These topics provide an overview of retiring employees.

Pages Used to Retire Employees

Page Name	Definition Name	Usage
Retire Employee Page	HR_DR_ADDL_INFO	Enter the effective date for the change.
Retire Employee - Select Employee Page	HR_DR_SELECT_EMPS	Select one or several employees for whom you want to request a retirement.
Retire Employee - Employee Page	FE_MGR_RETIRE	Submit the retirement request.
Retire Employee - Confirm Page	FE_RETIRE_CONFIRM	Confirm that the transaction has been submitted and review the approval process for the transaction.

Understanding Retiring Employees

To request an employee's retirement, managers:

1. Access the Retire Employee page.
2. Enter the effective date for the retirement, and click Continue.
3. Select the employee for whom the retirement is being requested, and click Continue.

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

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

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

Separating Employees

These topics provide an overview of separating employees.

Pages Used to Separate Employees

Page Name	Definition Name	Usage
Separate Employee Page	HR_DR_ADDL_INFO	Enter the effective date for the change.
Separate Employee - Select Employee Page	HR_DR_SELECT_EMPS	Select the employee to be separated.
Separate Employee - Employee Page	FE_MGR_SEPARATE	Submit a request for separation.
Separate Employee - Confirm Page	FE_SEPARATE_CONFRM	Confirm that the transaction has been submitted and review the approval process for the transaction.

Understanding Separating Employees

To request an employee's separation, managers:

1. Access the Separate Employee page.
2. Enter the effective date for the separation, and click Continue.
3. Select the employee for whom the separation is being requested, and click Continue.

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

4. Select the reason for the separation.

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

5. If Transfer to New Agency was selected as the reason for the separation, select an agency.
6. Enter any relevant comments, and click Submit.

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

Approving Change Requests

These topics provide an overview of approvals.

Pages Used to Approve Change Requests

Page Name	Definition Name	Usage
Review Transactions Page	HCM_APPR_STATUS	<p>Search for and view summary information for self-service transactions that you submitted or for which you are an approver.</p> <p>This page supports only transactions that were submitted <i>after</i> implementation of the Approval Framework.</p>

Page Name	Definition Name	Usage
Name Change Page	FE_EE_NAME_STS	Review transaction details and the status of the approval process. If you are the current approver, use this page to approve or deny the transaction.
Marital Status Change Page	FE_MARITAL_STS	
Address Change Page	FE_ADDRESS_STS	
Full/Part Time Status Change Page	FE_MGR_FULL_PART	
Approve Location Change Page	FE_MGR_LOC_CHG	
Promote Employee Page	FE_PROMOTE_APPROVE	
Reassign Employee Page	FE_REASSIGN_APPROV	
Approve Reporting Change Page	FE_MGR_REPORT_CHNG	
Separate Employee Page	FE_SEPARATE_APPRVE FE_RETIRE_APPROVE	
Review Change Requests - Select a Request Page	FE_MGR_CHG_REQ_STA	Review information about change requests that were processed before federal self-service transactions began using the Approval Framework to manage approval processing. This page supports only transactions that were submitted <i>before</i> implementation of the Approval Framework.

Understanding Approvals

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

Employee and Manager Transactions

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

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

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

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

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

Transaction Review and Approval

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

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

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

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

See "Working with Self-Service Approval Transactions" (PeopleSoft HCM 9.2: Application Fundamentals).

Pre-Approval Framework Approval Data

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

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

Note: Pre-Approval Framework transactions are view-only; you cannot take any approval-related action.

Administering Approvals

These topics provide an overview of approval administration.

Pages Used to Administer Approvals

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
Monitor Approvals Page	EOAW_ADM_MON_SRC	Review all Approval Framework transactions, including federal-self service transactions, and take action to resolve routing errors.
Workflow Inquiry (USF) Page	FE_SS_STAGED	Review activity for federal self-service transactions

Understanding Approval Administration

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

Additionally, the Workflow Inquiry (USF) page that you use to monitor federal self-service transactions supports both Approval Framework approval transactions and transactions that predate the conversion to Approval Framework processing.

Related Links

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

"(USF) Reviewing Federal Self-Service Transactions" (PeopleSoft HCM 9.2: Application Fundamentals)

Chapter 9

Using the Manager Dashboard

Understanding the Manager Dashboard Content and Layout

The Manager Dashboard displays various pagelets showing a quick synopsis of information about your direct report. Many of the links within the pagelets will direct you to actual components throughout the HCM system with links on those pages to return you to the dashboard.

The Manager Dashboard provides actionable summaries of information for a manager's direct and indirect reports. A number of pagelets display information specific to the user. From the pagelets, managers have the ability to focus on items needing their attention and to act on those items by providing an immediate update from within the dashboard or by transferring to a specific application component. For example, managers can complete approval requests or initiate manager self service transactions for a specific employee by clicking on the Actions link all from the Manager Dashboard.



[Manager Dashboard and Self Service Usability](#)

You can access the Manager Dashboard from the root menu, Manager Self Service, and the Direct Line Reports page in the Org Chart Viewer.

Image: Example of the Manager Dashboard page

This example illustrates the Manager Dashboard page.

The screenshot displays the Manager Dashboard interface with several key sections:

- Alerts:** A list of upcoming dates and events, such as "License/Certificate Expires on 12/01 for Edmund Donahue - Assoc of Cost Mgmt Accountants".
- Pending Approvals:** A table showing requests for approval, including Performance Documents, Promotions, Reporting Changes, and Transfers.
- Company Directory:** A search interface for finding individuals by name, job title, department, or email.
- My Open Jobs:** A table listing current job openings with columns for Job ID, Job Title, Days Open, and Applicants in Process.
- Direct Line Reports:** A summary table for direct reports, including columns for Name, Job Title, Compensation, Performance, and Time.
- Objective Alignment:** A bar chart showing the number of employees for various organizational objectives, with a dropdown menu to filter by section (e.g., Profitability).
- Quick Links:** A set of shortcuts for tasks like "Search and Compare Profiles", "Allocate Compensation", "Smart HR Transactions", and "Manage My Objectives".

Use this dashboard to manage and analyze information about your direct report workforce. The Manager Dashboard enables you to:

- View important upcoming dates and events.
- Analyze company and employee objectives.
- Approve pending requests.
- Search for individuals in your company directory.
- Manage your current job openings.
- Examine details about your direct reports, such as job details, compensation, performance, career and succession plans, and time reporting.
- Initiate self service actions, such as creating a performance document or request a reporting change, which you would typically perform from Manager Self Service.
- Access and analyze a summary of your employee's abilities on the Talent Summary page.
- Manage your employee's learning.
- Access quick links to perform additional managerial tasks in the system.

- View reports that you run.
- View progress of employees' performance documents.

You can determine the dashboard content and layout. Use the Personalize Content and Layout links to access the Personalize Content: Manager Dashboard and Personalize Layout: Manager Dashboard pages respectively.

- The Personalize Content: Manager Dashboard page enables you to select or deselect pagelets you wish to view on your dashboard.
- The Personalize Layout: Manager Dashboard page enables you to determine whether you want your dashboard to display in a 2- or 3-column layout. You will also select which pagelets should appear in which column.

Click the header of each pagelet and drag it to manually move pagelets around on the dashboard. You can also minimize or remove pagelets from the dashboard by using the corresponding icons in the header. To have a pagelet appear after deleting it from the dashboard, access the Personalize Content: Manager Dashboard page to select the pagelet.

Defining the Manager Dashboard Content and Layout

These topics discuss how to define the Manager Dashboard content and layout.

Pages Used to Define the Manager Dashboard Content and Layout

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
Manager Dashboard Page	UX_MGR_DASHBOARD	View frequently-accessed manager information such as important manager alerts, messages, and employee details through various pagelets on one page.
<u>Personalize Content: Manager Dashboard Page</u>	PORTAL_HPCOMP	Define the Manager Dashboard pagelet content by selecting or deselecting pagelets that should appear on your Manager Dashboard page.
<u>Personalize Layout: Manager Dashboard Page</u>	PORTAL_HPLAYOUT	Define the Manager Dashboard pagelet layout by selecting either a 2- or 3-column layout style you wish to display on your Manager Dashboard page. Identify the pagelets that should appear in each column.

Personalize Content: Manager Dashboard Page

Use the Personalize Content: Manager Dashboard page (PORTAL_HPCOMP) to define the Manager Dashboard pagelet content by selecting or deselecting pagelets that should appear on your Manager Dashboard page.

Navigation

- Click the Personalize Content link at the top of the Manager Dashboard page.
- Click the Personalize Content link on the Personalize Layout: Manager Dashboard page.

Image: Personalize Content: Manager Dashboard page

This example illustrates the fields and controls on the Personalize Content: Manager Dashboard page. You can find definitions for the fields and controls later on this page.

Personalized Home Page

Personalize Content: Manager Dashboard

Tab Name

Welcome Message

Choose Pagelets: Simply check the items that you want to appear on your homepage. Remember to click "Save" when done.

Arrange Pagelets: Go to [Personalize Layout](#)

PeopleSoft Applications	HCM Dashboard
<input type="checkbox"/> My Reports	<input checked="" type="checkbox"/> Quick Links
	<input checked="" type="checkbox"/> Direct Line Reports
	<input checked="" type="checkbox"/> Pending Approvals
	<input checked="" type="checkbox"/> Alerts
	<input checked="" type="checkbox"/> Objective Alignment
	<input checked="" type="checkbox"/> Company Directory
	<input checked="" type="checkbox"/> My Open Jobs
	<input checked="" type="checkbox"/> Taleo
	<input type="checkbox"/> Learning
	<input type="checkbox"/> Business Objective Alignment

[Return to Home](#)

Use this page to select or deselect pagelets you want to display on your Manager Dashboard page. Click the pagelet name link to preview the pagelet.

The following pagelets display the same information but in different formats:

- *Objective Alignment*: Displays a narrow graph illustrating the number of employees that are in alignment with the department business objectives.

- *Business Objective Alignment*: Displays a wide graph illustrating the number of employees that are in alignment with the department business objectives.

Personalize Layout: Manager Dashboard Page

Use the Personalize Layout: Manager Dashboard page (PORTAL_HPLAYOUT) to define the Manager Dashboard pagelet layout by selecting either a 2- or 3-column layout style you wish to display on your Manager Dashboard page.

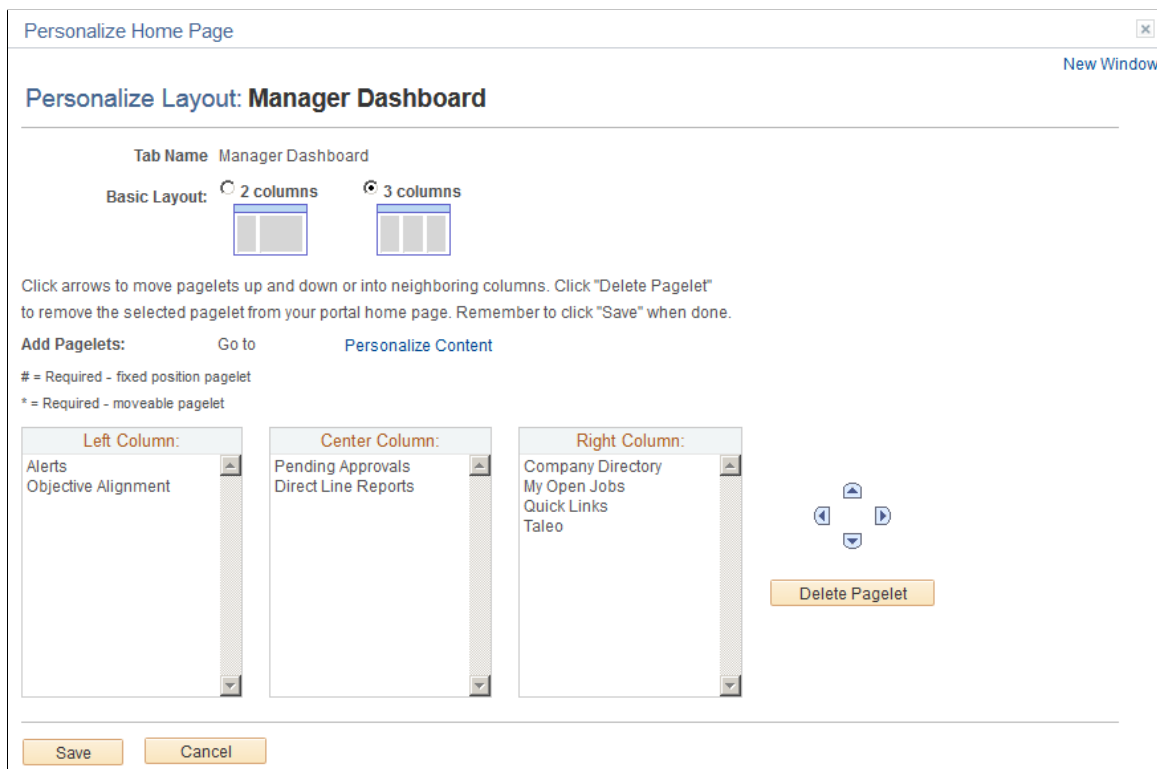
Identify the pagelets that should appear in each column.

Navigation

- Click the Personalize Layout link at the top of the Manager Dashboard page.
- Click the Personalize Layout link on the Personalize Content: Manager Dashboard page.

Image: Personalize Layout: Manager Dashboard page

This example illustrates the fields and controls on the Personalize Layout: Manager Dashboard page. You can find definitions for the fields and controls later on this page.



Use this page to determine the number of columns you want on the dashboard. Move pagelets from one column to the next.

The columns will list only those pagelets you have selected on your personalization page to appear on the dashboard.

Viewing the Manager Dashboard Pagelets

These topics discuss viewing the Manager Dashboard pagelets.

Note: You can personalize many of these pagelets so they appear differently on the dashboard.

See [Personalizing Pagelets](#).

See [Personalizing Column and Sort Order within the Pagelet Grids](#).

Pages Used to View Additional Manager Dashboard Pagelet Content

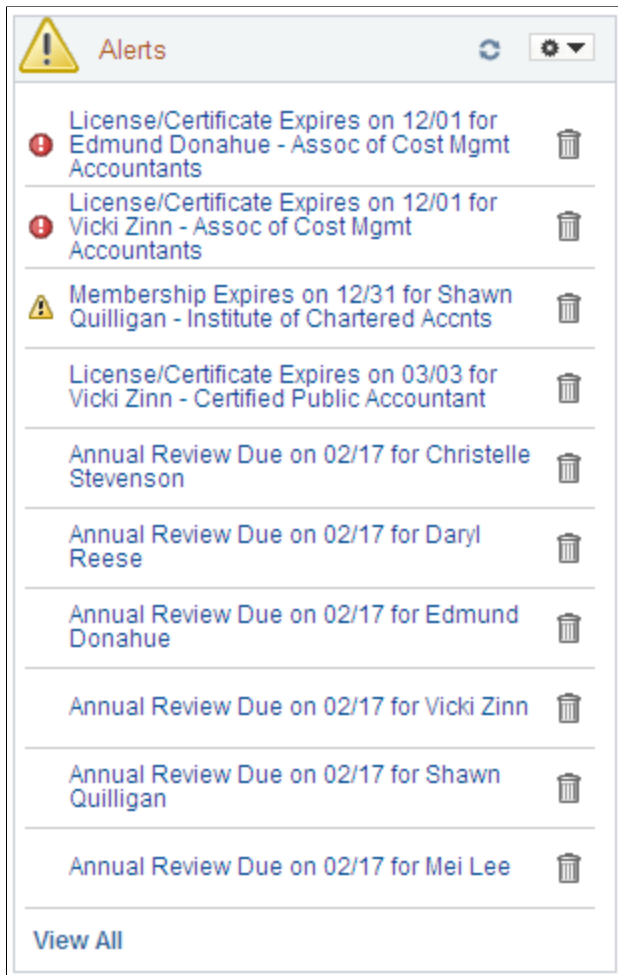
<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
More Alert Information Page	UX_ALERT_DTL	View details regarding all alerts associated with your direct reports.
Objective Alignment Progress Page	UX_EPO_ALIGN_DET	View the detailed alignment information and the progress of the employee goals compared to the business objective.
My Reports Pagelet	UX_DIRECTS_HGRID	View information about your direct and indirect reports in a hierarchical list (or Hgrid) format.
Change Settings Page	EP_PG_DOCSTS_SEC	Edit the default settings used for launching the My Team's Performance Status pagelet.

Alerts Pagelet

The Alerts pagelet displays alerts associated with direct reports.

Image: Alerts pagelet

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



Use this pagelet to view past or upcoming events and dates related to your direct reports. These alerts are grouped by alert level: critical appearing first, then by all warning alerts, and finally informational alerts. Within each level, the pagelet then sorts the alerts by type. There are seven alert types delivered for the Alerts pagelet:

- ePerformance
- eCompensation
- Expiring Licenses/Certificates
- Expiring Memberships
- Scheduled Training
- Birthday Alerts
- Anniversary Alerts

The administrator defines the rules for when an alert moves to another level for each alert type. All alerts are time sensitive and the system generates them by comparing the current date to the date specified for each alert type and level.

<alert message link>

Click the link of any of the alert messages to have the system display the appropriate application detail page to provide more information about the alert. These secondary pages are view only.

View All

Click this link to open the More Alert Information page and view all alerts associated with your direct reports.

More Alert Information Page

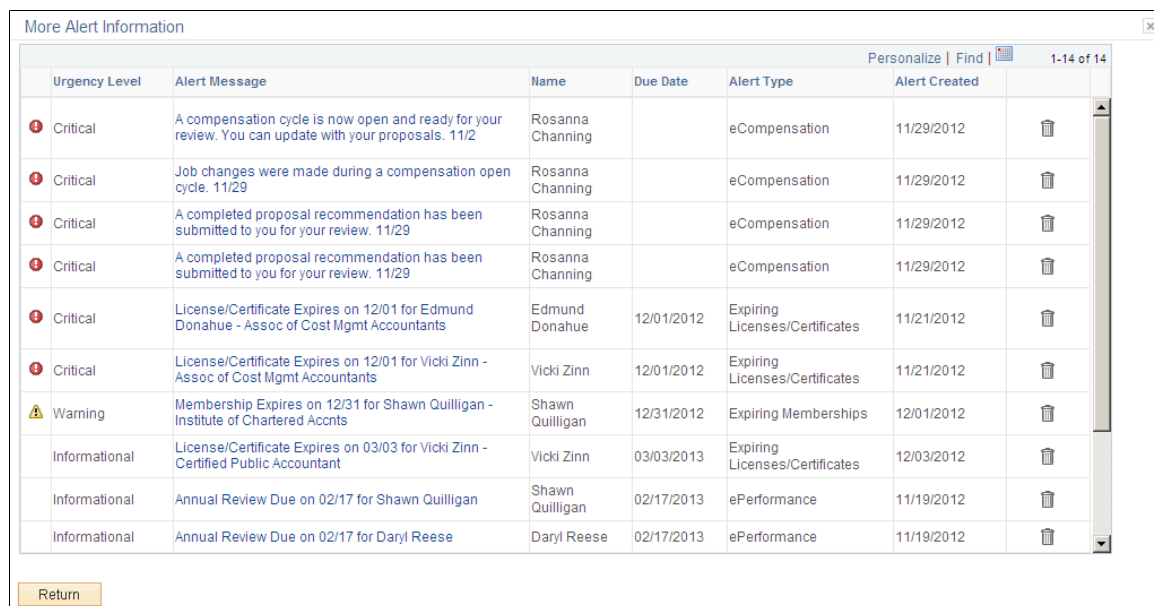
Use the More Alert Information page (UX_ALERT_DTL) to view details regarding all alerts associated with your direct reports.

Navigation

Click the View All link on the Alerts pagelet in Manager Dashboard.

Image: More Alert Information page

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



Urgency Level	Alert Message	Name	Due Date	Alert Type	Alert Created	
Critical	A compensation cycle is now open and ready for your review. You can update with your proposals. 11/2	Rosanna Channing		eCompensation	11/29/2012	🗑️
Critical	Job changes were made during a compensation open cycle. 11/29	Rosanna Channing		eCompensation	11/29/2012	🗑️
Critical	A completed proposal recommendation has been submitted to you for your review. 11/29	Rosanna Channing		eCompensation	11/29/2012	🗑️
Critical	A completed proposal recommendation has been submitted to you for your review. 11/29	Rosanna Channing		eCompensation	11/29/2012	🗑️
Critical	License/Certificate Expires on 12/01 for Edmund Donahue - Assoc of Cost Mgmt Accountants	Edmund Donahue	12/01/2012	Expiring Licenses/Certificates	11/21/2012	🗑️
Critical	License/Certificate Expires on 12/01 for Vicki Zinn - Assoc of Cost Mgmt Accountants	Vicki Zinn	12/01/2012	Expiring Licenses/Certificates	11/21/2012	🗑️
Warning	Membership Expires on 12/31 for Shawn Quilligan - Institute of Chartered Acnts	Shawn Quilligan	12/31/2012	Expiring Memberships	12/01/2012	🗑️
Informational	License/Certificate Expires on 03/03 for Vicki Zinn - Certified Public Accountant	Vicki Zinn	03/03/2013	Expiring Licenses/Certificates	12/03/2012	🗑️
Informational	Annual Review Due on 02/17 for Shawn Quilligan	Shawn Quilligan	02/17/2013	ePerformance	11/19/2012	🗑️
Informational	Annual Review Due on 02/17 for Daryl Reese	Daryl Reese	02/17/2013	ePerformance	11/19/2012	🗑️

Return

Use this page to view details regarding all alerts associated with your direct reports.

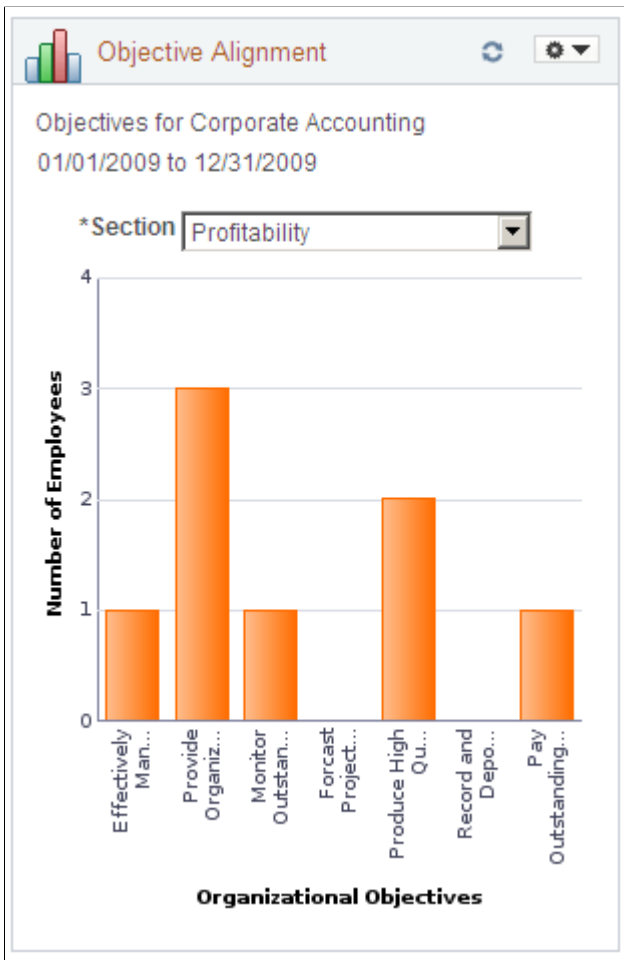
If you have set the number of alerts to appear on the pagelet as a number less than all the alerts in your queue, you can view all remaining alerts on this page.

Objective Alignment Pagelet

The Objective Alignment pagelet displays narrow version of the manager’s department business objectives.

Image: Objective Alignment pagelet

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



The business objective is listed at the top of the pagelet, with the business objective beginning and end date below it. If you have not saved a default value through the Personalize Business Objectives Alignment page, the system will display the most recently created business objective.



Select the Pagelet Settings drop-down list in the header and select the Personalize option to open the Personalize Business Objectives Alignment page and define a default business objective and section. If you are associated with more than one department objective, you would select the business objective through this page.

See [Personalize Business Objectives Alignment Page](#).

Section

Chose a section from the business objective of this department.
The pagelet refreshes and displays a graphical representation of the corresponding Business Objective Alignment data.

The chart is a 2D bar chart. The X-Axis lists all the objectives under the selected section. When you pause over a bar in the graphic, the objective name shows as well as the number of employee aligned to this objective. The Y-Axis gives the number of employees that currently have their goals aligned to the business objective. If no employees aligned, the bar does not appear, but the objective label still appears on the X-Axis.

Click an objective bar within the graphic to open the Objective Alignment Progress page and see the detailed alignment information and the progress of the employee goals.

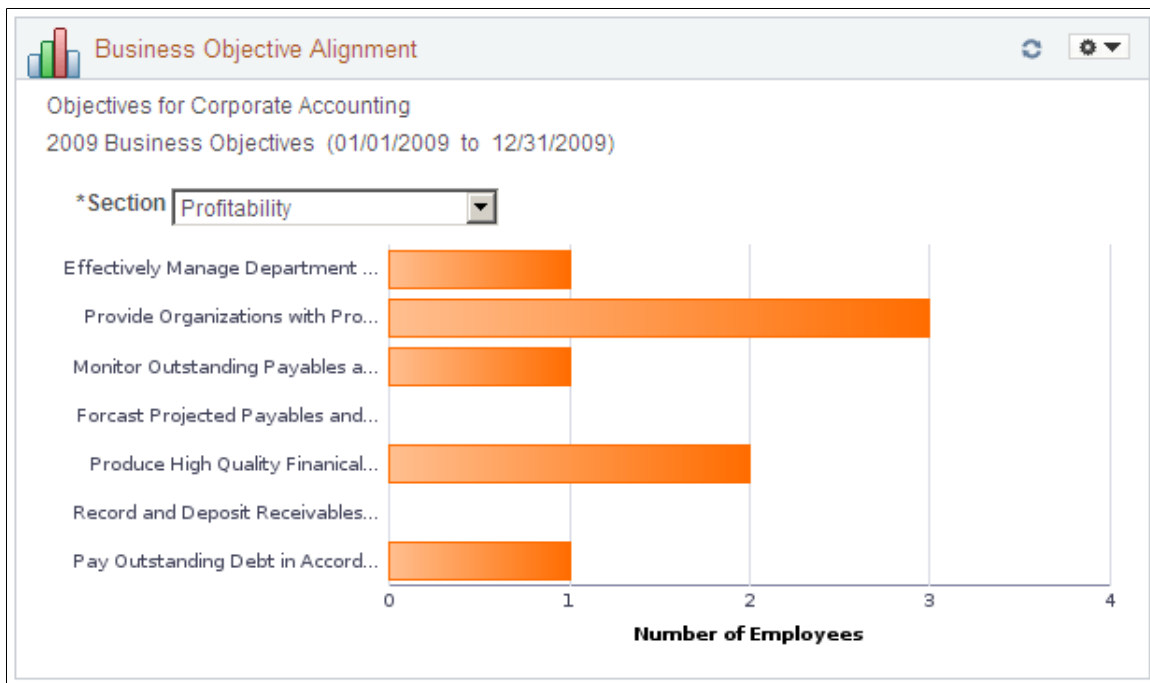
See [Objective Alignment Progress Page](#).

Business Objective Alignment Pagelet

The Business Objective Alignment pagelet displays wide version of the manager's department business objectives.

Image: Business Objective Alignment pagelet

This example illustrates the fields and controls on the Business Objective Alignment pagelet. You can find definitions for the fields and controls later on this page.



The Business Objective Alignment pagelet works the same as the [Objective Alignment Pagelet](#), but the graph and bars are displayed in a horizontal, wide view with longer objective labels and the X- and Y-axis reversed.

See [Objective Alignment Progress Page](#).

Objective Alignment Progress Page

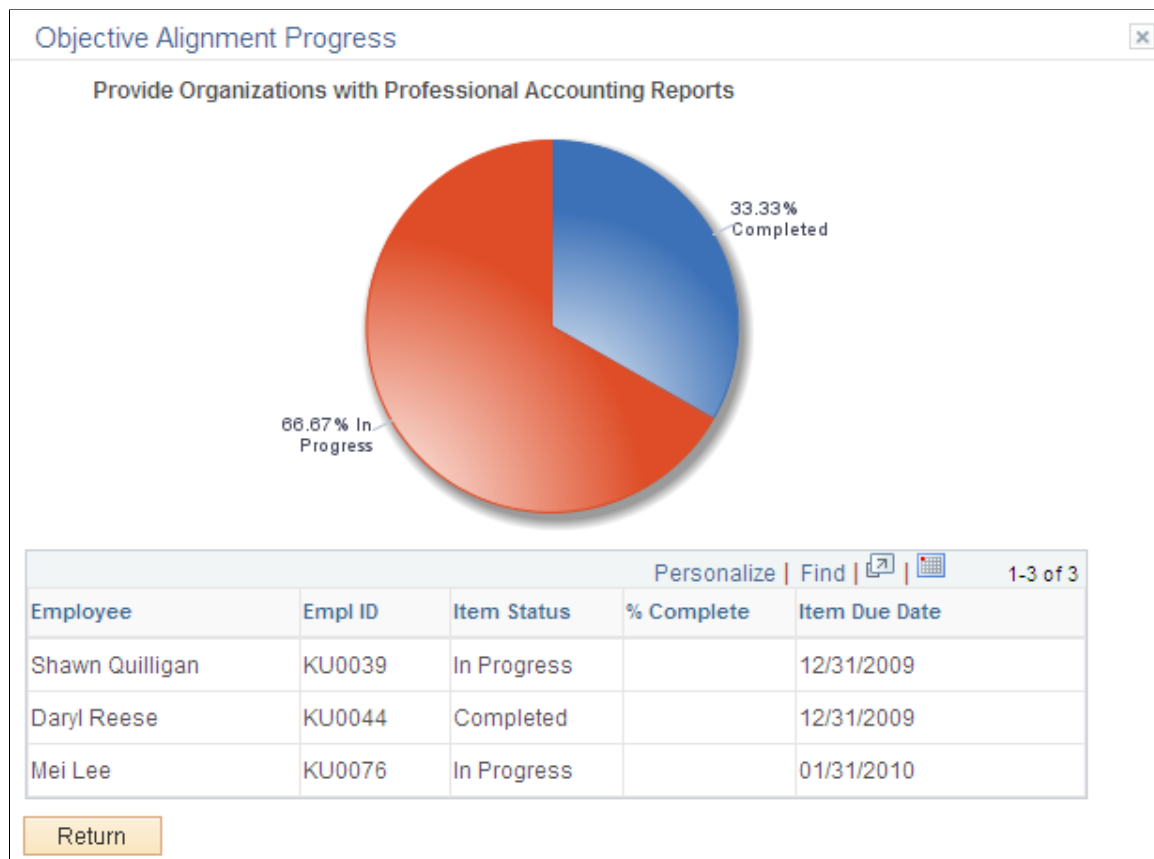
Use the Objective Alignment Progress page (UX_EPO_ALIGN_DET) to view the detailed alignment information and the progress of the employee goals compared to the business objective.

Navigation

- Click a bar from within the Objective Alignment pagelet.
- Click a bar from within the Business Objective Alignment pagelet.

Image: Objective Alignment Progress page

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



The objective name that corresponds to the bar you clicked. The page displays the goal progress chart for the department employees as a 2D pie chart.

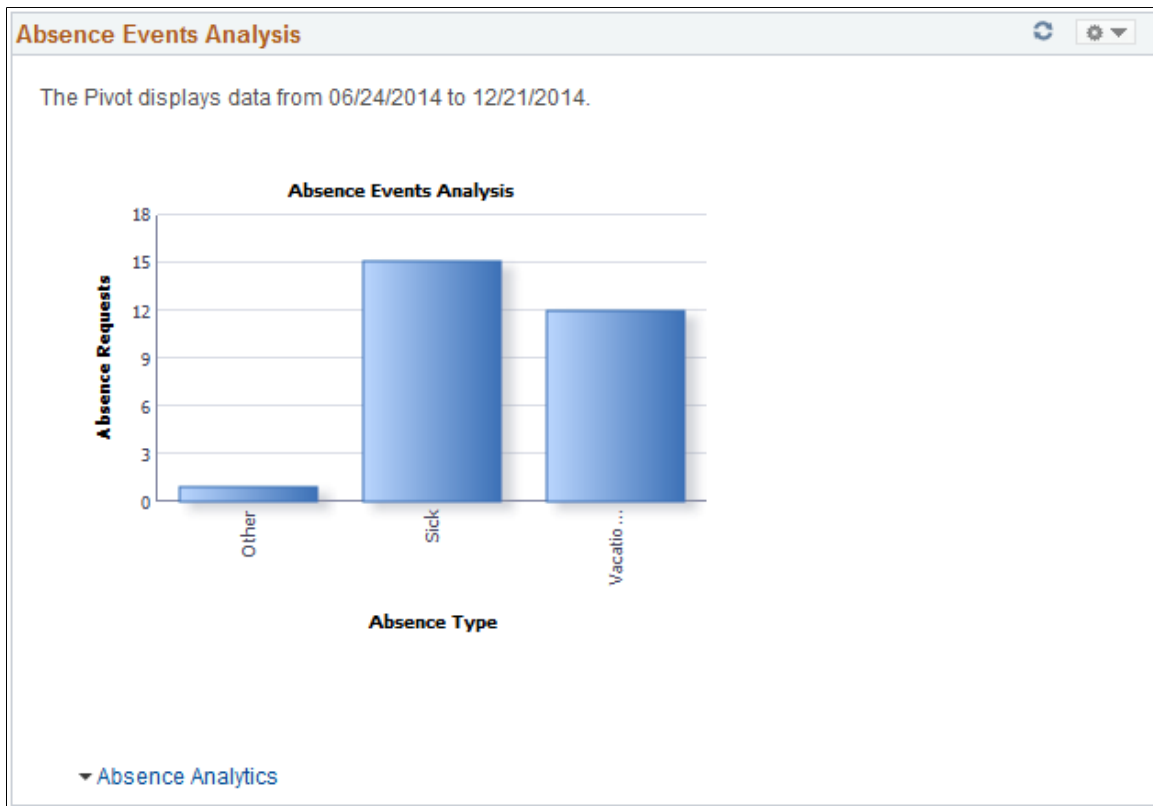
The grid at the bottom shows all the employees that have their goal aligned to the objective. It includes the employee name, employee ID, status, percentage complete, and due date of the objective.

Absence Events Analysis Pagelet

The Absence Events Analysis pagelet displays a bar chart of your employees' absence requests organized by absence type.

Image: Absence Events Analysis pagelet

This example illustrates the fields and controls on the Absence Events Analysis pagelet.



Absence Analytics

Click to access modal versions of the following pivot grids:

- Absence Event Analysis: This pivot grid enables you to analyze absence entries by status, absence type, absence take, and absence reason.

For more information about this pivot grid, see the documentation for the "Absence Events Analysis Pagelet" (PeopleSoft HCM 9.2: Absence Management).

- Absence Cost Analysis: This pivot grid enables you to analyze the cost of reported absences by absence type, absence take, and absence reason.

For more information about this pivot grid, see the documentation for the "Absence Cost Analysis Pagelet" (PeopleSoft HCM 9.2: Absence Management).

- Absence Liability & Trends: This pivot grid enables you to analyze the absence liability for all absence entitlements by period begin date.

For more information about this pivot grid, see the documentation for the "Absence Liability and Trends Pagelet" (PeopleSoft HCM 9.2: Absence Management).

- **Periodic Absence Rate:** This pivot grid enables you to analyze absence entries by employee engagement factors such as absence rate for a business entity as of a specific date, absence rate for a given period, total number of absence days, average absence duration, and average absence days.

For more information about this pivot grid, see the documentation for the "Periodic Absence Rate Pagelet" (PeopleSoft HCM 9.2: Absence Management).

Adding the Absence Events Analytics Pagelet to the Manager Dashboard

By default, the Absence Events Analytics pagelet is not available to add to the Manager Dashboard using the [Personalize Content: Manager Dashboard Page](#). To enable managers to add the Absence Events Analytics pagelet to the Manager Dashboard:

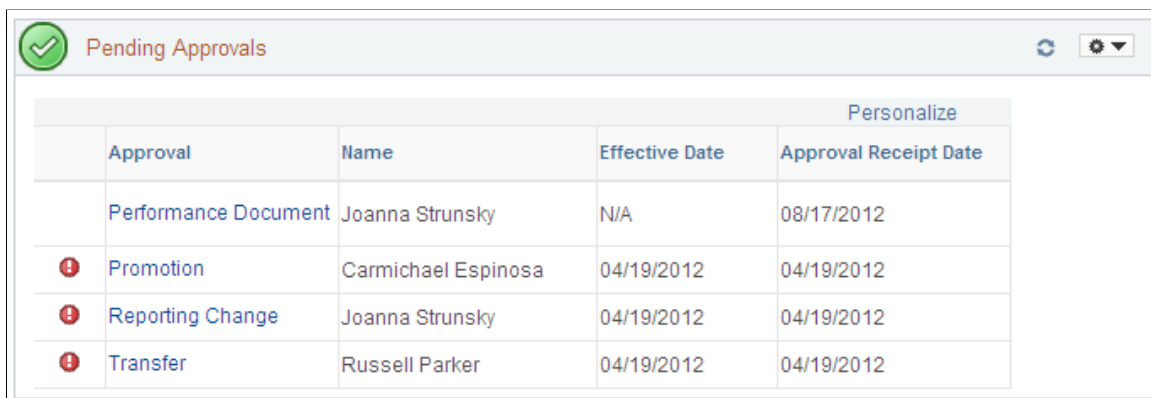
1. Access the Manage Dashboard Pages page (PeopleTools >Portal >Dashboard >Manage Dashboard Pages)
2. Click the Pagelets button for the Manager Dashboard row to access the Tab Content page for Manager Dashboard.
3. Select the Include all? check box in the Absence Mgmt Manager Pagelets group box.

Pending Approvals Pagelet

The Pending Approvals pagelet displays time sensitive approvals requiring action by the manager.

Image: Pending Approvals pagelet

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



The screenshot shows the 'Pending Approvals' pagelet interface. It features a title bar with a green checkmark icon, the text 'Pending Approvals', a refresh icon, and a settings icon. Below the title bar is a table with four columns: 'Approval', 'Name', 'Effective Date', and 'Approval Receipt Date'. The table contains five rows of data. The first row is for a 'Performance Document' approval for Joanna Strunsky, with an effective date of N/A and a receipt date of 08/17/2012. The subsequent three rows are for 'Promotion', 'Reporting Change', and 'Transfer' approvals, all for the same effective date of 04/19/2012 and receipt date of 04/19/2012. Each of these three rows has a red warning icon in the first column.

Personalize			
Approval	Name	Effective Date	Approval Receipt Date
Performance Document	Joanna Strunsky	N/A	08/17/2012
⚠ Promotion	Carmichael Espinosa	04/19/2012	04/19/2012
⚠ Reporting Change	Joanna Strunsky	04/19/2012	04/19/2012
⚠ Transfer	Russell Parker	04/19/2012	04/19/2012

Use this pagelet to view the pending approvals for your direct reports and determine what approval actions must be taken right now. Only approvals that use the Approval Workflow Engine (AWE) framework appear in this pagelet. If enabled by the administrator, the pagelet can display the Response due or Response overdue icon, indicating that the date upon which an approval is required is nearing. These dates are set by the administrator.

When there are no pending approvals in your queue, then the Pending Approvals pagelet will display the text *No approvals are pending at this time.*

<warning level icon>

The first column displays a warning icon when warning levels are associated with transactions. When no warnings are associated with any of the transactions appearing in the grid, this column is hidden.

The warning icons that can appear in the first column are determined using the rules the administrator defines on the Approvals Pagelet Setup page, and are based on the number of days before a transaction effective date or days after the approval receipt date. The two levels of warnings are:

- The Standard Warning or Response due icon.
- The Overdue Warning or Response overdue icon.

Approval

Click the approval transaction name link in the Approval column to view the application specific transaction approval page. Here you can view transaction details, approve or deny the transaction request, and enter comments regarding your response.

See [Approve <Transaction> Page](#).

Name

Displays the name of the employee associated with the approval transaction. If multiple employees are linked to the same transaction, then the field will display the text Transaction Number X (where X is the number of transactions), with the exception of the Reporting Change approval.

For Reporting Change approvals, the system will fetch the name of the first employee tied to the transaction and display it in this column, if there is more than one, an ellipsis (...) is added to indicate more employees are tied to the approval transaction.

When there is no employee associated with an approval transaction, such as a nonperson job profile, then the field will display N/A (not applicable).

Effective Date

Displays the date on which a transaction is scheduled to take place. For example, the date an employee is scheduled for a promotion, and still needing your approval, will display here.

When there is no transaction date associated with the approval transaction, then the field will display N/A (not applicable).

The transaction effective date for Compensation approvals is the budget start date.

Approval Receipt Date

Displays the date the approval was sent to you.

You can refresh your queue as by clicking the Refresh icon on the pagelet header.

Note: You can also personalize the columns of the grid in this pagelet by clicking the Personalize link above the grid in the pagelet.

Related Links

[Understanding Approvals](#)

[Approvals Pagelet Setup Page](#)

[Personalizing Column and Sort Order within the Pagelet Grids](#)

Approve <Transaction> Page

Access the application specific transaction approval page (click the approval transaction name link in the Approval column of the Pending Approvals pagelet).

Image: Example of an application specific approval page for a Performance document

This example illustrates an example of an application specific approval page for a Performance document.

Approve Transaction
✕

Approve or deny the proposed information for the employee listed below. You may also enter optional comments about each approval choice. When you are finished, select the Approve or Deny button at the bottom of the page.

Joanna Strunsky

Performance Document

Empl ID KU0016

Doc Type Performance Document

Author Christelle Stevenson

Period Begin Date 01/01/2012 Period End Date 04/30/2012

Rating 3-Good

Performance Document Details

Evaluation Approval Chain

▼ Review Employee: Pending
View/Hide Comments

Evaluation Approval Chain

Pending

[PS] Rosanna Channing - MGR

ePerformance Approving Mgr

▶ Comment History

Comment

Go To [Approval Summary](#)

Use the approval page specific to the business process to approve, deny, or perform any other response to an approval. This approval page is identical to the application page you would typically access using the standard menu navigation.

The page displays who the approval has been routed to and the approval status. Click the approver's name or the text Multiple Approvers to see a list of approvers.

The Approve, Deny, and other actions options appear at the bottom of the page. After clicking Approve or Deny, you should receive the appropriate confirmation. To return to the Pending Approvals pagelet and the Manager Dashboard, click the Cancel button.

Company Directory Pagelet

The Company Directory pagelet enables managers to search for employees in the company directory.

Image: Company Directory pagelet

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



Enter search criteria and click the Search button to retrieve a person in the Org Chart Viewer - Company Directory pages.

My Org Chart or My Profile

Click one of these links to access either the Org Chart page or your Profile page in the Company Directory. The link that appears here is determined by your personal preferences for the Org Chart Viewer - Company Directory.

Advanced Search

Click this link to open the Advanced Search page and enter multiple search criteria, like a name and department, to locate a person.

My Open Jobs Pagelet

The My Job Openings pagelet displays all job openings assigned to the manager.

Image: My Job Openings pagelet

This example illustrates the fields and controls on the My Job Openings pagelet. You can find definitions for the fields and controls later on this page.



Job	Job Title	Days Open	Applicants in Process
504024	Billing Manager - Medical Claims	190	1
504018	Administrative Assistant	188	0
504005	Administrative Assistant (Medical Operations)	188	2
504004	Executive Services Administrator	197	11
504003	Administrative Support Supervisor	192	5

[Browse Job Openings](#)
[Create Job Opening](#)

Use this pagelet to view your job openings with an *Open* status. You must be designated as the assigned hiring manager to have a job opening visible in this pagelet. Job openings in which you are assigned as the recruiter, interviewer, screener, approver, or reviewer, but not as the hiring manager, will not appear in this list.

If you are not assigned as a hiring manager to any open job openings, the grid will be hidden and the following will be displayed: *You are not assigned to any open jobs.*

The pagelet displays the job openings in sets of five. To view additional job openings, use the Find link, View All link, Zoom icon, or scroll arrows at the top of the grid. Job openings are listed in descending job number order by default but can personalize the columns and sort order by clicking the Personalize link.

Job

Click the job number link to access the Find Job Opening - Job Opening page in the Talent Acquisition Manager application.

Manage all aspects of a job opening, including managing applicants, finding applicants, reviewing activity, creating notes, attachments, and expenses, and viewing or updating the job opening itself from this page.



Browse Job Openings

Click this link to open the Browse Job Openings page to view all existing job openings in the Talent Acquisition Manager application. This link is hidden if you do not have security access to the Browse Job Openings page.



Create Job Opening

Click this link to open the Enter Primary Job Opening Information page to enter the primary job opening details in the

Talent Acquisition Manager application. This link is hidden if you do not have security access to create job openings.

Related Links

"Searching for Job Openings" (PeopleSoft HCM 9.2: Talent Acquisition Manager)

"Managing Job Openings" (PeopleSoft HCM 9.2: Talent Acquisition Manager)

"Understanding Job Openings" (PeopleSoft HCM 9.2: Talent Acquisition Manager)

[Personalizing Column and Sort Order within the Pagelet Grids](#)

Quick Links Pagelet

The Quick Links pagelet provides navigation links to menu items frequently used by the manager.

Image: Quick Links pagelet

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



Use this pagelet as an alternative to navigating to frequently used pages. This enables you to access these pages with one click as opposed to traditional navigation. You must have security permission to access these quick link pages.

The administrator can create or add quick links to this pagelet by using Navigation Collections and Pagelet Wizard. To add additional links, you would use the following steps:

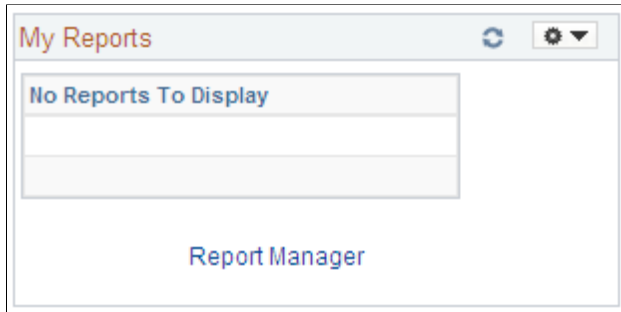
1. Navigate to PeopleTools > Portal > Portal Utilities > Navigation Collections.
2. Search for Quick Links and click the Edit link. Navigate to PeopleTools > Portal > Portal Utilities > Navigation Collections.
3. Click the Add Link button to add additional links to this pagelet.

My Reports Pagelet

The My Reports pagelet enables manager to display selected reports on the dashboard.

Image: My Reports pagelet

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



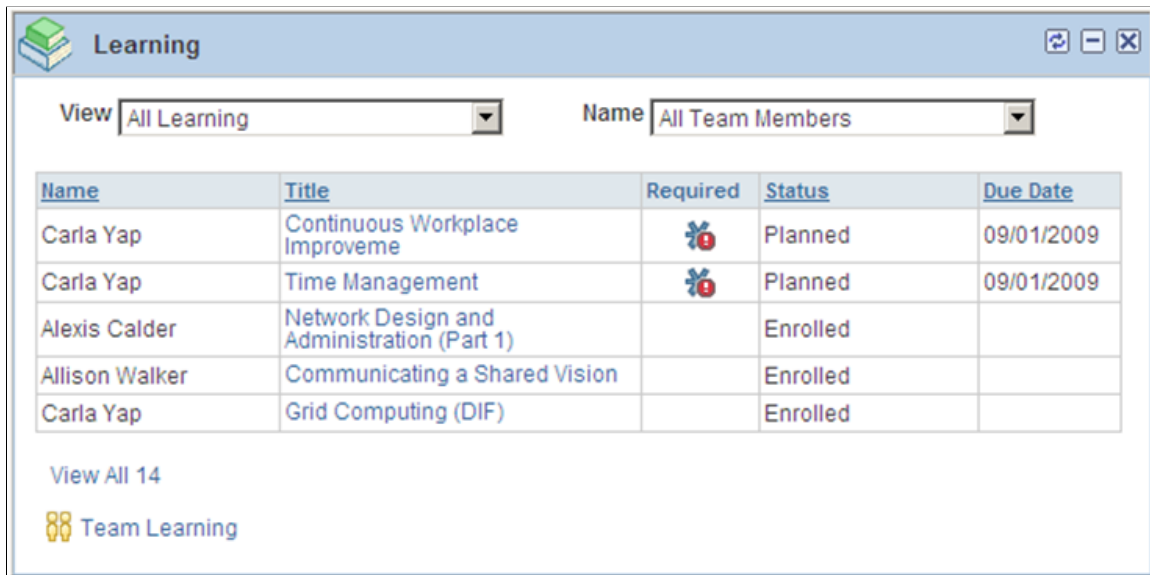
Click the report name to access the report run control page. Click the Report Manager link to access the Report Manager.

Learning Pagelet

The Learning pagelet displays the training status of employees. This information comes from the Enterprise Learning Management (ELM) system.

Image: Learning pagelet

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



Use this pagelet to see an overview of learning events for direct reports. This pagelet highlights required learning and certifications which are expired or in warning status, with the Past Due and Due Soon warnings appearing first. The pagelet presents the classes, programs, and courses in *Planned* status for each direct report.

The View and Name drop-down fields enable you to filter the data that you see in the grid.

View

Select which view of data you wish to display in the grid.
Choices are:

- *All Learning* - does not filter out information but shows all learning scheduled for your employees.
- *Required Learning* - filters the grid to show only training that is marked as required, in warning status, or expired.

Name

Select the individuals you want to display in the grid. You can chose to display all team members by selecting *All Team Members*, or you can select an individual direct report team member by name. Indirect team member will not be available in this pagelet.

Title

Click the title link to open an application page that corresponds to the type of learning item it is, for example, a class, course, or program.

Note: The data for ELM Learning is pulled from ELM database via IB Integration setup.



(Past Due icon)

Indicates that this learning event is required and past due.



(Due Soon icon)

Indicates that this learning event is required and due soon.

View All <number>

The pagelet displays five rows of information in the grid. Click this link to open a modal Learning grid page to view all rows of employee learning. The number of employees that appear in the page grid will appear in the link name.



Team Learning

Click this link to open the Team Learning page in Manager Self Service.

See the documentation for *PeopleSoft Enterprise Learning Management*.

Direct Line Reports Pagelet

The Direct Line Reports pagelet displays data about a manager's direct reports from information stored across the HCM product line. Managers can view various details about their employees from this single location. Managers will use this pagelet to view job details, contact information, career and succession plans, compensation, performance reviews, and time tracking for their direct reports. This data comes from a number of PeopleSoft HCM products including ePerformance, Career Planning, Succession Planning, Time and Labor, Absence Management, Compensation, and ELM.

The HCM data that is brought into the pagelet is organized into a grid with tabs, as defined on the Direct Reports Pagelet Setup page and the user preferences. Each tab contains a group of fields displaying employee data from a specific area from within HCM. See [Understanding the Direct Line Reports Pagelet Features](#).

Note: Users can personalize the tabs and columns of the grid in this pagelet by clicking the Personalize link above the grid in the pagelet. Because of this, columns and tabs shown in this document may vary from your application. The tabs and columns shown here are the delivered default values.

See [Personalizing Column and Sort Order within the Pagelet Grids](#).

The Direct Line Reports pagelet uses access types to determine which employees report to a manager. The Direct Line Reports pagelet component uses the access type registered in the Direct Reports Setup under Set Up HCM > Common Definitions > Direct Reports for Managers.

See [Understanding the Direct Line Reports Pagelet Features](#).

These topics discuss the:

- Direct Line Reports pagelet: Summary tab.
- My Organization page.
- Direct Line Reports pagelet: Job Details tab.
- Direct Line Reports pagelet: Contact tab.
- Direct Line Reports pagelet: Career Plan tab.
- Direct Line Reports pagelet: Compensation tab.
- Direct Line Reports pagelet: Performance tab.
- Direct Line Reports pagelet: Time tab.
- Direct Line Reports pagelet: Succession tab.

Direct Line Reports Pagelet: Summary Tab

The Summary tab displays a high level overview of employee's job and rankings.

Image: Direct Line Reports pagelet: Summary tab

This example illustrates the fields and controls on the Direct Line Reports pagelet: Summary tab. You can find definitions for the fields and controls later on this page.

Name	Actions	Job Title	Position in Salary Range
Christelle Stevenson	▼ Actions	Manager-Accounting	[Salary Range Bar]
Daryl Reese	▼ Actions	Analyst-Financial	[Salary Range Bar]
Edmund Donahue	▼ Actions	Manager-Accounting	[Salary Range Bar]
Mei Lee	▼ Actions	Accountant	[Salary Range Bar]
Shawn Quilligan	▼ Actions	Analyst-Financial	[Salary Range Bar]
Vicki Zinn	▼ Actions	Accountant	[Salary Range Bar]

View My Organization
Headcount Analytics

The grid displays your direct reports based on the reporting structure specified in the Direct Reports Setup Access Type Security.

The employee Name and the Action columns are frozen in the grid and these columns will be available on every tab in the grid.

Name

Displays the employee's full name. Click the employee's name link in the Name column to access the Talent Summary page for a person. The Talent Summary page displays various pagelets displaying much of the information available in the Direct Line Reports grid in greater detail.

Employees with an Inactive status in HR will be shown on the My Organization page, by clicking the View My Organization link, only when it is necessary, to display the name so that drilling down to direct reports is possible. An inactive employee will not appear if he or she does not have direct reports.

When you are using Position Management and the administrator has selected to allow empty positions, the text Empty Position will appear in the name field. When the administrator has set the system not to allow empty position, the inactive employee name will display in the name field through the View My Organization link, My Organization page, if the employee has direct reports.

First Name and Last Name

Displays the first and last names of the employee. These fields are delivered hidden but can be added using the Direct Reports Pagelet Setup page. Click the employee's first or last name link to access the Talent Summary page for a person.

Actions

Click this menu drop-down list to select manager self service actions to perform for your employees. The system will direct you to the appropriate manager self service page.

PeopleSoft delivers various manager self service transactions to work in conjunction with the Manager Dashboard that enables managers to view or manage employee information in the PeopleSoft database, as they would from the manager self service pages. This menu list also enables you to quickly access the Company Directory and Talent Summary pages for an employee.

For a list of manager self service action available through the Manager Dashboard, see the "Related Actions" subtopic under [Understanding the Direct Line Reports Pagelet Features](#).



(high potential icon)

This column displays the High Potential icon if an employee is identified as a high potential in the career plan. You can access this information by navigating to Workforce Development > Career Planning > Prepare Evaluation/Career Plan > Manage Career Plan.

Job Title

Displays the employee's job title. For example, an employee who holds two jobs and reports to the same manager for both of those jobs will have two rows of data in the grid, one for each job title.

The Job Title field is available in both the Summary tab and the Job Details tab. The administrator has the ability to hide the Summary tab job title column separately from the Job Details tab job title column.

Performance Rating

Displays a graphical representation of the most recent performance review rating for an employee. The number of stars is determined by the rating model that is being used.

There will be one star for each value in the rating model.

The performance rating that is shown is taken from the last completed performance review of the document type specified in the Direct Reports Pagelet Setup page. Pause over the star image to see the rating as text.

To get the column to display the stars, you must enter numeric values in the Numeric Rating column on the Rating Model page.

The pagelet uses the Numeric Rating value to determine the number of stars that should appear for each rating. If there is no Numeric Rating value for a rating in the rating model, the stars will not display.

Note: The Numeric Rating field is not a required field, so be sure to enter numeric values to get the star ratings to appear.

See "Rating Model Page" (PeopleSoft HCM 9.2: Human Resources Manage Profiles).

Position in Salary Range

Displays a graphical representation of an employee's position in the salary range for that job. The vertical bar depicts where the employee's salary falls in that range.

Pause on the graphic to view the actual salary of the employee and view the minimum, midpoint, and maximum salary values for the job.



View My Organization

Click this link when you are a higher level manager to access the My Organization pagelet and view the same data for direct and indirect reports in an hierarchical grid.

Note: You will not see the View My Organization link when you do not have indirect reports.



Headcount Analytics

Select this link to display a list of headcount analytic reports: Headcount Movement and Current Headcount. Select the appropriate report from the list. See "Viewing Quick Analytics Headcount Pivot Grids" (PeopleSoft HCM 9.2: Human Resources Administer Workforce).

My Organization Pagelet

Use the My Organization pagelet (UX_DIRECTS_HGRID) to view information about your direct and indirect reports in a hierarchical list (or Hgrid) format.

Navigation

Click the View My Organization link in the Direct Line Reports pagelet on the Manager Dashboard.

Image: My Organization pagelet

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

Name	Actions	Job Title	Position in Salary Range
+ Christelle Stevenson	Actions	Manager-Accounting	[Progress Bar]
Daryl Reese	Actions	Analyst-Financial	[Progress Bar]
- Edmund Donahue	Actions	Manager-Accounting	[Progress Bar]
Alan Carr	Actions	Bookkeeper	[Progress Bar]
Brenton Francisco	Actions	Bookkeeper	[Progress Bar]
Cecil Greens	Actions	Clerk-File	[Progress Bar]
Chris Cameron	Actions	Bookkeeper	[Progress Bar]
Cindy Bains	Actions	Clerk-Accounting	[Progress Bar]
Grayson Mann	Actions	Clerk-Data Entry	[Progress Bar]
Jason Lee	Actions	Clerk-General Ledger	[Progress Bar]
Jason Thomsen	Actions	Clerk-File	[Progress Bar]
Jody Clampton	Actions	Bookkeeper-Sr	[Progress Bar]
Kai MacKenzie	Actions	Clerk-Accounting	[Progress Bar]
Steve Religioso	Actions	Bookkeeper	[Progress Bar]
Mei Lee	Actions	Accountant	[Progress Bar]
Shawn Quilligan	Actions	Analyst-Financial	[Progress Bar]
Vicki Zinn	Actions	Accountant	[Progress Bar]

Higher level managers have the ability to view and complete actions for their direct and indirect employees. The page displays your reporting structure in an hierarchical list (Hgrid) format. Employees that are also managers are represented by a + or – sign preceding their name. You can expand (+) or collapse (–) different levels to view the reporting structure of managers and employees that report up to you.

Note: The page will display up to nine levels of managers and employees. The system will display a message when reporting structures exceed nine levels.

Direct Line Reports Pagelet: Job Details Tab

The Job Details tab displays information about the employee’s current job and work history.

Image: Direct Line Reports pagelet: Job Details tab

This example illustrates the fields and controls on the Direct Line Reports pagelet: Job Details tab. You can find definitions for the fields and controls later on this page.

Name	Actions	Empl ID	Job Code	Years in Job	Job Title
Christelle Stevenson	▼ Actions	KU0020	600145	0.9	Manager-Accounting
Daryl Reese	▼ Actions	KU0044	140035	1.5	Analyst-Financial
Edmund Donahue	▼ Actions	KU0102	600145	1.5	Manager-Accounting
Mei Lee	▼ Actions	KU0076	110000	1.5	Accountant
Shawn Quilligan	▼ Actions	KU0039	140035	3.0	Analyst-Financial
Vicki Zinn	▼ Actions	KU0059	110000	1.5	Accountant

View My Organization
Headcount Analytics

The last column displays a schedule icon, if applicable. This indicates where an employee is today. The column displays only one icon to indicate the employee schedule for the day, even if more than one schedule applies. There are five icons and the grid determines which icon to display using this priority sequence:



(planned absence)

Indicates that the employee has a planned absence for today.



(holiday)

Indicates that the employee is on a holiday break today.



(not scheduled)

Indicates that the employee is not scheduled to work today based on the employee's holiday schedule in Job Data.



(training)

Indicates that the employee is in training today. Information is obtained from ELM or HR Training.



(no show)

Indicates that the employee did not show up to work today when he or she is scheduled to work.

Direct Line Reports Pagelet: Contact Tab

The Contact tab displays different methods for contacting an employee.

Image: Direct Line Reports pagelet: Contact tab

This example illustrates the fields and controls on the Direct Line Reports pagelet: Contact tab. You can find definitions for the fields and controls later on this page.

Name	Actions	Telephone	Email	Location
Christelle Stevenson	▼ Actions	925.694.7920	HCMGENUser1	Corporation Headquarters
Daryl Reese	▼ Actions	925.555.5678	daryl.reese	Corporation Headquarters
Edmund Donahue	▼ Actions	925.694.7902	edmund.donahue	Corporation Headquarters
Mei Lee	▼ Actions	925.694.7976	mei.lee	Corporation Headquarters
Shawn Quilligan	▼ Actions	925.555.9856	shawn.quilligan	Corporation Headquarters
Vicki Zinn	▼ Actions	925.694.7959	vicki.zinn	Corporation Headquarters

View My Organization
Headcount Analytics

The employee's preferred phone number and email that appear on this page come from personal data in HR. The Department and Chat columns are hidden when delivered and must be enabled by the system administrator.

The last column displays an IM chat icon if the employee has defined an instant messaging ID in HR. A green icon will appear when the employee is active, or will be grayed out when the employee is not online. The icon will appear under the following conditions:

1. The employee has defined an instant messaging ID in HR.
2. The Instant Message Presence Icon is selected for direct line reports in the Org Chart Viewer.
3. The employee's IM protocol and IM domain matches the protocol and domain for the direct line reports in the Org Chart Viewer.

For more information about enabling the IM chat icon for direct reports, see the Columns field definition for instant messaging under [Direct Reports Pagelet Setup Page](#).

Direct Line Reports Pagelet: Career Plan Tab

The Career Plan tab displays information about the employee's mobility preferences and last review date.

Image: Direct Line Reports pagelet: Career Plan tab

This example illustrates the fields and controls on the Direct Line Reports pagelet: Career Plan tab. You can find definitions for the fields and controls later on this page.

Name		Review Date	Relocate?	International?	Travel?
Christelle Stevenson	▼ Actions	09/30/2010	✓		✓
Daryl Reese	▼ Actions	06/30/2010	✓	✓	✓
Edmund Donahue	▼ Actions	12/31/2010			✓
Mei Lee	▼ Actions	06/30/2010	✓		✓
Shawn Quilligan	▼ Actions	12/31/2010	✓		
Vicki Zinn	▼ Actions	09/30/2010	✓	✓	

View My Organization
Headcount Analytics

Use this page to view the data from the most recent effective dated career plan. The Review Date reflects the Career Plan Review Date for this current career plan. Mobility preferences are seen in the career plan, but are maintained in the person's profile. A check mark identifies that an employee is willing to relocate, take an international assignment, or travel for a job.

Direct Line Reports Pagelet: Compensation Tab

The Compensation tab displays how employees fit into the salary range for their jobs.

Image: Direct Line Reports pagelet: Compensation tab

This example illustrates the fields and controls on the Direct Line Reports pagelet: Compensation tab. You can find definitions for the fields and controls later on this page.

Name		Annual Salary	Currency	Minimum	Midpoint	Maximum	Compa-Ratio	Quartile
Christelle Stevenson	▼ Actions	32,240.00	USD	24,452.00	30,565.00	36,678.00	105	3
Daryl Reese	▼ Actions	40,560.00	USD	33,372.00	41,715.00	50,058.00	97	2
Edmund Donahue	▼ Actions	62,400.00	USD	58,916.00	73,645.00	88,374.00	85	1
Mei Lee	▼ Actions	40,040.00	USD	41,905.00	52,381.00	62,857.00	76	1
Shawn Quilligan	▼ Actions	48,006.40	USD	41,905.00	52,381.00	62,857.00	92	2
Vicki Zinn	▼ Actions	56,160.00	USD	41,905.00	52,381.00	62,857.00	107	3

View My Organization
Headcount Analytics

Minimum, Midpoint, and Maximum Displays the minimum, midpoint and maximum amounts suggested for the salary range for the job code of the employee. If no salary grade is associated with the job code, no information will display. This information, along with the

annual salary can be seen visually on the Summary tab in the Position in Salary Range column.

Compa-Ratio

Indicates as a percentage where workers' salaries lie in relation to the midpoint range for their salary grades. The compa-ratio displays *100* percent, when the salary is exactly at the midpoint of the salary range. It is a number less than *100* when the salary is below the midpoint of the salary range. It is a number greater than *100* when the salary is greater than the midpoint.

This field is delivered as available in both the Summary tab and the Compensation tab and displays the same information. The administrator has the ability to hide the Summary tab Compa-Ratio column separately from the Compensation tab Compa-Ratio column on the Direct Reports Pagelet Setup page.

Quartile

Indicates where the employee's salary relates to the salary range when the range is divided into quarters. Values are *1, 2, 3, or 4*, the higher the number, the higher the employee is within the salary range.

%Range

Displays how close the employee's salary is to the midpoint of the salary range. This field is delivered hidden by default.

Direct Line Reports Pagelet: Performance Tab

The Performance tab displays the latest performance review information for a manager's employees.

Image: Direct Line Reports pagelet: Performance tab

This example illustrates the fields and controls on the Direct Line Reports pagelet: Performance tab. You can find definitions for the fields and controls later on this page.

Name	Description	Period Begin Date	Period End Date
Christelle Stevenson	▼ Actions		
Daryl Reese	▼ Actions		
Edmund Donahue	▼ Actions		
Mei Lee	▼ Actions		
Shawn Quilligan	▼ Actions		
Vicki Zinn	▼ Actions		

Last Rating

Identifies the rating that the employee received on his or her last completed performance document for the document type that is specified on the Direct Reports Pagelet Setup page by the administrator. The rating is taken from the overall rating section of the performance document. If the document type has

not been specified in the setup or the employee does not have a completed performance rating from the specified document, the performance rating information will not display.

Period Begin Date and Period End Date

Displays the dates the performance period began and ended where the employee received their Last Rating.

Direct Line Reports Pagelet: Time Tab

The Time tab displays the employee’s available compensatory, vacation, and sick hours.

Image: Direct Line Reports pagelet: Time tab

This example illustrates the fields and controls on the Direct Line Reports pagelet: Time tab. You can find definitions for the fields and controls later on this page.

Name	Actions	Compensatory Time	Vacation	Sick
Christelle Stevenson	▼ Actions		183.99	96.00
Daryl Reese	▼ Actions		167.99	96.00
Edmund Donahue	▼ Actions		152.25	96.00
Mei Lee	▼ Actions		191.99	96.00
Shawn Quilligan	▼ Actions		191.99	96.00
Vicki Zinn	▼ Actions		192.00	96.00

Compensatory Time

Shows the number of comp time hours available to the employee. The comp time balance is retrieved from Time and Labor. An employee must be enrolled in Time and Labor to accrue compensatory time. You enroll employees in the Time and Labor by navigating to Time and Labor > Enroll Time Reporters > Maintain Time Reporter Data or by clicking the Time Reporter Data link on the Job Data - Employment Data page.

Vacation and Sick

Displays the number of vacation or sick hours available to the employee and balances are retrieved from Time and Labor. These fields are delivered hidden by default.

Absence Management Leave Balance 1, 2, and 3 (column label names will vary)

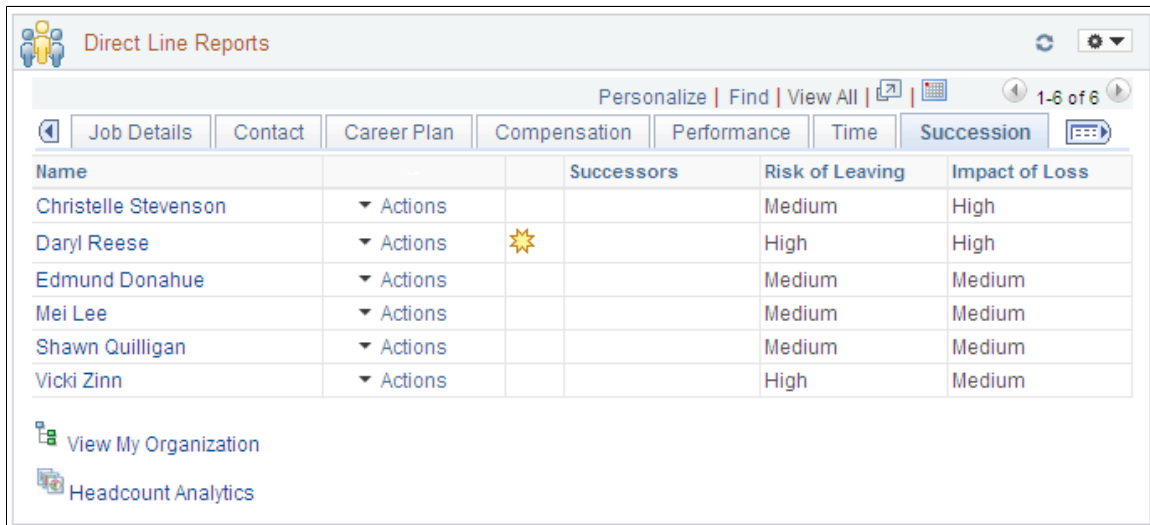
Displays user defined information from Absence Management. The administrator identifies these fields on the Direct Reports Pagelet Setup page in conjunctions with the Global Payroll and Absence Management pages. The Absence Management Leave Balance 3 field is delivered hidden by default.

Direct Line Reports Pagelet: Succession Tab

The Succession tab displays employee's succession plan information.


Image: Direct Line Reports pagelet: Succession tab

This example illustrates the fields and controls on the Direct Line Reports pagelet: Succession tab. You can find definitions for the fields and controls later on this page.



Name	Actions	Successors	Risk of Leaving	Impact of Loss
Christelle Stevenson	▼ Actions		Medium	High
Daryl Reese	▼ Actions	★	High	High
Edmund Donahue	▼ Actions		Medium	Medium
Mei Lee	▼ Actions		Medium	Medium
Shawn Quilligan	▼ Actions		Medium	Medium
Vicki Zinn	▼ Actions		High	Medium

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 (key person)

The first column after the Actions field displays the Key Person icon to indicate that an employee has been identified as a vital, or key, employee within the organization for succession planning.

Successors

Displays the number of candidates that have been identified as successors in the Succession Plan. The number of successors is the sum of the candidates listed on a succession plan for a key person.

To add succession candidates to a person's succession plan, create or modify a succession plan by navigating to **Organizational Development > Succession Planning > Maintain Succession Plan** and entering the candidates on the Candidates page.

Risk of Leaving and Impact of Loss

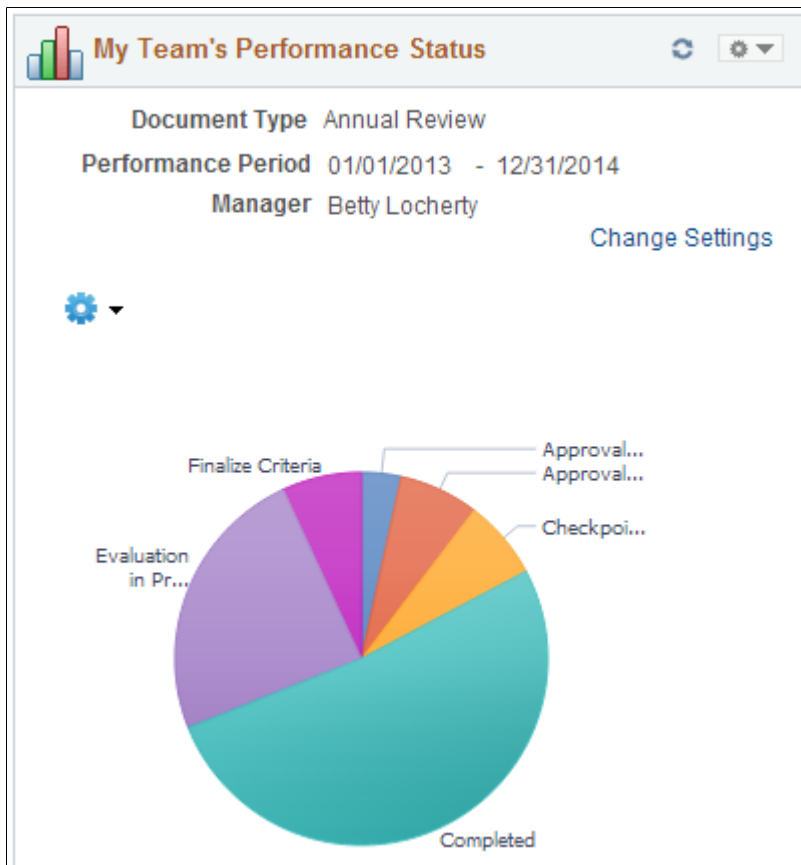
Show the employee's risk of leaving and the impact of that loss, as defined in the career plan for an employee.

My Team's Performance Status Pagelet

The My Team's Performance Status pagelet displays the performance status of documents that are owned by the manager's team.

Image: My Team's Performance Status pagelet

This example illustrates the fields and controls on the My Team's Performance Status pagelet.



[ePerformance Team Performance Status Chart](#)

The pie chart shows the progress of ePerformance documents for the manager's organization. Documents represented in the pie chart are filtered by the document type, performance period, and manager that are specified at the top of the pagelet. The chart displays all supported document status, except for *Canceled*.

The performance status pivot chart supports these access types:

- By Supervisor ID (access type – 2)
- By Department Manager ID (access type – 3)
- By Reports To Position (access type – 4)
- By Part Posn Mgmt Supervisor (access type – 5)
- By Part Posn Mgmt Dept Mgr ID (access type – 6)

The chart uses the access type that is specified on the "Direct Reports Transaction Configuration Page" (PeopleSoft HCM 9.2: Application Fundamentals) for the *EP_APPR_SELECT* component.

Note: To support the performance status pivot chart, run the Direct Reports Table Build process periodically. This process populates direct report flat tables corresponding to each access type. The pivot chart selects data from flat tables through PSQuery.

Change Settings

Click to access the [Change Settings Page](#) to update parameters that are used to build the chart.

For example, if you wish to view the progress of a particular manager's team in your organization, you can change the manager using this link. The system updates the pie chart to show only documents that pertain to the newly selected manager.



Click to select the Export Data option to export the data of the documents that are selected for the pie chart to a spreadsheet.

This is the same as selecting the detailed view of a pie chart segment, except that this Export Data option includes all the documents, not just the ones in a particular document status.

Filters and Status

This control appears only if you click a pie chart segment and select a DrillDown To option to manipulate the pie chart data.

By default, the document status of the clicked segment is selected.

Select one or more document statuses for their documents to be included in the pie chart. For example, you may select two document statuses as filters and drill down to view documents of these two statuses by department.

Click the Status link to return to the original pie chart display.

Pie Chart Display

For all the documents that meet the filter criteria, they are represented in the pie chart by document status and sub-statuses (for example, *Approval Submitted*, *Checkpoint #*, and *Finalize Criteria*).

Hover over a pie chart segment to view its document status and the number of documents that are in this status.

Click a pie chart segment to:

- See a detailed view of the documents that are included in this status, in a grid format on a modal page.

The grid displays document information such as employee and manager names, document status, next due date and so on. A related action is available to users to open documents in the WorkCenter for edit (if the document status is not *Completed*) or review (if the document status is *Completed*, or if the user is not the manager listed on the document).

- Drill down to further segregate the data (documents) of the selected status (segment) by these options:
 1. Department—Data of the selected segment is represented by a pie chart, grouped by department.
 2. Location—Data of the selected segment is represented by a pie chart, grouped by location.

3. Manager—Data of the selected segment is represented by a pie chart, grouped by manager.

Related Links

"Team Performance Status Page" (PeopleSoft HCM 9.2: ePerformance)

Change Settings Page

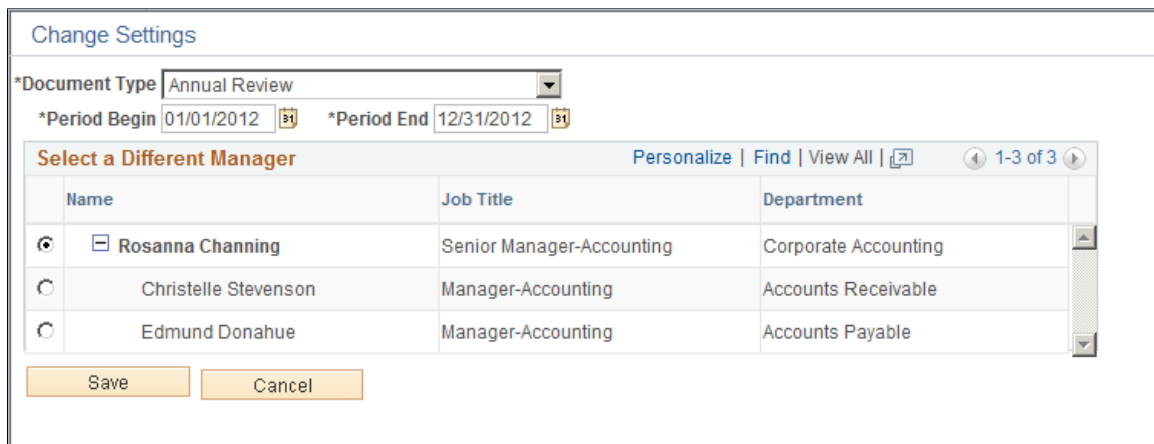
Use the Change Settings page (EP_PG_DOCSTS_SEC) to edit the default settings used for launching the My Team’s Performance Status pagelet.

Navigation

Click the Change Settings link on the My Team’s Performance Status pagelet.

Image: Change Settings page

This example illustrates the fields and controls on the Change Settings page.



Use this page to update the parameters used for launching the performance status chart. The system includes in the status chart documents that match the specified document type, period, and manager.

Document Type, Period Begin and Period End

Update the default document type and evaluation period as needed.

By default, the system displays the values that are specified in the "Assign Document Defaults Page" (PeopleSoft HCM 9.2: ePerformance).

Select a Different Manager

Displays the reporting structure that lists the direct and indirect managers of the logged on manager user, whose name is displayed in bold text in the grid. Select a manager for the system to filter documents for the chart to those that are owned by him or her.

Personalizing Pagelets

Each individual user can personalize the content for their pagelets by clicking the Pagelet Settings drop-down menu list on the pagelet headers. These topics discuss how to personalize pagelets.

Pages Used to Personalize Pagelets

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
<u>Personalize Alerts Page</u>	UX_ALERTS_PRS	Select alert types and urgency levels that should display in your Alerts pagelet. You can define the maximum number of rows to display on the pagelet.
<u>Personalize Business Objectives Alignment Page</u>	UX_EPO_ALIGN_PRS	Select the default objective to appear on the objective pagelets.
<u>Personalize My Reports Page</u>	PSRF_PGLT_OPTIONS	Personalize the My Reports pagelet.

Personalize Alerts Page

Use the Personalize Alerts page (UX_ALERTS_PRS) to select alert types and urgency levels that should display in your Alerts pagelet.

You can define the maximum number of rows to display on the pagelet.

Navigation

Select the Pagelet Settings drop-down menu list in the Alerts pagelet header, and select Personalize.

Image: Personalize Alerts page

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

The screenshot shows the 'Personalize Alerts' configuration page. It is divided into three main sections:

- Alert Types to Include:** A list of seven alert types, each with a checked checkbox: Anniversary Alerts, Birthday Alerts, eCompensation, ePerformance, Expiring Licenses/Certificates, Expiring Memberships, and Scheduled Training.
- Alerts Level to Display:** A list of three alert levels, each with a checked checkbox and a corresponding icon: Critical (red exclamation mark), Warning (yellow triangle), and Informational.
- Number of Alerts to Display:** A label '*Number of Alerts' followed by a text input field containing the number '20'.

At the bottom of the form are two buttons: 'Save' and 'Cancel'.

Use this page to personalize which alert types and level should appear on the Alerts pagelet. This page can contain these three sections, if enabled by the administrator:

Alert Types to Include

Select which alert types that the Alerts pagelets should display. Only those enabled by the administrator will be available for selection. Deselect an alert type to not have it appear on the Alert pagelet.

Alerts Level to Display

Select urgency levels to have only those alerts associated with these levels appear in the pagelet.

Number of Alerts

Define how many of alerts should appear in the pagelet. If your alerts exceed this number, you can click the View All link on the pagelet to view all alerts.

Related Links

[Alerts Pagelet Setup Page](#)

Personalize Business Objectives Alignment Page

Use the Personalize Business Objectives Alignment page (UX_EPO_ALIGN_PRS) to select the default objective to appear on the objective pagelets.

Navigation

- Select the Pagelet Settings drop-down menu list in the Objective Alignment pagelet header, and select Personalize.
- Select the Pagelet Settings drop-down menu list in the Business Objective Alignment pagelet header, and select Personalize.

Image: Personalize Business Objectives Alignment page

This example illustrates the fields and controls on the Personalize Business Objectives Alignment page. You can find definitions for the fields and controls later on this page.

Business Objectives

Select the preferred business objective to show on the Objective Alignment and Business Objective Alignment pagelets when you are associated with more than one objective. The default objective you select here will show on both pagelets. If you have not defined a default value, the system will display the most recently created business objective.

Section

Select the preferred section of the business objective to show on the Objective Alignment and Business Objective Alignment pagelets. The default section you select here will show on both pagelets.

Personalize My Reports Page

Use the Personalize My Reports page (PSRF_PGLT_OPTIONS) to personalize the My Reports pagelet.

Navigation

Select the Pagelet Settings drop-down menu list in the My Reports pagelet header, and select Personalize.

Image: Personalize My Reports page

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

The screenshot shows a form titled "Personalize My Reports". It contains the following elements:

- Maximum Reports:** A text input field containing the number "5".
- Within:** A text input field that is currently empty.
- Time Unit:** Two radio buttons labeled "DAYS" and "HOURS".
- Buttons:** A yellow "Save Options" button and a blue "Close And Return To Home Page" link.

Identify the number of reports that the My Reports pagelet should display in the grid as well and the time frame in which to display them.

Personalizing Column and Sort Order within the Pagelet Grids

Managers can personalize the columns that appear in many of the Manager Dashboard pagelets. You do this by clicking the Personalize link on the pagelet above the grid. These pagelets allow you to change column and sort order within the pagelet grids:

- Pending Approvals
- Direct Line Reports
- My Job Openings

This topic discusses how to personalize the content of the pagelet grids.

Personalize Column and Sort Order Page

Use the Personalize Column and Sort Order page to manage the column and sorting order of a grid within a pagelet.

Navigation

Select the Personalize link above the pagelet grid

Image: Example of the Personalize Column and Sort Order page for the Direct Line Report pagelet (1 of 2)

This example illustrates the Personalize Column and Sort Order page for the Direct Line Report pagelet (1 of 2).



Image: Example of the Personalize Column and Sort Order page for the Direct Line Report pagelet (2 of 2)

This example illustrates the Example of the Personalize Column and Sort Order page for the Direct Line Report pagelet (2 of 2).



Use this page to hide, freeze, or reorder columns in your pagelet. All the dashboard Personalize Column and Sort Order pages are similar to the example shown here, where the fields that available for personalizing are specific to the grid columns available in the pagelet.

To hide a column, click a column name in the left column and select the Hidden check box. When you freeze a column, all the columns that precede it will also be frozen.

The rows in a grid typically sort by a predefined order. For example, the My Job Openings pagelet displays rows of data in descending order of job opening number. To override this default sort order, click the column or columns you want to sort data by. Click the Add to Sort right arrow button to move the rows to the Sort Order group box. The grid rows sort by the order you have the columns listed here. Click a column name in the Sort Order group box and select the Descending check box to have the rows sort in descending order.

To change the order of columns, click the column and use the Move Up and Move Down arrows to change the column order.

Changing the Column Order to a Different Tab for Direct Line Reports

The Direct Line Reports pagelet is different in that the columns are grouped by tabs on the pagelet grid for ease of viewing. The page lists the tab names preceded by the word *Tab*. Columns that should appear in this tab are listed under this tab name. To change a column to a different tab, click the column name and move it under the designated Tab name.

Previewing Your Column Personalizations

To view your changes before saving them to the system, click the Preview button at the bottom of the page.

Chapter 10

Using the Talent Summary Pagelets

Understanding the Talent Summary Content and Layout

The Talent Summary page provides managers with a comprehensive view of talent data related to an individual employee through the use of a dashboard. With the Talent Summary pagelets, managers have access to an employee's talent data from one location instead of accessing several components separately.

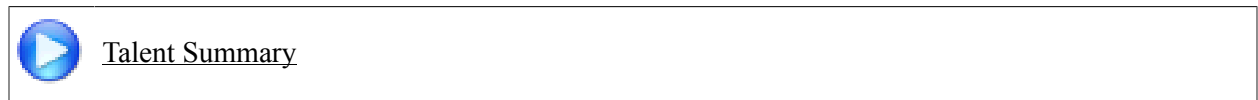


Image: Example of the Talent Summary page

This example illustrates an example of the Talent Summary page.

The screenshot displays the Talent Summary page for Rosanna Channing. The page is organized into several sections:

- Employee Profile:** Includes a photo, name, job title (Senior Manager-Accounting), job code (600135), address (4500 Corporate Lane, Pleasanton, CA 94588), work phone (925.555.1234), location (Corporation Headquarters, Building 2000), email (HCMGENUser1@ap6023fems.us.oracle.com), group box (Full/Part Time: Full-Time, Employee ID: KU0046, Birthday: 01/04), and HR status (Active).
- Performance and Risk:** Shows performance metrics (Achiever ★★★★★), last start date (08/29/1988), years of service (26.4), date in current job (11/04/2008), years in current job (4.2), last performance period (Jan 2011 to Dec 2011), potential rating (High Potential Candidate), and last performance rating (Exceeds Expectations).
- Job Related Competencies:** A bar chart showing proficiency levels for various skills such as Managerial Efficiency, Resource Planning, Develop & Implement, Financial Accounting, Financial Analysis, Financial Planning, Provides Direction, and Directiveness/Assertiveness.
- Base Salary History:** A line graph showing salary growth from 2008 to 2012, with values ranging from approximately \$58,516.00 to \$72,800.00.
- Performance History:** A bar chart comparing performance ratings (Exceeds Expectations, Meets Expectations, Needs Improvement, Unsatisfactory Performance) for different roles (Manager-Finance, Senior Manager-Accounting) across various periods.
- Current Salary:** Displays the annual base salary (\$72,800.00) and pay frequency (Monthly).
- Career History:** A table listing job titles, job codes, start dates, and end dates for previous roles.
- Personal Competencies:** A table showing proficiency levels for Business Banking (3-Good) and Strategic Planning (4-Very Good).
- Responsibilities:** A table showing proficiency levels for various responsibilities, all rated as 4-Very Good.
- Succession Options:** A table listing potential successors (Betty Loehery, Director-Finance) and their readiness for succession.
- Career Planning:** A section for mobility preferences (Travel, Take Global Assignments, Relocate) and an official path table showing career moves and readiness.

Use the Talent Summary page to manage and analyze information about your workforce. This page enables you to:

- View an employee's profile details such as competencies, responsibilities, and certifications.

- Examine career and succession plans for your employees.
- View employee compensation data and compare it to the job salary range.
- Analyze performance history.
- Assess your staff's learning and education.

Note: The system checks direct report access for the Talent Summary page as a whole as well as for access to the contents of each pagelet. If a manager does not have security access to the component, the related pagelets will not show up in the dashboard. If a manager has access to the component, but not to the direct reports access needed for the component, then the related pagelet will display a message that the manager does not have access to this information for the employee.

For a list of pagelets delivered with the Talent Summary feature, see [Understanding the Talent Summary Dashboard Pagelets and Setup](#).

Customizing the Talent Summary Page

You can also customize the look of your Talent Summary page. On the Talent Summary dashboard, you can drag and drop pagelets to a desired location on the page. You can also minimize or remove pagelets from the dashboard by using the corresponding icons in the header. To have a pagelet appear after deleting it from the dashboard, access the Personalize Content: Talent Summary page to select the pagelet.

To further personalize Talent Summary dashboard content and layout, use the Personalize Content and Layout links:

- *The Personalize Content: Talent Summary page*—enables you to select or deselect pagelets you wish to view on your Talent Summary page.
- *The Personalize Layout: Talent Summary page*—enables you to determine whether you want your Talent Summary page to display in a 2- or 3-column layout. You will also select which pagelets should appear in which column.

Note: The pagelets available on the Personalize Content page are based on permission lists. If a user does not have access to a permission list, for example, if the Manager Dashboards - JPM (*HCCPJP2200*) permission list is removed from the Manager Dashboard role, the profile based pagelets may not be listed for selection from the Personalize content page.

Related Links

[Understanding Accessing Direct Line Report Information on the Dashboard Pagelets](#)
[Defining the Manager Dashboard Content and Layout](#)

Displaying the Talent Summary Page and Pagelets

These topics discuss how to display the Talent Summary page and pagelets.

Pages Used to Display the Talent Summary Page and Pagelets

Page Name	Definition Name	Usage
Talent Summary - Employee Selection Criteria Page	HR_DR_DIRECTREPORT	Select a direct or indirect report from this page to view the employee's talent summary data.
Talent Summary Page	HC_TALENT_SUMMARY	View the Talent Summary pagelet content by selecting or deselecting pagelets that should appear on your Talent Summary page.
Personalize Content: Talent Summary Page	PORTAL_HPCOMP	<p>Define the Talent Summary pagelet content by selecting or deselecting pagelets that should appear on your Talent Summary page.</p> <p>Standard PeopleSoft role-based security ensures that managers can access only the pagelets appropriate to their roles.</p> <p>The Talent Summary page delivers two performance history pagelets: a graphical view of performance history and a table view of performance history.</p> <p>The pagelets available on the Personalize Content page are based on permission lists. If a user does not have access to a permission list, for example, if the <i>Manager Dashboards - JPM</i> (HCCPJ2200) permission list is removed from the <i>Manager Dashboard</i> role, the profile based pagelets may not be listed for selection from the Personalize content page.</p> <p>The Personalize Content: Talent Summary works like the Personalize Content: Manager Dashboard Page.</p>
Personalize Layout: Talent Summary Page	PORTAL_HPLAYOUT	<p>Define the Talent Summary pagelet layout by selecting either a 2- or 3-column layout style you wish to display on your Talent Summary page. Identify the pagelets that should appear in each column by moving pagelets from one column to the next. The columns list only those pagelets you have selected on your Personalize Content: Talent Summary page.</p> <p>The Talent Summary page is optimized using the 3-column layout.</p> <p>The Personalize Layout: Talent Summary works like the Personalize Layout: Manager Dashboard Page.</p>

Talent Summary - Employee Selection Criteria Page

Use the Talent Summary - Employee Selection Criteria page (HR_DR_DIRECTREPORT) to select a direct or indirect report from this page to view the employee's talent summary data.

Navigation

- Talent Summary
- Manager Self Service > Talent Summary

Image: Talent Summary - Employee Selection Criteria page

This example illustrates the fields and controls on the Talent Summary - Employee Selection Criteria page. You can find definitions for the fields and controls later on this page.

Talent Summary						
Employee Selection Criteria						
Select the employee whose Talent Summary you would like to view.						
As Of Date <input type="text" value="12/31/2012"/>						
Betty Locherty's employees						
Select	Name	Empl ID	Job	Empl Status	HR Status	Position
<input type="button" value="Select"/>	Beatrice Test	K0G004	0	Active	Active	
<input type="button" value="Select"/>	<input type="checkbox"/> Cynthia Adams	KU0101	0	Active	Active	19000074
<input type="button" value="Select"/>	Diane Palmer	K0MTX005	0	Active	Active	
<input type="button" value="Select"/>	Ginger Buckalew	K0G005	0	Active	Active	
<input type="button" value="Select"/>	<input type="checkbox"/> Jill Chancellor	KUL702	0	Active	Active	
<input type="button" value="Select"/>	<input type="checkbox"/> John Breamar	HUX001	0	Active	Active	
<input type="button" value="Select"/>	Mei Lee	HXCMP0076	0	Active	Active	19000071
<input type="button" value="Select"/>	<input type="checkbox"/> Netty Owyang	KU0055	0	Active	Active	
<input type="button" value="Select"/>	<input type="checkbox"/> Rosanna Channing	KU0046	0	Active	Active	
<input type="button" value="Select"/>	<input type="checkbox"/> Steve Parsons	R-RDSP14	0	Active	Active	19000013
<input type="button" value="Select"/>	Susan Hoinck	KU0119	0	Active	Active	
<input type="button" value="Select"/>	<input type="checkbox"/> Tina Palisco	KU0071	0	Active	Active	
<input type="button" value="Select"/>	<input type="checkbox"/> Willies Ray	HXPSFT105	0	Active	Active	10101010

View information about your direct and indirect reports. As a higher level manager, you will see your employees in a hierarchical list, or hierarchal grid (Hgrid) format. This enables you to expand or collapse the list to view or hide the indirect reports that report to your direct report managers.

As Of Date

Displays the current date, which dictates the reporting structure that appears in the employee list as of this date.

Find Employee

The Find Employee link above the header grid enables you to select from the same list of direct and indirect reports as if you expanded all nodes.

To search within your direct reports organization, click the Find Employee link. Enter criteria on the Find Employee page (HRDR_SRCH_EMPS_SEC), and then click Search. Select an employee to open in the transaction.

The Find Employee link appears only when the transaction applies to individuals. It does not appear for transactions where you select groups of individuals until you get to the point where you select individuals in that group.

Note: The Direct Reports UI setup determines which employees are available for selection and which fields appear on the <Application Context> - Employee Selection Criteria page. See "Configuring Direct Reports Functionality" (PeopleSoft HCM 9.2: Application Fundamentals).

HR Status

The HR Status field appears on the Employee Selection Criteria page only if the Allow Indirect Reports check box is selected on the Direct Report Transaction Configuration page.



Inactive employees can have active employees reporting to them directly or indirectly.

Select

Click this button to open the Talent Summary page for this person.

The Select button may display inactive for these reasons:

- You do not have access to an individual in the Direct Reports setup but you have access to their direct reports.
- The employee's status is inactive. Having the grid display the inactive person enables you to access employees under the inactive person who have not yet been reassigned to a new manager.
- The row reflects a position instead of an employee.

 (Expand) or  (Collapse)

Click these buttons to expand or collapse the hierarchal grid to view or hide your indirect reports (the direct reports of your subordinates).

Talent Summary Page

Use the Talent Summary page (HC_TALENT_SUMMARY) to view the Talent Summary pagelet content by selecting or deselecting pagelets that should appear on your Talent Summary page.

Navigation

- Click Select for an employee on the Talent Summary - Employee Selection Criteria page.
- Click the name link of an employee from the Direct Line Reports pagelet of the Manager Dashboard.
- Click the View in Talent Summary link from the Actions menu of an employee in the Direct Line Reports pagelet of the Manager Dashboard.
- Click the View in Talent Summary link from the Actions menu of an employee within the Org Chart Viewer pages.

Image: Talent Summary page header

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

The screenshot displays the Talent Summary page header for Rosanna Channing. It includes a profile picture, a list of actions, and various fields such as Job Title (Senior Manager-Accounting), Job Code (600135), Address (4500 Corporate Lane, Pleasanton, CA 94588), Work Phone (925.555.1234), Location (Corporation Headquarters, Building 2000), Email (HCMGENUser1@ap6023fems.us.oracle.com), Full/Part Time (Full-Time), Employee ID (KU0046), and Birthday (01/04). Performance metrics include HR Status (Active), Org Relationship (Employee), Talent Category (Achiever with 4 stars), Last Start Date (08/29/1986), Years of Service (26.4), Date in Current Job (11/04/2008), and Years in Current Job (4.2). Risk of leaving indicators include Last Performance Period (Jan 2011 to Dec 2011), Potential Rating (High Potential Candidate), and Last Performance Rating (Exceeds Expectations). Two charts are shown: Performance and Risk of Leaving, both with a blue square in the top-right cell.

The fields in the header are defined by the administrator and may vary from what is shown here.



(Additional Jobs icon)

Displays the Additional Jobs icon next to the employee's name when an employee holds multiple jobs within the organization. Pause over the icon to see the name of the other job or jobs held by this person.



(Key Person icon)

Displays the Key Person icon next to the employee's name to indicate that this employee has been identified as a vital, or key, employee within the organization for succession planning.

Actions

Click this menu drop down list to select manager self service actions to perform for your employees. The system will direct you to the appropriate manager self service page.

PeopleSoft delivers the various self service transactions to work in conjunction with the Talent Summary page that enables managers to view or manage employee information in the PeopleSoft database, as they would from the manager self service pages.

For a list of self service actions available from the Talent Summary page, see [Understanding Related Actions and Self Service Transactions](#).



(IM icon)

Displays the IM icon, if enabled. Pause over the icon to see the employee's chat ID. Click the ID to open the chat window. The page uses the following conditions to determine if it should display the IM icon:

1. The employee has defined an instant messaging ID in HR.
2. The Instant Message Presence Icon is selected for direct line reports in the Org Chart Viewer.
3. The employee's IM protocol and IM domain matches the protocol and domain for the direct line reports in the Org Chart Viewer.

Select Another Employee, Return To Manager Dashboard, or Return to Org Chart Viewer Click this link to return to the page from which you accessed the Talent Summary page.

Personalize Content Click this link above the header to open the Personalize Content: Talent Summary page and select or deselect pagelets you want to view on your Talent Summary page.

Personalize Layout Click this link above the header to open the Personalize Layout: Talent Summary page to define the column layout of your Talent Summary page.

Viewing IM Icons in the Header

Different IM icons will be displayed based on the following:



Indicates the employee is available on the IM Protocol specified.



Indicates the employee is either not available on the IM Protocol specified or the employee does not have an account on that IM Protocol.



Indicates there is an error connecting to the IM Protocol.

Related Links

[Understanding the Talent Summary Dashboard Pagelets and Setup Header Rate Boxes Page](#)

Viewing the HR Job and Plan Careers Pagelets

These topics discuss the:

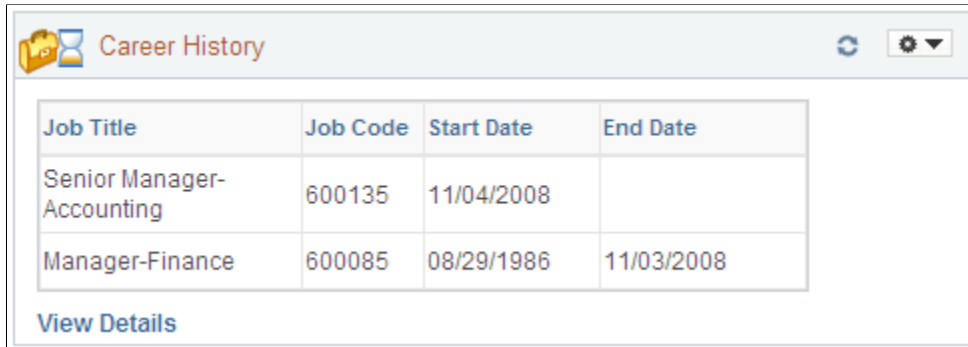
- Career History pagelet.
- Career Planning pagelet.

Career History Pagelet

The Career History pagelet displays job summary information for the employee.

Image: Career History pagelet

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



The screenshot shows a 'Career History' pagelet with a table containing two rows of job history. Below the table is a 'View Details' link.

Job Title	Job Code	Start Date	End Date
Senior Manager-Accounting	600135	11/04/2008	
Manager-Finance	600085	08/29/1986	11/03/2008

[View Details](#)

This pagelet displays a grid with a list of jobs that the employee holds and has held in the past, most recent jobs first.

View Details or View All

Click this link to open the Career History model window to view all of the employee's job history. The Career History model window also displays the employment record number for the person.

The View Details link appears when there are five or fewer rows of job history.

The View All link appears when there are more than five rows of history.

Related Links

"Viewing Worker Job History" (PeopleSoft HCM 9.2: Human Resources Administer Workforce)

Career Planning Pagelet

The Career Planning pagelet displays career paths for the employee.

Image: Career Planning pagelet

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

Career Move	Option	Job Title	Readiness
1st Move	1	Director-Finance	1 - 2 Years
2nd Move	1	Senior Vice President Finance	3 - 5 Years

Use this pagelet to view the mobility preferences for an employee. The pagelet may also display up to 3 grids to view the employee's different types of career paths: the Official Path, the Manager Approved Path, and the Personal Path, if applicable. The grids will appear only when there is data to display. The Personal Path grid will appear only if it has data to display and if the employee has not marked the personal career path as private.

Willing To

Display the mobility preferences for this employee. Mobility preferences are maintained in the person's profile. The check mark indicates an employee is willing to relocate, travel, or take an international assignment for his or her job.

Career Move

Identifies the order of career steps. For example, *1st Move* is the first step in the suggested career path.

Option

Displays the preference order of jobs when more than one job is associated with a career move.

Job Title

Identifies the suggested job for an employee's career progression.

Readiness

Displays when this employee is or will be ready for this career move. Values are: *1-2 Yrs*, *3-5 Yrs*, *Emergency*, *Ready Now*, and *Retirement*.

Manage Career Plan

Click this link to open the Manage Career Plan component and manage career information for this employee.

**Career Progression Chart**

Click this link to open the Career Progression Chart page and see a graphical representation of an employee's career path.

**Search and Compare Profiles**

Click this link to open the Search for Profiles page to perform profile comparisons between this employee and other employees or jobs within the organization.

View All <number>

Click this link when more than five rows of data appear in a grid to view additional career move options for this person.

Related Links

"Person Profile Page" (PeopleSoft HCM 9.2: Human Resources Manage Profiles)

"Understanding Plan Careers" (PeopleSoft HCM 9.2: Human Resources Plan Careers and Successions)

Viewing the HR Manage Profiles Pagelets

These topics discuss the various HR Manager Profiles pagelets.

Related Links

PeopleSoft Human Resources Manage Profiles

PeopleSoft eDevelopment

Pages Used to View Additional Manage Profiles Pagelet Content

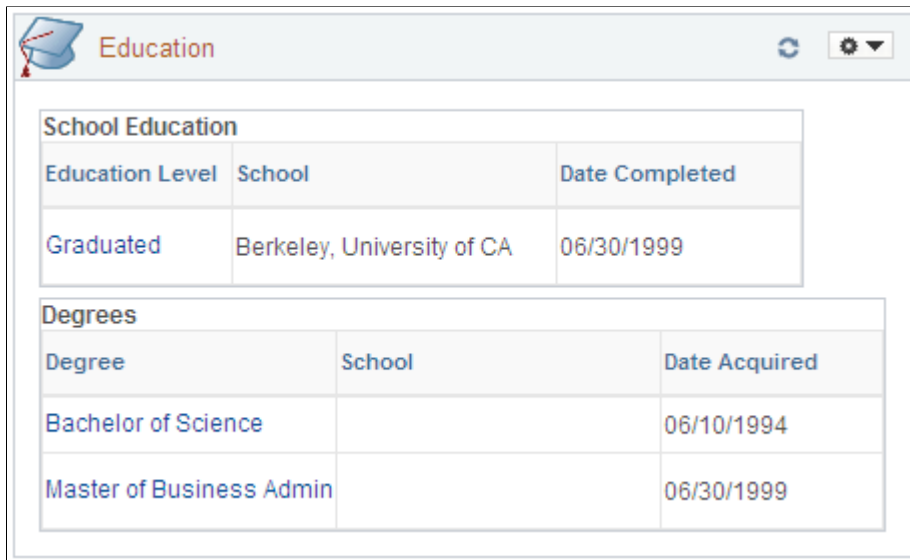
Page Name	Definition Name	Usage
<u>Job Related Competencies Pagelet</u>	HCTS_JOB_COMP_SEC	View all job related competencies when there are more competencies associated with an employee's job than the 10 the pagelet can display.
<u>Personal Competencies Pagelet</u>	HCTS_PERS_COMP_SEC	View all the employee competencies not associated with the employee's job. This link is available when the employee has more than five non-job related competencies.

Education Pagelet

The Education pagelet displays the schools attended and degrees completed by this employee.

Image: Education pagelet

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



The Education pagelet displays two tables. The first table, titled "School Education", has columns for Education Level, School, and Date Completed. The second table, titled "Degrees", has columns for Degree, School, and Date Acquired.

School Education		
Education Level	School	Date Completed
Graduated	Berkeley, University of CA	06/30/1999

Degrees		
Degree	School	Date Acquired
Bachelor of Science		06/10/1994
Master of Business Admin		06/30/1999

Up to two grids can display on this pagelet: the School Education grid and the Degrees grid. If there is not data to populate one of the grids, only one grid will appear.

View an employee's schooling and degrees acquired. You can click the names of the education level and degree name links to open the Profile Details page and view additional details about this employee's education.

View All <number>


Click this link when more than five rows of data appear in either educational grid to view additional education of degrees for this person.

Honors and Awards Pagelet

The Honors and Awards pagelet displays the honors and awards this employee has received.

Image: Honors and Awards pagelet

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



The Honors and Awards pagelet displays a table with columns for Honor and Award and Received On.

Honor and Award	Received On
Outstanding Contributor Award	01/01/2006

Managers use this pagelet to view a list of honors and awards obtained by an employee and the date it was received. The grid sorts the information by received date, more recent first.

Honor and Award

Click the honor and award name link to open the View Profile page and view more details about the honor or award for this person.

View All <number>

Click this link when more than five honors or awards are associated with the employee's person profile.

Interest List Pagelet

The Interest List pagelet displays the job profiles in which an employee may have an interest.

Image: Interest List pagelet

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

**Profile**

Displays a list of job profiles (in this case typically jobs or positions) that are of interest to the employee. Click the profile name link to open the Manager Self-Service Job Profile page and view more information about the job's profile, such as competencies, responsibilities, or qualifications.

Assigned By

Identifies the person that added this job profile to the employee's interest list.

Compare Profiles

Click the Compare icon button to open the Compare Profiles - Match Result page to compare this job's skills and competencies with that of the employee's current skills and competencies.

View All <number>

Click this link when the employee is associated with more than five profiles and view all profiles on the interest employee's list.

 **Interest List**

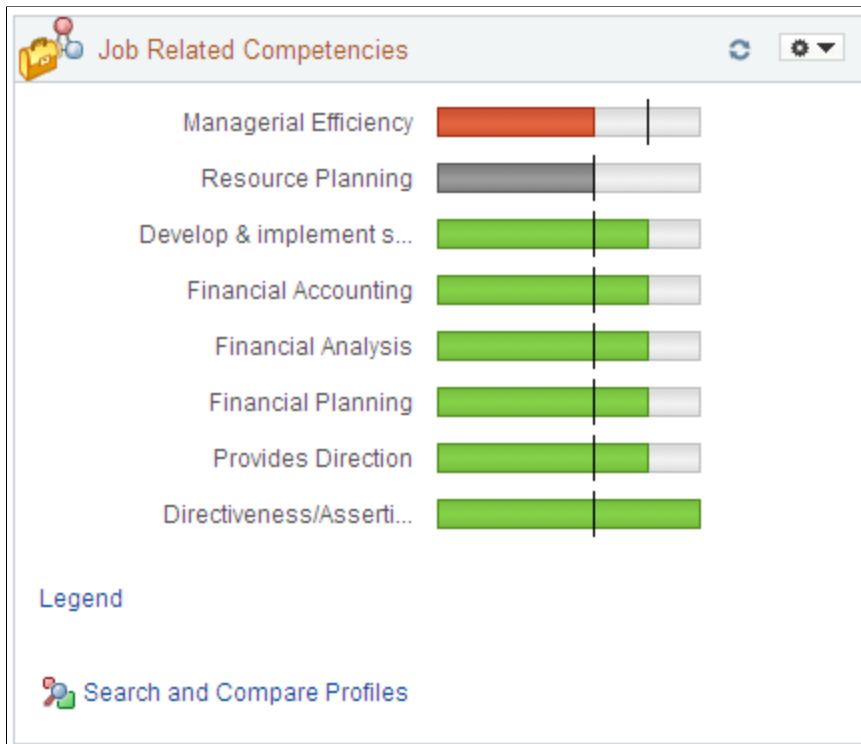
Click this link to open the Team Interest List page in Manager Self Service. There you can review, update, or delete job interests for this person.

Job Related Competencies Pagelet

The Job Related Competencies pagelet displays the list of competencies associated with this employee's job (non-person) profile compared to the employee's (person) profile.

Image: Job Related Competencies pagelet

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



This pagelet displays the primary nonperson profile type as the target profile. Define Primary profile types by navigating to Set Up HCM > Product Related > Profile Management > Profiles > Assign Default Profile Types. For example, if the Primary NonPerson Profile Type field is *JOB*, only the profile competency types of *JOB* will show.

This pagelet displays a bar graph of the target versus actual proficiencies for competencies found on the job (non-person) profile related to the employee. The vertical line on the graphic represents the minimum target level an employee should have in this job. The colored horizontal bars represent the employee's proficiency level.

The color of the bar changes based on these employee proficiency levels:

- *Red bar that appears below the target line:* Employee's proficiency is less than the target level of the job.
- *Dark gray bar that appears even with the target line:* The employee is on target and matches the target level for a competency.
- *Green bar that appears beyond the target line:* The employee exceeds that of the target level for the job.
- *Only the light gray competency bar appears:* The employee has not been rated for this job competency.

Pause over a competency bar to view the full name of the competency, the target level rating, and the employee's rating. Click the bar to open the View Profiles page to see additional details about the rating for this employee.

The types of evaluations to display and the number of year to display them are defined on the Talent Summary Setup - Other Pagelets page.


See [Other Pagelets Page](#).

View All <number>

Click this link when more than 10 competencies are associated with the job (non-person) profile.

Legend

Click this link to open the Legend page and view the bar descriptions.

 **Exceptions**

Click this link to open the Exceptions page and view chart exceptions where the competency actual rating model of the employee does not match the target rating model of the job.

 **Search and Compare Profiles**

Click to open the Search for Profiles page and perform a profile comparison between profiles.

Note: Competencies that the employee has been rated on but not associated with the employee's non-person job profile are visible on the Personal Competencies pagelet.

Personal Competencies Pagelet

The Personal Competencies pagelet displays the list of competencies associated with this employee's person profile, but not the employee's job (non-person) profile.

Image: Personal Competencies pagelet

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



Competency	Proficiency
Business Banking	3-Good
Strategic Planning	4-Very Good

Competency

Click the competency name link to open the View Profile page and view more details about the competency rating for this person.

For competencies that have multiple reviewers for the same evaluation type, data for the most recent effective date displays on the pagelet. The types of evaluations to display and the number of years to display them are defined on the Talent Summary Setup - Other Pagelets page.

See [Other Pagelets Page](#).

View All <number>

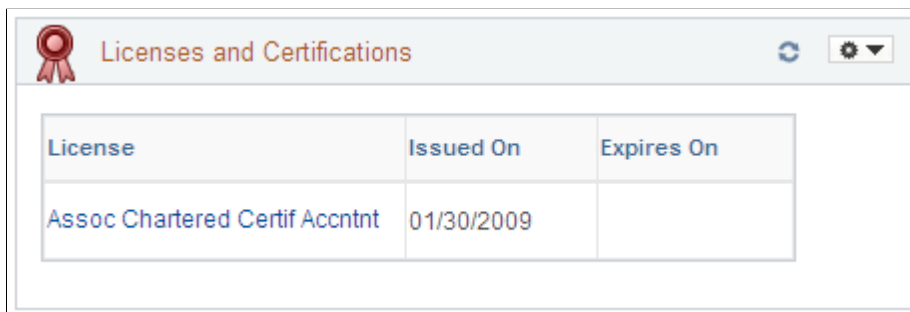
Click this link when more than five non-job related competencies are associated with the employee's person profile.

Licenses and Certifications Pagelet

The Licenses and Certifications pagelet displays the licenses and certificate held by this employee and their expiration date.

Image: Licenses and Certifications pagelet

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



License	Issued On	Expires On
Assoc Chartered Certif Acctnt	01/30/2009	

The grid sorts the rows by expiration date, then by issued date.

<warning icon>

This column displays a warning icon, if applicable. The grid can display the Critical or Warning icons based on the alert level definitions set up by the administrator on the Alerts Pagelet Setup page. The grid will also display this icon when a certificate or licenses is past due.

See [Alerts Pagelet Setup Page](#).

License

Click the license name link to open the View Profile page and view more details about the license or certificate for this person.

View All <number>

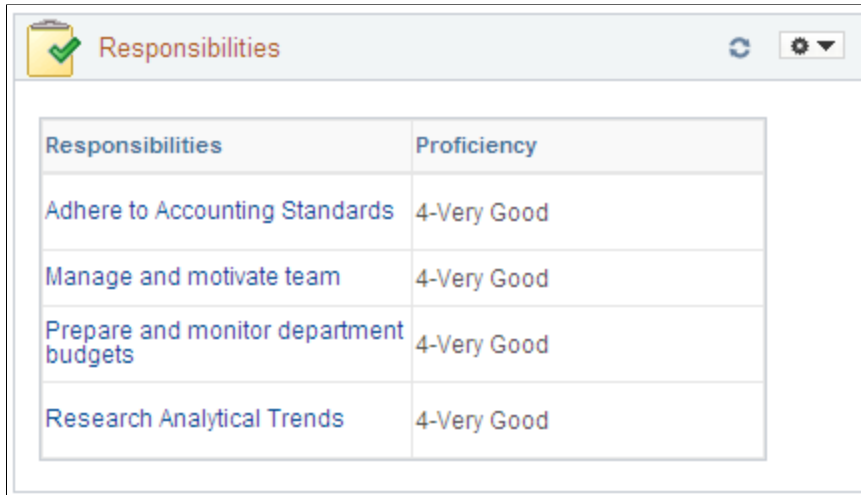
Click this link when more than five licenses or certificate are associated with the employee's person profile.

Responsibilities Pagelet

The Responsibilities pagelet displays the list of responsibilities associated with an employee's person profile.

Image: Responsibilities pagelet

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



Responsibilities	Proficiency
Adhere to Accounting Standards	4-Very Good
Manage and motivate team	4-Very Good
Prepare and monitor department budgets	4-Very Good
Research Analytical Trends	4-Very Good

Responsibilities

Lists the responsibilities held by this employee as defined on the person profile. Click the responsibilities name link to open the Profile Details page and view additional information about the responsibilities.

View All <number>

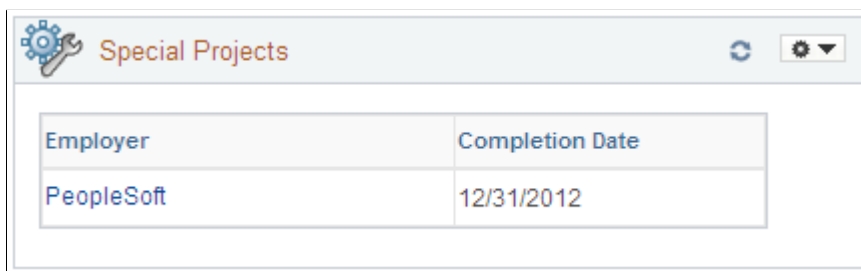
Click this link when more than five responsibilities are listed on the employee's person profile.

Special Projects Pagelet

The Special Projects pagelet displays projects assigned to this employee.

Image: Special Projects pagelet

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



Employer	Completion Date
PeopleSoft	12/31/2012

Employer

Lists the projects assigned to this employee. Projects are sorted by completion date. Click the employer name link to open the Profile Details page. The number or years to display a project is defined on the Talent Summary Setup - Other Pagelets page.

See [Other Pagelets Page](#).

View All <number>

Click this link when more than five projects are listed for the employee.

(E&G) E&G Special Projects Pagelet

The E&G Special Projects pagelet displays Education and Government projects assigned to this employee.

Image: E&G Special Projects pagelet

This example illustrates the fields and controls on the E&G Special Projects pagelet . You can find definitions for the fields and controls later on this page.

Project	Completion Date
Community Outreach Program	11/01/2011
Recycle Initiative	07/31/2012

Project

Lists the E&G projects assigned to this employee. Projects are sorted by completion date. Click the project name link to open the Profile Details page. The number or years to display a project is defined on the Talent Summary Setup - Other Pagelets page.

See [Other Pagelets Page](#).

View All <number>

Click this link when more than five projects are listed for the employee.

Viewing the Compensation Pagelets

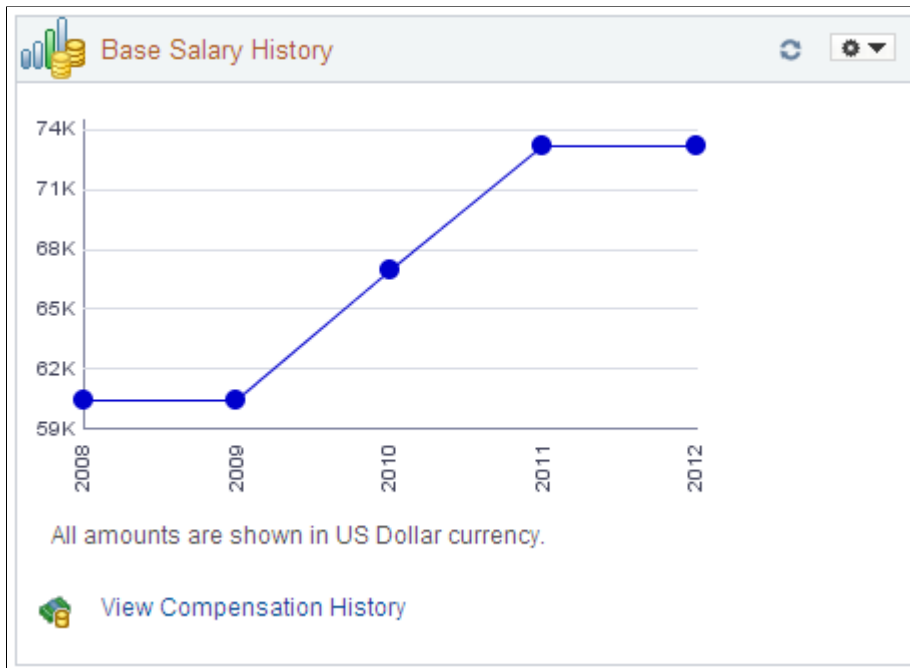
These topics discuss the compensation pagelets.

Base Salary History Pagelet

The Base Salary History pagelet displays the compensation history for an employee.

Image: Base Salary History pagelet

This example illustrates the fields and controls on the Base Salary History pagelet. You can find definitions for the fields and controls later on this page.



Use this pagelet to view salary change history. The pagelet displays the last five years of compensation. Pause over the graph line points to view the exact employee's salary for a specific year.

Note: In order for the pagelet to display data, it may be necessary to modify the access type for the View Compensation History (HR_SS_MG_COMP_HIST) component on the Direct Reports Configuration page by navigating to Set Up HCM > Common Definitions > Direct Reports for Managers > Configure Direct Reports UI.



View Compensation History

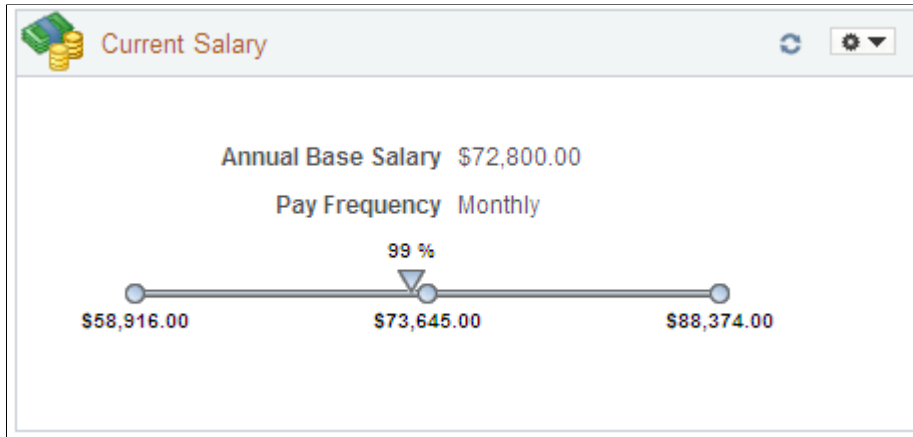
Click this link to open the Compensation History page in self service and view the employee's salary, variable cash, and variable noncash information.

Current Salary Pagelet

The Current Salary pagelets displays the salary range for an employee's job and where the employee falls within that range.

Image: Current Salary pagelets

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



The pagelet displays the minimum, midpoint, and maximum of the salary grade for this employee's job. The arrow icon that runs across the salary range bar indicates the employee's compa-ratio. The percentage that appears is in comparison to the midpoint of the range. You can pause over the arrow icon to view the employee's actual salary.

Related Links

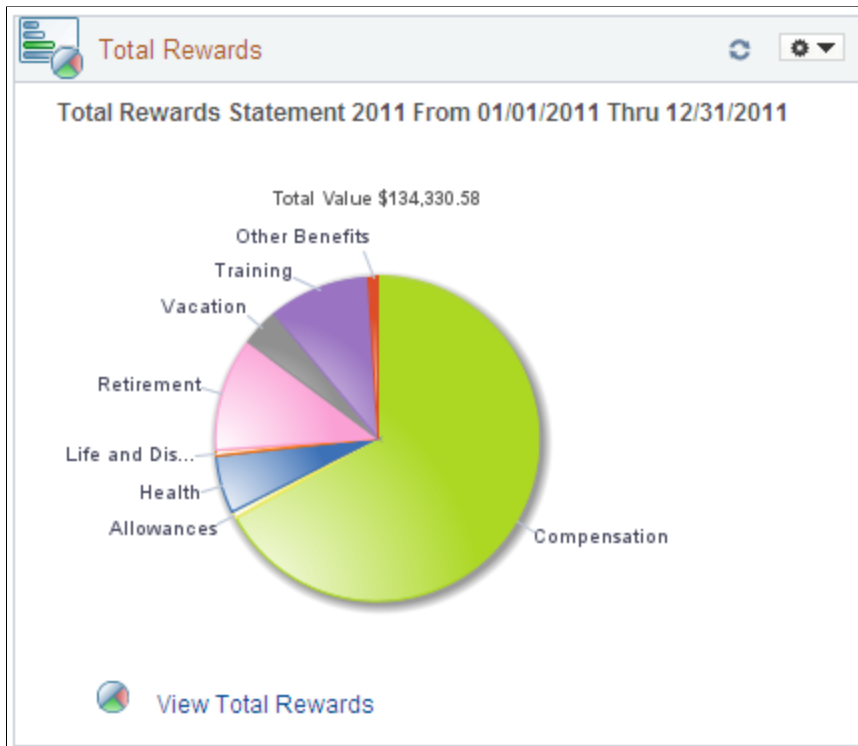
"Understanding Salary Grades and Steps" (PeopleSoft HCM 9.2: Human Resources Manage Base Compensation and Budgeting)

Total Rewards Pagelet

The Total Rewards pagelets displays the composition of an employee's compensation and rewards package.

Image: Total Rewards pagelets

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



Use this pagelet to view a summary chart depicting a graphical representation of compensation and benefit summary information. The pagelet displays the most recent total rewards information for the employee.

The top of the pagelet displays the employee's total rewards value amount. Pause over various pie slices in the graphic to see the amount associated with each rewards component and its percentage of the reward. Click each individual pie slice to view more details about that reward. For example, a health benefit may represent 10 percent of your total reward, and by clicking the Health pie slice, you can see that the benefit is comprised of health and dental insurance.



View Total Rewards

Click this link to open the View Total Rewards page. Review compensation and benefit summary information for a particular reward period.

Note: The Total Rewards pagelet will display data only when the Total Rewards feature has been implemented.

Related Links

"Understanding the Administer Compensation Total Rewards Statement" (PeopleSoft HCM 9.2: Human Resources Administer Compensation)

"Understanding Reward Data Sources" (PeopleSoft HCM 9.2: Human Resources Administer Compensation)

Viewing the ePerformance Pagelets

The Talent Summary page delivers two performance history pagelets and the user can choose to display either of them.

Data for the graph and grid is derived from the completed performance documents for an employee. The manager listed on the performance document can access both current and historical documents. When managers have access to the View Only Documents transaction, they can view any document for direct or indirect reports based upon the Direct Reports setup. This includes past documents for which the employee was not their direct or indirect report. If the manager does not have access to the View Only Documents transaction, then access is limited to the Historical Documents transaction where the user is listed as a manager on the document.

Note: It is best to use the graphical view of performance history when the rating model has not changed over performance periods. However, if the rating model has changed one or more times, it may be better to use the table grid view. The graphical view does not represent a change in rating model.

These topics discuss the ePerformance pagelets.

Performance History Pagelet as a Graph

This Performance History pagelet displays the overall rating (y-axis) for an employee from past performance periods (x-axis) using a bar graph.

Image: Performance History pagelet in graphical format

This example illustrates the fields and controls on the Performance History pagelet in graphical format. You can find definitions for the fields and controls later on this page.



We recommend that you use the graphical view when the rating model has not changed over performance periods.

This pagelet displays a bar graph. The colored vertical bars represent the employee's overall performance rating for the period specified. Each distinct job title is represented by a different colored bar. A legend for each job title appears below the graph. The administrator determines the document type and how many periods worth of data to show on the Talent Summary Setup - Other Pagelets page.

See [Other Pagelets Page](#).

Pause over a period rating bar to view the performance dates and employee rating. Click the bar to open the Document Details page to see additional details about the rating for this employee and access the performance evaluation.

View Details

Click this link to view the performance history in a grid format.



Current Document - <status>

Click this link to view or manage the most current performance evaluation that is in progress in WorkCenter.

Related Links

"Viewing Evaluation Ratings" (PeopleSoft HCM 9.2: ePerformance)

Performance History Pagelet in a Table Grid

This Performance History pagelet displays the overall rating for an employee from past performance periods using a table grid.

Image: Performance History pagelet in a table grid format

This example illustrates the fields and controls on the Performance History pagelet in a table grid format. You can find definitions for the fields and controls later on this page.



Period	Job Title	Rating	Manager
Jan 2011 - Dec 2011	Senior Manager- Accounting	Exceeds Expectations	Betty Locherty
Jan 2010 - Dec 2010	Senior Manager- Accounting	Exceeds Expectations	Betty Locherty
Jan 2009 - Dec 2009	Senior Manager- Accounting	Exceeds Expectations	Betty Locherty
Jan 2008 - Dec 2008	Senior Manager- Accounting	Meets Expectations	Betty Locherty
Jan 2007 - Dec 2007	Manager- Finance	Meets Expectations	Betty Locherty

[Current Document - Def Criter](#)

If a rating model has changed one or more times over performance periods, it is recommended you use the grid view. The graphical view does not represent a change in rating model. This format also supports ADA (Americans with Disability Act of 1990) accessibility.

The administrator determines the document type and how many periods worth of data to show on the Talent Summary Setup - Other Pagelets page.

See [Other Pagelets Page](#).

The grid sorts the rows by period end date, most recent first.

Period

Display the performance review period. Click this link to open the Document Details page and view additional information about this performance review.

Current Document - <status>

Click this link to view or manage the most current performance evaluation that is in progress in WorkCenter.

Related Links

"Viewing Evaluation Ratings" (PeopleSoft HCM 9.2: ePerformance)

Viewing the Plan Succession Pagelet

This topic discusses the Succession Options pagelet.

Succession Options Pagelet

The Succession Options pagelet displays all positions, jobs, and persons for which the employee is slated as a successor.

Image: Succession Options pagelet

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

The screenshot shows a pagelet titled "Succession Options" with a refresh button and a settings icon. Below the title is a table with the following data:

Successor For	Type	Order		Plan Status
Betty Locherty	Person	1 of 3	◆	Draft
Director-Finance	Position	1 of 3	◆	Draft

Below the table is a legend for Readiness:

- ◆ Ready Now
- 1-2 Years
- 3-5 Years
- ▲ Emergency

This pagelet displays succession plan data for which a manager has access to. The rows in the grid are sorted by status then readiness.

Successor For

Displays the person, job, or position from a succession plan for which an employee is a successor. Click this link to open the Succession 360 page and view or update the succession plan details.

Type

Indicates the type of succession plan with which this person is associated. Succession plan types are *Person*, *Position*, or *Job*.

Order

Displays this employee's candidate ranking order for this succession plan.

<readiness status>

This column displays the readiness status of this person for this job or position. The icons that appear in this grid are defined in the Readiness ledger at the bottom of this pagelet, or pause over an icon to view text defining this icon.

Plan Status

Displays the status of this succession plan. Values are *Official* or *Draft*.

View All <number>

Click this link when the employee is associated with more than five succession plans to view all succession plans linked to this employee.

Viewing the Enterprise Learning Management Pagelet

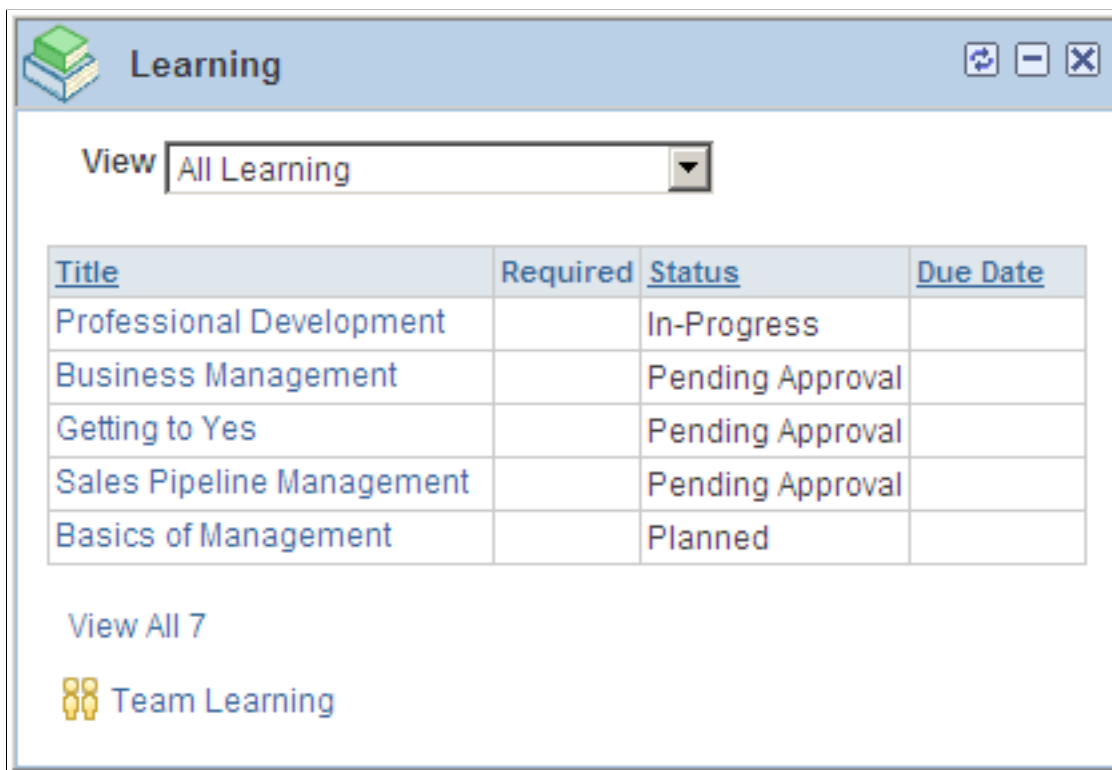
This topic discusses the Learning pagelet.

Learning Pagelet

The Learning pagelet displays an overview of learning events for a particular employee. This information comes from the Enterprise Learning Management (ELM) system.

Image: Learning pagelet

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



Use this pagelet to see an overview of learning activities of an employee. This pagelet highlights required learning and certifications which are expired or in warning status, with the Past Due and Due Soon warnings appearing first. The pagelets presents the classes, programs, and courses in *Planned* status.

The View drop-down field enables you to filter the data that you see in the grid.

View

Select which view of data you wish to display in the grid.



Choices are:

- *All Learning* – does not filter out information but shows all learning scheduled for your employee
- *Required Learning* – filters the grid to show training that is only marked as required, in warning status, or expired.

Title

Click the title link to open an application page that corresponds to the type of learning item it is, for example, a class, course, or program.

Note: The data for ELM Learning is pulled from ELM database via IB Integration setup.

Required—  (Due Soon) and  (Past Due)

Displays the Due Soon or Past Due icon if the learning item has reached the date that defines an item as due soon or past due. If the item is not past due or due soon, the field is left blank.

View All <number>

The pagelet displays five rows of information in the grid. Click this link to open a modal Learning grid page to view all rows of employee learning. The number of employees that appear in the page grid will appear in the link name.



Team Learning

Click this link to open the Team Learning page in manager self service.

See the documentation for *PeopleSoft Enterprise Learning Management*, “Defining Defaults”.

Viewing the Employee Snapshot

Understanding the Employee Snapshot Content and Layout

The Employee Snapshot feature provides managers and administrators with a comprehensive view of talent data related to an individual employee through the use of dashboards and tiles within the PeopleSoft Fluid User Interface pages. With Employee Snapshot, managers and administrators have access to an employee's talent data from one location instead of accessing several components separately.

These videos demonstrate Fluid Employee Snapshot features:



[PeopleSoft Employee Snapshot](#)



[Image Highlights, PeopleSoft HCM Update Image 19: Employee Snapshot](#)



[Image Highlights, PeopleSoft HCM Update Image 22: Fluid Employee Snapshot New Content and Enhancements](#)



[Image Highlights, PeopleSoft HCM Update Image 23: Employee Snapshot for HR](#)



[Image Highlights, PeopleSoft HCM Update Image 24: Enhancements to Employee Snapshot Dashboards](#)



[Image Highlights, PeopleSoft HCM Update Image 26: Employee Snapshot for Administrators](#)



[Image Highlights, PeopleSoft HCM Update Image 28: Employee Snapshot Learning Integration and Tile](#)



[Image Highlights, PeopleSoft HCM Update Image 28: Employee Snapshot Related Actions and Nav Collection Updates](#)



[Image Highlights, PeopleSoft HCM Update Image 30: Employee Snapshot Multiple Performance Document Type Configuration and Display](#)

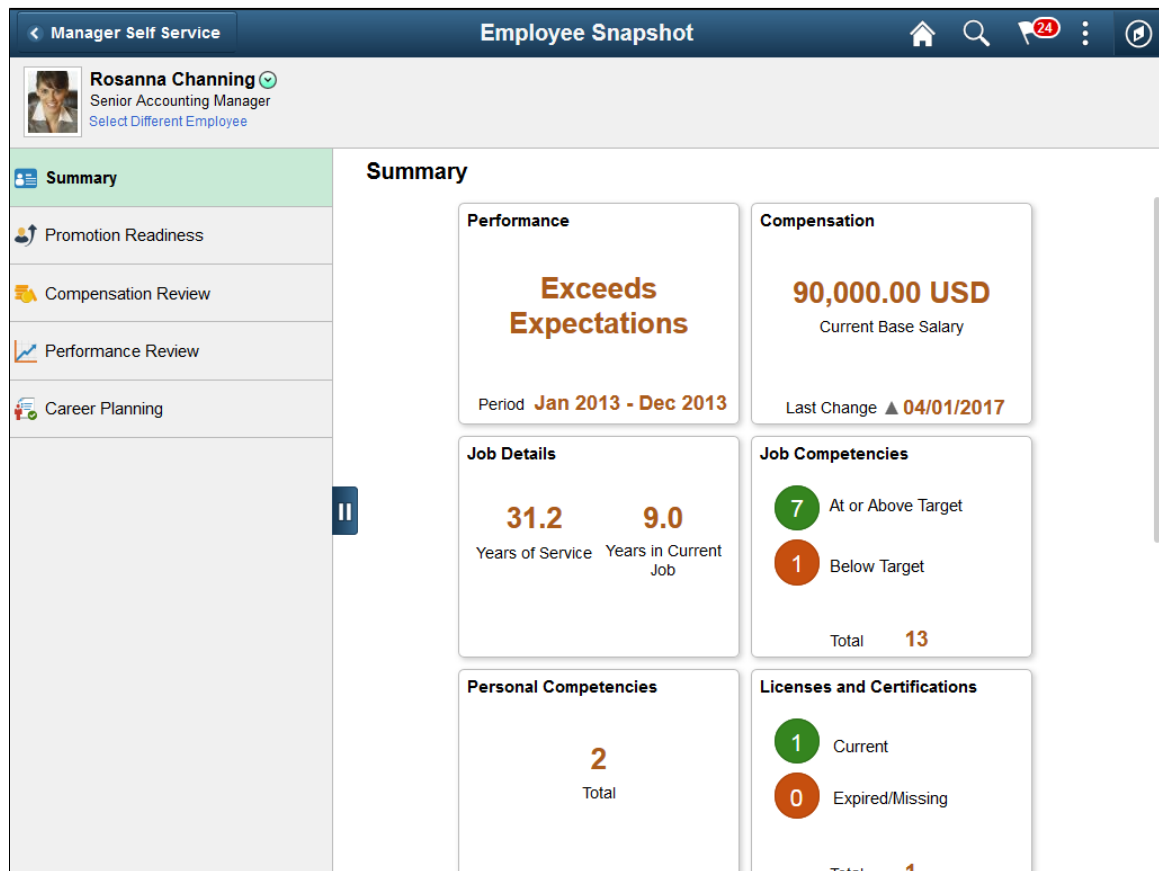


[Image Highlights, PeopleSoft HCM Update Image 31: Development Documents for Employee Snapshot](#)

The Employee Snapshot page appears in a three panel layout. The top panel displays the header and includes the employee's name, job title, and the Related Actions menu icon, where you can access other self service transactions for this employee, if applicable. The left panel lists the various dashboard categories delivered with the Employee Snapshot. When using a small form factor, such as a phone, this panel is collapsed when you access the Employee Snapshot and dashboards. Click the tab to open the category list and change dashboard views. The right main panel displays the employee content dashboard. Fluid dashboards are PeopleSoft pages that aggregate and display tiles that share a common or similar purpose. These dashboard pages provide quick access to useful information by presenting concise but feature-rich tiles to the user. These tiles can vary in function and complexity, enabling you to see not only an overview, but to drill into your data to access detailed information.

Image: Employee Snapshot Pages

This example illustrates the Employee Snapshot layout and content.



The PeopleSoft HCM application delivers these Employee Snapshot dashboards and tiles, to manage and analyze information about your workforce:

- Employee Snapshot - Summary Dashboard: See a high level overview of data about one of your employees using these tiles:
 - Performance
 - Compensation
 - Job Details
 - Job Competencies *

- Personal Competencies *
- Licenses and Certifications *
- Responsibilities *
- Honors and Awards *
- Job Interests
- Development
- Education
- Career Plans

- Employee Snapshot - Promotion Readiness Dashboard: Analyze promotion readiness for an employee using these tiles:
 - Current Salary
 - Job Competencies
 - Salary History
 - Performance History
 - Personal Competencies *
 - Learning
 - Job History

- Employee Snapshot - Compensation Review Dashboard: Review employee compensation data using these tiles:
 - Current Salary
 - Bonus Earnings
 - Salary History
 - Performance History
 - Total Rewards
 - Employee Impact

- Employee Snapshot - Performance Review Dashboard: View talent-related information about an employee to see their overall performance using these tiles:
 - Performance History
 - Responsibilities *

- Special Projects *
 - E&G Special Projects *
 - Personal Competencies *
 - Licenses and Certifications *
 - Job Competencies
 - Development History
- Employee Snapshot - Career Planning Dashboard: View employee career paths and assess their preparation for new roles using these tiles:
 - Career Plans
 - Succession Plans
 - Job Competencies
 - Employee Impact
 - Job Interests
 - Personal Competencies *

Important! * Indicates that viewable content may also be controlled by the of the person profile role security options. See the security access to tile and page content that follows for more information.

Creating Custom Profile Tiles

Note: Talent administrators can also add custom profile-related tiles to any dashboard. See the [Understanding How to Display Content on the Configurable Profile Tiles and Pages](#) and [Viewing Configurable Profile Content Tiles and Pages](#) topics for more information.

Security Access to Tile and Page Content: Direct Reports and Profile Management

The Employee Snapshot tiles and pages use direct report and profile management role security to enable or restrict managers or administrators in viewing potentially confidential data.

Direct Report Access

The system checks direct report access for the Employee Snapshot pages as a whole as well as for access to the contents of each tile. If a user (manager or administrator) does not have security access to a component or tile, then the related tile will display a message saying that he or she does not have access to the tile. If a user has access to that component and tile but not to the employee's data, then the related tile will display a message that he or she does not have access to this information for the employee.

Profile Management Role Security

When data is associated with a person's profile, the viewable content for the user may also be restricted by profile role security. A person's profile data is made up of content items—skills and abilities associated with content types such as competencies, languages, responsibilities, and so forth. For a list of dashboard tiles that contain profile data, see the previous section and those items marked with an asterisks (*).

Profile Management enables you to use PeopleTools security roles to further define your Profile Management security. When PeopleTools roles are associated with a profile role, the system looks to the user profile to see who has access to a content section for this profile type. Those users that have the direct report access and the role associated with the profile role will have access to the content according to the parameters set up for the profile type.

This video demonstrates the enhanced security for Profile Management:



For more information on defining role security for a profile content type (or tile), see the "Content Section Page" (PeopleSoft HCM 9.2: Human Resources Manage Profiles), Role Security section.

Accessing the Employee Snapshot Pages and Tiles

As delivered, managers and administrator can access Employee dashboards and pages by selecting the following:

- Managers:
 - [Employee Snapshot Tile](#) from the *Manager Self Service* fluid home page.
 - Related Actions menu icon next to an employee's name in fluid and select the View Employee Snapshot menu item. See the "Related Actions for Manager Self Service Pages" (PeopleSoft HCM 9.2: Application Fundamentals) topic for a list of related actions.
- Administrators:
 - [Employee Snapshot Tile](#) from the *Talent Administrator* fluid home page.

When you have selected the Employee Snapshot tile, you will be prompted to select an employee.

- Managers will be presented with the [Employee Snapshot - Select Employee Page \(for Managers\)](#), which displays a list of all their direct reports.
- Administrators will be presented with the [Employee Snapshot - Search Page \(for Administrators\)](#), which displays the Search field and a list of up to 20 of the most recently viewed employees.



These topics discuss accessing the Employee Snapshot tiles and pages.

Pages Used to Access the Employee Snapshot Pages and Tiles

Page Name	Definition Name	Usage
Employee Snapshot Tile	HC_HCTS_START_PAGE_FL_GBL (this is the cref for the tile)	Click this tile to access a group of tiles and dashboards to see a comprehensive view of talent data related to an employee.
Employee Snapshot - Select Employee Page (for Managers)	HR_PSEL_FLU	Select a direct or indirect report to view the employee's snapshot data.
Employee Snapshot - Search Page (for Administrators)	HCTS_CO_DIRECT_FL	Search for individuals within your organization for whom you wish to view Employee Snapshot data.
Employee Snapshot - Search Results Page	HCTS_SEARCH_FL	View a list of employees that meet your search criteria.

Employee Snapshot Tile

Use the Employee Snapshot tile to access a group of tiles and dashboards to see a comprehensive view of talent data related to an employee.

Navigation

The Employee Snapshot tile is delivered as part of the fluid *Manager Self Service* and *Talent Administrator* home pages.

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

Image: Employee Snapshot Tile

This example illustrates the Employee Snapshot tile.



Employee Snapshot - Select Employee Page (for Managers)

Use the Employee Snapshot - Select Employee page (HR_PSEL_FLU) to select a direct or indirect report to view the employee's snapshot data.









Navigation

- Click the Employee Snapshot tile on the Manager Self Service homepage.
- Click the Select Different Employee link in the sub-banner of the Employee Snapshot pages.

Image: Employee Snapshot - Select Employee Page (For Managers)

This example illustrates the Employee Snapshot - Select Employee page when a manager accesses the page.

The screenshot shows the 'Employee Snapshot' page for managers. At the top, there is a navigation bar with 'Manager Self Service' and 'Employee Snapshot'. Below this is a 'Search Options' section with a search bar labeled 'Search your Employees' and a 'Search' button. The main content area is titled 'Select Employee' and shows a table of employees. The table has columns for 'Name / Title / ID', 'Directs / Total', and 'Department'. There are five employees listed: Cynthia Adams (Corporate Controller, 3/3 direct reports), Diane Palmer (Administrative Assistant, 0 direct reports), Franca Rizzo (Administrator, 0 direct reports), Jill Chancelor (Payroll Manager, 22/24 direct reports), and Netty Owyang (Manager-Accounting, 4/23 direct reports). Each row has a small icon in the 'Directs / Total' column and a right-pointing arrow in the 'Department' column.

Name / Title / ID	Directs / Total	Department
 Cynthia Adams Corporate Controller KU0101		Corporate Accounting
 Diane Palmer Administrative Assistant KOMTX005		Corporate Finance
 Franca Rizzo Administrator N40007		Finance and Administration
 Jill Chancelor Payroll Manager KUL702		Payroll
 Netty Owyang Manager-Accounting KU0055		International Accounting

The Employee Snapshot - Select Employee page displays all direct reports of the logged-in manager based on that manager's job. To view a person's snapshot data, click his or her row from the grid. You can also drill down to another employee's direct reports by clicking the icon in the Directs / Total column.

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

Use the Sort button to sort employees by column headings.

Employee Snapshot - Search Page (for Administrators)

Use the Employee Snapshot - Search page (HCTS_CO_DIRECT_FL) to search for individuals within your organization for whom you wish to view Employee Snapshot data.

The landing page also displays one collapsible section that lists employees whose snapshot data you have recently viewed.

Navigation

Click the Employee Snapshot tile on the Talent Administrator homepage (or any other home page with the tile when you have administrator access).

Image: (Tablet) Employee Snapshot - Search Page (For Administrators)

This example illustrates the Employee Snapshot - Search page for the tablet when an administrator accesses the page.

The screenshot displays the 'Employee Snapshot' search interface on a tablet. At the top, there is a navigation bar with 'Talent Administrator' on the left and 'Employee Snapshot' in the center. To the right of the title are icons for home, search, and a menu. Below the navigation bar is a search bar with the placeholder text 'Search by name, job title, location, etc.' and a search icon. The main content area is titled 'Recently Viewed (2)' and contains a table with two rows of employee data. Each row includes a profile picture, the employee's name and title, their email address, and their department/location, with a right-pointing arrow icon for further details.



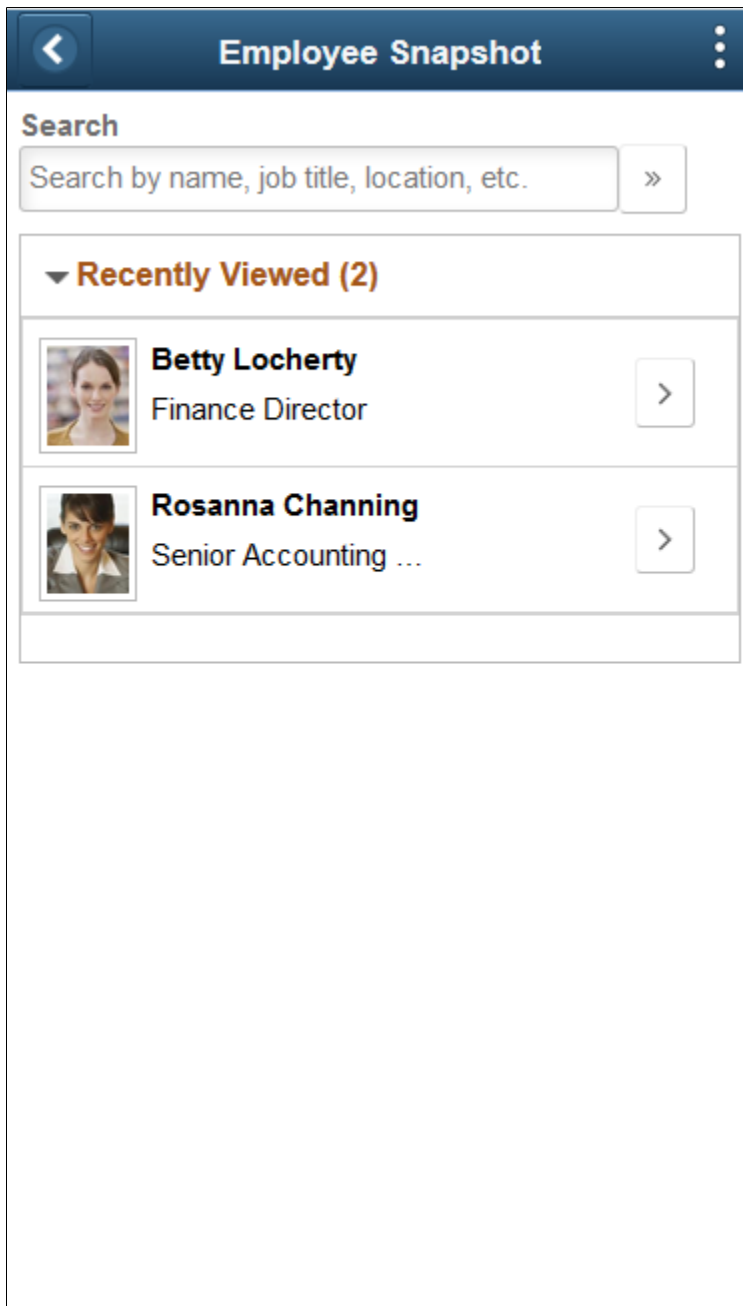
Name / Title	Email / Phone	Department / Location
 Betty Locherty Finance Director	HCMGENUser1@ap6023f... 555/123-4567	Finance and Administration Delaware Operations
 Rosanna Channing Senior Accounting Manager	HCMGENUser1@ap6023f... 925.555.1234	Corporate Accounting Corporation Headquarters

Image: (Smartphone) Snapshot - Search Landing Page

This example illustrates the on the Snapshot - Search landing page for the smartphone.



A standard banner appears at the top of every fluid page. For more information see "Common Elements Used with PeopleSoft Fluid User Interface" (PeopleSoft HCM 9.2: Application Fundamentals).

Search

Enter basic search criteria in this field, such as name, department, location, or so forth and click the Run Search button to locate specific individuals. For partial searches, PeopleSoft Search Framework supports the use of search wildcards to specify the type of search to be performed.

The administrator Search field uses the PeopleTools Search Framework, based on the Company Directory tree. A person

must be present in the tree to appear in the directory. For information on the process to building your company trees, see "Understanding the Org Chart Viewer and Company Directory Setup Steps" (PeopleSoft HCM 9.2: Human Resources Administer Workforce). For more information on searching, see *PeopleTools Search Technology*, "Working with PeopleSoft Search," Working with Search Operators in PeopleSoft Search.

Recently Viewed

Use this section to view and access recently viewed snapshot data for a person, if any. A person appears in this list when you have viewed their Employee Snapshot data in the past. The list displays employees in descending order of date of access. The page displays a maximum of 20 people.



Select this Person arrow button

Select the arrow button at the end of the employee row to access the Employee Snapshot dashboards for that person.

Employee Snapshot - Search Results Page

Use the Employee Snapshot - Search Results page (HCTS_SEARCH_FL) to view a list of employees that meet your search criteria.

Navigation

Enter search criteria in the Search field and select the Run Search (>>) button.

Image: (Tablet) Employee Snapshot - Search Results Page

This example illustrates the Employee Snapshot - Search Results page for the tablet.

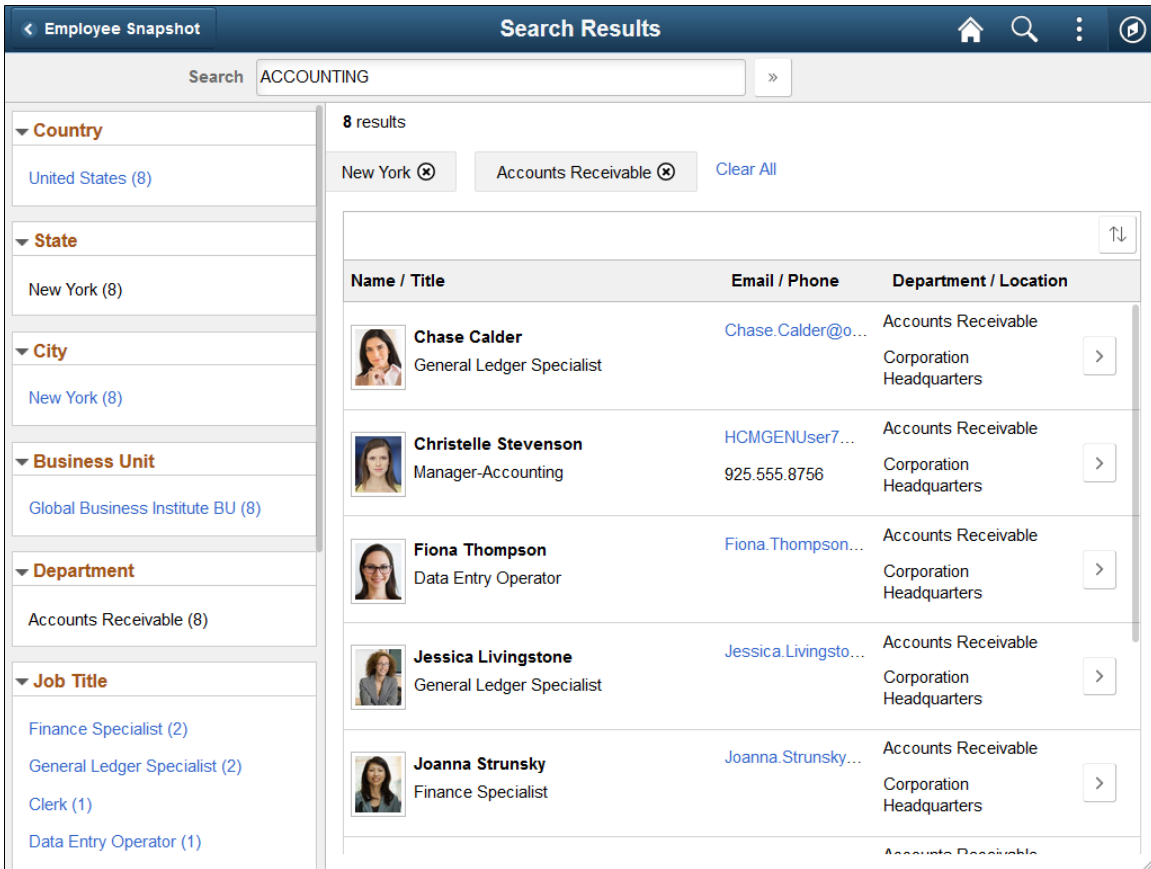
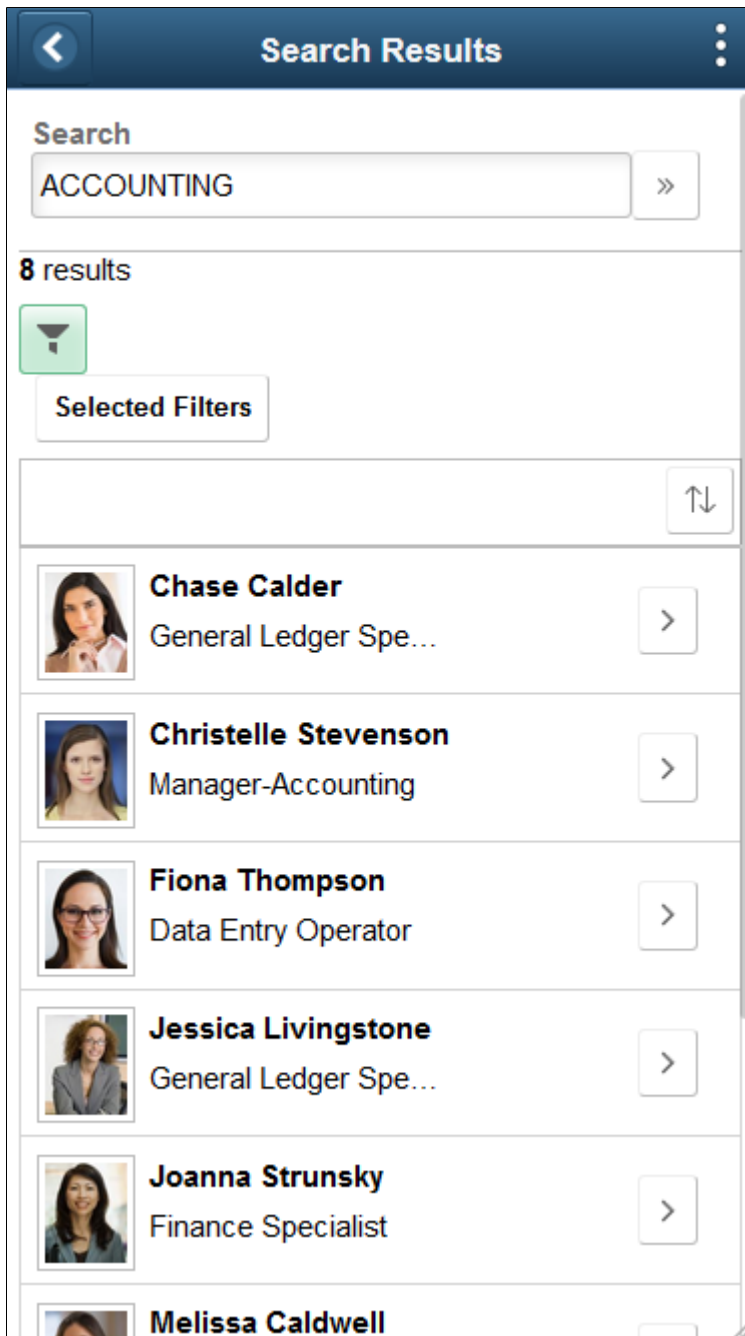


Image: (Smartphone) Employee Snapshot - Search Results Page

This example illustrates the Employee Snapshot - Search Results page for the smartphone.



After running a search using Keyword Search, the system presents the search results in an intuitive display, enabling interactive filtering and further navigation.

(Tablet) When using a large form factor, like a tablet or workstation, a filter panel appears on the left side of the page, which shows facets with counts of those that match that search criteria. Select the facet links to filter results further, seeing which employee meet the additional criteria. For large form factor devices, the page will reset to show only those that meet the additional criteria. The page also displays the criteria you have selected in boxes at the top of the page. Click the cancel icon (X) for a filter item, or select the Clear All link to remove all filters.

(Smartphone) When using a small form factor, like a smartphone, the page displays a Search Filter button. Select the button to access a separate Filters page and select your facets. When you have identified all your criteria, select Done to return to the Search Results page. When filters are in place, the Filter button will be green, and a Select Filters button now appears on the page. Click this button to view the filters that are in place or to remove filters.



Select this Person arrow button

Select the arrow button at the end of the employee row to access the Employee Snapshot dashboards for that person.

Viewing the Summary Tiles and Pages

When accessing the Employee Snapshot, the system displays the Summary dashboard by default. The Summary dashboard displays tiles with a variety of high level information you can quickly review.

These topics discuss the Employee Snapshot - Summary tiles and pages.

Pages Used to View the Employee Snapshot - Summary Tiles and Page

Page Name	Definition Name	Usage
<u>Employee Snapshot - Summary Dashboard</u>	PT_LANDINGPAGE	Access a variety of high level summary tiles about an employee.
<u>Performance (Summary) Tile</u>	HCTS_PERF_SUM1_FL	View the overall rating for an employee from the last performance period.
<u>Performance History Page</u>	HCTS_PERFHIST_FL HCTS_PERFHIST_SCF	Review the overall rating for an employee from past performance periods using either a chart or table grid.
Manager Evaluation Page Mentor Evaluation Page (See "<Manager or Self-> Evaluation Page" (PeopleSoft HCM 9.2: ePerformance))	EP_APPR_MAIN1	Review evaluation data for an employee using ePerformance.
<u>Compensation (Summary) Tile</u>	HCTS_CMP_SAL1_FL	View the current base salary for an employee and when the employee's base salary was last changed.
<u>Compensation: Current Salary Page</u>	HCTS_COMP_SALRY_FL	View the salary range for an employee's job and where the employee falls within that range.
<u>Compensation: Salary History Page</u>	HCTS_COMP_SALRY_FL	View the compensation history for an employee.
<u>Compensation History Page</u>	HCTS_COMP_HIST_SCF	Review or verify an employee's compensation history.

Page Name	Definition Name	Usage
Salary Change Details Page	HCTS_COMP_VC_SCF	View details of a specific salary change.
Compensation: Total Rewards Page	HCTS_COMP_SALRY_FL HCTS_CMP_TRW_SBF	Review employee total rewards data.
"Total Rewards Page" (PeopleSoft HCM 9.2: Human Resources Administer Compensation)	TRW_SS_STMT_FL	Review your direct reports' earnings, benefits, and other compensation information for a select review period.
Job Details (Summary) Tile	HCTS_JOBDTL_SUM_FL	View an individual employee's years of service and time in the current job.
Job Details: Job Information Page	HCTS_JOB_DTLS_FL	Review detailed information about a person's current job.
Job Details: Job History Page	HCTS_JOB_DTLS_FL	View a summary of a person's job history.
Job Competencies (Summary) Tile	HCTS_JOBCOMP1_FL	Note the number of competencies where the employee's profile rating is above or below the target for the employee's job.
Job Competencies Page	HCTS_JOBCOMPDTL_FL HCTS_JOBCOMPDTL_FL	Review a list of competencies associated with this employee's job (non-person) profile compared to the employee's (person) profile.
Job Competency Details Page	JPM_ITM_DTL_FL	View the details of an employee's rating for a job competency.
Team Talent Profile Page (See the "Talent Profile Page (for Employees) or Team Talent Profile Page (for Managers)" (PeopleSoft HCM 9.2: eDevelopment) topic for information on the Team Profile Page for the manager.)	JPM_PERS_PROFL_FLU	View and update a team member's talent profile data in fluid.
Personal Competencies (Summary) Tile	HC_HCTS_PERS_COMP1_FL	View the total number of competencies associated with this employee's person profile, but not the employee's job (non-person) profile.
Personal Competencies Page	HCTS_PERS_COMP_FL	View a complete list of competencies associated with this employee's person profile, but not the employee's job (non-person) profile.
Personal Competency Details Page	JPM_ITM_DTL_FL	View additional details about the competency rating for this person.
Licenses and Certifications (Summary) Tile	HCTS_LICENSE_FL	View the number of current, expiring, or missing licenses and certifications held by this employee.

Page Name	Definition Name	Usage
<u>Licenses and Certifications Page</u>	HCTS_LICENSE1_FL HCTS_LICENSE_SCF	View the licenses and certifications held by this employee. Note: This page will appear differently based on the setup defined on the Configure Employee Snapshot - Licenses and Certifications Page .
<u>Licenses and Certifications Details Page</u>	JPM_ITM_DTL_FL	View additional details about a license or certification held by this person.
<u>Responsibilities (Summary) Tile</u>	HC_HCTS_RESP_SUM1_FL	Note the number of responsibilities assigned to an employee.
<u>Responsibilities Page</u>	HCTS_RESP1_FL HCTS_RESP_FL	Review a list of responsibilities assigned to an employee.
<u>Responsibilities Details Page</u>	JPM_ITM_DTL_FL	View additional details about a responsibility assigned to a person.
<u>Honors and Awards (Summary) Tile</u>	HC_HCTS_HONAW_SUM1_FL	View the total number of honors and awards this employee has received.
<u>Honors and Awards Page</u>	HCTS_HONORS_FL	Review a list of the honors and awards this employee has received.
<u>Honors and Awards Details Page</u>	JPM_ITM_DTL_FL	View additional details about an honor or award for a person.
<u>Job Interests (Summary) Tile</u>	HCTS_JOBIN_SUM1_FL	See a job as well as a count of the number of jobs in which a person has expressed interest.
<u>Job Interests Page</u>	HCTS_JOB_INT1_FL	Review a list of jobs in which the employee has expressed interest.
<u>Maintain Job Profiles Page</u>	JPM_MGRSS_PROFLIC	Review or update a job profile using the Profile Management system. For more information on managing job profiles, see the documentation "(Fluid) Viewing and Updating Job Profiles" (PeopleSoft HCM 9.2: eDevelopment).
<u>Development (Summary) Tile</u>	HCTS_DEV_SUM1_FL	View if there is a completed development document for this employee.
<u>Development History Page</u>	HCTS_DEVHIST_FL HCTS_DEVHIST_SCF HCTS_DEVHIST_SBF	View the most recently completed development documents for an employee.

Page Name	Definition Name	Usage
<u>Education Tile</u>	HCTS_EDUCATION1_FL_GBL	See the most recent education level recorded for the employee and a number count of all other degrees and school levels.
<u>Education Page</u>	HCTS_EDUCATION_FL	See the school education levels attended and degrees completed by this employee.
<u>Education Details Page</u>	JPM_ITM_DTL_FL	View details about the education level or degree obtained by the employee.
<u>Career Plans (Summary) Tile</u>	HCTS_CAREERPLN1_FL_GBL	View the next step in this employee's career path. The tile will also list the number of other career path options specified for this employee.
<u>Career Plans Page</u>	HCTS_CAREERPLN_FL	Review a list of all career path options defined for the employee.
<u>Career Move Details Page</u>	HCTS_CP_ADMPTH_SCF	View additional details about a career move for a person.
"Manage Career Plans Component" (PeopleSoft HCM 9.2: Human Resources Plan Careers and Successions)	HR_CP_MANAGER	Perform career planning activities for your direct reports.
"Career Progression Chart Page" (PeopleSoft HCM 9.2: Human Resources Plan Careers and Successions)	HR_CP_PRO_CHART	View a graphical representation of the employee's career paths and perform a competency gap/fit analysis.

Employee Snapshot - Summary Dashboard

Use the Summary dashboard page to access a variety of high level tiles about an employee.

Navigation

- Click the Employee Snapshot tile on the *Manager Self Service*, *Talent Administrator*, or any fluid homepage to which the tile has been added, then select an employee from the search page.
- (Managers only) Select the Related Actions icon next to a person's name in fluid and select View Employee Snapshot.
- From the Employee Snapshot pages, select the Summary dashboard category item from the left panel.

Image: (Tablet) Employee Snapshot - Summary Dashboard

This example illustrates the Employee Snapshot - Summary dashboard page for the tablet.

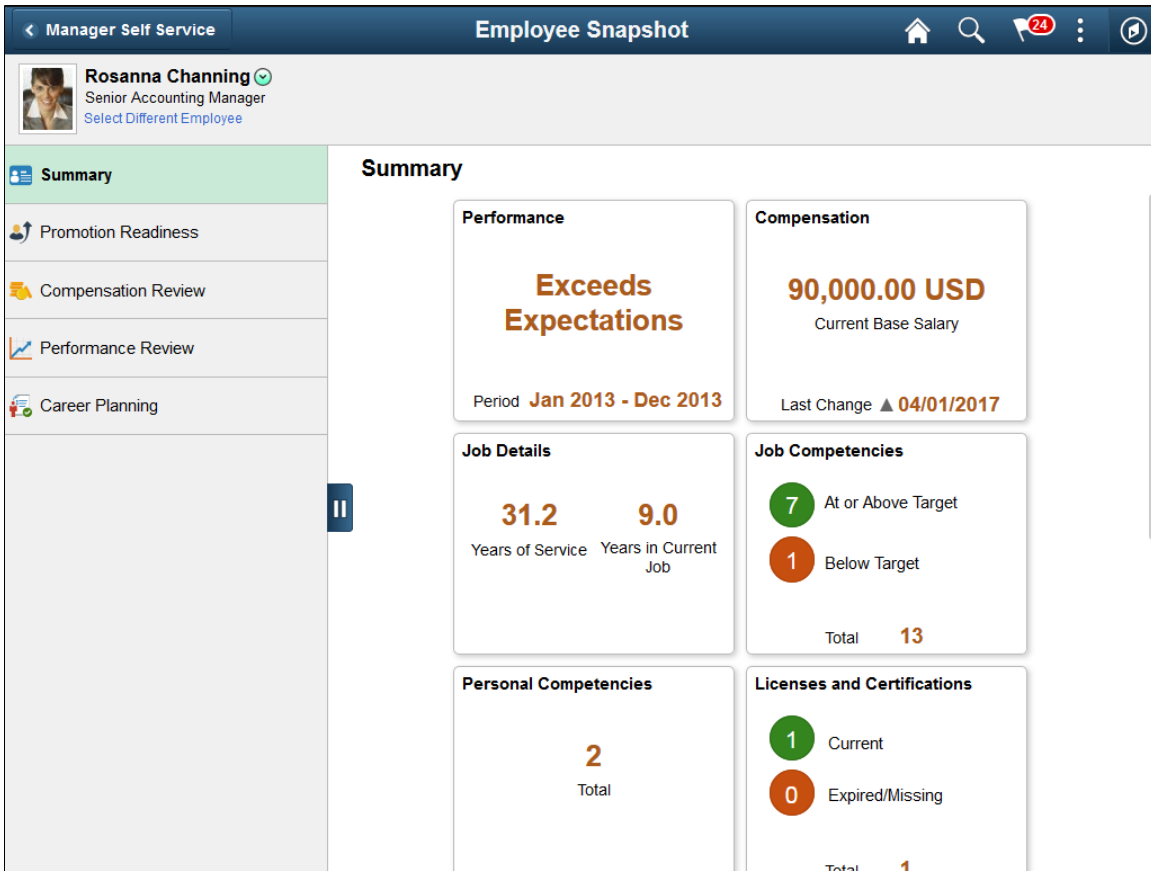
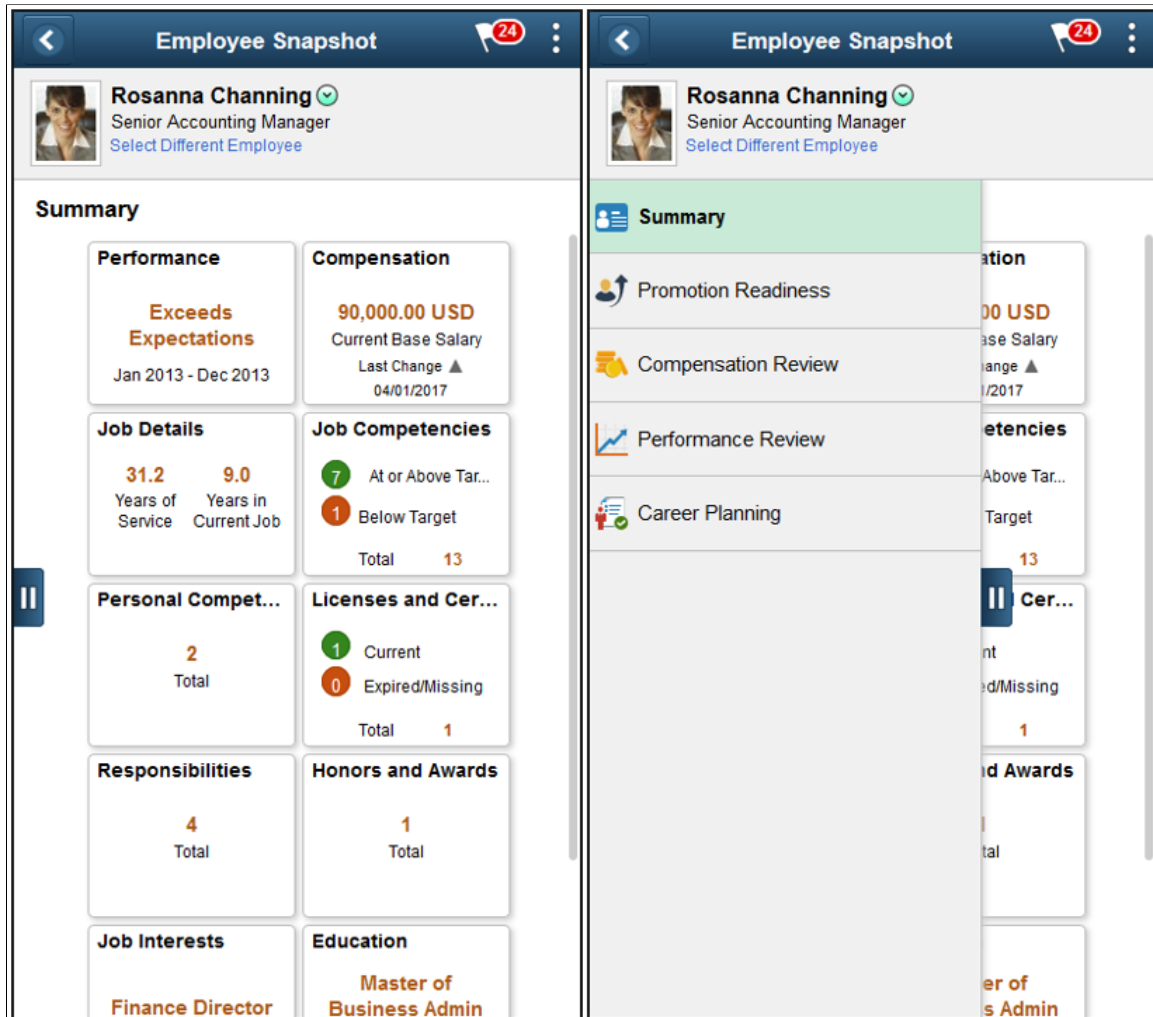


Image: (Smartphone) Employee Snapshot - Summary Dashboard

This example illustrates the Employee Snapshot - Summary dashboard on a small form factor device. In the first image, the left panel is hidden. In the second image, the left panel is exposed.



The Summary dashboard appears by default when you access the Employee Snapshot pages. The Summary dashboard uses tiles to provide a very high level of information about the employee.

These tiles are delivered by default with the *Summary* dashboard:

- [Performance \(Summary\) Tile](#)
- [Compensation \(Summary\) Tile](#)
- [Job Details \(Summary\) Tile](#)
- [Job Competencies \(Summary\) Tile](#)
- [Personal Competencies \(Summary\) Tile](#)
- [Licenses and Certifications \(Summary\) Tile](#)
- [Responsibilities \(Summary\) Tile](#)
- [Honors and Awards \(Summary\) Tile](#)

- [Job Interests \(Summary\) Tile](#)
- [Development \(Summary\) Tile](#)
- [Education Tile](#)
- [Career Plans \(Summary\) Tile](#)

Note: These tiles are delivered by default to appear on the Summary dashboard page of Employee Snapshot; however, the administrator can move the tiles to appear on other Employee Snapshot dashboard folders. The navigation in these topics references the delivered navigation.

Administrators can also publish custom profile tiles to the Summary dashboard using the [Configure Employee Snapshot - Profile Content Page](#) and [Tile Attributes Page](#).

Select Different Employee

(Manager view only) Select this link to access the [Employee Snapshot - Select Employee Page \(for Managers\)](#) and change the Employee Snapshot view to another employee.



Hide or Show Action Item List
tab

Click this tab to view and select other Employee Snapshot dashboards or close the dashboard list panel.

Performance (Summary) Tile

Use the Performance (Summary) tile (HCTS_PERF_SUM1_FL) to view the overall rating for an employee from the last performance period.

Navigation

Select the [Employee Snapshot - Summary Dashboard](#) category item from the Employee Snapshot pages.

Image: Performance (Summary) Tile

This example illustrates the Performance (Summary) tile.



To view a list of this employee's historical performance reviews, click the tile to access the [Performance History Page](#).

The performance document that should display is defined on the [Configure Employee Snapshot - Document History Page](#).

Note: When the administrator does not identify a valid document type, the tile will display a message that you need to contact the system administrator to configure this view.

Performance History Page

Use the Performance History page (HCTS_PERFHIST_FL or HCTS_PERFHIST_SCF) to review the overall rating for an employee from past performance periods using either a chart or table grid.

Navigation

- Click the [Performance \(Summary\) Tile](#) from the [Employee Snapshot - Summary Dashboard](#) or any dashboard to which the tile has been added.
- Click the View Details link on the [Performance History Tile](#) from one of the non-summary (Performance Review, Promotion Readiness, and Compensation Review) dashboards.

Image: Performance History Page (Chart View) from the Performance (Summary) Tile

This example illustrates the chart view of the Performance History page. The chart view is available on this page only when accessed from the Performance (Summary) tile.

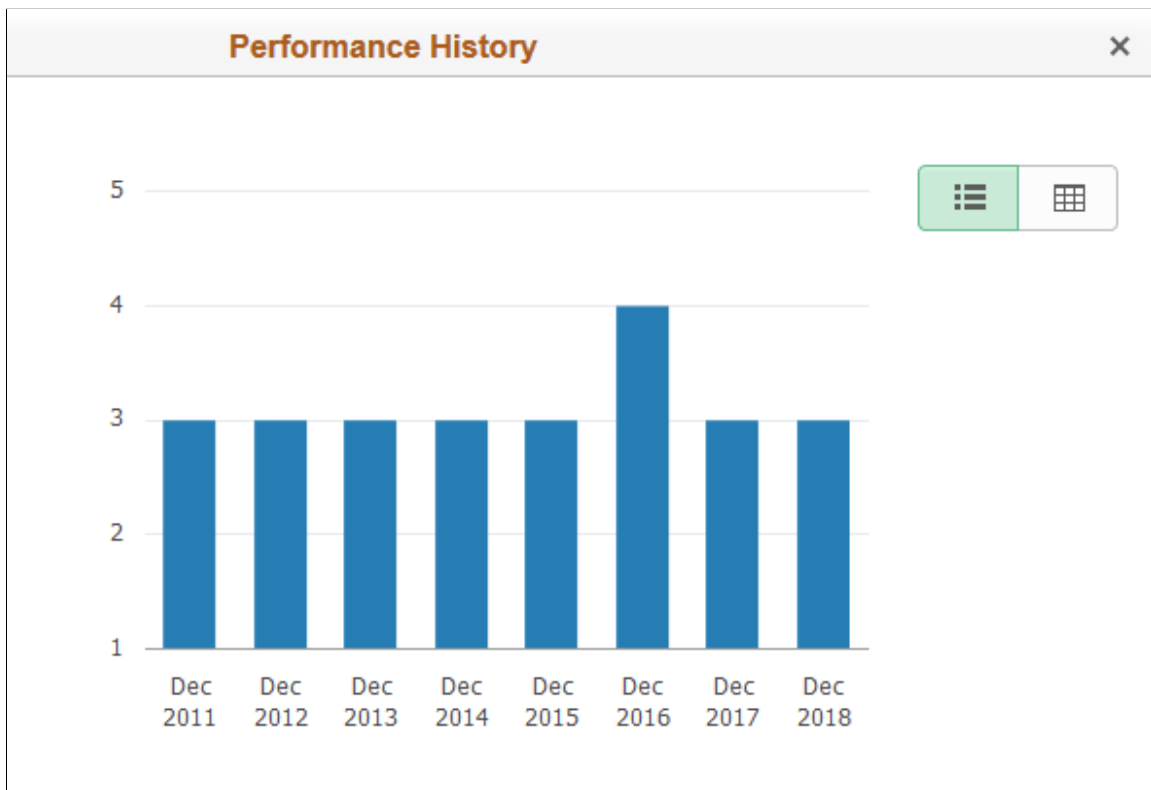


Image: Performance History Page (Chart View) from the Performance (Summary) Tile with Different Performance Document Review Types

This example illustrates the Performance History page in chart view where the employee has different performance document review types. The page displays reviews for the document review types in different colors. The chart view is available on this page only when accessed from the Performance (Summary) tile.

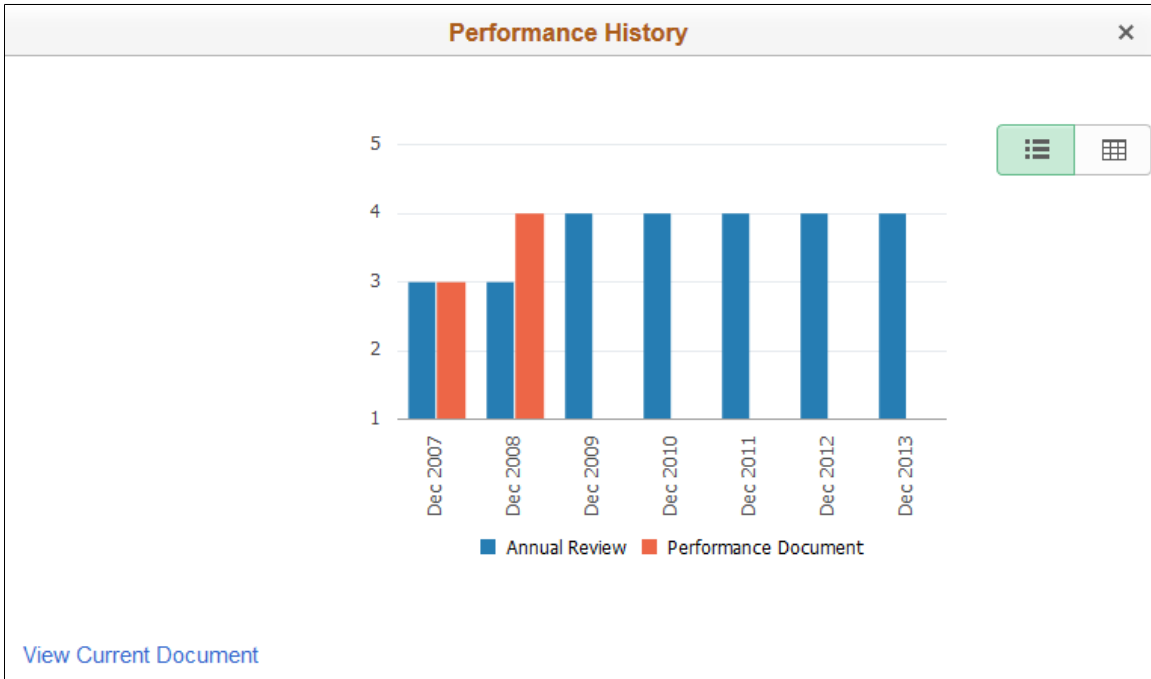
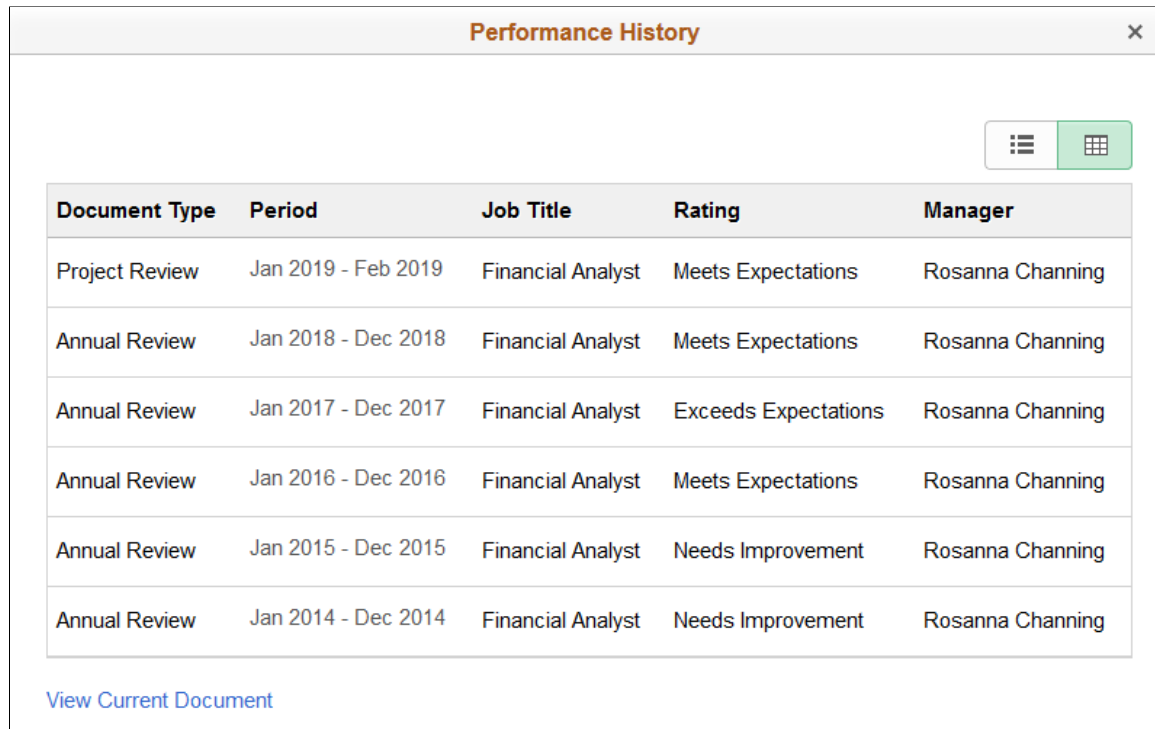


Image: Performance History Page (Grid View) from the Performance (Summary) Tile

This example illustrates the Performance History page in grid view. This employee has reviews under different document types: *Project Review* and *Annual Review*.



Document Type	Period	Job Title	Rating	Manager
Project Review	Jan 2019 - Feb 2019	Financial Analyst	Meets Expectations	Rosanna Channing
Annual Review	Jan 2018 - Dec 2018	Financial Analyst	Meets Expectations	Rosanna Channing
Annual Review	Jan 2017 - Dec 2017	Financial Analyst	Exceeds Expectations	Rosanna Channing
Annual Review	Jan 2016 - Dec 2016	Financial Analyst	Meets Expectations	Rosanna Channing
Annual Review	Jan 2015 - Dec 2015	Financial Analyst	Needs Improvement	Rosanna Channing
Annual Review	Jan 2014 - Dec 2014	Financial Analyst	Needs Improvement	Rosanna Channing

[View Current Document](#)

This page displays the performance review types, periods, and the employee's rating for each.

The document types and maximum number of performance reviews to display are defined on the [Configure Employee Snapshot - Document History Page](#). This page will display all document types held by the employee that match those as defined on the configuration page.

Note: When the administrator does not identify valid document types, the page will display a message that you need to contact the system administrator to configure this view.

For information on the performance documents, see "Manager Evaluation Page (Manage Employee Reviews)" (PeopleSoft HCM 9.2: Human Resources Manage Employee Reviews) or "Accessing Documents" (PeopleSoft HCM 9.2: ePerformance) in ePerformance.

Accessing the Page from the Performance (Summary) Tile

The following options are available when you access the page from the [Performance \(Summary\) Tile](#).



Click the Chart View button icon to view the information in a graphical format.

When in Chart View, pause or hover over a bar item to view the review rating. Click a graph bar item to access the Annual Review - Manager Evaluation Page (see "<Manager or Self-> Evaluation Page" (PeopleSoft HCM 9.2: ePerformance)) and view additional details about the rating for this employee and access the performance evaluation.



Click the Grid View button icon to view the information in a grid format.

View Current Document

This link is available when there is an open (in-progress) performance document for the employee.

Click this link to access the ePerformance WorkCenter for the document that was most recently created. For information on this page, see the "Understanding ePerformance WorkCenter" (PeopleSoft HCM 9.2: ePerformance) documentation.

Accessing the Page from a Non-Summary Performance Tile

When you click the View Details link from a non-summary Performance History Tile, the Performance History page will display in grid mode only.

Image: Performance History Page from a Non-Summary Tile

This example illustrates the Performance History page when accessed from a non-summary performance tile.

Performance History				
Document Type	Period	Job Title	Rating	Manager
Project Review	Jan 2019 - Feb 2019	Accountant	Meets Expectations	Rosanna Channing >
Annual Review	Jan 2018 - Dec 2018	Accountant	Meets Expectations	Rosanna Channing >
Annual Review	Jan 2017 - Dec 2017	Accountant	Exceeds Expectations	Rosanna Channing >
Annual Review	Jan 2016 - Dec 2016	Accountant	Meets Expectations	Rosanna Channing >
Annual Review	Jan 2015 - Dec 2015	Accountant	Exceeds Expectations	Rosanna Channing >
Annual Review	Jan 2014 - Dec 2014	Accountant	Meets Expectations	Rosanna Channing >

You can click the rows from the grid to access the Annual Review - Manager Evaluation Page (see "<Manager or Self-> Evaluation Page" (PeopleSoft HCM 9.2: ePerformance)) and view additional details about the rating for this employee and access the performance evaluation.

This video demonstrates the Fluid Employee Snapshot multiple document types feature:

[Image Highlights, PeopleSoft HCM Update Image 30: Employee Snapshot Multiple Performance Document Type Configuration and Display](#)

Compensation (Summary) Tile

Use the Compensation (Summary) tile (HCTS_CMP_SAL1_FL) to view the current base salary for an employee and when the employee's base salary was last changed.

Navigation

Select the [Employee Snapshot - Summary Dashboard](#) category item from the Employee Snapshot pages.

Image: Compensation (Summary) Tile

This example illustrates the Compensation (Summary) tile.



Use this tile to view the employee's current base salary. The tile also displays the last time the employee's pay was updated. An arrow pointing up indicates he or she received a salary increase, while an arrow pointing down indicates that the employee received a decrease in pay.

If no change exists the tile reads *Last Change None*.

When the manager does not have access to the employee's compensation, a tile will display text that the manager does not have access to the compensation information.

Click the tile to access the [Compensation: Current Salary Page](#).

Compensation: Current Salary Page

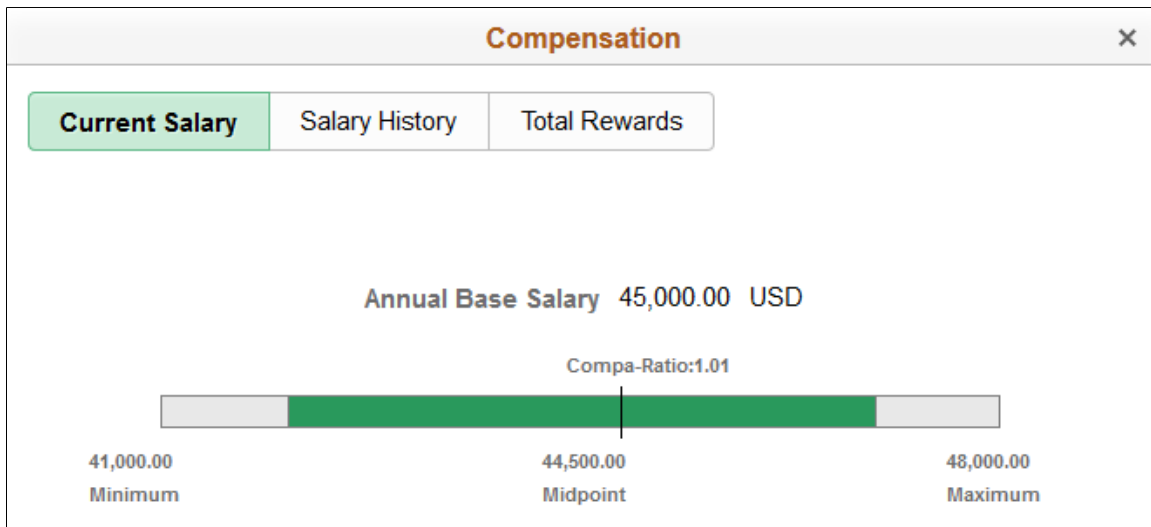
Use the Compensation: Current Salary page (HCTS_COMP_SALRY_FL) to view the salary range for an employee's job and where the employee falls within that range.

Navigation

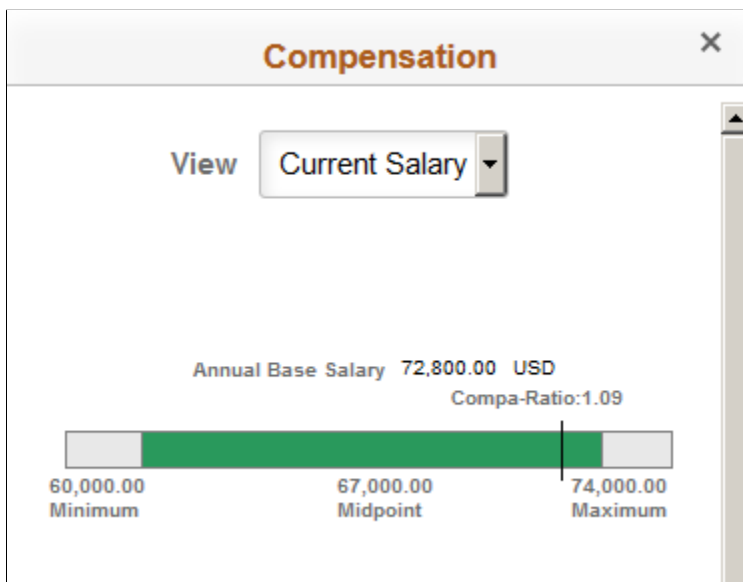
Click the [Compensation \(Summary\) Tile](#) from the [Employee Snapshot - Summary Dashboard](#) or any dashboard to which the tile has been added, then select the Current Salary touch point item (tablet or desktop) or select *Current Salary* from the View field.

Image: (Tablet) Compensation: Current Salary Page

This example illustrates the Compensation: Current Salary page for the tablet.

**Image: (Smartphone) Compensation: Current Salary Page**

This example illustrates the Compensation: Current Salary page for the smartphone.



The page displays the minimum, midpoint, and maximum of the salary grade for this employee's job. The line that runs through the salary range bar indicates the employee's current base salary. The compa ratio is the comparison of the current salary to the mid point of the range.

View

(Smartphone) Select the compensation specific page from this field to view details related to this view. Page views include:

- [Compensation: Current Salary Page](#)
- [Compensation: Salary History Page](#)
- [Compensation: Total Rewards Page](#)

(Tablet or desktop) These page categories display across the top of the page as touch points. Click a touch point to access that data.

Compensation: Salary History Page

Use the Compensation: Salary History page (HCTS_COMP_SALRY_FL) to review or verify an employee's compensation history.

Navigation

Click the Compensation (Summary) Tile from the Employee Snapshot - Summary Dashboard or any dashboard to which the tile has been added, then select the Salary History touch point item (tablet or desktop) or select *Salary History* from the View field.

Image: Compensation: Salary History Page (Chart View)

This example illustrates the chart view of the Compensation: Salary History page.

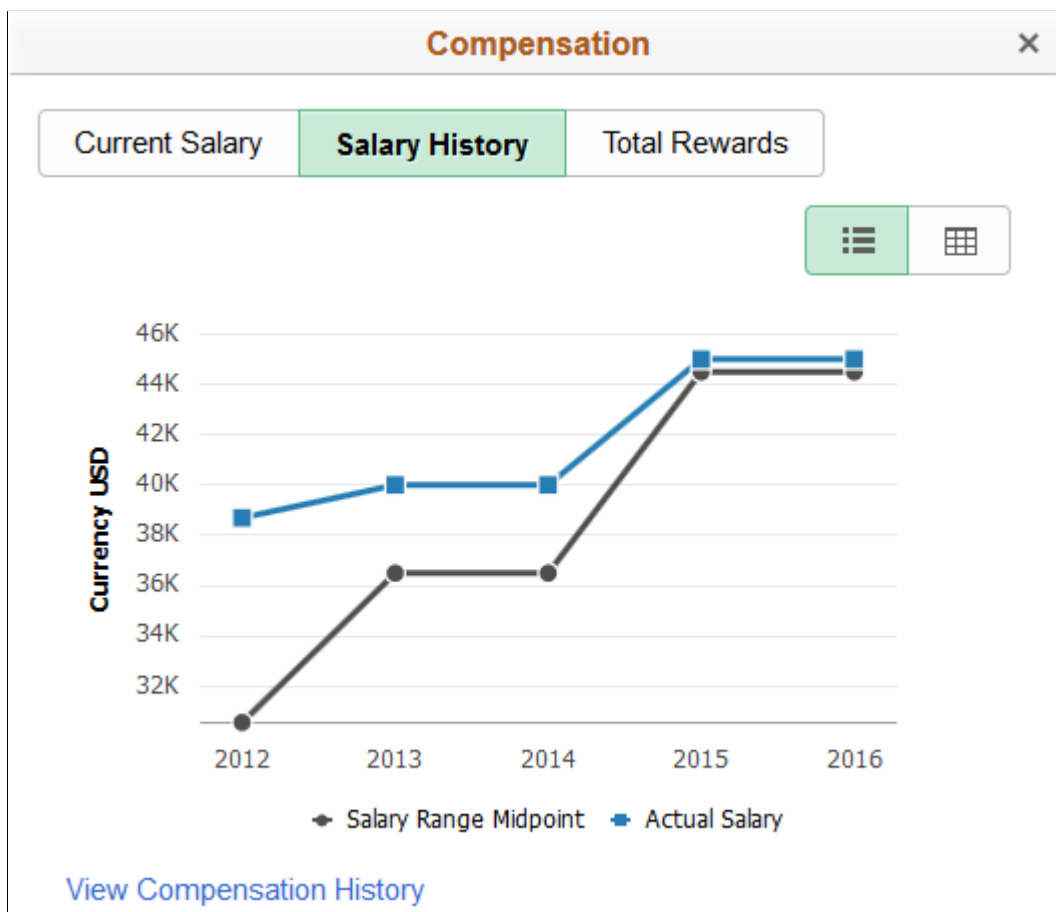


Image: (Tablet) Compensation: Salary History Page (Grid View)

This example illustrates the grid view of the Compensation: Salary History page for the tablet.

Year	Job Title	Annual Salary	Midpoint
2016	Manager-Revenue	45,000.00	44,500.00
2015	Manager-Revenue	45,000.00	44,500.00
2014	Manager-Revenue	40,000.00	36,500.00
2013	Senior Finance Specialist	40,000.00	36,500.00
2012	Senior Finance Specialist	38,700.00	30,565.00

[View Compensation History](#)

Image: (Smartphone) Compensation: Salary History Page (Grid View)

This example illustrates the grid view of the Compensation: Salary History page for the smartphone.

Year	Job Title	Annual Salary	Midpoint
2016	Manager-Revenue	45,000.00	44,500.00
2015	Manager-Revenue	45,000.00	44,500.00
2014	Manager-Revenue	40,000.00	36,500.00
2013	Senior Finance Specialist	40,000.00	36,500.00
2012	Senior Finance Specialist	38,700.00	30,565.00

[View Compensation History](#)

Use this page to view salary change history. The page displays the last five years of compensation for the employee as well as the midpoint range for the employee's job. Pause or hover over a data point on the graph to view the exact salary or salary midpoint for a specific year.

View

(Smartphone) Select the compensation specific page from this field to view details related to this view. Page views include:

- [Compensation: Current Salary Page](#)
- [Compensation: Salary History Page](#)
- [Compensation: Total Rewards Page](#)

(Tablet or desktop) These page view categories display across the top of the page as touch points. Click a touch point to access that data.



Click the Chart View button icon to view the information in a graphical format.



Click the Grid View button icon to view the information in a grid format.

View Compensation History

Click this link to open the "View Compensation History Page (Fluid Manager View)" (PeopleSoft HCM 9.2: eCompensation Manager Desktop) in self service and view the employee's salary, variable cash, and variable noncash information.

If the manager does not have access to the fluid View Compensation History page, the Compensation History Page is displayed.

Compensation History Page

Use the Compensation History page (HCTS_COMP_HIST_SCF) to review or verify an employee's compensation history.

Navigation

- Click the View Compensation History link from the Compensation: Salary History Page.
- Click the Current Salary Tile from the Employee Snapshot - Promotion Readiness Dashboard.
- Click the View Compensation History link from the Salary History Tile from a non-summary dashboard.

Image: Compensation History Page

This example illustrates the Compensation: Salary History page.

Compensation History							x
Date of Change	Amount	Change	Type	Source	Currency	Job Title	
02/22/2015	45,000.00	5,000.00	Pay Rate Change	Base Salary	USD	Manager-Revenue	>
12/01/2013	40,000.00	1,300.00	Data Change	Base Salary	USD	Senior Finance Specialist	>
04/01/2012	38,700.00	1,700.00	Parental Leave	Base Salary	USD	Senior Finance Specialist	>
01/01/2012	37,000.00		Hire	Base Salary	USD	Senior Finance Specialist	>

Use this page to view the history of all pay rate changes the worker has received to date.

Click an individual row to access the Salary Change Details Page and view further details for this specific salary change.

Related Links

"View Compensation History Page (Fluid Manager View)" (PeopleSoft HCM 9.2: eCompensation Manager Desktop)

Salary Change Details Page

Use the Salary Change Details page (HCTS_COMP_VC_SCF) to view details of a specific salary change.

Navigation

Click a specific Compensation History row from the [Compensation History Page](#).

Image: Salary Change Details Page

This example illustrates the Salary Change Details page.

Salary Change Details	
Date of Change	02/22/2015
Annual Salary	45,000.00 USD
Previous Annual Salary	40,000.00 USD
Change Amount	5,000.00 USD
Change Percent	12.500

Compensation: Total Rewards Page

Use the Compensation: Total Rewards page (HCTS_COMP_SALRY_FL or HCTS_CMP_TRW_SBF) to review employee total rewards data.

Navigation

Click the [Compensation \(Summary\) Tile](#) from the [Employee Snapshot - Summary Dashboard](#) or any dashboard to which the tile has been added, then select the Total Rewards touch point item (tablet or desktop) or select *Total Rewards* from the View field.

Image: (Tablet) Compensation: Total Rewards Page (Chart View)

This example illustrates the chart view of the Compensation: Total Rewards page for the tablet.

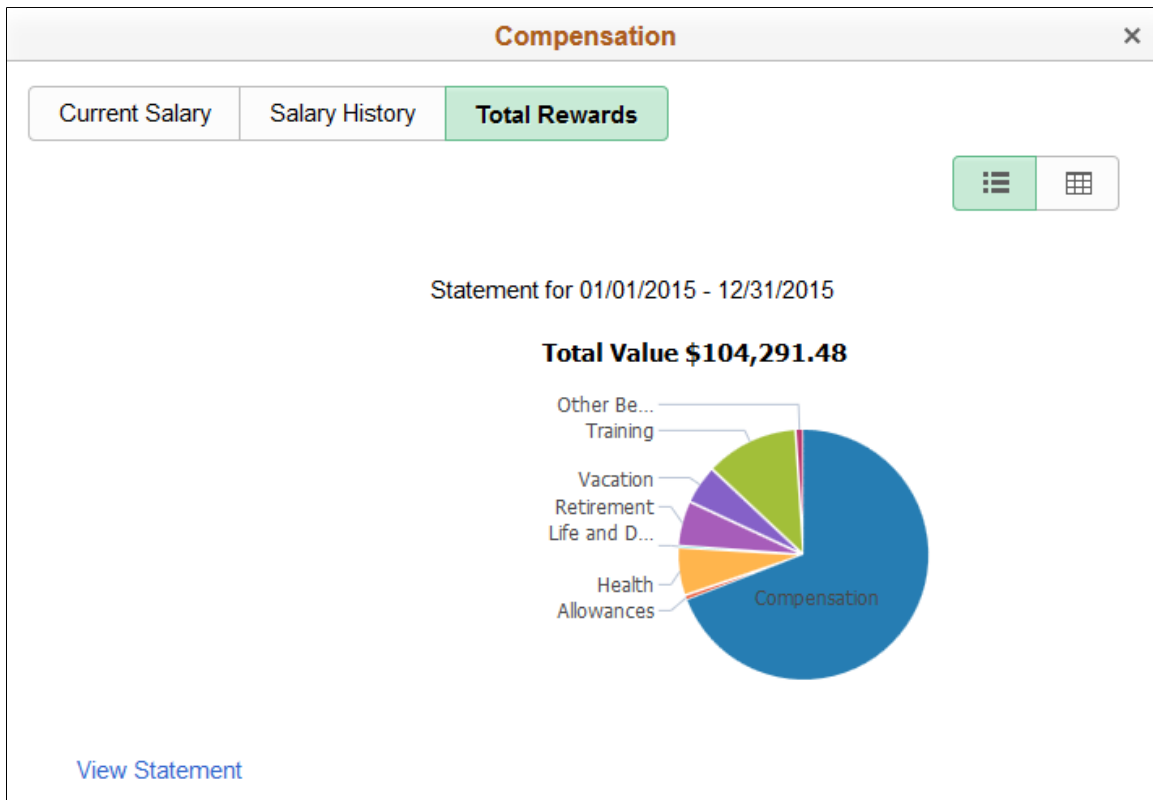


Image: (Tablet) Compensation: Total Rewards Page (Grid View)

This example illustrates the grid view of the Compensation: Total Rewards page for the tablet.

Compensation ×

Current Salary
Salary History
Total Rewards

☰ ☐

Statement for 01/01/2015 - 12/31/2015

Reward Item	Employee Contribution	Employer Provided
Compensation	0.00	0.00
Allowances	0.00	0.00
Health	1,434.24	0.00
Life and Disability	688.20	0.00
Retirement	8,889.96	0.00
Vacation	0.00	5,250.00
Training	0.00	2,500.00

Image: (Smartphone) Compensation: Total Rewards Page (Chart View)

This example illustrates the chart view of the Compensation: Total Rewards page for the smartphone.

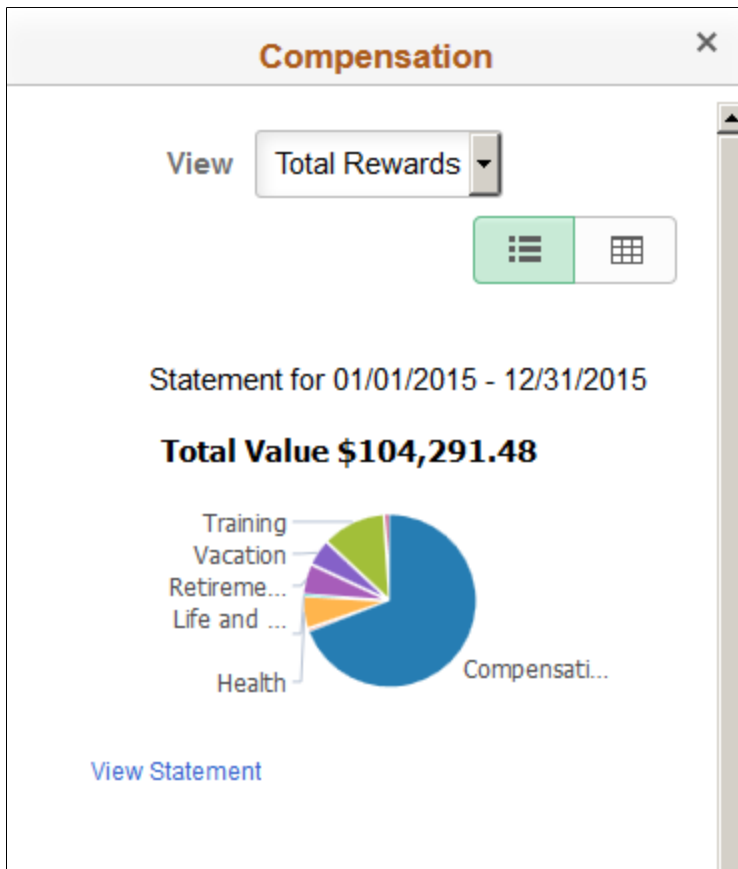


Image: (Smartphone) Compensation: Total Rewards Page (Grid View)

This example illustrates the grid view of the Compensation: Total Rewards page for the smartphone.

Statement for 01/01/2015 - 12/31/2015	
Compensation	
Your Contribution	0.00
Company Provided	0.00
Allowances	
Your Contribution	0.00
Company Provided	0.00
Health	
Your Contribution	1,434.24
Company Provided	0.00
Life and Disability	
Your Contribution	688.20
Company Provided	0.00
Retirement	
Your Contribution	8,889.96
Company Provided	0.00
Vacation	
Your Contribution	0.00
Company Provided	5,250.00
Training	
Your Contribution	0.00
Company Provided	2,500.00
Other Benefits	
Your Contribution	0.00

The page displays the most recent statement period information, the period identified at the top of the page. It lists all total rewards page sections that are included with the associated template, listing associated reward items and calculated amounts.

View

(Smartphone) Select the compensation specific page from this field to view details related to this view. Page views include:

- [Compensation: Current Salary Page](#)
- [Compensation: Salary History Page](#)

- Compensation: Total Rewards Page

(Tablet or desktop) These page views display across the top of the page as touch points. Click a touch point to access that data.



Click the Chart View button icon to view the information in a graphical format.



Click the Grid View button icon to view the information in a grid format.

View Statement

Click this link from the chart view to access the "Total Rewards Page" (PeopleSoft HCM 9.2: Human Resources Administer Compensation) to review employee’s earnings, benefits, and other compensation information in further detail for selected review periods.

Job Details (Summary) Tile

Use the Job Details (Summary) tile (HCTS_JOBDTL_SUM_FL) to view an individual employee’s years of service and time in the current job.

Navigation

Select the Employee Snapshot - Summary Dashboard category item from the Employee Snapshot pages.

Image: Job Details (Summary) Tile

This example illustrates the Job Details (Summary) tile.



Use this tile to view a person’s years of service with the company and within the current job.

Click the tile to access the Job Details: Job Information Page to see additional information about this person’s job history with the organization.

Job Details: Job Information Page

Use the Job Details: Job Information page (HCTS_JOB_DTLS_FL) to review detailed information about a person’s current job.

Navigation

Click the [Job Details \(Summary\) Tile](#) from the [Employee Snapshot - Summary Dashboard](#) or any dashboard to which the tile has been added.

Image: Job Details: Job Information Page

This example illustrates the Job Details: Job Information page.

×
Job Details

Job Information

Job History

Business Unit Global Business Institute BU

Department Revenue Management

Location Kansas Operations

Job Title Manager-Revenue

Job Code 600155

Full/Part Time Full-Time

Standard Hours 40.00

HR Status Active

Org Relationship Employee

Years of Service 4.9

Last Start Date 01/01/2012

Years in Current Job 2.9

Date in Current Job 01/01/2014

Job Details: Job History Page

Use the Job Details: Job History page (HCTS_JOB_DTLS_FL) to view a summary of a person's job history.

Navigation

Click the [Job Details \(Summary\) Tile](#) from the [Employee Snapshot - Summary Dashboard](#) or any dashboard to which the tile has been added and select the Job History page item, then select the Job History tab item.

Image: Job Details: Job History Page

This example illustrates the Job Details: Job History page.



Job Details		
Job Information	Job History	
Job Title	Dates	Years in Job
Manager-Revenue	01/01/2014 - Present	2.9
Senior Finance Specialist	01/01/2012 - 12/31/2013	2.0

Job Competencies (Summary) Tile

Use the Job Competencies (Summary) tile (HCTS_JOBCOMP1_FL) to note the number of competencies where the employee’s profile rating is above or below the target for the employee’s job.

Navigation

Select the Employee Snapshot - Summary Dashboard category item from the Employee Snapshot pages.

Image: Job Competencies (Summary) Tile

This example illustrates the Job Competencies (Summary) tile.



The Job Competencies (Summary) tile displays a quick view of the number of employee competencies (Person profile) that rate at or above the job requirements and also those that rate below the target number associated with the job (Non-person profile). The tile also displays a Total number value. This is an accumulation of the employee’s competencies that have been rated against the job profile, those that are not rated (the competencies associated with the job that have not been rated for the employee), and exceptions (competencies that use a different rating model between the Person and Non-Person profiles). The evaluation types and how long an evaluation should be included in the total count are defined on the Configure Employee Snapshot - Competencies Page. When evaluation types have not been defined on the

configuration page, the tile will display a message that you need to contact the system administrator to configure this view.

When a person has not been rated for any of the competencies that are associated with his or her job, the tile will display the message that the competencies have not been rated. When a profile has not been set up for this person's job, the tile displays the message that no competencies exist for this person's job.

If the manager does not have access to the employee's person profile, a message will display indicating that the manager does not have access to job competencies.

To view further details about each competency rating and how it compares to the job target, click the tile to access the [Job Competencies Page](#).

Related Links

[Personal Competencies \(Summary\) Tile](#)

Job Competencies Page

Use the Job Competencies page (HCTS_JOBCOMPDT_FL) to review a list of competencies associated with this employee's job (non-person) profile compared to the employee's (person) profile.

Navigation

- Click the [Job Competencies \(Summary\) Tile](#) from the [Employee Snapshot - Summary Dashboard](#) or any dashboard to which the tile has been added.
- Click the [Job Competencies Tile](#) from one of the non-summary dashboards.

Image: (Tablet) Job Competencies Page

This example illustrates the Job Competencies page for the tablet.








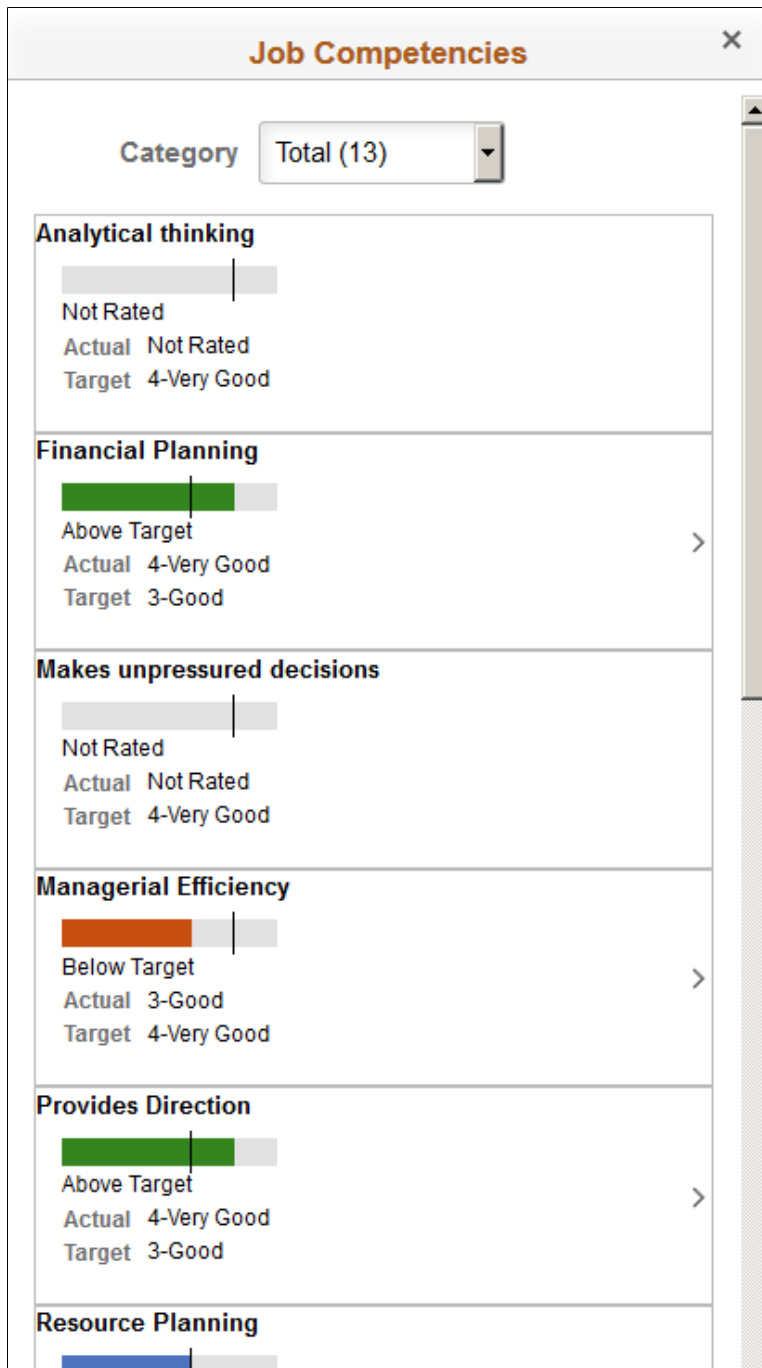
Job Competencies				
Total (13)	Above Target (6)	Meets Target (1)	Below Target (1)	Not Rated (5)
Competency	Actual Versus Target	Actual Rating	Target Rating	
Analytical thinking	 Not Rated	Not Rated	4-Very Good	
Financial Planning	 Above Target	4-Very Good	3-Good	>
Makes unpressured decisions	 Not Rated	Not Rated	4-Very Good	
Managerial Efficiency	 Below Target	3-Good	4-Very Good	>
Provides Direction	 Above Target	4-Very Good	3-Good	>
Resource Planning	 Meets Target	3-Good	3-Good	>
Technical Knowledge	 Not Rated	Not Rated	4-Very Good	

Image: (Smartphone) Job Competencies Page

This example illustrates the Job Competencies page for the smartphone.



When using a large form factor device, select a touch point category tab at the top of the page to view competencies by the target rating. When using a small form factor device, select the rating from the Category field.

These categories display a bar graph of the target versus actual proficiencies for competencies found on the job (non-person) profile related to the employee by touch point category. Categories display the following:

- *Total*: Lists all the competencies and the employee’s rating for this person’s job.

- *Above Target:* Lists those job competencies in which the employee exceeds that of the target level for the job. A dark green bar appears beyond the target line.
- *Meets Target:* Lists those job competencies in which the employee matches the target level for a competency. A light green bar appears even with the target line.
- *Below Target:* Lists those job competencies in which the employee's proficiency is less than the target level of the job. An orange bar appears below the target line.
- *Not Rated:* Displays the job competencies for which the employee has not been rated. The competency bar does not display a color bar.
- *Exceptions:* Shows the competencies that have a different rating model on the Job profile as compared to the Person profile.

Note: The evaluation types and number of years an evaluation should appear in the Employee Snapshot are defined on the [Configure Employee Snapshot - Competencies Page](#). When evaluation types have not been defined on the configuration page, the page will display a message that you need to contact the system administrator to configure this view.

Click a row to access the [Job Competency Details Page](#) and view more details about the job competency rating given for this employee. When the employee's profile record displays a *Not Rated* row, you cannot click the row to view additional details, since the employee does not have rating information to display.

View Talent Profile

(Manager view only) The page displays this link when a manager is viewing an authorized direct report and profile content is available; it is not visible for indirect reports.

Click this link to access the Team Talent Profile pages to view and update this team member's talent profile data in fluid (see "(Fluid) Maintaining Person Profiles" (PeopleSoft HCM 9.2: eDevelopment)).

Related Links

"(Fluid) Maintaining Person Profiles" (PeopleSoft HCM 9.2: eDevelopment)

"Person Profile Page" (PeopleSoft HCM 9.2: Human Resources Manage Profiles)

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

Job Competency Details Page

Use the Job Competency Details page (JPM_ITM_DTL_FL) to view the details of an employee's rating for a job competency.

Navigation

Click a competency row from the [Job Competencies Page](#).

Image: Job Competency Details Page

This example illustrates the Job Competency Details page.

Job Competency Details	
Effective Date	08/03/2015
Competency	Financial Planning
Evaluation Type	Approved/Official
Reviewer ID	
Status	Active
Rating Model	Competency Management Scale
Proficiency	4-Very Good
Verified By	
Interest Level	
EmplID	
Year Last Used	
Reviewer Is Approved	No
Year Acquired	
Years Of Experience	
Review Active	No
Review Date	
Description	
Reviewer	
Long Description	Financial Planning
Workflow Status	Approved

Related Links

["\(Fluid\) Maintaining Person Profiles" \(PeopleSoft HCM 9.2: eDevelopment\)](#)

["Person Profile Page" \(PeopleSoft HCM 9.2: Human Resources Manage Profiles\)](#)

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

[Personal Competency Details Page](#)

Personal Competencies (Summary) Tile

Use the Personal Competencies (Summary) tile (HC_HCTS_PERS_COMP1_FL) to view the total number of competencies associated with an employee's person profile, but not the employee's job (non-person) profile.

Navigation

Select the [Employee Snapshot - Summary Dashboard](#) category item from the Employee Snapshot pages.

Image: Personal Competencies (Summary) Tile

This example illustrates the Personal Competencies (Summary) tile.



The evaluation types and how long an evaluation should be included in the total count are defined on the [Configure Employee Snapshot - Competencies Page](#).

Click the tile to access the [Personal Competencies Page](#) to see a list of the personal competencies for this person that are not associated with his or her job.

Related Links

[Job Competencies \(Summary\) Tile](#)

Personal Competencies Page

Use the Personal Competencies page (HCTS_PERS_COMP_FL) to view a complete list of competencies associated with an employee's person profile, but not the employee's job (non-person) profile.

Navigation

- Click the [Personal Competencies \(Summary\) Tile](#) from the [Employee Snapshot - Summary Dashboard](#) or any dashboard to which the tile has been added.
- Click the View More link on the [Personal Competencies Tile](#) from one of the non-summary dashboards.

Image: Personal Competencies Page

This example illustrates the Personal Competencies page.

Personal Competencies ×	
Competency	Proficiency
Business Banking	3-Good
Strategic Planning	4-Very Good

[View Talent Profile](#)

The page displays competencies associated with this person's *Person* profile on the Person Profile or Talent Profile: Competencies tab, which are not associated with his or her job.

Note: The evaluation types and number of years a competency should appear on the Employee Snapshot are defined on the [Configure Employee Snapshot - Licenses and Certifications Page](#).

For competencies that have multiple reviewers for the same evaluation type, data for the most recent effective date displays on the page.

For competencies that have reviews using different evaluation types, the system uses those evaluations with the lowest sequence number. For more information on sequence numbers, see the "Instance Qualifiers Page" (PeopleSoft HCM 9.2: Human Resources Manage Profiles).

Click a row to access the [Personal Competency Details Page](#) and view more details about the personal competency rating given for the employee.

View Talent Profile

(Manager view only) The page displays this link when a manager is viewing an authorized direct report and profile content is available; it is not visible for indirect reports.

Click this link to access the Team Talent Profile pages to view and update this team member's talent profile data in fluid (see "(Fluid) Maintaining Person Profiles" (PeopleSoft HCM 9.2: eDevelopment)).

Related Links

"(Fluid) Maintaining Person Profiles" (PeopleSoft HCM 9.2: eDevelopment)

"Maintaining Profiles as an Administrator" (PeopleSoft HCM 9.2: Human Resources Manage Profiles)

"Person Profile Page" (PeopleSoft HCM 9.2: Human Resources Manage Profiles)

Personal Competency Details Page

Use the Personal Competency Details page (JPM_ITM_DTL_FL) to view additional details about the competency rating for a person.

Navigation

- Click a row from the [Personal Competencies Page](#).
- Click a row from the [Personal Competencies Tile](#) from one of the non-summary dashboards.

Image: Personal Competency Details Page

This example illustrates the Personal Competency Details page.

Personal Competency Details
×

Effective Date	03/23/2012
Competency	Business Banking
Evaluation Type	Approved/Official
Reviewer ID	
Status	Active
Rating Model	Competency Management Scale
Proficiency	3-Good
Verified By	
Interest Level	
EmpIID	
Year Last Used	
Reviewer Is Approved	No
Year Acquired	
Years Of Experience	
Review Active	No
Review Date	
Description	
Reviewer	
Long Description	Business Banking
Workflow Status	Approved

Details for a person's competency evaluation are recorded on the "<Content Type> Page" (PeopleSoft HCM 9.2: eDevelopment) for the *Person* profile for the employee.

Related Links

"(Fluid) Maintaining Person Profiles" (PeopleSoft HCM 9.2: eDevelopment)

"Maintaining Profiles as an Administrator" (PeopleSoft HCM 9.2: Human Resources Manage Profiles)
[Job Competency Details Page](#)

Licenses and Certifications (Summary) Tile

Use the Licenses and Certifications (Summary) tile (HC_HCTS_LICENSE1_FL) to view the number of current, expiring, or missing licenses and certifications held by an employee.

Navigation

Select the [Employee Snapshot - Summary Dashboard](#) category item from the Employee Snapshot pages.

Image: Licenses and Certifications (Summary) Tile

This example illustrates the Licenses and Certifications (Summary) tile.



The Licenses and Certifications (Summary) tile displays a quick view of the number of licenses and certifications held by the employee that are current, expiring soon, or have expired. The tile also displays a Total number. This is an accumulation of the employee's licenses and certification, regardless if they are required by the job profile or not.

To configure when the system should begin showing a licenses or certification as expiring soon, use the [Configure Employee Snapshot - Licenses and Certifications Page](#). When the administrator has configured the system to compare an employee's licenses and certifications with his or her job, the tile will display the Expired/Missing total count. When the compare with job option is turned off, the tile will display the Expired total count only and not identify missing items.

If the manager does not have access to the employee's person profile, a message will display indicating that.

Click the tile to access the [Licenses and Certifications Page](#) to see a list of licenses and certifications held by the employee.

Licenses and Certifications Page

Use the Licenses and Certifications page (HC_HCTS_LICENSE1_FL or HCTS_LICENSE_SCF) to view the licenses and certifications held by an employee.

Note: This page will appear differently based on the setup defined on the [Configure Employee Snapshot - Licenses and Certifications Page](#).

— When the Compare Person with Job Profile is set to *No*, the page will display all licenses and certifications held by the employee on one page.

— When the Compare Person with Job Profile is set to *Yes*, the page will display the licenses and certifications held by the employee on two different page tabs. The first tab of the page will show those items held by the employee that are required for the job, and the second tab of the page will display additional items held by the employee that are not required by the job.

Navigation

- Click the [Licenses and Certifications \(Summary\) Tile](#) from the [Employee Snapshot - Summary Dashboard](#) or any dashboard to which the tile has been added.
- Click the [Licenses and Certifications Tile](#) from the [Employee Snapshot - Performance Review Dashboard](#) or any dashboard to which the tile has been added.

Image: Licenses and Certifications Page When Not Comparing with the Job


This example illustrates the Licenses and Certifications page when the person's licenses and certifications are not being compared with those required by the job.

Licenses and Certifications				
Alert	License or Certification	Issue Date	Expiration Date	
⚠ Expiring Soon	Certified Public Accountant	06/01/2015	06/01/2018	>
⚠ Expiring Soon	Certified General Accountant	05/21/2015	05/21/2018	>
❌ Expired	Finance Analyst Certification	04/17/2013	04/17/2018	>
	WHMIS Safety Associate	03/28/2017		>
	Assoc Chartered Certif Accntnt	01/30/2009		>

[View Talent Profile](#)

Image: Licenses and Certifications: Required for Job Page



This example illustrates the Licenses and Certifications page showing the licenses and certifications held by the employee that are required by the job.

Licenses and Certifications				
Required for Job (2)		Additional Items (3)		
Alert	License or Certification	Issue Date	Expiration Date	
 Expiring Soon	Certified Public Accountant	06/01/2015	06/01/2018	>
	Assoc Chartered Certif Accntnt	01/30/2009		>

[View Talent Profile](#)

Image: Licenses and Certifications: Additional Items Page

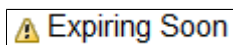
This example illustrates the Licenses and Certifications page showing additional licenses and certifications held by the employee that are not required by the job.

Licenses and Certifications				
Required for Job (2)		Additional Items (3)		
Alert	License or Certification	Issue Date	Expiration Date	
 Expiring Soon	Certified General Accountant	05/21/2015	05/21/2018	>
 Expired	Finance Analyst Certification	04/17/2013	04/17/2018	>
	WHIMIS Safety Associate	03/28/2017		>

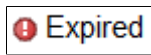
[View Talent Profile](#)

The page lists the licenses and certifications held by this individual as defined for the *Person* profile on the Person Profile or Talent Profile: Qualifications tab.

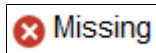
Click a row to access the [Licenses and Certifications Details Page](#) to see additional information about this license or certification held by the employee.

Alerts

This icon appears when the expiration date, entered on the employee's profile for this licence or certification, is approaching. The page will display the Expiring Soon icon based on the number of days before its expiration, as defined in the Days for Warning Alert field on the [Configure Employee Snapshot - Licenses and Certifications Page](#).



This icon appears after the expiration date of the license of certification has passed.



This icon appears when a license or certification required by the job is not held by the employee.

View Talent Profile

(Manager view only) The page displays this link when a manager is viewing an authorized direct report and profile content is available; it is not visible for indirect reports.

Click this link to access the Team Talent Profile pages to view and update this team member's talent profile data in fluid (see "(Fluid) Maintaining Person Profiles" (PeopleSoft HCM 9.2: eDevelopment)).

Licenses and Certifications Details Page

Use the Licenses and Certifications Details page (JPM_ITM_DTL_FL) to view additional details about a license or certification held by this person.

Navigation

- Click a row from the [Licenses and Certifications Page](#).
- Click a row from the [Responsibilities Tile](#) from one of the non-summary dashboards.

Image: Licenses and Certifications Details Page

This example illustrates the fields and controls on the Licenses and Certifications Details page.

Licenses and Certifications Details	
Issue Date	06/01/2015
License	Certified Public Accountant
Status	Active
Country	
State	
Renewal Required	No
Renewal In Progress	Yes
License Verified	No
Expiration Date	06/01/2018
License/Certification Number	
Issued By	

Details for a person's licences and certifications are recorded on the "<Content Type> Page" (PeopleSoft HCM 9.2: eDevelopment) for the *Person* profile for the employee.

Responsibilities (Summary) Tile

Use the Responsibilities (Summary) tile (HC_HCTS_RESP_SUM1_FL) to note the number of responsibilities assigned to an employee.

Navigation

Select the [Employee Snapshot - Summary Dashboard](#) category item from the Employee Snapshot pages.

Image: Responsibilities (Summary) Tile

This example illustrates the Responsibilities (Summary) tile.



Click the tile to access the [Responsibilities Page](#) to see a list of this person's responsibilities.

Responsibilities Page

Use the Responsibilities page (HCTS_RESP1_FL or HCTS_RESP_FL) to review a list of responsibilities assigned to an employee

Navigation

- Click the [Responsibilities \(Summary\) Tile](#) from the [Employee Snapshot - Summary Dashboard](#) or any dashboard to which the tile has been added.
- Click the [View More](#) link on the [Responsibilities Tile](#) from one of the non-summary dashboards.

Image: Responsibilities Page

This example illustrates the Responsibilities page.

Responsibilities		
Responsibilities	Proficiency	
Adhere to Accounting Standards	4-Very Good	>
Manage and motivate team	4-Very Good	>
Prepare and monitor department budgets	4-Very Good	>
Research Analytical Trends	4-Very Good	>

[View Talent Profile](#)

The page lists the responsibilities held by this individual as defined for the *Person* profile on the Person Profile or Talent Profile: Responsibilities tab.

Click a row from this page to access the [Responsibilities Details Page](#) and view more details about the responsibility given this employee.

View Talent Profile

(Manager view only) The page displays this link when a manager is viewing an authorized direct report and profile content is available; it is not visible for indirect reports.

Click this link to access the Team Talent Profile pages to view and update this team member's talent profile data in fluid (see "(Fluid) Maintaining Person Profiles" (PeopleSoft HCM 9.2: eDevelopment)).

Related Links

"Maintaining Profiles as an Administrator" (PeopleSoft HCM 9.2: Human Resources Manage Profiles)

Responsibilities Details Page

Use the Responsibilities Details page (JPM_ITM_DTL_FL) to view additional details about a responsibility assigned to a person.

Navigation

- Click a row from the [Responsibilities Page](#).
- Click a row from the [Responsibilities Tile](#) from one of the non-summary dashboards.

Image: Responsibilities Details Page

This example illustrates the Responsibilities Details page.



Details for a person's competency evaluation are recorded on the "<Content Type> Page" (PeopleSoft HCM 9.2: eDevelopment) for the *Person* profile for the employee.

Related Links

"(Fluid) Maintaining Person Profiles" (PeopleSoft HCM 9.2: eDevelopment)

Honors and Awards (Summary) Tile

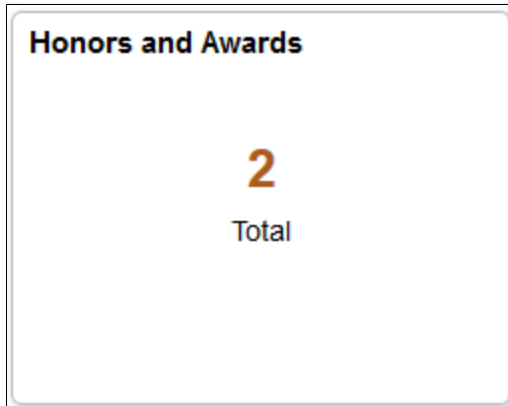
Use the Honors and Awards (Summary) tile (HC_HCTS_HONAW_SUM1_FL) to view the total number of honors and awards an employee has received.

Navigation

Select the [Employee Snapshot - Summary Dashboard](#) category item from the Employee Snapshot pages.

Image: Honors and Awards (Summary) Tile

This example illustrates the Honors and Awards (Summary) tile.



Click the tile to access the [Honors and Awards Page](#) to see a list of the employee's honors and awards.

Honors and Awards Page

Use the Honors and Awards page (HCTS_HONORS_FL) to review a list of the honors and awards an employee has received.

Navigation

Click the [Honors and Awards \(Summary\) Tile](#) from the [Employee Snapshot - Summary Dashboard](#) or any dashboard to which the tile has been added.

Image: Honors and Awards Page

This example illustrates the Honors and Awards page.

 A screenshot of a web page titled "Honors and Awards" with a close button (x) in the top right corner. Below the title is a table with two columns: "Honor or Award" and "Received On". The table contains two rows of data. Below the table is a link labeled "View Talent Profile".

Honor or Award	Received On
Distinguished Lectureship Awrd	05/01/2015
Outstanding Contributor Award	01/01/2006

[View Talent Profile](#)

The page displays honors and awards listed for this individual's *Person* profile on the Person Profile or Talent Profile: Qualifications tab.

Click a row from this page to access the [Honors and Awards Details Page](#) and view more details about the honors and award rating given for the employee.

View Talent Profile

(Manager view only) The page displays this link when a manager is viewing an authorized direct report and profile content is available; it is not visible for indirect reports.

Click this link to access the Team Talent Profile pages to view and update this team member's talent profile data in fluid (see "(Fluid) Maintaining Person Profiles" (PeopleSoft HCM 9.2: eDevelopment)).

Related Links

"Maintaining Profiles as an Administrator" (PeopleSoft HCM 9.2: Human Resources Manage Profiles)

Honors and Awards Details Page

Use the Honors and Awards Details page (JPM_ITM_DTL_FL) to view additional details about an honor or award for a person.

Navigation

Click a row from the [Honors and Awards Page](#).

Image: Honors and Awards Details Page

This example illustrates the Honors and Awards Details page.



Details for a person's honors and awards are recorded on the "<Content Type> Page" (PeopleSoft HCM 9.2: eDevelopment) for the *Person* profile for the employee.

Related Links

"(Fluid) Maintaining Person Profiles" (PeopleSoft HCM 9.2: eDevelopment)

"Maintaining Profiles as an Administrator" (PeopleSoft HCM 9.2: Human Resources Manage Profiles)

Job Interests (Summary) Tile

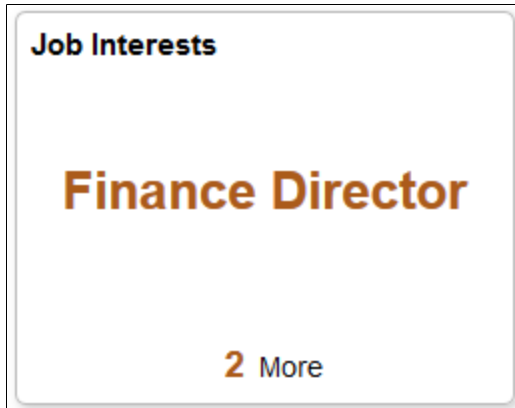
Use the Job Interests (Summary) tile (HCTS_JOBIN_SUM1_FL) to see a job as well as a count of the number of jobs in which a person has expressed interest.

Navigation

Select the [Employee Snapshot - Summary Dashboard](#) category item from the Employee Snapshot pages.

Image: Job Interests (Summary) Tile

This example illustrates the Job Interests (Summary) tile.



This tile displays the first job interest listed for the employee. It also provides a number count of all the other jobs in which the employee has expressed interest. Click the tile to access the [Job Interests Page](#) and view the full list of job interests.

Managers identify job interests for a person on the "Interest List by Person Page" (PeopleSoft HCM 9.2: Human Resources Manage Profiles). This page lists job interests alphabetically, thus the job that appears on this tile is the one that is alphabetically first.

Job Interests Page

Use the Job Interests page (HCTS_JOB_INT1_FL) to review a list of jobs in which the employee has expressed interest.

Navigation

- Click the [Job Interests \(Summary\) Tile](#) from the [Employee Snapshot - Summary Dashboard](#) or any dashboard to which the tile has been added.
- Click the View More link on the [Job Interest Tile](#) from the [Employee Snapshot - Career Planning Dashboard](#) or from any dashboard where you have added the tile.

Image: Job Interests Page

This example illustrates the Job Interests page.



Job Interests	
Job Profile	
Finance Director	>
Sr Analyst	>
Sr.Comp Oper	>

The page lists those jobs in which an individual has interest. The system lists jobs alphabetically.

Administrators identify job interests for a person on the "Interest List by Person Page" (PeopleSoft HCM 9.2: Human Resources Manage Profiles). Employees and managers use the My Interest List Page and Team Interest Lists Page respectively to maintain job a person's interest list.

Click a row to access the Maintain Job Profile page in Profile Management where you can review or update a job profile using the Profile Management system. For more information on managing job profiles, see the documentation "(Fluid) Viewing and Updating Job Profiles" (PeopleSoft HCM 9.2: eDevelopment).

Related Links

"(Fluid) Maintaining Interest Lists" (PeopleSoft HCM 9.2: eDevelopment)

Development (Summary) Tile

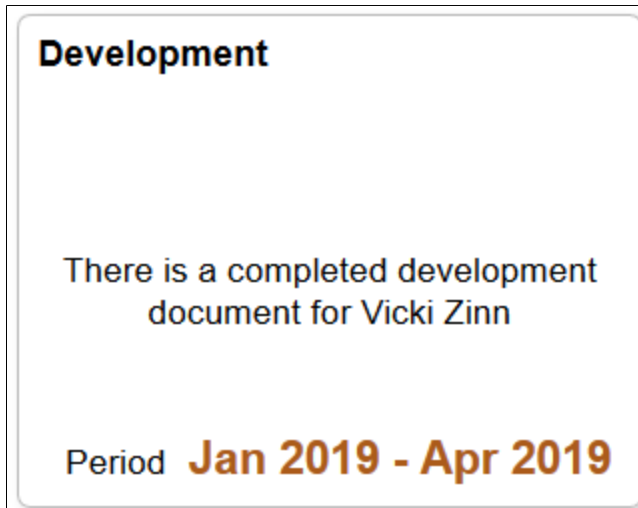
Use the Development tile (HCTS_DEV_SUM1_FL_GBL) to view if there is a completed development document for this employee.

Navigation

Select the [Employee Snapshot - Summary Dashboard](#) category item from the Employee Snapshot pages.

Image: Development (Summary) Tile

This example illustrates the Development (Summary) tile.



This tile displays whether or not there is a completed development document for the employee as follows:

- If there is a completed document with assigned rating, then the summary tile displays the rating and the associated review period.
- If there is a completed document with no assigned rating, then the tile displays a message *There is a completed development document for <employee name>* and the associated review period.
- If there is an in-progress document but no completed documents, then the tile displays a message *There is a development document in progress for <employee name>*.
- If there are no completed documents and no in-progress documents then the tile displays a message *There are no completed documents for <employee name>*.

When the employee has more than one document, the tile will display the information for the most recent document.

Click the tile to access the [Development History Page](#) and view the development document for the employee, if any.

Development History Page

Use the Development History page (HCTS_DEVHIST_FL or HCTS_DEVHIST_SCF) to view the most recently completed development documents for an employee.

Navigation

- Click the [Development \(Summary\) Tile](#) from the [Employee Snapshot - Summary Dashboard](#) or any dashboard to which the tile has been added.
- Click the View Details link from the [Development History Tile](#) from the [Employee Snapshot - Performance Review Dashboard](#) or any dashboard to which the tile has been added.

Image: Development History Page from the Development (Summary) Tile

This example illustrates the Development History page when accessed from the Development (Summary) tile. This example also shows an employee that has reviews for different document types.

Development History				
Document Type	Period	Job Title	Rating	Name
Leadership	Jan 2019 - Apr 2019	Manager-Revenue		Rosanna Channing
Performance Improvement Plan	Jan 2019 - Apr 2019	Manager-Revenue		Rosanna Channing

Image: Development History Page from the non-summary Development History Tile

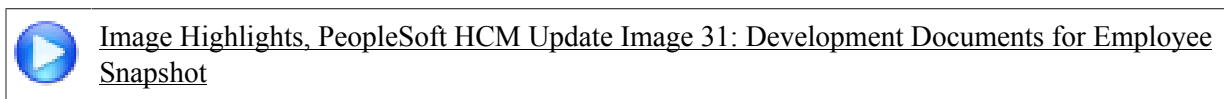
This example illustrates the Development History page when accessed from the non-summary Development History tile. This example also shows an employee that has reviews for different document types.

Development History				
Document Type	Period	Job Title	Rating	Manager
Leadership	Jan 2019 - Apr 2019	Accountant		Rosanna Channing >
Development Documents	Sep 2018 - Dec 2018	Accountant		Betty Locherty >

This page displays the development review types, periods, review ratings (if applicable), and job title held for completed development reviews for this employee based on the development document configuration. The document types and maximum number of development reviews to display are defined on the [Configure Employee Snapshot - Document History Page](#).

Note: When the administrator does not identify valid development document types, the page will display a message that you need to contact the system administrator to configure this view.

This video demonstrates the Fluid Employee Snapshot multiple development document types feature:



Accessing the Page from a Development (Summary)Tile

When you access this page from the [Development \(Summary\) Tile](#), you can only view a summary of development documents. To access the individual reviews, access the page from the non-summary Development History tile and select a row.

Accessing the Page from a Non-Summary Development History Tile

When you click the View Details link from the [Development History Tile](#), you can click the rows in the grid to access the Mentor Evaluation - Completed Page (see "<Manager or Self-> Evaluation Page" (PeopleSoft HCM 9.2: ePerformance)) and view additional details about the document for this employee.

Education Tile

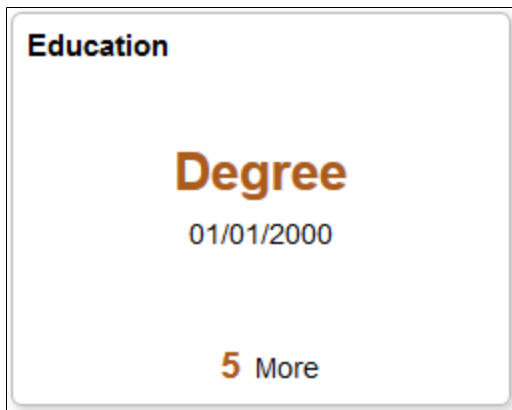
Use the Education tile (HCTS_EDUCATION1_FL_GBL) to see the most recent education level recorded for the employee and a number count of all other degrees and school levels.

Navigation

Select the [Employee Snapshot - Summary Dashboard](#) category item from the Employee Snapshot pages.

Image: Education (Summary) Tile

This example illustrates the Education (Summary) tile.



This tile displays the most recent education level listed for the employee. It also provides a number count of all the other education levels and degrees recorded for the employee. Click the tile to access the [Education Page](#) and view the education and degrees completed by the employee.

Education Page

Use the Education page (HCTS_EDUCATION_FL) to see the school education levels and degrees completed by this employee.

Navigation

Click the [Education Tile](#) from the [Employee Snapshot - Summary Dashboard](#) or any dashboard to which the tile has been added.

Image: Education Page

This example illustrates the Education page.

Education			
Degrees			
Degree	School	Date Acquired	
Doctor of Philosophy	Houston, University of	01/01/2000	>
Master of Business Admin		06/30/1999	>
Bachelor of Science		06/10/1994	>
School Education			
Education Level	School	Date Attended	
Degree	New York University	01/01/2000	>
General University	Westwood	01/01/2000	>
Graduated	Berkeley, University of CA	01/01/2000	>
View Talent Profile			

The page displays the degrees and education levels recorded on this individual's *Person* profile on the Person Profile or Talent Profile: Education tab in the Profile Management system.

Click a row from this page to access the [Education Details Page](#) and view more details about the education or degree.

View Talent Profile

(Manager view only) The page displays this link when a manager is viewing an authorized direct report and profile content is available; it is not visible for indirect reports.

Click this link to access the Team Talent Profile pages to view and update this team member's talent profile data in fluid (see "(Fluid) Maintaining Person Profiles" (PeopleSoft HCM 9.2: eDevelopment)).

Related Links

"(Fluid) Viewing and Updating Job Profiles" (PeopleSoft HCM 9.2: eDevelopment)

Education Details Page

Use the Education Details page (JPM_ITM_DTL_FL) to view details about the education level or degree obtained by the employee.

Navigation

Click a row from the [Education Page](#).

Image: Education Details Page (1 of 2)

This example illustrates the fields and controls on the Education Details page (1 of 2).

Education Details	
Date Acquired	01/01/2000
Degree	Doctor of Philosophy
Major Code	Sociology
Status	Active
Country	United States
State	Texas
School Code	KUS023
School Description	Houston, University of
Major Description	Sociology
Minor Code	
Minor Description	
Average Grade	
GPA	
Graduated	Yes
Year Acquired	2000
Terminal Degree for Discipline	No
Educator	

Image: Education Details Page (2 of 2)

This example illustrates the fields and controls on the Education Details page (2 of 2).

The screenshot displays the Education Details page (2 of 2) with three sections, each representing a different country. Each section is preceded by a small icon of the country's flag and a right-pointing arrow.

- Germany:**
 - Practical Grade (DEU)
 - Theoretical Grade (DEU)
 - Intern. Professional Education: No
- Australia:**
 - Education Level (AUS)
 - Education Level Detail (AUS)
- Japan:**
 - Faculty Code (JPN)
 - Faculty Description
 - Sub-Faculty Code (JPN)
 - Subfaculty Description
 - Major Category (JPN)

This page displays differently depending on whether you are reviewing a degree of education level item.

This information comes from the Profile Management system. Details for a person's education are recorded on the "<Content Type> Page" (PeopleSoft HCM 9.2: eDevelopment) for the *Person* profile for the employee.

Career Plans (Summary) Tile

Use the Career Plans (Summary) tile (HCTS_CAREERPLN1_FL_GBL) to view the next step in this employee's career path. The tile will also list the number of other career path options specified for this employee.

Navigation

Select the [Employee Snapshot - Summary Dashboard](#) category item from the Employee Snapshot pages.

Image: Career Plans (Summary) Tile

This example illustrates the Career Plans (Summary) tile.

**Career Plans Page**

Use the Career Plans page (HCTS_CAREERPLN_FL) to review a list of all career path options defined for the employee.

Navigation

- Click the [Career Plans \(Summary\) Tile](#) from the [Employee Snapshot - Summary Dashboard](#) or any dashboard to which the tile has been added.
- Click the [Career Plans Tile](#) from the [Employee Snapshot - Career Planning Dashboard](#) or from any dashboard to which this tile has been added.

Image: Career Plans Page

This example illustrates the Career Plans page.

Career Plans					×
Official Path					
Career Move	Option	Job Title	Previous Option	Previous Job Title	
1st Move	1	Finance Director	1	Senior Accounting Manager	>
1st Move	2	Senior Financial Analyst	1	Senior Accounting Manager	>
2nd Move	1	Chief Finance Officer	1	Finance Director	>
Manager Approved Path					
Career Move	Option	Job Title	Previous Option	Previous Job Title	
1st Move	1	Corporate Controller	1	Senior Accounting Manager	>
2nd Move	1	Chief Finance Officer	1	Corporate Controller	>
Personal Path					
Career Move	Option	Job Title	Previous Option	Previous Job Title	
1st Move	1	Finance Director	1	Senior Accounting Manager	>
2nd Move	1	Chief Finance Officer	1	Finance Director	>
Manage Career Plan					
Career Progression Chart					

Information shown on this page is stored on the "Career Path Page" (PeopleSoft HCM 9.2: Human Resources Plan Careers and Successions) (administrator), "Manage Career Plans Component" (PeopleSoft HCM 9.2: Human Resources Plan Careers and Successions) (manager self service), and "Career Path Page" (PeopleSoft HCM 9.2: Human Resources Plan Careers and Successions) (employee self service) in the Career Planning module.

The page displays up to three career path section types, when available:

- Official Path: This section displays those career paths that use the evaluation type *Approved/Official*.
- Manager Approved Path: This section displays those career paths that use the evaluation type *Supervisor/Manager*.
- Personal Path: This section displays those career paths that use the evaluation type *Self*.

Career Move	Identifies the next job that the employee will move to from the current job or from the job option number specified in the Previous Option field.
Option	Displays the job options number. This sorts the job codes in the preferred order. For example, an employee may have career paths defined to move either to the Financial Director job (option 1) or the Senior Financial Analyst job (option 2) as his next move. This option number should then be referenced in the Previous Option field for the next move for this career path option.
Previous Option	Shows the previous move Option number field value for the current movement, when the previous movement has more than one option available. This value should reference the Option field of the previous job step. For example, this will identify if this is the second job move is for job option number 1 or job option number 2.

Click any row to access the [Career Move Details Page](#) and view more details about the job move.

Manage Career Plan	Click this link to access the "Manage Career Plans Component" (PeopleSoft HCM 9.2: Human Resources Plan Careers and Successions) as a manager where you can view or modify an employee's career path using the Career Planning module.
Career Progression Chart	Click this link to access the "Career Progression Chart Page" (PeopleSoft HCM 9.2: Human Resources Plan Careers and Successions) as a manager to view a graphical representation of the employee's career paths and perform career planning analysis using the Career Planning module.

Related Links

"Understanding Career Planning Self Service" (PeopleSoft HCM 9.2: Human Resources Plan Careers and Successions)

"Manage Career Plans Component" (PeopleSoft HCM 9.2: Human Resources Plan Careers and Successions)

"Understanding the Career Progression Chart" (PeopleSoft HCM 9.2: Human Resources Plan Careers and Successions)

"Career Progression Chart Page" (PeopleSoft HCM 9.2: Human Resources Plan Careers and Successions)

Career Move Details Page

Use the Career Move Details page (HCTS_CP_ADMPH_SCF) to view additional details about a career move for a person.

Navigation

Click a row from the [Career Plans Page](#).

Image: Career Move Details Page

This example illustrates the Career Move Details page.

Career Move Details
×

Previous Option 1

Career Move 1st Move

Job Option 2

Position Sr Financial Analyst

Department Finance and Administration

Job Title Senior Financial Analyst

Readiness 1 - 2 Years

Target Date 04/01/2018

Manager Level

Salary Plan KU01

Salary Grade 006

Military

Rank

Salary Grade 006

Information shown on this page is stored on the "Career Path Page" (PeopleSoft HCM 9.2: Human Resources Plan Careers and Successions) in the Career Planning module.

Related Links

"Understanding Career Planning Self Service" (PeopleSoft HCM 9.2: Human Resources Plan Careers and Successions)

"Manage Career Plans Component" (PeopleSoft HCM 9.2: Human Resources Plan Careers and Successions)

"Understanding the Career Progression Chart" (PeopleSoft HCM 9.2: Human Resources Plan Careers and Successions)

"Career Progression Chart Page" (PeopleSoft HCM 9.2: Human Resources Plan Careers and Successions)

Viewing the Promotion Readiness Tiles and Pages

Use the Promotion Readiness dashboard from the Employee Snapshot to view tiles and pages that can aid in determining if an employee is ready for a promotion.

These topics discuss the Employee Snapshot - Promotion Readiness tiles and pages.

Pages Used to View the Employee Snapshot - Promotion Readiness Tiles and Pages

Page Name	Definition Name	Usage
Employee Snapshot - Promotion Readiness Dashboard	PT_LANDINGPAGE	Access tiles related to an employee's promotion readiness.
Current Salary Tile	HCTS_CMP_SALCUR_FL	View the salary range for an employee's job and where the employee falls within that range.
Compensation History Page	HCTS_COMP_HIST_SCF	Review or verify an employee's compensation history.
Job Competencies Tile	HCTS_JOBCOMPSTUM_FL	View a summary graphic of how the employee's (primary person) profile matches the competencies associated with this employee's job (primary non-person) profile.
Job Competencies Page	HCTS_JOBCOMPDT_FL	Review a list of competencies associated with this employee's job (non-person) profile compared to the employee's (person) profile.
Job Competency Details Page	JPM_ITM_DTL_FL	View the details of the employee's rating for a job competency.
Salary History Tile	HCTS_CMP_SALHST_FL	View the compensation history for an employee in a graph.
Salary History Details Page	HCTS_CMP_SALHS_SCF	View the compensation history for an employee in grid format.
Salary Change Details Page	HCTS_COMP_VC_SCF	View details of a specific salary change.
Performance History Tile	HCTS_PERFHIST2_FL	View a summary of current and historical performance documents.
Performance History Page	HCTS_PERFHIST_FL HCTS_PERFHIST_SCF	Review the overall rating for an employee from past performance periods using a table grid. <hr/> Note: When you access the Performance History page from the Promotion Readiness - Performance History tile, you can click the rows on the page to access the Annual Review - Manager Evaluation Page. <hr/>

Page Name	Definition Name	Usage
Annual Review - Manager Evaluation Page	EP_APPR_MAIN1	Evaluate performance data for an employee. See "<Manager or Self-> Evaluation Page" (PeopleSoft HCM 9.2: ePerformance) for information on this page.
<u>Personal Competencies Tile</u>	HC_HCTS_PERS_COMP2_FL	View a list of competencies associated with this employee's person profile, but not the employee's job (non-person) profile.
<u>Personal Competencies Page</u>	HCTS_PERS_COMP_FL	View a complete list of competencies associated with this employee's person profile, but not the employee's job (non-person) profile.
<u>Personal Competency Details Page</u>	JPM_ITM_DTL_FL	View additional details about the competency rating for this person.
<u>Learning Tile</u>	LM_MYCOURSE_FL	View a graphical summary of learning statuses associated with an employee's profile.
My Learning Page : Current Tab	LM_MYCOURSE_FL	View a list of all the courses, programs and supplemental learnings in which a person is currently enrolled or registered. For information on the All Learning pages, see the <i>PeopleSoft Enterprise Learning Management</i> , "Using the PeopleSoft Fluid User Interface for Learning Self-Service," Managing Learning Using the PeopleSoft Fluid User Interface documentation.
My Learning Page : Planned Tab	LM_MYCOURSE_FL	View an employee's learning plan. For information on the All Learning pages, see the <i>PeopleSoft Enterprise Learning Management</i> , "Using the PeopleSoft Fluid User Interface for Learning Self-Service," Managing Learning Using the PeopleSoft Fluid User Interface documentation.
My Learning Page : History Tab	LM_MYCOURSE_FL	View a person's completed learning. For information on the All Learning pages, see the <i>PeopleSoft Enterprise Learning Management</i> , "Using the PeopleSoft Fluid User Interface for Learning Self-Service," Managing Learning Using the PeopleSoft Fluid User Interface documentation.

Page Name	Definition Name	Usage
<Learning Item> Details Page	LM_HR_ACT_SECF (for classes) LM_HR_CI_SECF (for courses) LM_HR_SL_SECF (for supplemental learning) LM_HR_PRG_SECF (for programs)	View the details of a learning type, such as a course, program, or supplemental learning. For information on the All Learning pages, see the <i>PeopleSoft Enterprise Learning Management</i> , “Using the PeopleSoft Fluid User Interface for Learning Self-Service,” Using the PeopleSoft Fluid User Interface for Manager Self-Service documentation.
Team Learning Pages	LM_HR_CUR_LRNG_FLU LM_MANAGER_HM LM_FND_LRN_PG LM_MGR_GRP_CURNT LM_MGR_CERT_STATUS LM_OBJV_MTM LM_ADHC_MGR_HM LM_LPLN_MGR	Access a collection of frequently-used team learning management components For information on the All Learning pages, see the <i>PeopleSoft Enterprise Learning Management</i> , “Using the PeopleSoft Fluid User Interface for Learning Self-Service,” Using the PeopleSoft Fluid User Interface for Manager Self-Service, Team Learning Tile documentation.
<u>Job History Tile</u>	HCTS_JOB_HIST_FL	See the last two jobs held by the employee.
<u>Job History Page</u>	HCTS_JOBHST_MDL_FL	View a complete list of the employee’s job history.

Employee Snapshot - Promotion Readiness Dashboard

Use the Promotion Readiness dashboard page to access tiles related to an employee’s promotion readiness.

Navigation

- Click the Employee Snapshot tile on the *Manager Self Service*, *Talent Administrator*, or any fluid homepage to which the tile has been added, select an employee from the search page, and then select Promotion Readiness from the left panel.
- (Managers only) Select the Related Actions icon next to a person’s name in fluid, select View Employee Snapshot, then select the Promotion Readiness dashboard category from the left panel.
- From the Employee Snapshot pages, select the Promotion Readiness category item from the left panel.

Image: (Tablet) Employee Snapshot - Promotion Readiness Dashboard

This example illustrates the Employee Snapshot - Promotion Readiness dashboard for the tablet.

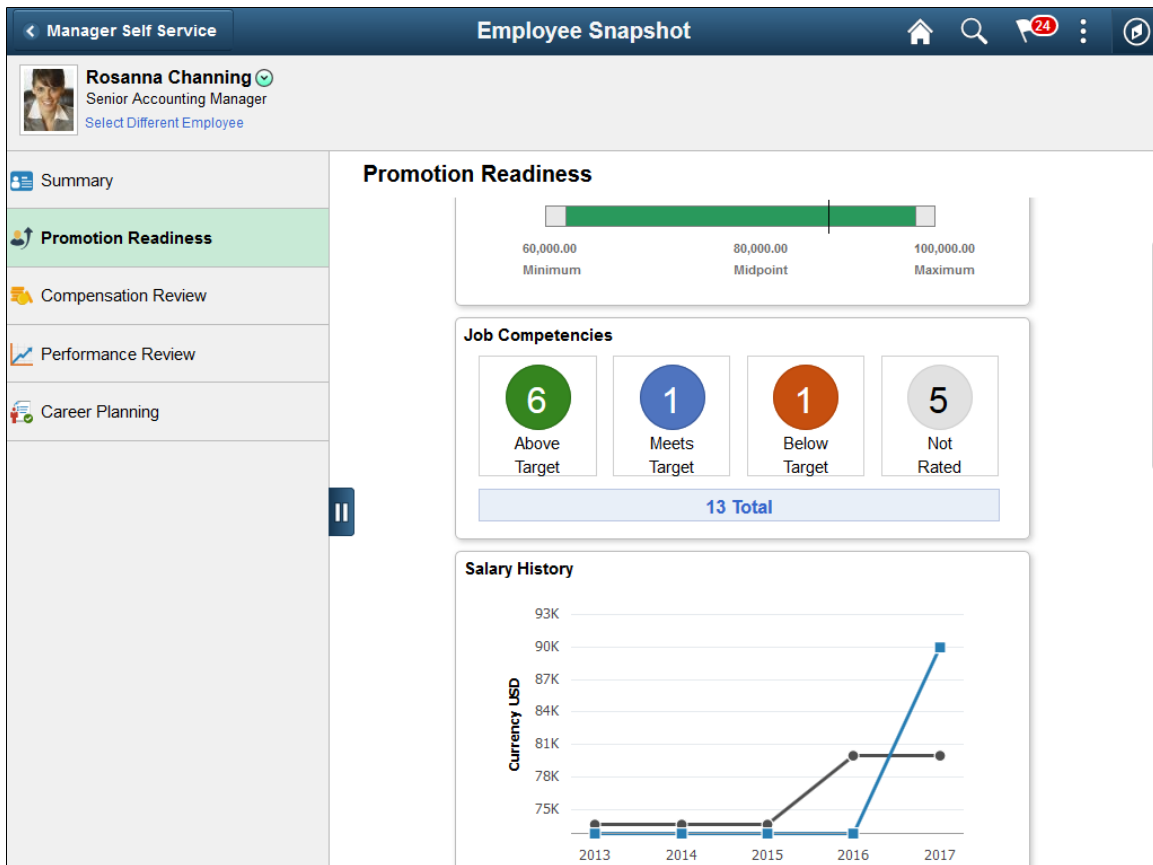
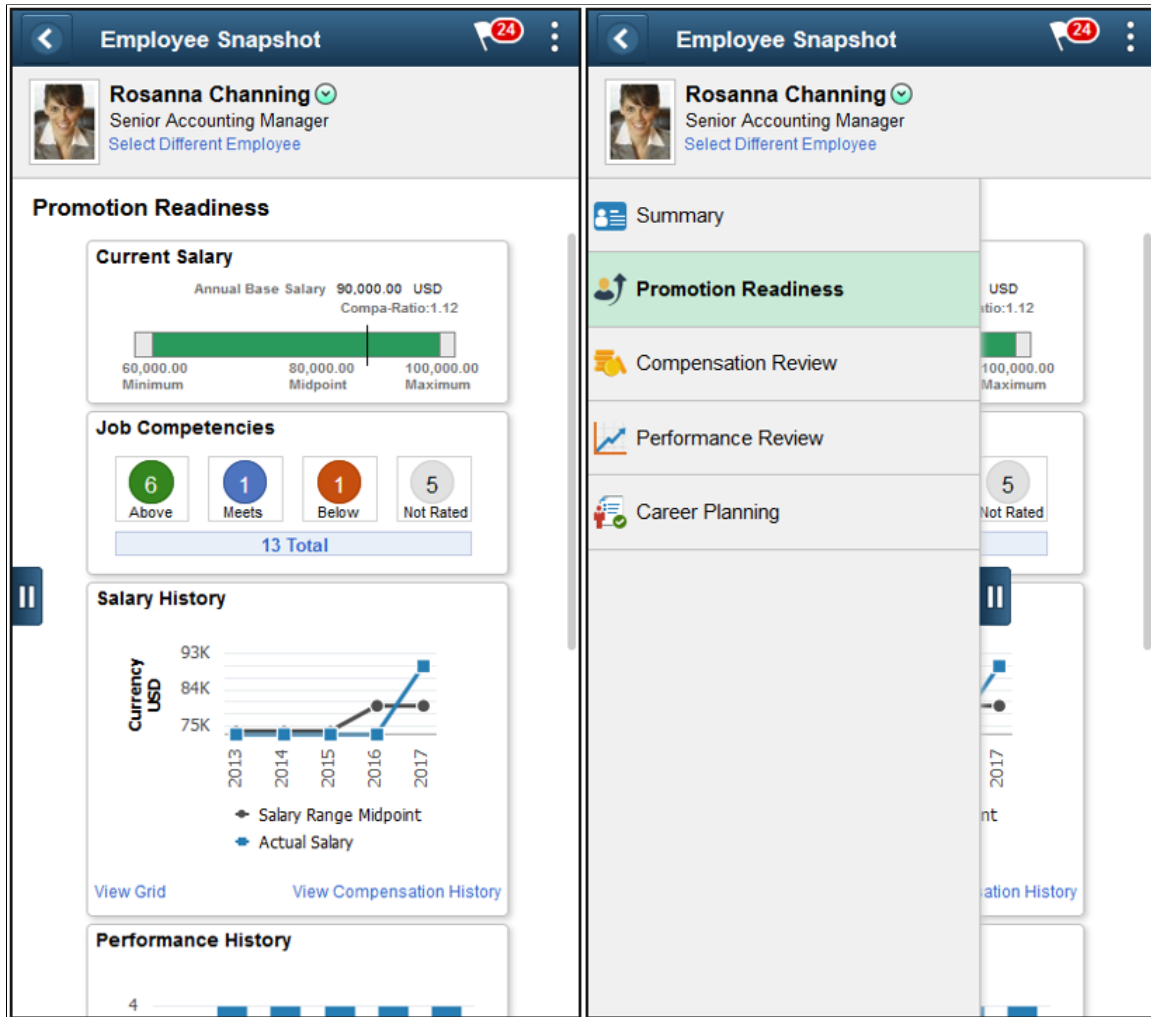


Image: (Smartphone) Employee Snapshot - Promotion Readiness Dashboard

This example illustrates the Employee Snapshot - Promotion Readiness dashboard on a small form factor device. In the first image, the left panel is hidden. In the second image, the left panel is exposed.



Use the Promotion Readiness dashboard to access tiles related to your employee's readiness for advancement. These tiles show more details than those which appear on the Summary dashboard.

These tiles are delivered by default with the *Promotion Readiness* dashboard:

- [Current Salary Tile](#)
- [Job Competencies Tile](#)
- [Salary History Tile](#)
- [Performance History Tile](#)
- [Personal Competencies Tile](#)
- [Learning Tile](#)
- [Job History Tile](#)

Note: These tiles are delivered by default to appear on the Promotion Readiness dashboard page of Employee Snapshot; however, the administrator can move the tiles to appear on other Employee Snapshot dashboard folders. The navigation in these topics references the delivered navigation.

Select Different Employee

(Manager view only) Select this link to access the [Employee Snapshot - Select Employee Page \(for Managers\)](#) and change the Employee Snapshot view to another employee.



Hide or Show Action Item List
tab

Click this tab to view and select from other Employee Snapshot dashboard categories or close the dashboard list panel.

Note: When you click a tile to access a secondary page and then click the back button to return to the Employee Snapshot pages, the system will return you to the [Employee Snapshot - Summary Dashboard](#) by default. Access the left panel to select another dashboard.

Current Salary Tile

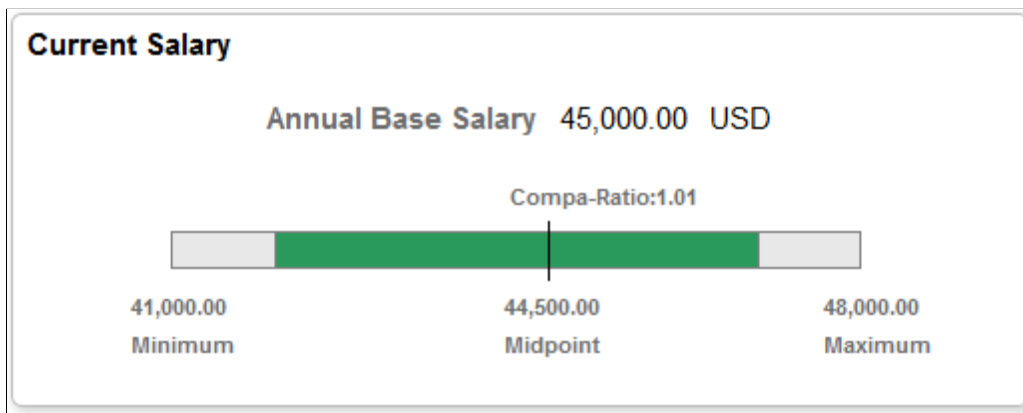
Use the Current Salary tile (HCTS_CMP_SALCUR_FL) to view the salary range for an employee's job and where the employee falls within that range.

Navigation

Select the [Employee Snapshot - Promotion Readiness Dashboard](#) item from the left panel of the Employee Snapshot pages.

Image: Current Salary Tile

This example illustrates the Current Salary tile.



The tile displays the minimum, midpoint, and maximum of the salary grade for this employee's job. The vertical line that runs through the salary range bar indicates the employee's current base salary. The compa ratio is the comparison of the current salary to the mid point of the range.

Click this tile to access the "View Compensation History Page (Fluid Manager View)" (PeopleSoft HCM 9.2: eCompensation Manager Desktop) to review an employee's compensation history. If the manager does not have access to the fluid View Compensation History page, the [Compensation History Page](#) is displayed.

Job Competencies Tile

Use the Job Competencies tile (HCTS_JOBCOMPSUM_FL) to view a summary graphic of how the employee's (primary person) profile matches the competencies associated with this employee's job (primary non-person) profile.

Navigation

Select the [Employee Snapshot - Promotion Readiness Dashboard](#) or [Employee Snapshot - Performance Review Dashboard](#) item from the left panel of the Employee Snapshot pages.

Image: Job Competencies Tile

This example illustrates the Job Competencies tile.



The tile is very similar to the [Job Competencies \(Summary\) Tile](#), located on the Summary dashboard, however it displays all the employee rating types in comparison to the competency ratings associated with the job. Rating types include:

- *Above Target*: The employee's competency rating is beyond what is required of the job.
- *Meets Target*: The employee's competency rating meets the requirements of the job.
- *Below Target*: The employee's competency rating does not meet the requirements of the job.
- *Not Rated*: The employee has not been evaluated for this job requirement.
- *Total*: The total number of competencies associated with this job and the employee.
- *Exception(s)*: Competencies where the employee's Person profile uses a rating model that is different from the rating model used for the Job profile. When there is not a rating model discrepancy, this option will not appear in the tile.

Select any rating type to access the [Job Competencies Page](#) and view detail lists of the employee's rating for the competencies by rating type.

Salary History Tile

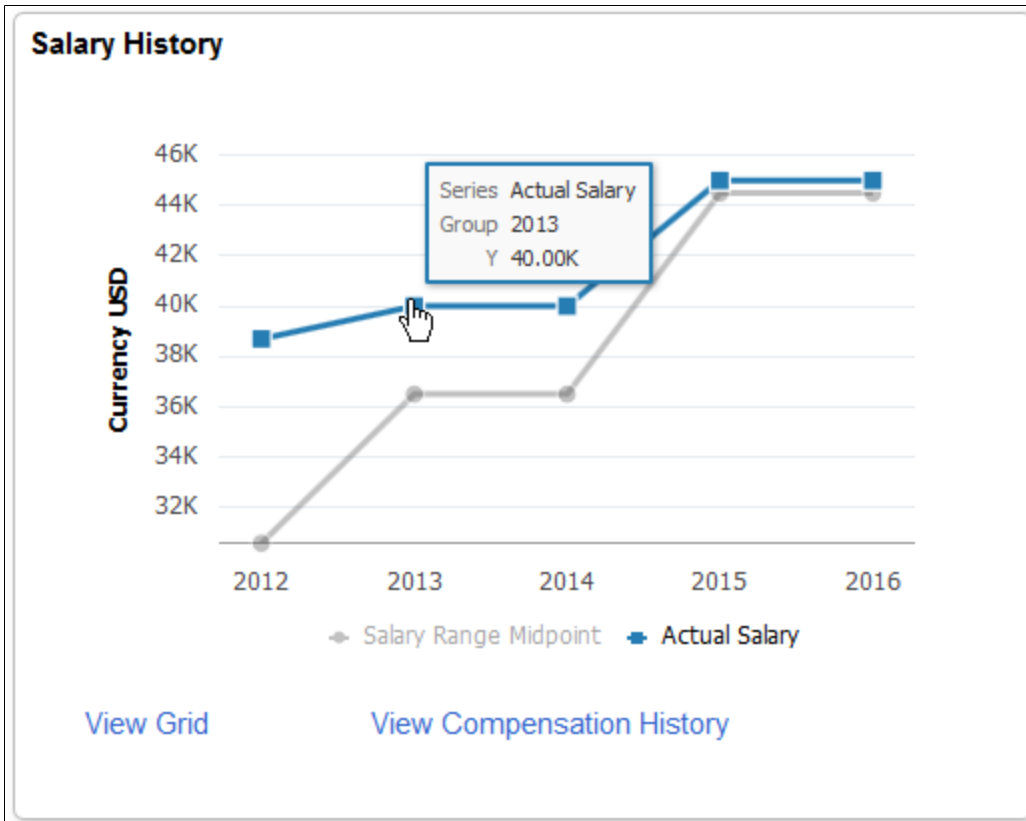
Use the Salary History tile (HCTS_CMP_SALHST_FL) to view the compensation history for an employee in a graph.

Navigation

Select the [Employee Snapshot - Promotion Readiness Dashboard](#) or [Employee Snapshot - Compensation Review Dashboard](#) item from the left panel of the Employee Snapshot pages.

Image: Salary History Tile

This example illustrates the Salary History tile.



Use this tile to view salary change history. The tile displays the last five years of compensation for the employee as well as the midpoint range for the employee’s job. Pause or hover over a data point on the graph to view the exact salary or salary midpoint for a specific year.

View Grid

Click this link to open the [Salary History Details Page](#) to view this information in a grid format.

View Compensation History

Click this link to open the "View Compensation History Page (Fluid Manager View)" (PeopleSoft HCM 9.2: eCompensation Manager Desktop) in a modal window where you can view the employee's salary, variable cash, and variable noncash information. If the manager does not have access to the fluid View Compensation History page, the [Compensation History Page](#) is displayed.

Salary History Details Page

Use the Salary History Details page (HCTS_CMP_SALHS_SCF) to view the compensation history for an employee in grid format.

Navigation

Click the View Grid link from the [Salary History Tile](#) from any dashboard to which the tile has been added.

Image: Salary History Details Page

This example illustrates the Salary History Details page.

Salary History Details ×			
Year	Job Title	Annual Salary	Midpoint
2016	Manager-Revenue	45,000.00	44,500.00
2015	Manager-Revenue	45,000.00	44,500.00
2014	Manager-Revenue	40,000.00	36,500.00
2013	Senior Finance Specialist	40,000.00	36,500.00
2012	Senior Finance Specialist	38,700.00	30,565.00

Related Links

[Compensation: Salary History Page](#)

Performance History Tile

Use the Performance History tile (HCTS_PERFHIST2_FL) to view a summary of current and historical performance documents.

Navigation

Select from any of the non-summary dashboard item from the left panel of the Employee Snapshot pages.

Image: Performance History Tile

This example illustrates the Performance History tile.

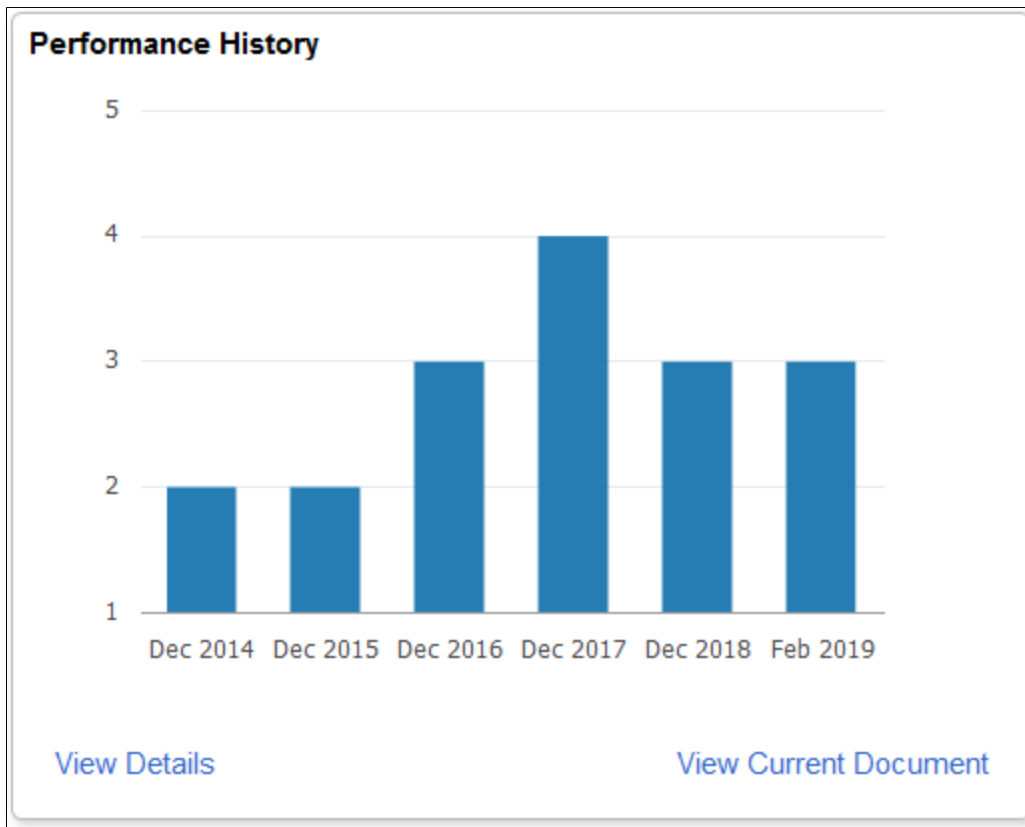
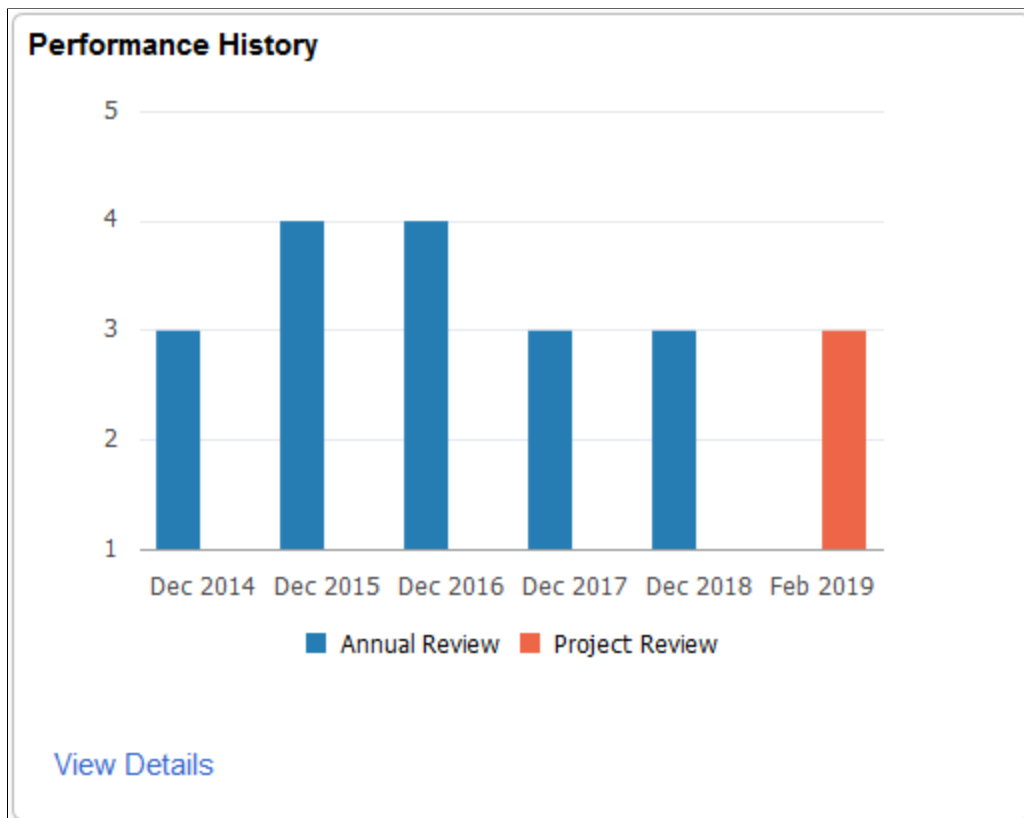


Image: Performance History Tile: Different performance document review types

This example illustrates the Performance History tile and shows an employee has different performance document review types. The page displays reviews for the document review types in different colors.



The Performance History tile displays the overall rating (y-axis) for an employee from past performance periods (x-axis) using a bar graph. The tile displays reviews based on the setup of the [Configure Employee Snapshot - Document History Page](#) for the performance history data.

Note: When the administrator does not identify valid document types in the setup, the page will display a message that you need to contact the system administrator to configure this view. You will also not be able to access the [Performance History Page](#) by clicking the tile.

The colored vertical bars represent the employee's overall performance rating for the period specified. Each distinct performance review is represented by a different colored bar. A legend for performance review title appears below the graph. The color is specific to the performance review.

Pause or hover over a period rating bar to view the performance dates and employee rating. Click the bar to open the Manager Evaluation page to view additional details about the rating for this employee and access the performance evaluation. For information on the performance documents, see "Manager Evaluation Page (Manage Employee Reviews)" (PeopleSoft HCM 9.2: Human Resources Manage Employee Reviews) or "Accessing Documents" (PeopleSoft HCM 9.2: ePerformance) in ePerformance.

View Details

Click this link to open the [Performance History Page](#) and view the performance history in grid format. From that page, you can also access the Manager Evaluation page by clicking a row in the grid.

View Current Document

This link is available when there is an open (in-progress) performance document for the employee when the employee is using the same Document Type as defined on the [Configure Employee Snapshot - Document History Page](#).

Click this link to access the ePerformance WorkCenter. For information on this page, see the "Understanding ePerformance WorkCenter" (PeopleSoft HCM 9.2: ePerformance) documentation.

Personal Competencies Tile

Use the Personal Competencies tile (HC_HCTS_PERS_COMP2_FL) to view a list of competencies associated with this employee’s person profile, but not the employee’s job (non-person) profile.

Navigation

Select the [Employee Snapshot - Promotion Readiness Dashboard](#) or [Employee Snapshot - Performance Review Dashboard](#) item from the left panel of the Employee Snapshot pages.

Image: Personal Competencies Tile

This example illustrates the fields and controls on the Personal Competencies tile.

Personal Competencies		
Competency	Proficiency	
Ability to manage own time	4-Very Good	>
Business Banking	3-Good	>
Organize people and goal tasks	3-Good	>
Set & achieve goals	3-Good	>
Shows honesty & integrity	4-Very Good	>
Strategic Planning	4-Very Good	>

[View More](#)
[View Talent Profile](#)

The evaluation types and how long an evaluation should be included in the list are defined on the [Configure Employee Snapshot - Competencies Page](#).

Click a row to access the [Personal Competency Details Page](#) and view more details about the competency rating for the employee.

View More

The View More link appears when there are more than six valid personal competencies for an employee. Click this link to access the [Personal Competencies Page](#) and view a list of all valid personal competencies for this employee.

View Talent Profile

(Manager view only) The page displays this link when a manager is viewing an authorized direct report and profile content is available; it is not visible for indirect reports.

Click this link to access the Team Talent Profile pages to view and update this team member's talent profile data in fluid (see "(Fluid) Maintaining Person Profiles" (PeopleSoft HCM 9.2: eDevelopment)).

Learning Tile

Use the Learning tile (LM_MYCOURSE_FL) to view a graphical summary of learning statuses associated with an employee's profile.

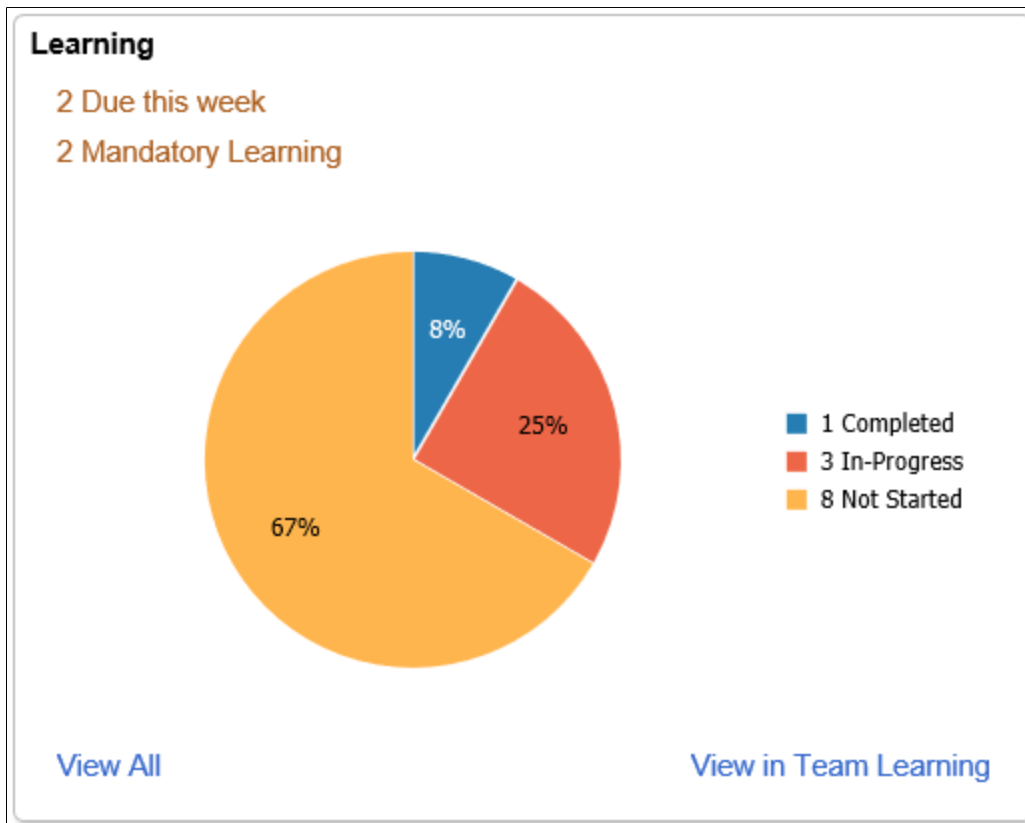
Note: You must have the Enterprise Learning application installed and the Learning tile configured to view data on this tile. When this configuration is incomplete, the tile will display the message that data is not available.

Navigation

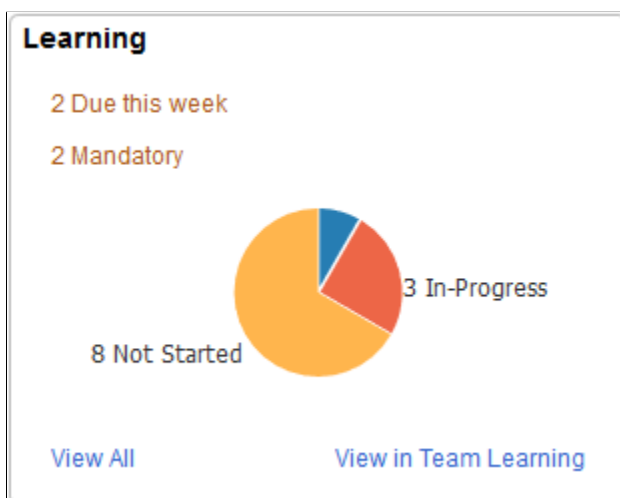
Select the [Employee Snapshot - Promotion Readiness Dashboard](#) item from the left panel of the Employee Snapshot pages to view this tile.

Image: Learning Tile

This example illustrates the Learning tile.

**Image: Learning Tile**

This example illustrates the Learning tile as seen on a smartphone.



The Learning tile displays the following learning information:

<number> Due this week or
<number> Due this month

Displays the number of courses that are approaching due date in the current week or month for the selected employee.

<number> Mandatory Learning

Displays the number of Mandatory Learnings that the selected employee is currently enrolled in.

Enrolled Courses pie chart

On a desktop or tablet device, the learning pie chart of the selected employee is displayed with slice values representing percentages of *Completed*, *In-Progress* and *Not Started* course statuses. This information appears only when there are courses to which the selected employee is enrolled. A legend with the actual number of courses in each status is also available.

On a smartphone, the pie chart displays the actual number of the courses in each status.

Note: The enrollment should be within the date range as given in the Install Defaults - Fluid Defaults Page of the Enterprise Learning application. If date range is not indicated in the setup page then the data in the pie chart will be displayed for 365 days.

The pie chart is not displayed, when there are no learning enrollments for the selected employee.

View All

Click the View All link to access the All Learning pages for the selected employee in the ELM application.

View in Team Learning

(Manager view only) The tile displays this link when a manager is viewing an authorized direct report and profile content is available; it is not visible for indirect reports.

Click the View in Team Learning link to access the Team Learning pages in the ELM application. The page is pre-filtered to the selected employee's list of learnings.

When the individual is not enrolling in learning, the tile will display the message that there is no enrolled learning for this person.

When you are not granted access to a person's information, the tile will display the message that you are not permitted to view learning information for this person.

For information on the All Learning pages, see the *PeopleSoft Enterprise Learning Management*, "Using the PeopleSoft Fluid User Interface for Learning Self-Service," Managing Learning Using the PeopleSoft Fluid User Interface and Using the PeopleSoft Fluid User Interface for Manager Self-Service documentation topics.

This video demonstrates Fluid Employee Snapshot Learning Integration feature:



[Image Highlight, PeopleSoft HCM Update Image 28: Employee Snapshot Learning Integration and Tile](#)

Job History Tile

Use the Job History tile (HCTS_JOB_HIST_FL) to see the last two jobs held by the employee.

Navigation

Select the [Employee Snapshot - Promotion Readiness Dashboard](#) item from the left panel of the Employee Snapshot pages.

Image: Job History Tile

This example illustrates the fields and controls on the Job History tile.

Job History		
Job Title	Dates	Years in Job
Senior Accounting Manager	11/04/2008 - Present	8.8
Manager-Finance	08/29/1986 - 11/03/2008	22.2

[View More](#)

View More

Select this link to open the [Job History Page](#) and view a full list of the employee's job history.

Job History Page

Use the Job History page (HCTS_JOBHST_MDL_FL) to view a complete list of the employee's job history.

Navigation

Select the View More link on the [Job History Tile](#).

Image: Job History Page

This example illustrates the fields and controls on the Job History page.

Job History		
Job Title	Dates	Years in Job
Senior Accounting Manager	11/04/2008 - Present	8.8
Manager-Finance	08/29/1986 - 11/03/2008	22.2

Viewing the Compensation Review Tiles and Pages

Use the Compensation Review dashboard from the Employee Snapshot to view tiles and pages that show data related to an employee's compensation and potentially aid in determining compensation changes for an employee.

These topics discuss the Employee Snapshot - Compensation Review tiles and pages.

Pages Used to View the Employee Snapshot Compensation Review Tiles and Pages

Page Name	Definition Name	Usage
Employee Snapshot - Compensation Review Dashboard	PT_LANDINGPAGE	Access a variety of high level tiles about an employee's compensation.
Current Salary Tile	HCTS_CMP_SALCUR_FL	View the salary range for an employee's job and where the employee falls within that range.
Bonus Earnings Tile	HCTS_BONUS2_FL	View a history of bonus amounts received by the employee over the past few years.
Salary History Tile	HCTS_CMP_SALHST_FL	View the compensation history for an employee in a graph or click the links on the tile to access additional salary information.
Compensation History Page	HCTS_COMP_HIST_SCF	Review or verify an employee's compensation history.
Salary Change Details Page	HCTS_COMP_VC_SCF	View details of a specific salary change.
Salary History Details Page	HCTS_CMP_SALHS_SCF	View the compensation history for an employee in grid format.
Performance History Tile	HCTS_PERFHIST2_FL	View a summary of current and historical performance documents in a graph or click the links on the tile to access additional performance information.
Performance History Page	HCTS_PERFHIST_FL HCTS_PERFHIST_SCF	Review the overall rating for an employee from past performance periods using a table grid.
"<Manager or Self-> Evaluation Page" (PeopleSoft HCM 9.2: ePerformance)	EP_APPR_MAIN1	Enter and maintain evaluation data for an employee using ePerformance.
"Checkpoint <#> Page" (PeopleSoft HCM 9.2: ePerformance)	EP_APPR_BASE1	Track the checkpoint progress of a performance or development document using the ePerformance pages.

Page Name	Definition Name	Usage
<u>Total Rewards Tile</u>	HCTS_CMP_TRW_FL	View the most recent total rewards statement to review earnings, benefits, and other compensation information of a direct report in a chart format.
<u>Total Rewards Details Page</u>	HCTS_CMP_TRGRD_SCF	View the list of reward items that make up the employee's total rewards.
"Total Rewards Page" (PeopleSoft HCM 9.2: Human Resources Administer Compensation)	TRW_SS_STMT_FL	Review employee's earnings, benefits, and other compensation information for a specified review period.
<u>Employee Impact Tile</u>	HCTS_RATINGBOX2_FL	Assess the impact of loss, risk of leaving, performance and potential rating for an employee within the context of ratings boxes.
<u>Employee Impact Page</u>	HCTS_RB_DTLS_SCF	Assess the employee's performance rating and potential rating in text format.
"Manage Career Plans Component" (PeopleSoft HCM 9.2: Human Resources Plan Careers and Successions)	HR_CP_MANAGER	Perform career planning activities for your direct reports.

Employee Snapshot - Compensation Review Dashboard

Use the Compensation Review dashboard page to access a variety of high level tiles about an employee's compensation.

Navigation

- Click the Employee Snapshot tile on the *Manager Self Service*, *Talent Administrator*, or any fluid homepage to which the tile has been added, select an employee from the search page, and then select Compensation Review from the left panel.
- (Manager only) Select the Related Actions icon next to a person's name in fluid, select View Employee Snapshot, then select the Compensation Review dashboard category from the left panel.
- From the Employee Snapshot pages, select the Compensation Review dashboard category item from the left panel.

Image: (Tablet) Employee Snapshot - Compensation Review Dashboard

This example illustrates the Employee Snapshot - Compensation Review dashboard page for the tablet.

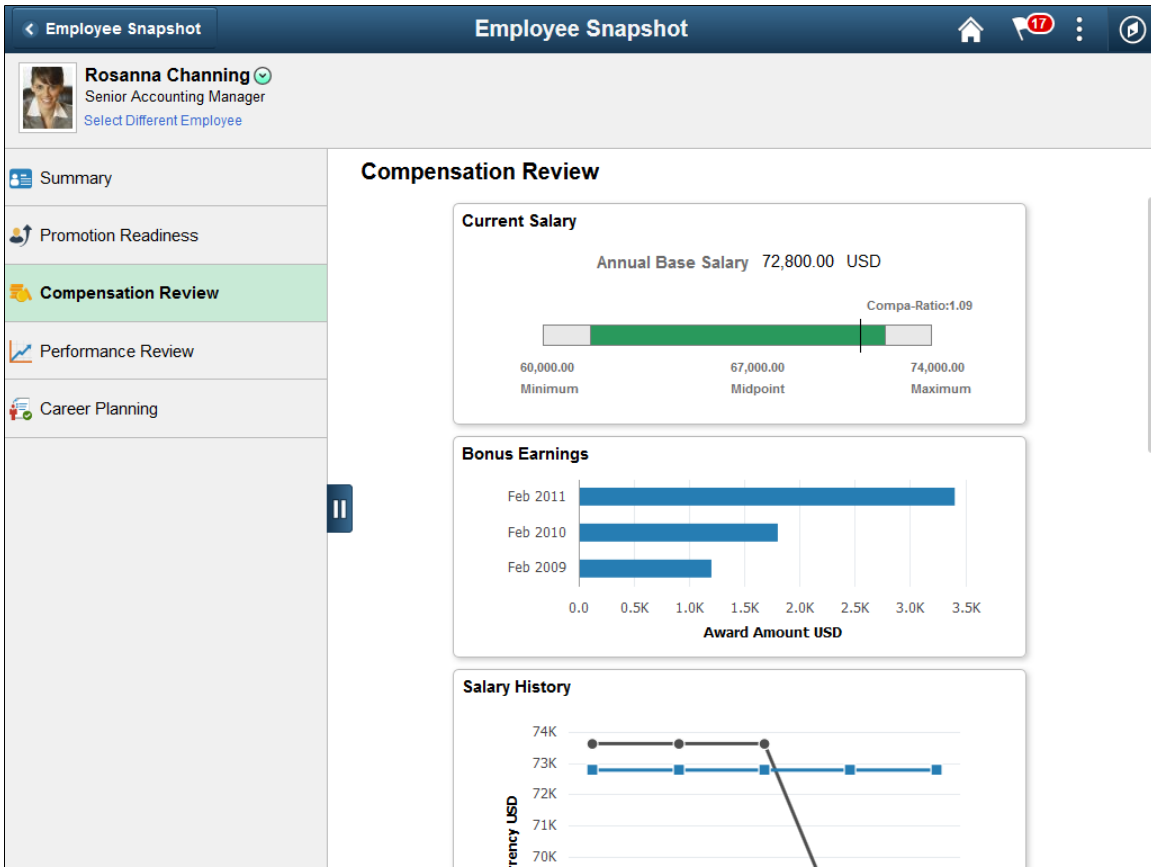
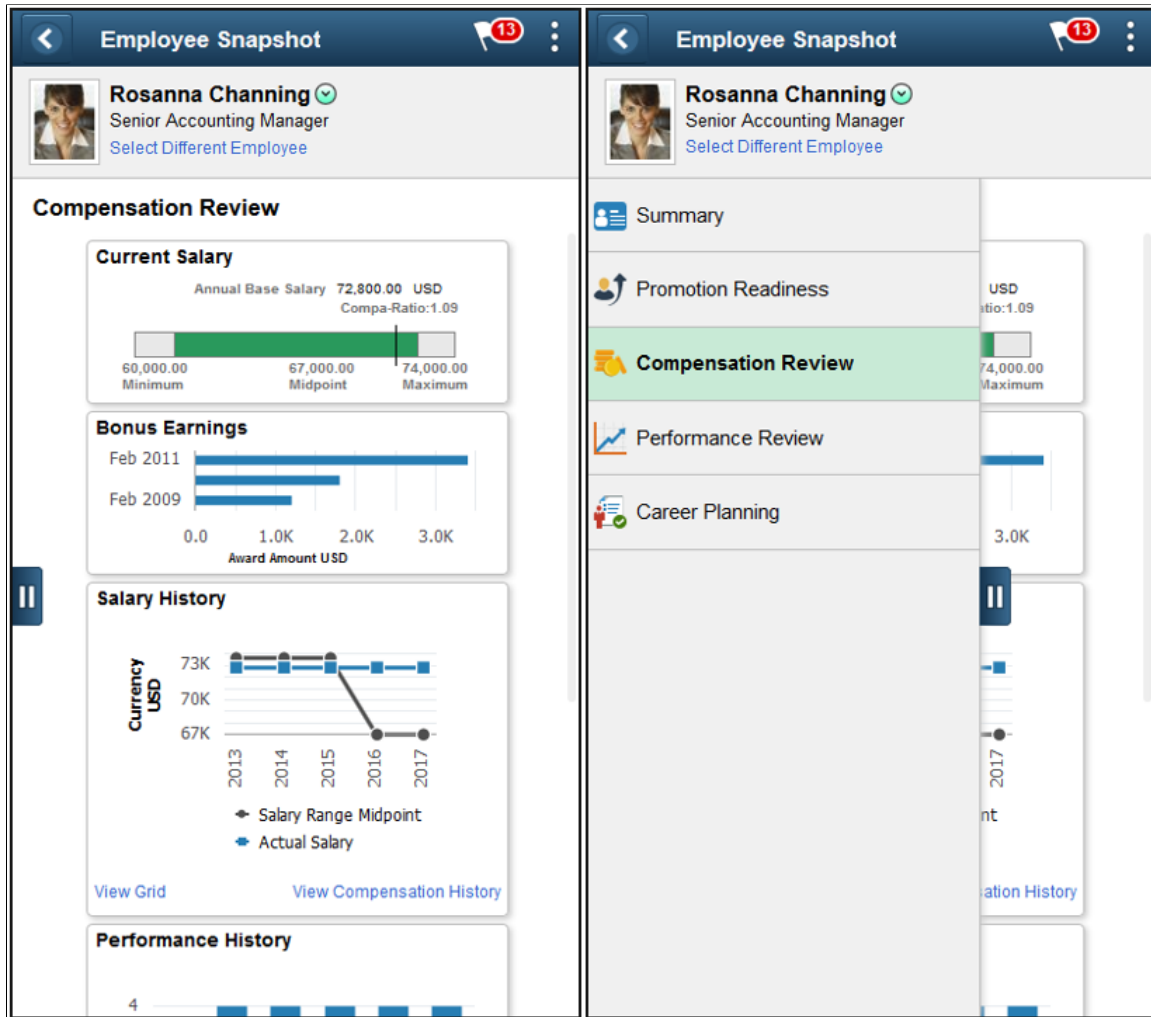


Image: (Smartphone) Employee Snapshot - Compensation Review Dashboard

This example illustrates the Employee Snapshot - Compensation Review dashboard on a small form factor device. In the first image, the left panel is hidden. In the second image, the left panel is exposed.



Use the Compensation Review dashboard to access tiles related to your employee's compensation. These tiles show more details than those which appear on the Summary dashboard.

These tiles are delivered by default with the *Compensation Review* dashboard:

- [Current Salary Tile](#)
- [Bonus Earnings Tile](#)
- [Salary History Tile](#)
- [Performance History Tile](#)
- [Total Rewards Tile](#)
- [Employee Impact Tile](#)

Note: These tiles are delivered by default to appear on the Compensation Review dashboard page of Employee Snapshot; however, the administrator can move the tiles to appear on other Employee Snapshot dashboard folders. The navigation in these topics references the delivered navigation.

Select Different Employee

(Manager view only) Select this link to access the [Employee Snapshot - Select Employee Page \(for Managers\)](#) and change the Employee Snapshot view to another employee.



Hide or Show Action Item List
tab

Click this tab to view and select other Employee Snapshot dashboards.

Note: When you click a tile to access a secondary page and then click the back button to return to the Employee Snapshot pages, the system will return you to the [Employee Snapshot - Summary Dashboard](#) by default. Access the left panel to select another dashboard.

Bonus Earnings Tile

Use the Bonus Earnings tile (HCTS_BONUS2_FL) to view a history of bonus amounts received by the employee over the past few years.

Navigation

Select the [Employee Snapshot - Compensation Review Dashboard](#) action item from the Employee Snapshot pages.

Image: (Tablet) Bonus Earnings Tile

This example illustrates the fields and controls on the Bonus Earnings tile for a tablet.

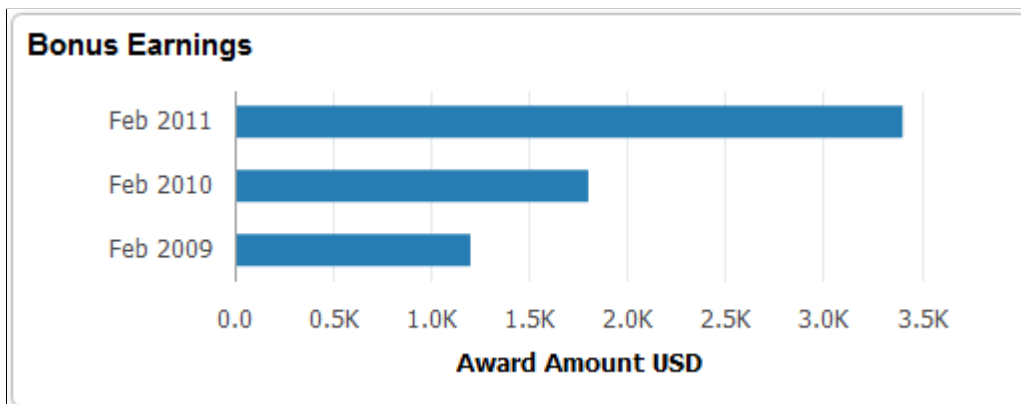


Image: (Smartphone) Bonus Earnings Tile

This example illustrates the fields and controls on the Bonus Earnings tile for a smartphone.



The tile displays the date and amount for up to the last three bonuses the employee received. Pause or hover over a bar item to view individual information. All currency amounts are shown according to the currency specified at the bottom of the tile.

Click this tile to access the "View Compensation History Page (Fluid Manager View)" (PeopleSoft HCM 9.2: eCompensation Manager Desktop), which will display all rows of compensation history in addition to the bonus earnings. If the manager does not have access to the fluid View Compensation History page, the [Compensation History Page](#) is displayed.

Total Rewards Tile

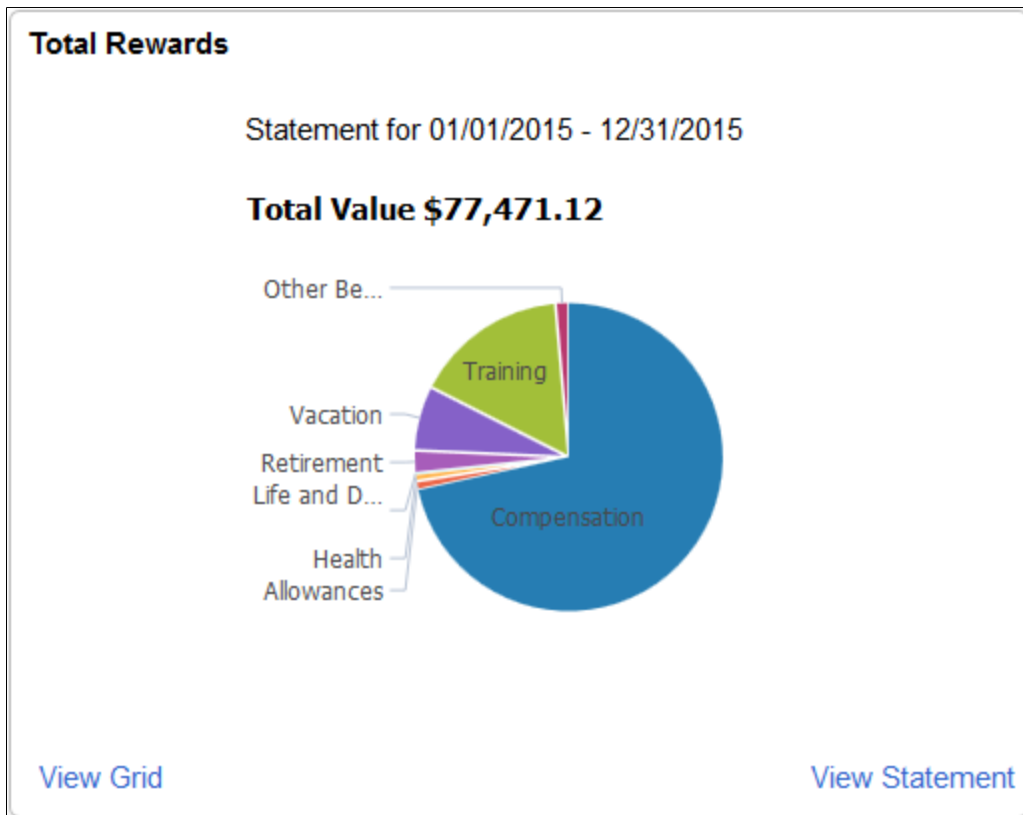
Use the Total Rewards tile (HCTS_CMP_TRW_FL) to view the most recent total rewards statement to review earnings, benefits, and other compensation information of a direct report.

Navigation

Select the [Employee Snapshot - Compensation Review Dashboard](#) action item from the Employee Snapshot pages.

Image: Total Rewards Tile

This example illustrates the fields and controls on the Total Rewards tile.



The tile displays the most recent statement period information, the period and total value shown at the top of the page. Pause or hover over a reward item to view the item amount and reward percentage for this period.

View Grid

Click this link to access the [Total Rewards Details Page](#) to view the reward items that make up an employee's total rewards.

View Statement

Click this link to access the "Total Rewards Page" (PeopleSoft HCM 9.2: Human Resources Administer Compensation) to review employee's earnings, benefits, and other compensation information for a specified review period.

Total Rewards Details Page

Use the Total Rewards Details page (HCTS_CMP_TRGRD_SCF) to view the list of reward items that make up the employee's total rewards.

Navigation

Click the View Grid link from the [Total Rewards Tile](#).

Image: Total Rewards Details Page

This example illustrates the fields and controls on the Total Rewards Details page.

Total Rewards Details ×			
Currency USD			
Reward Item	Employer Paid	Employee Contribution	Employer Provided
Compensation	55,442.30	0.00	0.00
Allowances	720.00	0.00	0.00
Health	286.65	327.06	0.00
Life and Disability	39.96	0.00	0.00
Retirement	365.05	1,460.10	0.00
Vacation	0.00	0.00	5,250.00
Training	10,000.00	0.00	2,500.00
Other Benefits	0.00	0.00	1,080.00
Total	66,853.96	1,787.16	8,830.00

This grid include the earnings, benefits, credits, and any additional compensation received during the most recent statement period.

Related Links

"Reward Item Details Page" (PeopleSoft HCM 9.2: Human Resources Administer Compensation)

Employee Impact Tile

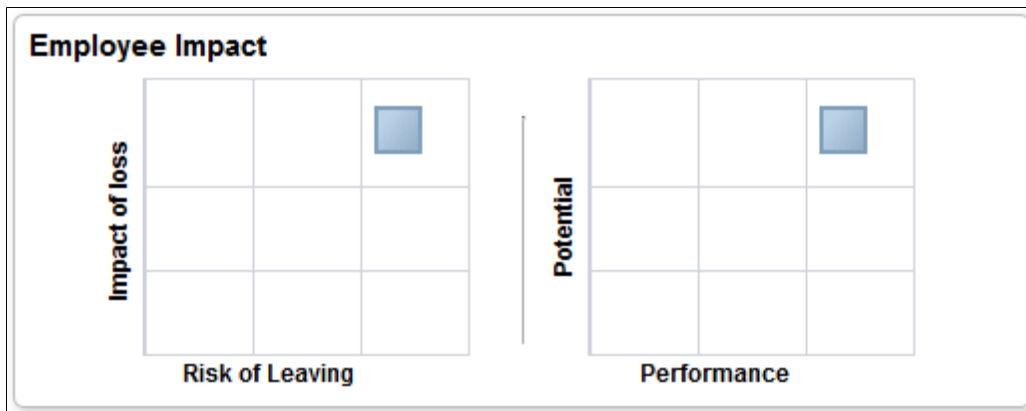
Use the Employee Impact tile (HCTS_RATINGBOX2_FL) to assess the impact of loss, risk of leaving, performance and potential rating for an employee within the context of ratings boxes.

Navigation

Select the [Employee Snapshot - Compensation Review Dashboard](#) or [Employee Snapshot - Career Planning Dashboard](#) action item from the Employee Snapshot pages.

Image: Employee Impact Tile

This example illustrates the fields and controls on the Employee Impact tile.



Use this tile to view to compare an employee's risk lose versus leaving the organization as well as an employee's performance rating in relationship to his or her potential.

The impact of loss, risk of leaving, and potential rating are defined on the career plan. The performance rating comes from the most recently completed performance document.

Click the tile to access the [Employee Impact Page](#) to see the individual ratings values.

Note: When the administrator has not enabled either of the boxes, the tile will display a message that you need to contact the system administrator to configure this view.

Impact of Loss Versus Risk of Leaving Ratings Box

The administrator configures the Risk versus Loss ratings box on the [Configure Employee Snapshot - Risk versus Loss Page](#). Here the administrator selects to show or not show this rating box on the Employee Snapshot tile and page. The administrator can also define the axis labels for this table.

Potential Versus Performance Ratings Box

The administrator configures the Performance versus Potential ratings box on the [Configure Employee Snapshot - Performance versus Potential Page](#). Here the administrator defines the size of the ratings boxes, axis labels, and maps the values to the rating models that are associated with the employees' evaluations.

Related Links

"Career Plan Page" (PeopleSoft HCM 9.2: Human Resources Plan Careers and Successions)

"Career Ranking and Potential Page" (PeopleSoft HCM 9.2: Human Resources Plan Careers and Successions)

"Accessing Documents" (PeopleSoft HCM 9.2: ePerformance)

"Completing Manager Evaluation Documents" (PeopleSoft HCM 9.2: Human Resources Manage Employee Reviews)

Employee Impact Page

Use the Employee Impact tile (HCTS_RB_DTLS_SCF) to assess the employee's performance rating and potential rating in text format.

Navigation

Click the ratings boxes on the [Employee Impact Tile](#).

Image: Employee Impact Page

This example illustrates the fields and controls on the Employee Impact page.



The impact of loss, risk of leaving, and potential rating are defined on the career plan. The performance review rating comes from the most recently completed performance document.

Manage Career Plan

Click this link to access the "Manage Career Plans Component" (PeopleSoft HCM 9.2: Human Resources Plan Careers and Successions) where you can view or modify an employee's career path using the Career Planning module.

Viewing the Performance Review Tiles and Pages

Use the Performance Review dashboard from the Employee Snapshot to view tiles and pages that show data related to an employee's performance data, such as reviews, responsibilities, and certifications.

These topics discuss the Employee Snapshot - Performance Review tiles and pages.

Pages Used to View the Performance Review Tiles and Pages

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
Employee Snapshot - Performance Review Dashboard	PT_LANDINGPAGE	View tiles related to an employee's performance.
Performance History Tile	HCTS_PERFHIST2_FL	View a summary of current and historical performance documents.

Page Name	Definition Name	Usage
<u>Performance History Page</u>	HCTS_PERFHIST_SCF	Review the overall rating for an employee from past performance periods using a table grid.
Manager Evaluation Page Mentor Evaluation Page (See "<Manager or Self-> Evaluation Page" (PeopleSoft HCM 9.2: ePerformance))	EP_APPR_MAIN1	Review evaluation data for an employee using the ePerformance pages.
"Checkpoint <#> Page" (PeopleSoft HCM 9.2: ePerformance)	EP_APPR_BASE1	Track the checkpoint progress of a performance or development document using the ePerformance pages.
<u>Responsibilities Tile</u>	HCTS_RESP_CMP_FL	View a short list of responsibilities associated with an employee.
<u>Responsibilities Page</u>	HCTS_RESP_FL	View a list of responsibilities associated with an employee.
<u>Responsibilities Details Page</u>	JPM_ITM_DTL_FL	View additional information about a responsibility assigned to an employee.
<u>Special Projects Tile</u>	HCTS_PROJECTS_FL	View a short list of projects assigned to this employee.
<u>Special Projects Page</u>	HCTS_PROJECTS_SCF	View a complete list of projects assigned to this employee.
<u>Special Projects Details Page</u>	JPM_ITM_DTL_FL	View additional details about a project assigned to an employee.
<u>E&G Special Projects Tile</u>	HCTS_EGPROJ_CMP_FL	View a short list of education and government projects assigned to this employee.
<u>E&G Special Projects Page</u>	HCTS_EGPROJ_SCF	View a complete list of education and government projects assigned to this employee.
<u>E&G Special Projects Details Page</u>	JPM_ITM_DTL_FL	View additional details about an education and government project assigned to an employee
<u>Personal Competencies Tile</u>	HCTS_PERS_COMP2_FL	View a list of competencies associated with this employee's person profile, but not the employee's job (non-person) profile.
<u>Personal Competencies Page</u>	HCTS_PERS_COMP_FL	View a complete list of competencies associated with this employee's person profile, but not the employee's job (non-person) profile.

Page Name	Definition Name	Usage
Personal Competency Details Page	JPM_ITM_DTL_FL	View additional details about the competency rating for this person.
Licenses and Certifications Tile	HCTS_LICENSE_FL	View the number of current, expiring, or missing licenses and certifications held by this employee. This tile will appear differently based on the setup defined on the Configure Employee Snapshot - Licenses and Certifications Page .
Licenses and Certifications Page	HCTS_LICENSE_SCF	View the licenses and certifications held by an employee. This page will appear differently based on the setup defined on the Configure Employee Snapshot - Licenses and Certifications Page .
Job Competencies Tile	HCTS_JOBCOMP SUM_FL	View a summary graphic of how the employee's (primary person) profile matches the competencies associated with this employee's job (primary non-person) profile.
Job Competencies Page	HCTS_JOBCOMPDT_FL	Review a list of competencies associated with this employee's job (non-person) profile compared to the employee's (person) profile.
Development History Tile	HCTS_DEVHIST2_FL	View and overview of completed development documents along with document type, period, and job title for this employee. You can also access the details of the development document from this tile.
Development History Page	HCTS_DEVHIST_SCF	View the completed development documents for an employee. <hr/> Note: When you access the Development History page from the Performance Review - Development History tile, you can click the rows on the page to access the Mentor Evaluation - Completed Page. <hr/>

Employee Snapshot - Performance Review Dashboard

Use the Employee Snapshot - Performance Review dashboard page to view tiles related to an employee's performance.

Navigation

- Click the Employee Snapshot tile on the *Manager Self Service*, *Talent Administrator*, or any fluid homepage to which the tile has been added, select an employee from the search page, and then select Performance Review from the left panel.
- (Manager only) Select the Related Actions icon next to a person’s name in fluid, select View Employee Snapshot, then select the Performance Review dashboard category from the left panel.
- From the Employee Snapshot pages, select the Performance Review dashboard category item from the left panel.

Image: (Tablet) Employee Snapshot - Performance Review Dashboard

This example illustrates the fields and controls on the Employee Snapshot - Performance Review Dashboard page.

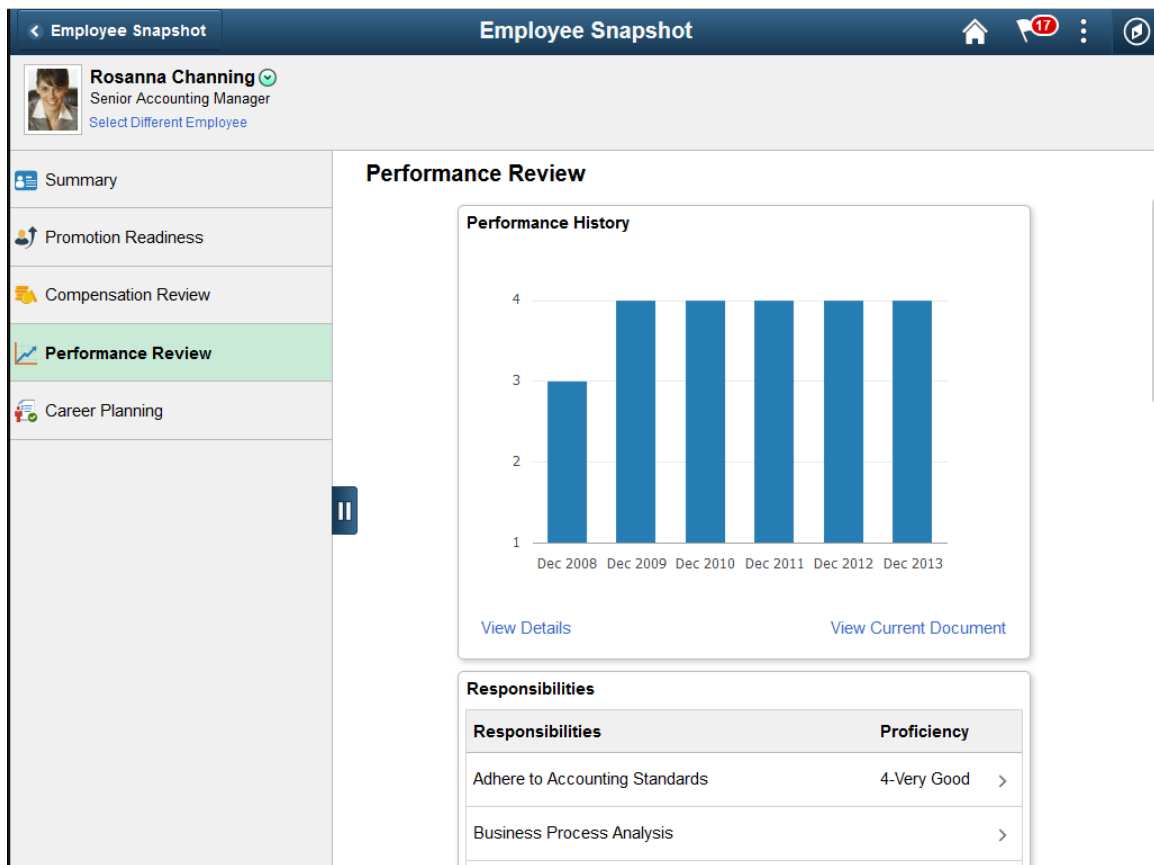
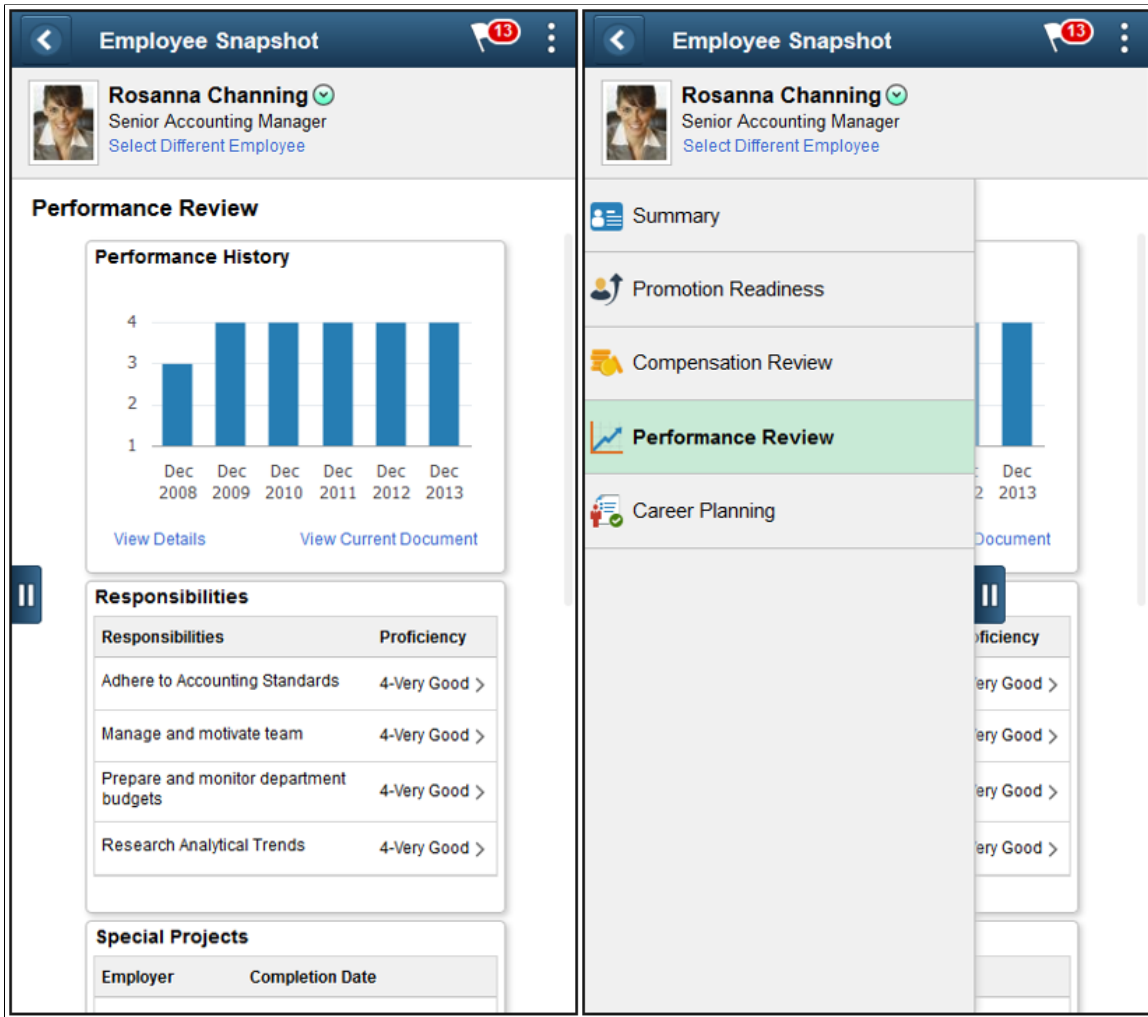


Image: (Smartphone) Employee Snapshot - Performance Review Dashboard

This example illustrates the Employee Snapshot - Performance Review dashboard on a small form factor device. In the first image, the left panel is hidden. In the second image, the left panel is exposed.



Use the Performance Review dashboard to access tiles related to your employee’s performance reviews. These tiles show more details than those which appear on the Summary dashboard.

These tiles are delivered by default with the *Performance Review* dashboard:

- [Performance History Tile](#)
- [Responsibilities Tile](#)
- [Special Projects Tile](#)
- [E&G Special Projects Tile](#)
- [Personal Competencies Tile](#)
- [Licenses and Certifications Tile](#)
- [Job Competencies Tile](#)

- Development History Tile

Note: These tiles are delivered by default to appear on the Performance Review dashboard page of Employee Snapshot; however, the administrator can move the tiles to appear on other Employee Snapshot dashboard folders. The navigation in these topics references the delivered navigation.

Select Different Employee

(Manager view only) Select this link to access the [Employee Snapshot - Select Employee Page \(for Managers\)](#) and change the Employee Snapshot view to another employee.



Hide or Show Action Item List
tab

Click this tab to view and select other Employee Snapshot dashboards.

Note: When you click a tile to access a secondary page and then click the back button to return to the Employee Snapshot pages, the system will return you to the [Employee Snapshot - Summary Dashboard](#) by default. Access the left panel to select another dashboard.

Responsibilities Tile

Use the Responsibilities tile (HCTS_RESP_CMP_FL) to view a short list of responsibilities associated with an employee's profile.

Navigation

Select the [Employee Snapshot - Performance Review Dashboard](#) action item from the left panel of the Employee Snapshot pages to view this tile.

Image: Responsibilities Tile

This example illustrates the fields and controls on the Responsibilities tile.

Responsibilities	
Responsibilities	Proficiency
Adhere to Accounting Standards	4-Very Good >
Business Process Analysis	>
Manage and motivate team	4-Very Good >
Prepare and monitor department budgets	4-Very Good >
Prepare various financial reports	>
Research Analytical Trends	4-Very Good >

[View More](#)
[View Talent Profile](#)

The tile lists the responsibilities held by this individual as defined for the *Person* profile on the Person Profile or Talent Profile: Responsibilities tab.

Click a row from this page to access the [Responsibilities Details Page](#) and view more details about the responsibility given this employee.

View More

The View More link appears when there are more than six responsibilities listed for an employee. Click this link to access the [Responsibilities Page](#) and view a list of all active responsibilities associated with the employee.

View Talent Profile

(Manager view only) The page displays this link when a manager is viewing an authorized direct report and profile content is available; it is not visible for indirect reports.

Click this link to access the Team Talent Profile pages to view and update this team member's talent profile data in fluid (see "(Fluid) Maintaining Person Profiles" (PeopleSoft HCM 9.2: eDevelopment)).

Special Projects Tile

Use the Special Projects tile (HCTS_PROJECTS_FL) to view a short list of projects assigned to this employee.

Navigation

Select the [Employee Snapshot - Performance Review Dashboard](#) action item from the left panel of the Employee Snapshot pages.

Image: Special Projects Tile

This example illustrates the fields and controls on the Special Projects tile.

Special Projects		
Employer	Completion Date	
Firmware Inc.	01/20/2018	>
Corporate Marketing	06/01/2017	>
Micro Resesarch	05/15/2017	>
New Beginnings LLC	03/02/2017	>
Fly High Airlines	09/01/2016	>
Legends Marketing	06/12/2016	>
View More	View Talent Profile	

The tile lists the special projects held by this individual as defined for the *Person* profile on the Person Profile or Talent Profile: Projects tab.

Projects are sorted by completion date. Click a row to access the [Special Projects Details Page](#).

The number of years to display a project is defined on the [Configure Employee Snapshot - Projects Page](#).

View More

The View More link appears when there are more than six projects listed for an employee. Click the link to open the [Special Projects Details Page](#) and view a list of all active projects associated with the employee.

View Talent Profile

(Manager view only) The page displays this link when a manager is viewing an authorized direct report and profile content is available; it is not visible for indirect reports.

Click this link to access the Team Talent Profile pages to view and update this team member's talent profile data in fluid (see "(Fluid) Maintaining Person Profiles" (PeopleSoft HCM 9.2: eDevelopment)).

Special Projects Page

Use the Special Projects page (HCTS_PROJECTS_SCF) to view a complete list of projects assigned to this employee.

Navigation

Click the View More link from the [Special Projects Tile](#).

Image: Special Projects Page

This example illustrates the fields and controls on the Special Projects page.

Special Projects		
Employer	Completion Date	
Fly High Airlines	01/19/2018	>
Kwality Icecream	01/19/2018	>
Legends Marketing	01/19/2018	>
New Beginnings LLC	01/19/2018	>
Mircro Research	01/20/2018	>
Eclips Software	01/20/2018	>
Star Textiles	01/20/2018	>
Firmware Inc.	01/20/2018	>
Fortune Inc	01/20/2018	>
Tactonic LLC	01/20/2018	>
Agile Corp	01/30/2018	>
PeopleSoft	12/02/2018	>

[View Talent Profile](#)

The page lists the special projects held by this individual as defined for the *Person* profile on the Person Profile or Talent Profile page: Projects tab.

Projects are sorted by completion date. Click a row to access the [Special Projects Details Page](#).

The number of years to display a project is defined on the [Configure Employee Snapshot - Projects Page](#).

View Talent Profile

(Manager view only) The page displays this link when a manager is viewing an authorized direct report and profile content is available; it is not visible for indirect reports.

Click this link to access the Team Talent Profile pages to view and update this team member's talent profile data in fluid (see "(Fluid) Maintaining Person Profiles" (PeopleSoft HCM 9.2: eDevelopment)).

Special Projects Details Page

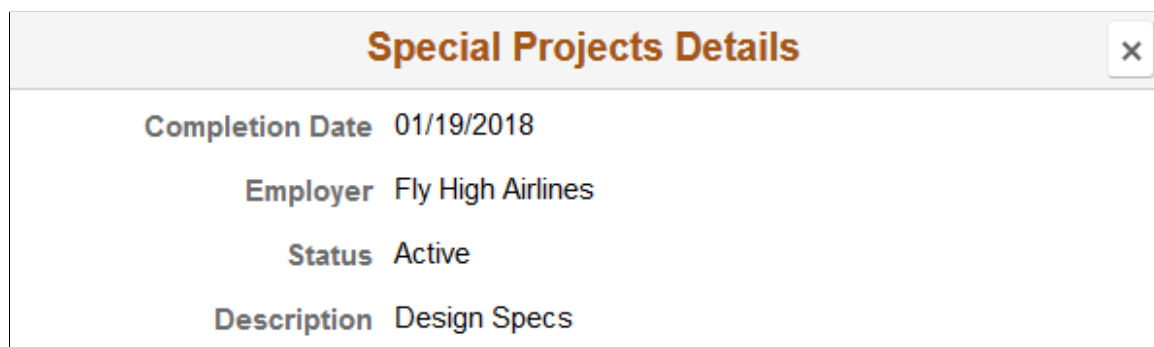
Use the Special Projects Details page (JPM_ITM_DTL_FL) to view additional details about a project assigned to an employee.

Navigation

- Click a row on the [Special Projects Tile](#), which is on the [Employee Snapshot - Performance Review Dashboard](#).
- Click a row from the [Special Projects Page](#).

Image: Special Projects Details Page

This example illustrates the fields and controls on the Special Projects Details page.



Projects are assigned to an employee on the "<Content Type> Page" (PeopleSoft HCM 9.2: eDevelopment) for the *Person* profile.

E&G Special Projects Tile

Use the E&G Special Projects tile (HCTS_EGPROJ_CMP_FL) to view a short list of education and government projects assigned to this employee.

Navigation

Select the [Employee Snapshot - Performance Review Dashboard](#) action item from the left panel of the Employee Snapshot pages.

Image: E&G Special Projects Tile

This example illustrates the E&G Special Projects tile.

E&G Special Projects		
Project	Completion Date	
Parson's Inc	08/31/2017	>
Pilot Project for Test Assessment	06/01/2017	>
Carpenter LLC	03/15/2017	>
Finance Education Program	01/31/2017	>
International Correspondence	08/31/2016	>
Review of Emergency Evacuation Procedu...	04/29/2016	>
View More	View Talent Profile	

The tile lists the Education and Government special projects held by this individual as defined for the *Person* profile on the Person Profile or Talent Profile: Projects tab.

Projects are sorted by completion date. Click a row to access the [E&G Special Projects Details Page](#).

The number of years to display a project is defined on the [Configure Employee Snapshot - Projects Page](#).

View More

The View More link appears when there are more than six Education and Government projects listed for an employee . Click the link to open the [E&G Special Projects Page](#) and view a list of all active projects associated with the employee.

View Talent Profile

(Manager view only) The page displays this link when a manager is viewing an authorized direct report and profile content is available; it is not visible for indirect reports.

Click this link to access the Team Talent Profile pages to view and update this team member's talent profile data in fluid (see "(Fluid) Maintaining Person Profiles" (PeopleSoft HCM 9.2: eDevelopment)).

E&G Special Projects Page

Use the E&G Special Projects page (HCTS_EGPROJ_SCF) to view a complete list of education and government projects assigned to this employee.

Navigation

Click the View More link from the [Special Projects Tile](#).

Image: E&G Special Projects Page

This example illustrates the E&G Special Projects page.

E&G Special Projects		
Project	Completion Date	
Parson's Inc	08/31/2017	>
Pilot Project for Test Assessment	06/01/2017	>
Carpenter LLC	03/15/2017	>
Finance Education Program	01/31/2017	>
International Correspondence	08/31/2016	>
Review of Emergency Evacuation Procedures	04/29/2016	>
Self service user interface	02/14/2016	>

The page lists the Education and Government projects held by this individual as defined for the *Person* profile on the Person Profile or Talent Profile: Projects tab.

Projects are sorted by completion date. Click a row to access the [E&G Special Projects Details Page](#).

The number of years to display a project is defined on the [Configure Employee Snapshot - Projects Page](#).

View Talent Profile

(Manager view only) The page displays this link when a manager is viewing an authorized direct report and profile content is available; it is not visible for indirect reports.

Click this link to access the Team Talent Profile pages to view and update this team member's talent profile data in fluid (see "(Fluid) Maintaining Person Profiles" (PeopleSoft HCM 9.2: eDevelopment)).

E&G Special Projects Details Page

Use the E&G Special Projects Details page (JPM_ITM_DTL_FL) to view additional details about an education and government project assigned to an employee.

Navigation

- Click a row on the [E&G Special Projects Tile](#), which is on the [Employee Snapshot - Performance Review Dashboard](#).
- Click a row on the [E&G Special Projects Page](#).

Image: Special Projects Details Page

This example illustrates the fields and controls on the Special Projects Details page.

E&G Special Projects Details	
Completion Date	06/01/2017
Project	Pilot Project for Test Assessment
Status	Active
Department ID	
Organization	Alameda County School District
Description	Conduct initial study of academic testing effectiveness

Projects are assigned to an employee on the "<Content Type> Page" (PeopleSoft HCM 9.2: eDevelopment) for the *Person* profile.

Licenses and Certifications Tile

Use the Licenses and Certifications tile (HCTS_LICENSE_FL) to view the number of current, expiring, or missing licenses and certifications held by this employee.

Note: This tile will display differently based on the setup defined on the [Configure Employee Snapshot - Licenses and Certifications Page](#).

— When the Compare Person with Job Profile is set to *No*, the tile will display the number count of all current and expired licenses and certifications held by the employee within a one box layout.

— When the Compare Person with Job Profile is set to *Yes*, the tile will display the licenses and certifications held by the employee within a two box layout. The first box will show the number count of current, expired, and missing items of job required items. The second box will show only the number count of additional items held by the employee.

Navigation

Select the [Employee Snapshot - Performance Review Dashboard](#) action item from the left panel of the Employee Snapshot pages.

Image: Licenses and Certifications Tile When Not Comparing with the Job

This example illustrates the Licenses and Certifications tile when the person's licenses and certifications are not being compared with those required by the job.

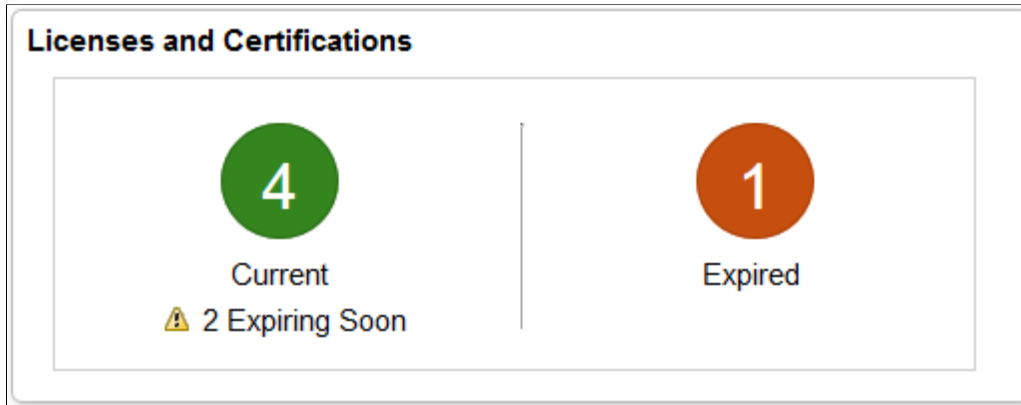


Image: (Tablet) Licenses and Certifications Tile When Comparing to a Job

This example illustrates the fields and controls on the Licenses and Certifications tile for the tablet when the Compare Person to Job Profile is enabled.

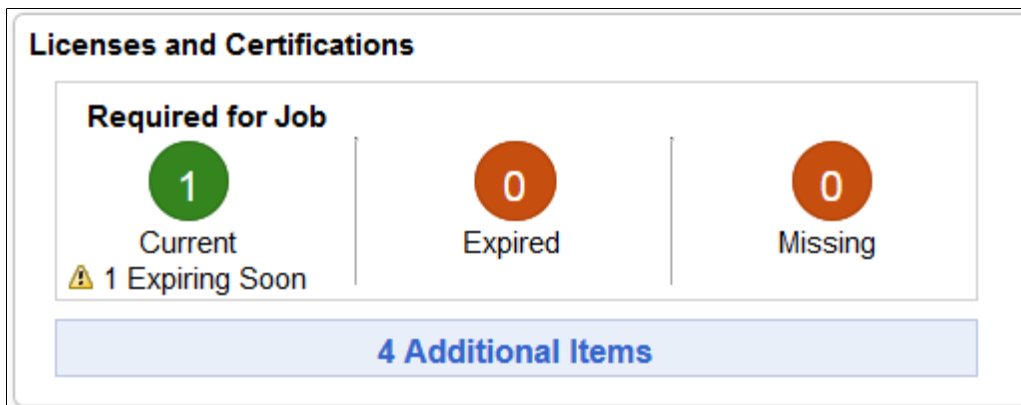


Image: (Smartphone) Licenses and Certifications Tile When Comparing to a Job

This example illustrates the fields and controls on the Licenses and Certifications tile for the smartphone when the Compare Person to Job Profile is enabled.



The tile will display the number count of required-for-job items that have expired or that are expiring soon. It will not list the number count of additional items that are expired or are expiring soon. Click the <number count> Additional Items box on the tile to view expiring soon or expired items that are not required by the job.

The tile will display the Expiring Soon icon based on the number of days before it's expiration, as defined in the Days for Warning Alert field on the [Configure Employee Snapshot - Licenses and Certifications Page](#).

When comparing profiles to a job and viewing the tile in a small form factor, such as a smartphone, the Expiring Soon warning message and icon will not appear in the tile. Click the tile to access the [Licenses and Certifications Page](#) and view if there are any soon to be expiring items.

Current

Lists the number count of licenses and certifications held by the employee and have not expired. If you are comparing the items to the job profile, only those required by the job will be included in the number count. If you are not comparing the items to the job profile, then all current items will be included in the count.

Click anywhere in this first box to access the [Licenses and Certifications Page](#). If job comparison is enabled, the system will display the Required by Job tab. When job comparison is not enabled, all items will appear on one page.

Expired

Lists the number count of licenses and certifications held by the employee that have expired. If you are comparing the items to the job profile, only those required by the job will be included in the number count. If you are not comparing the items to the job profile, then all expired items will be included in the count.

Click anywhere in this first box to access the [Licenses and Certifications Page](#). If job comparison is enabled, the system will display the Required by Job tab. When job comparison is not enabled, all items will appear on one page.

Missing

Lists the number count of licenses and certifications required by the job but not held by the employee.

Click anywhere in this first box to access the [Licenses and Certifications Page](#). The system will display the Required by Job tab.

This box item is not available when the Compare Profile to Job Profile is not enabled.

<number count> Additional Items

Lists the number count of additional licenses and certifications not required by the job but held by the employee.

Click anywhere in this second box to access the [Licenses and Certifications Page](#). The system will display the Additional Items tab.

This box item is not available when the Compare Profile to Job Profile is not enabled.

Development History Tile

Use the Development History tile (HCTS_DEVHIST2_FL) to view an overview of completed development documents along with document type, period, and job title for this employee.

You can also access the details of the development document from this tile.

Navigation

Select the [Employee Snapshot - Performance Review Dashboard](#) category item from the Employee Snapshot pages.

Image: Development History Tile

This example illustrates the Development History tile.

Development History		
Document Type	Period	Job Title
Leadership	Jan 2019 - Apr 2019	Manager-Revenue
Performance Improvement Plan	Jan 2019 - Apr 2019	Manager-Revenue

[View Details](#)

This tile can display development document content in one of the following ways:

- A *chart* - if there are completed development documents with ratings. This is similar to the [Performance History Tile](#).
- A *grid* - if there are completed documents that do not have ratings. When a completed development document exists without a rating, the tile will display the document with the most recent period start date along with the period dates and the employee's job title in a grid format.

If no current document exists, the tile will indicate that there are no development documents for this employee.

Period

Click the dates for the document type to access the Mentor Evaluation - Completed Page (see "<Manager or Self->")

Evaluation Page" (PeopleSoft HCM 9.2: ePerformance)) and view additional details about the document for this employee.

View Details

Click this link to access the [Development History Page](#) and view the development documents completed for the employee, if any.

This video demonstrates the Fluid Employee Snapshot multiple development document types feature:



[Image Highlights, PeopleSoft HCM Update Image 31: Development Documents for Employee Snapshot](#)

Related Links

[Development \(Summary\) Tile](#)

Viewing the Career Planning Tiles and Pages

Use the Career Planning dashboard from the Employee Snapshot to view tiles and pages to view an employee's career planning.

These topics discuss the Employee Snapshot - Career Planning tiles and pages.

Pages Used to View the Employee Snapshot - Career Planning Tiles and Pages

Page Name	Definition Name	Usage
Employee Snapshot - Career Planning Dashboard	PT_LANDINGPAGE	Access tiles related to an employee's career planning.
Career Plans Tile	HCTS_CAREERPLN2_FL_GBL	Note the career paths for the employee.
Career Plans Page	HCTS_CAREERPLN_FL HCTS_CAREERPLN_SCF	Review a list of all career path options defined for the employee.
Succession Plans Tile	HCTS_SUCC_PLN2_FL	View the next two jobs and persons for which the employee is slated as a successor.
Succession Plans Page	HCTS_SUCC_PLN_FL	View all jobs and persons for which the employee is slated as a successor.
"Succession 360° Page" (PeopleSoft HCM 9.2: Human Resources Plan Careers and Successions)	HR_VT_DASHBOARD	Visually review and manage the succession plan within the context of the organization.

Page Name	Definition Name	Usage
"Manage Succession Plans Page" (PeopleSoft HCM 9.2: Human Resources Plan Careers and Successions)	HR_SUCC_PLN_MGR	Review or edit plan details such as effective date, plan status, and projected vacancy date. The page is also used to review incumbent job and career plan details.
<u>Job Competencies Tile</u>	HCTS_JOBCOMPSTUM_FL	View a summary graphic of how the employee's (primary person) profile matches the competencies associated with this employee's job (primary non-person) profile.
<u>Job Competencies Page</u>	HCTS_JOBCOMPDTL_FL	Review a list of competencies associated with this employee's job (non-person) profile compared to the employee's (person) profile.
<u>Employee Impact Tile</u>	HCTS_RATINGBOX2_FL	Assess the impact of loss, risk of leaving, performance and potential rating for an employee within the context of ratings boxes.
<u>Employee Impact Page</u>	HCTS_RB_DTLS_SCF	Assess the employee's performance rating and potential rating in text format
<u>Job Interest Tile</u>	HCTS_JOB_INT2_FL_GBL	View the job profiles in which an employee may have an interest
<u>Job Interests Page</u>	HCTS_JOB_INT1_FL	Review a list of jobs in which the employee has expressed interest.
Maintain Job Profiles Page	JPM_MGRSS_PROFLIC	Review or update a job profile using the Profile Management system. For more information on managing job profiles, see the documentation "(Fluid) Viewing and Updating Job Profiles" (PeopleSoft HCM 9.2: eDevelopment).
Team Interest Lists page	JPM_INTEREST_MGR	Lists the job profiles in the employee's interest list. The Assigned By column shows who added the profile to the interest list. Employees can add profiles to their interest list, managers can add job profiles to their employees' interest lists, and profile administrators can add profiles to employees' interest lists. Employees and managers can only delete a job profile from the interest list if they added the profile to the list.
<u>Personal Competencies Tile</u>	HC_HCTS_PERS_COMP2_FL	View a list of competencies associated with this employee's person profile, but not the employee's job (non-person) profile.

Page Name	Definition Name	Usage
<u>Personal Competencies Page</u>	HCTS_PERS_COMP_FL	View a complete list of competencies associated with this employee's person profile, but not the employee's job (non-person) profile.
<u>Personal Competency Details Page</u>	JPM_ITM_DTL_FL	View additional details about the competency rating for this person.

Employee Snapshot - Career Planning Dashboard

Use the Career Planning dashboard to access tiles related to an employee's career planning.

Navigation

- Click the Employee Snapshot tile on the *Manager Self Service*, *Talent Administrator*, or any fluid homepage to which the tile has been added, select an employee from the search page, and then select Career Planning from the left panel.
- (Manager only) Select the Related Actions icon next to a person's name in fluid, select View Employee Snapshot, then select the Career Planning dashboard category from the left panel.
- From the Employee Snapshot pages, select the Career Planning category item from the left panel.

Image: (Tablet) Employee Snapshot - Career Planning Dashboard

This example illustrates the fields and controls on the Career Planning dashboard for the tablet.

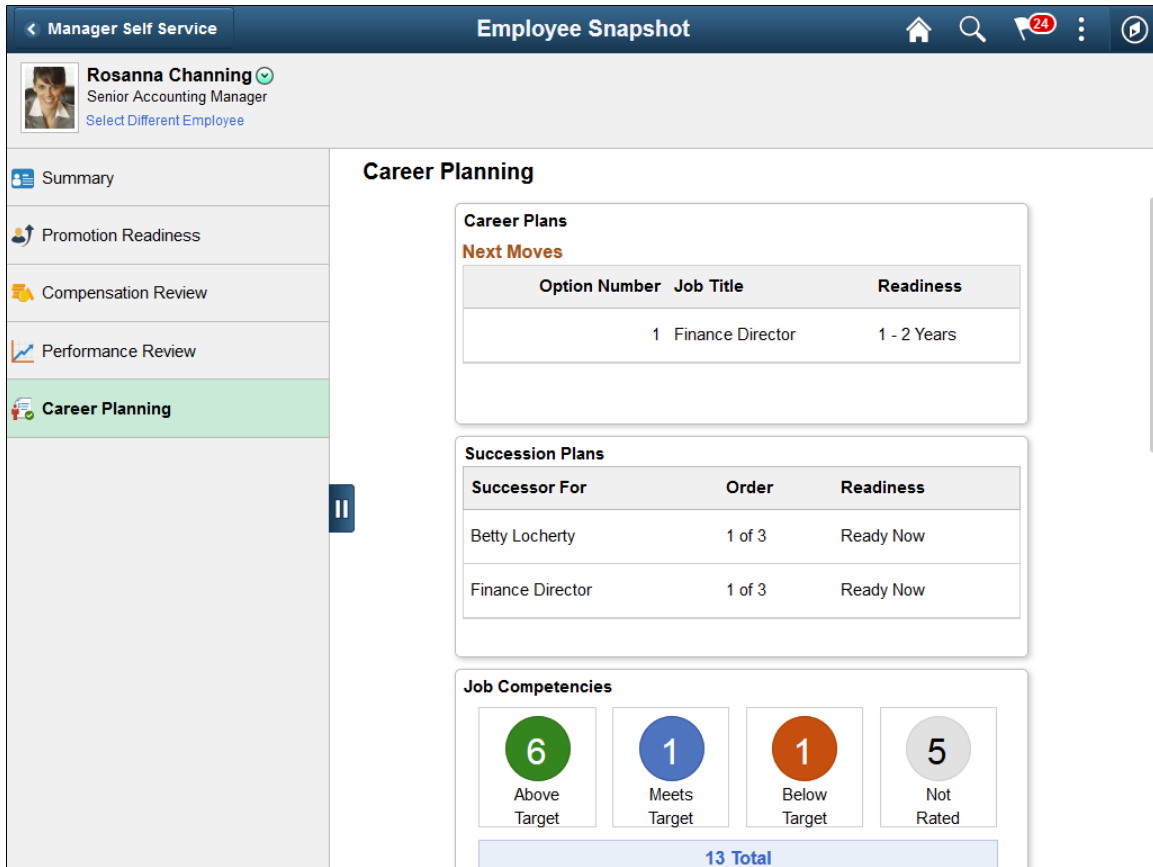
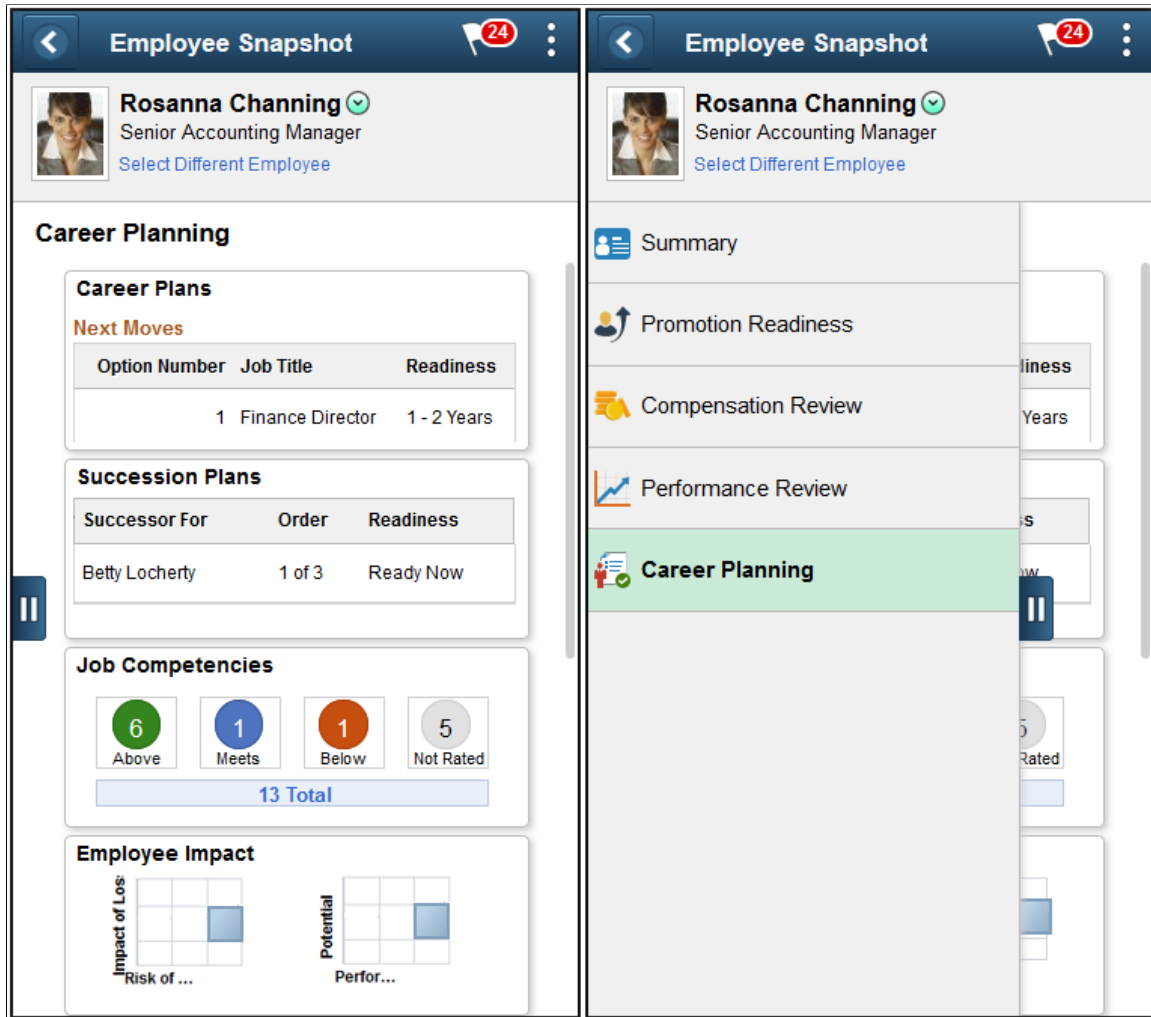


Image: (Smartphone) Employee Snapshot - Career Planning Dashboard

This example illustrates the Employee Snapshot - Career Planning dashboard on a small form factor device. In the first image, the left panel is hidden. In the second image, the left panel is exposed.



Use the Career Planning dashboard to access tiles related to your employee's career planning and advancement. These tiles show more details than those which appear on the Summary dashboard.

These tiles are delivered by default with the *Career Planning* dashboard:

- [Career Plans Tile](#)
- [Succession Plans Tile](#)
- [Job Competencies Tile](#)
- [Employee Impact Tile](#)
- [Personal Competencies Tile](#)
- [Job Interest Tile](#)

Note: These tiles are delivered by default to appear on the Career Planning dashboard page of Employee Snapshot; however, the administrator can move the tiles to appear on other Employee Snapshot dashboard folders. The navigation in these topics references the delivered navigation.

Select Different Employee

(Manager view only) Select this link to access the [Employee Snapshot - Select Employee Page \(for Managers\)](#) and change the Employee Snapshot view to another employee.



Hide or Show Action Item List

tab

Click this tab to view and select from other Employee Snapshot dashboard categories or close the dashboard list panel.

Note: When you click a tile to access a secondary page and then click the back button to return to the Employee Snapshot pages, the system will return you to the [Employee Snapshot - Summary Dashboard](#) by default. Access the left panel to select another dashboard.

Career Plans Tile

Use the Career Plans tile (HCTS_CAREERPLN2_FL_GBL) to note the career paths for the employee.

Navigation

Select the [Employee Snapshot - Career Planning Dashboard](#) action item from the left panel of the Employee Snapshot pages.

Image: Career Plans Tile

This example illustrates the Career Plans tile.

Career Plans		
Next Moves		
Option	Job Title	Readiness
1	Finance Director	1 - 2 Years
1	Chief Finance Officer	3 - 5 Years

Click this tile to access the [Career Plans Page](#) and view a list of all career path options defined for the employee.

Succession Plans Tile

Use the Succession Plans tile (HC_HCTS_SUCC_PLN2_FL) to view the next two jobs and persons for which the employee is slated as a successor.

Navigation

Select the [Employee Snapshot - Career Planning Dashboard](#) action item from the left panel of the Employee Snapshot pages.

Image: Succession Plans Tile

This example illustrates the Succession Plans tile.

Succession Plans		
Successor For	Order	Readiness
Betty Locherty	1 of 3	Ready Now
Finance Director	1 of 3	Ready Now

[View More](#)

For a manager, this tile will display *Draft* or *Official* succession plan options for this employee based on the administrator configuration on the [Configure Employee Snapshot - Succession Options Page](#). If both plan types are disabled on the configuration page, the tile will display the text to the manager to contact the system administrator to configure the view. The configuration setting applies to the manager only; the administrator will not be restricted by these setup options.

View More

Click this link to access the [Succession Plans Page](#) and view a list of all succession plan options defined for the employee.

Related Links

"Creating Succession Plans" (PeopleSoft HCM 9.2: Human Resources Plan Careers and Successions)

"Managing Succession Plans" (PeopleSoft HCM 9.2: Human Resources Plan Careers and Successions)

Succession Plans Page

Use the Succession Plans page (HCTS_SUCC_PLN_FL) to view all jobs and persons for which the employee is slated as a successor.

Navigation

Click the View More link on the [Succession Plans Tile](#) from the [Employee Snapshot - Career Planning Dashboard](#).

Image: Succession Plans Page

This example illustrates the Succession Plans page.

Succession Plans				
Successor For	Type	Order	Readiness	Plan Status
Betty Locherty	Person	1 of 3	Ready Now	Draft
Finance Director	Position	1 of 3	Ready Now	Draft

View Succession 360 View Succession Plan

For a manager, this page will display *Draft* or *Official* succession plan options for this employee based on the administrator configuration on the [Configure Employee Snapshot - Succession Options Page](#). The configuration settings apply to the manager only; the administrator will not be restricted by the setup options.

View Succession 360

Click this link to access the "Succession 360° Page" (PeopleSoft HCM 9.2: Human Resources Plan Careers and Successions) and manage the succession plan for a person.

View Succession Plan

Click this link to access the "Manage Succession Plans Page" (PeopleSoft HCM 9.2: Human Resources Plan Careers and Successions) and review or edit plan details such as effective date, plan status, and projected vacancy date. The page is also used to review incumbent job and career plan details.

Related Links

"Creating Succession Plans" (PeopleSoft HCM 9.2: Human Resources Plan Careers and Successions)

Job Interest Tile

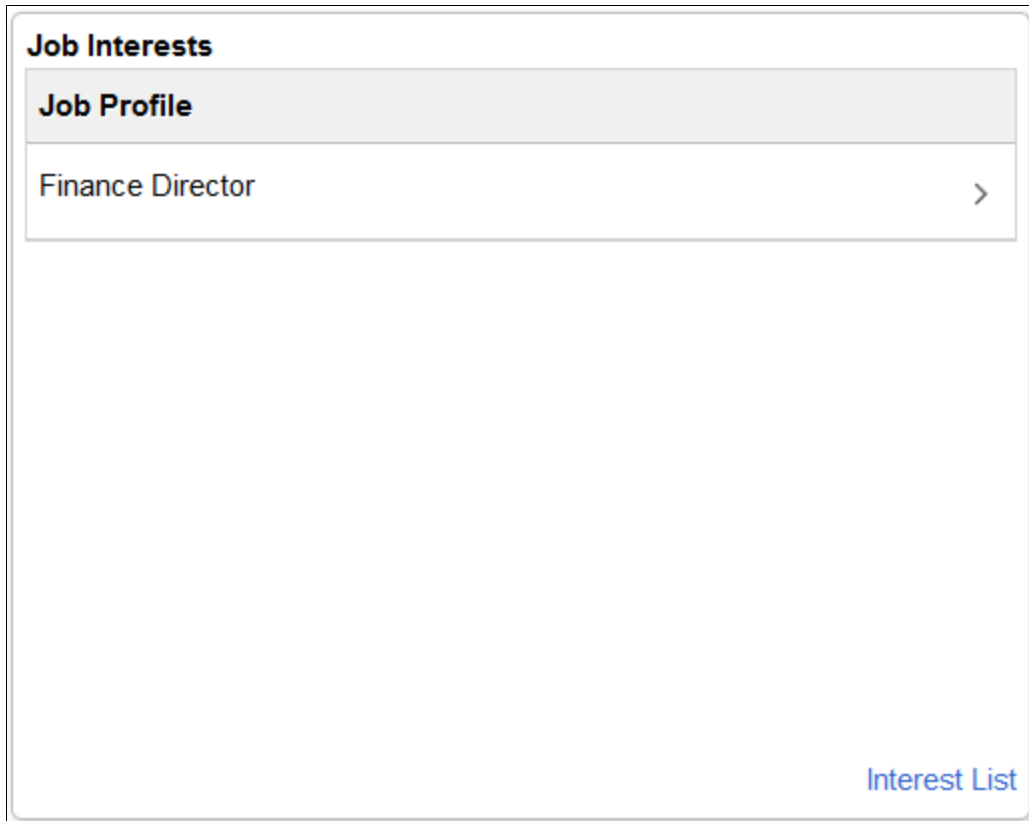
Use the Job Interest tile (HCTS_JOB_INT2_FL_GBL) to view the job profiles in which an employee may have an interest.

Navigation

Select the [Employee Snapshot - Career Planning Dashboard](#) action item from the left panel of the Employee Snapshot pages.

Image: Job Interest Tile

This example illustrates the Job Interest tile.



Click a row to access the Maintain Job Profiles Page and view or edit the profile for this job.

View More

The View More link appears when there are more than six valid personal jobs in which the employee has expressed interest.

Click this link to access the [Job Interests Page](#) and view a list of all job interests for this employee.

Interest List

Click this link to access the Team Interest Lists Page and review or edit the interest list for this employee.

Related Links

"(Fluid) Viewing and Updating Job Profiles" (PeopleSoft HCM 9.2: eDevelopment)

Viewing Configurable Profile Content Tiles and Pages

The PeopleSoft HCM Employee Snapshot feature delivers various dashboards and tiles for managers and administrators to view employee data (see [Understanding the Employee Snapshot Content and Layout](#) for a list of delivered dashboards and tiles).

The system also enables talent administrators to create and publish other tiles for profile-related content. For setting up configurable profile content, see the [Configure Employee Snapshot - Profile Content Page](#) and [Tile Attributes Page](#) topics.

After the administrator has configured and published tiles, managers and administrators can view profile content that may not already part of the delivered tiles or to display custom profile content that you have created in Profile Management. Employee Snapshot displays these configurable profile tiles much the same as the delivered tiles and pages.

This video demonstrates the Fluid Employee Snapshot configurable profile content:



These topics discusses viewing configurable profile content.

Related Links

"Manage Profiles Overview" (PeopleSoft HCM 9.2: Human Resources Manage Profiles)

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

"Setting Up Profile Types" (PeopleSoft HCM 9.2: Human Resources Manage Profiles)

Pages Used to View Configurable Profile Content Tiles and Pages

Page Name	Definition Name	Usage
<u><Content Type> Tile</u>	HC_CUST_<Content Type>_SUM1_FL HC_CUST_<Content Type>_DTL2_FL HC_CUST_<Content Type>_DTL3_FL HC_CUST_<Content Type>_DTL4_FL HC_CUST_<Content Type>_DTL5_FL (These are the crefs for these tiles) (Dashboard numbers are as follows: <ul style="list-style-type: none"> • 2 = Promotion Readiness, • 3 = Compensation Review • 4 = Performance Review • 5 = Career Planning For example, if you are accessing a tile from the Promotion Readiness dashboard, the cref will end in _DTL2_FL.)	View a summary of profile items within a content type.
<u><Content Type> Page</u>	HCTS_CONT_SUM1_FL HCTS_CONT_DTL_FL (2x1 tiles) HCTS_CONT_DTL2_FL (2x2 tiles)	Review a list of the employee help items associated with this content type.
<u><Content Item> Details Page</u>	JPM_ITM_DTL_FL	View details of a specific content item.

Note: The name of the tiles and pages will display differently based on the content type you are viewing. This documentation uses <Content Type> or <Content Item> to represent these different tiles and pages, although the talent administrator will define the actual name in the Tile Title field of the [Tile Attributes Page](#).

<Content Type> Tile

Use the <Content Type > tile to view a summary of profile items within a content type.

Note: The name of the tile will vary based on the content type selected (see the Tile Title value on the [Tile Attributes Page](#)).

The Summary and non-summary dashboard tiles display tiles differently:

- The Summary dashboard tiles will display only a count of content items held by the employee.
- Non-summary dashboard tiles will display a short list of items held by the employee.

See the examples that follow.

Summary Dashboard Tiles

Use tiles on the Summary dashboard to view the number of items held by an employee for a content type.

Note: Summary tiles can be configured as 1x1 tiles only.

Navigation

Select the [Employee Snapshot - Summary Dashboard](#) where the configurable profile content tile has been added to the Summary dashboard.

Image: Example of a 1x1 configurable <Content Type> tile on the Summary dashboard

This example illustrates a configurable 1x1 tile (Language Skills) on the Summary dashboard.



Click the tile to access the corresponding [<Content Type> Page](#) and view the list of related content items for the employee.

Non-Summary Dashboard Tiles

Use tiles on the non-summary dashboards to view a list of items held by an employee for a content type.

This section discussed the tile options for the 2x1 or 2x2 non-summary tiles.

Navigation

Select from a non-summary dashboard on which a configurable profile content tile has been added. Non-summary dashboards are:

- [Employee Snapshot - Promotion Readiness Dashboard](#)
- [Employee Snapshot - Compensation Review Dashboard](#)
- [Employee Snapshot - Performance Review Dashboard](#)
- [Employee Snapshot - Career Planning Dashboard](#)

Image: Example of a 2x1 configurable <Content Type> tile on a non-summary dashboard

This example illustrates a configurable 2x1 tile (Memberships) on a non-summary dashboard. 2x1 tiles display up to two rows of data.

Memberships	
Membership	Membership Date
Alliance of Gov't Managers	01/30/2009 >
Association Intl Toastmasters	07/24/2006 >

[View More](#) [View Talent Profile](#)

Image: Example of a 2x2 configurable <Content Type> tile on a non-summary dashboard

This example illustrates a configurable 2x2 tile (Memberships) on a non-summary dashboard. 2x2 tiles display up to six rows of data on a large form factor device, like a desktop, and four rows of data on a small form factor device, like a smartphone.

Memberships	
Membership	Membership Date
Alliance of Gov't Managers	01/30/2009 >
Association Intl Toastmasters	07/24/2006 >
Business & Professional Women	11/18/2003 >
Financial Executives Institute	06/15/2017 >
Institute of Chartered Accnts	01/26/2011 >
Institute of Managers	09/08/2016 >

[View More](#) [View Talent Profile](#)

View a list of items held by this employee. The tile will show up to two columns of data, typically the content item title and either a proficiency rating or the date if there is no rating available. The number of item rows that appear are based on the number of valid items recorded for the employee, the tile size configuration (see [Tile Attributes Page](#)), and the device you are using:

- 2x1 tiles:

(All devices) Displays up to 2 item rows.

- 2x2 tiles:
 - (Smartphone) Displays up to 4 item rows.
 - (Workstation or tablet) Displays up to 6 item rows.

Click a row to access the [<Content Item> Details Page](#) to view the employee details related to this item.

View More

The View More link appears when there are more items for an employee than can display on the tile for a content type (see the information above for row limits).

Click this link to access the [<Content Type> Page](#) and view a complete list of items held by this employee for this content type.

View Talent Profile

(Manager view only) The page displays this link when a manager is viewing an authorized direct report and profile content is available; it is not visible for indirect reports.

Click this link to access the Team Talent Profile pages to view and update this team member's talent profile data in fluid (see "(Fluid) Maintaining Person Profiles" (PeopleSoft HCM 9.2: eDevelopment)).

<Content Type> Date

This field displays when a content type is associated with a date, such as a test date, effective date, membership date, or completion date. This allows you to view some detail of the content item without having to access the item detail page.

<Content Type> Proficiency

This field displays when a content type is associated with a ratings model, such as a language proficiency. The tile will show the first proficiency only. Click the row to view more details or other proficiencies, if available.

Proficiency, or ratings fields, can display as either text (as shown above) or as a graphical ratings bar (as shown below), based on the tile configuration for a content type (see [Tile Attributes Page](#)).

Image: Example of a configurable <Content Type> tile on a non-summary dashboard showing a ratings bar

This example illustrates a configurable tile on a non-summary dashboard showing a ratings bar.



Pause or hover over a bar graph to view the proficiency values.

Related Links

[Configure Employee Snapshot - Profile Content Page](#)

[Accessing the Employee Snapshot Pages and Tiles](#)

<Content Type> Page

Use the <Content Type> page (HCTS_CONT_SUM1_FL, HCTS_CONT_DTL_FL, or HCTS_CONT_DTL2_FL) to review a list of the employee help items associated with this content type.

Note: The name of the page will vary based on the content type selected (see the Tile Title value on the [Tile Attributes Page](#)).

Navigation

Click a View More link from the from any dashboard to which the tile has been added.

Image: Example of a configurable <Content Type> page that is not associated with ratings

This example illustrates a configurable <Content Type> page not associated with ratings.

Membership	Membership Date	
Alliance of Gov't Managers	01/30/2009	>
Association Intl Toastmasters	07/24/2006	>
Business & Professional Women	12/10/2019	>

[View Talent Profile](#)

Image: Example of a configurable <Content Type> page showing proficiency ratings as text

This example illustrates a configurable <Content Type> page that shows ratings as text.

Membership	Membership Date	
Alliance of Gov't Managers	01/30/2009	>
Association Intl Toastmasters	07/24/2006	>
Business & Professional Women	12/10/2019	>

[View Talent Profile](#)

Image: Example of a configurable <Content Type> page showing a ratings bar

This example illustrates a configurable <Content Type> page showing ratings bars.

Language	Reading Proficiency	Speaking Proficiency	Writing Proficiency	
American Sign Language	<div style="width: 25%; background-color: green;"></div>	<div style="width: 25%; background-color: green;"></div>		>
English	<div style="width: 100%; background-color: green;"></div>	<div style="width: 100%; background-color: green;"></div>	<div style="width: 100%; background-color: green;"></div>	>
French	<div style="width: 25%; background-color: green;"></div>	<div style="width: 25%; background-color: green;"></div>	<div style="width: 25%; background-color: green;"></div>	>
Italian	<div style="width: 25%; background-color: green;"></div>	<div style="width: 25%; background-color: green;"></div>	<div style="width: 25%; background-color: green;"></div>	>
Japanese	<div style="width: 25%; background-color: green;"></div>	<div style="width: 25%; background-color: green;"></div>	<div style="width: 25%; background-color: green;"></div>	>
Spanish	<div style="width: 25%; background-color: green;"></div>	<div style="width: 25%; background-color: green;"></div>	<div style="width: 25%; background-color: green;"></div>	>

[View Talent Profile](#)

When the content type is associated with ratings, the page will show up to three proficiency ratings.

When showing a ratings bar, pause or hover over a bar graph to view the proficiency values.

Click a row to access the <Content Item> Details Page and view more details about this content item for the employee.

View Talent Profile

(Manager view only) The page displays this link when a manager is viewing an authorized direct report and profile content is available; it is not visible for indirect reports.

Click this link to access the Team Talent Profile pages to view and update this team member's talent profile data in fluid (see "(Fluid) Maintaining Person Profiles" (PeopleSoft HCM 9.2: eDevelopment)).

Related Links

[Configure Employee Snapshot - Profile Content Page](#)

[Accessing the Employee Snapshot Pages and Tiles](#)

<Content Item> Details Page

Use the <Content Item> Details page (JPM_ITM_DTL_FL) to view details of a specific content item.

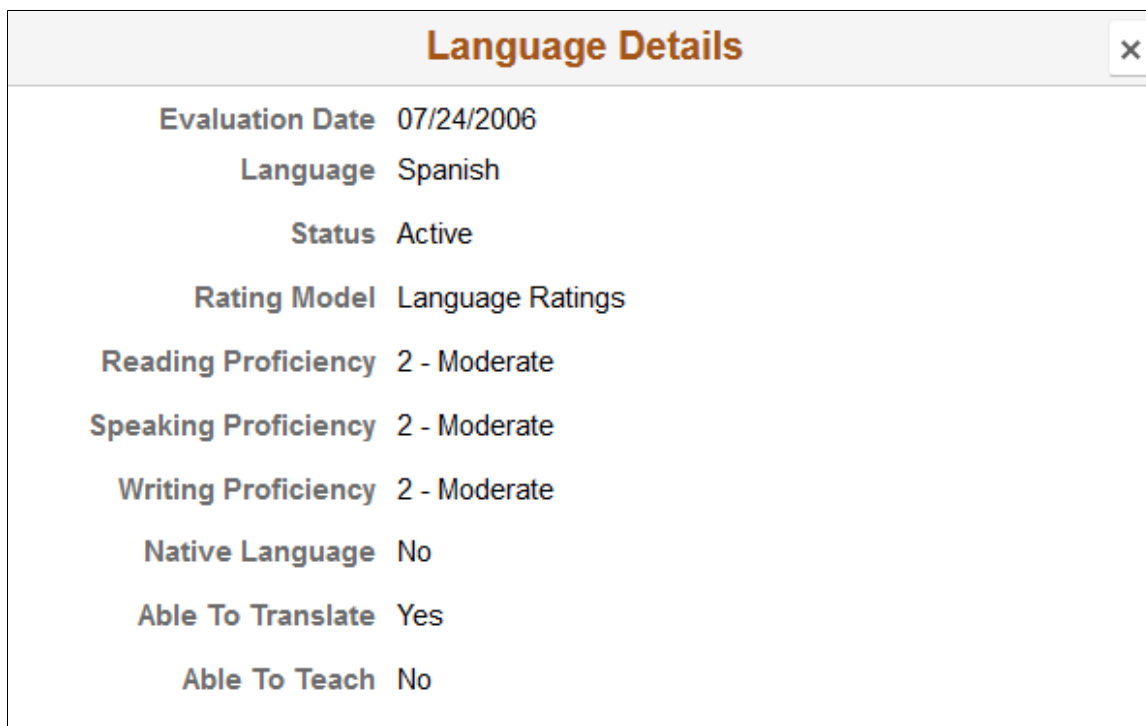
<Content Item> Details Page

Navigation

Click a content item row from a [<Content Type> Tile](#) or [<Content Type> Page](#).

Image: Example of a configurable <Content Item> Details page

This example illustrates a configurable <Content Item> Details page.



The detail page will display text only, even when ratings bars have been enabled for display.