PeopleSoft HCM 9.2: PeopleSoft Human Resources Manage Profiles

May 2024

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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 PeopleSoft Online Help

If you're setting up an on-premises 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. Installable PeopleSoft Online Help is made available with selected PeopleSoft Update Images and with PeopleTools releases for on-premises installations, through the Oracle Software Delivery Cloud.

Your installation documentation includes a chapter with instructions for how to install the online help for your business environment, and the documentation zip file may contain a README.txt file with additional installation instructions. See *PeopleSoft 9.2 Application Installation* for your database platform, "Installing PeopleSoft Online Help."

To configure the context-sensitive help for your PeopleSoft applications to use a locally installed online help website, 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.

Typographical Convention	*Description*
⇒	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.

PeopleSoft HCM Related Links

Oracle Help Center

PeopleSoft Online Help Home

PeopleSoft Information Portal

My Oracle Support

PeopleSoft Training from Oracle University

PeopleSoft Video Feature Overviews on YouTube

PeopleSoft Business Process Maps (Microsoft Visio format)

HCM Abbreviations

PeopleSoft Spotlight Series

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Please include the applications update image or PeopleTools release that you’re using.

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Chapter 1

Getting Started with Manage Profiles

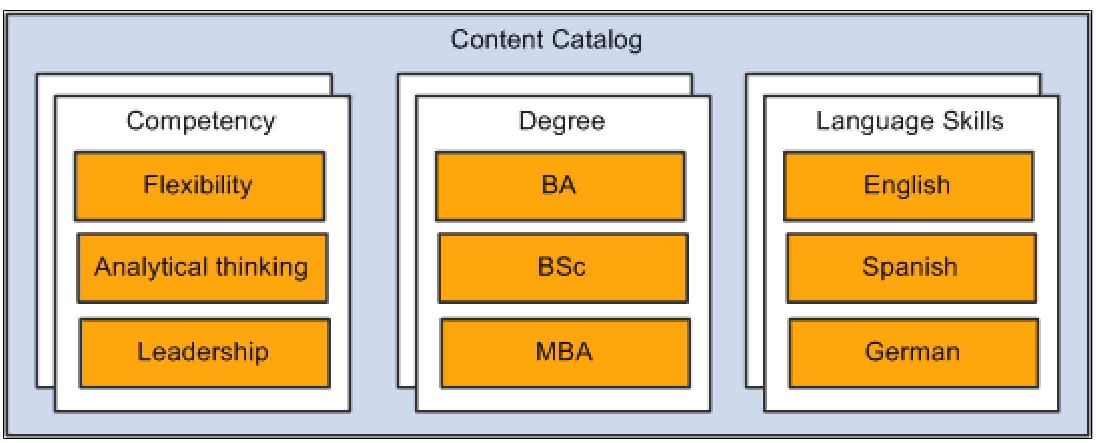
Manage Profiles Overview

Profiles are widely used by organizations to describe the attributes of jobs or individuals. Typically, profiles summarize the competencies, qualifications, and skills of a job or a person. Profiles are valuable for tracking employees' skills, competencies, and accomplishments, in career planning, for identifying training needs, for performance management, and in the recruitment process for identifying job requirements and suitable applicants. The Manage Profiles business process provides a framework for developing and managing profiles that meet your industry or organizational requirements. The Search and Compare profiles feature enables you to perform searches for profiles that match user-defined criteria and easily compare profiles.

Content Catalog

The content catalog is the source of competencies, accomplishments, and other data that administrators, managers, and employees add to their profiles.

The following diagram illustrates the content catalog that contains lists of competencies, such as flexibility, analytical thinking, and leadership; degrees, such as Bachelor of Arts, Bachelor of Science, and Masters; and language skills, such as English, Spanish, and German:



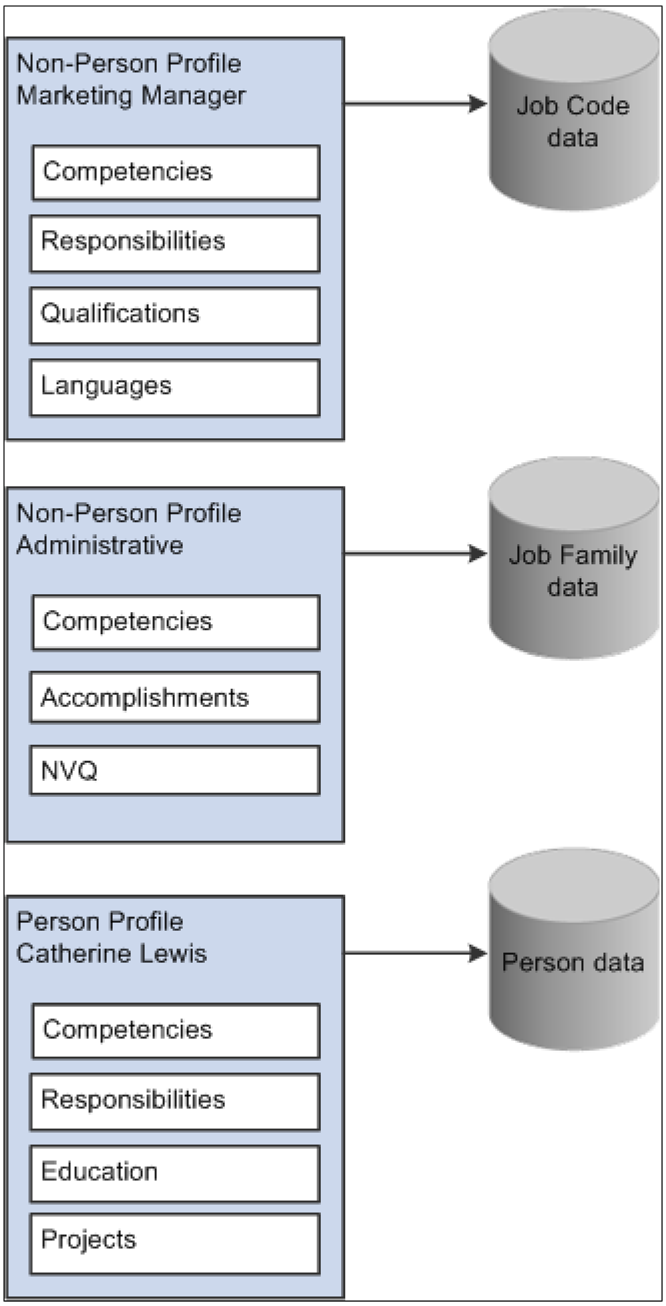
Information in the content catalog is organized by content type. A set of content types is delivered for the common content types such as competencies, language skills, degrees, licenses and certificates. Profile administrators add items for the delivered content types.

However, you are not limited to the delivered content types. You can extend the content catalog by defining additional content types and loading items for the new content types. This enables organizations to configure the content catalog to their specific needs and use this information in profiles. Note that you set up content types and properties to define the property structure of a content item as a separate task and then define the property structure of your profile types.

Person and Non-Person Profiles

In the same way that you set up the content catalog to include the attributes that you want to track, you define a set of profiles that match your organization's requirements.

The following diagram illustrates how Manage Profiles enables you to configure profile content and link profiles to any object in the system: a job code is linked to a profile that describes the competencies, responsibilities, qualifications, and languages of a Marketing Manager, a job family is linked to a profile that describes the competencies, accomplishments, and national vocational qualifications (NVQ) for administrative jobs, and a person's record is linked to a profile that describes that person's competencies, responsibilities, education, and projects:



You use the content types in the content catalog to create profile types that define the structure of your profiles. The profile type defines the content types, the field properties that will appear in the profile, and the approvals processing associated with that content. The profile type also defines whether the profile is linked to a person ID to create person profiles, or linked to business entities, such as job code or positions, to create non-person profiles.

You can define as many profile types as you require for your business needs. Four profile types are delivered as system data. Use the CLUSTER, ROLE, and JOB profile types to create non-person profiles, and the PERSON profile type to create profiles that describe your employees.

Manage Profiles offers syndication and import features to reduce the administration of profile content. Profile administrators can set up common profile content once and then reuse that content in related profiles. Syndication has the added benefit that changes to the source profile trigger automatic updates to the target profiles that contain the syndicated content.

Approvals processing is an optional aspect of profile management. If required, set up approval processing using the standard HCM approvals framework and use it to control changes to particular sections of person and non-person profiles. PeopleSoft delivers approvals processing to handle these scenarios, but you can modify or create new definitions according to your needs:

- Employee changes to their person profiles (using PeopleSoft eDevelopment) are submitted to their manager for approval.
- Manager changes to non-person profiles (using eDevelopment) are submitted to the profile administrator for approval.

Search and Compare Profiles

The Search and Compare Profiles feature in Manage Profiles provides the ability to build searches that work with your content catalog and profiles. Here are a few examples of the search types that are possible:

- Search for job profiles that match an employee's profile.
- Search for an employee who matches the profile for a job opening.
- Select a job profile and search for similar job profiles.

Searches are linked to roles which enables you to create a set of searches that are appropriate to employees, managers, and administrators.

Search and Compare Profiles uses the PeopleTools Search Framework to perform the search of profile data based on the search criteria. This returns a list of matching profiles ranked according to how well they match that criteria.

The Compare facility provides an online comparison of a given source profile against one or more target profiles. The contents of the source profile and the target profiles are displayed in adjacent columns, enabling the administrator to identify the differences between the profiles.

Note: For more information on the Search Framework and to learn how to create and implement the application-specific items, see the product documentation for *PeopleTools: Search Technology*

Manage Profiles Business Processes

PeopleSoft HR Manage Profiles provides these business processes:

- Manage person and non-person profiles.

  Administrators create profiles based on the profile types available and select items from the content catalog. They create and maintain employees' person profiles. They can also create and maintain non-person profiles for entities such as a job code, position, or job family.

- Manage interest lists.

  An interest list is a collection of non-person profiles associated with an employee. It provides a way for employees to identify profiles that are of interest. Profile administrators can add to and remove profiles from employee interest lists.

- Manage profile approvals.

  Using Manage Approvals, administrators can view profile changes routed to them by the approvals workflow engine and approve or reject the changes. They can also view approvals information for changes previously approved or rejected.

- Search and compare profiles.

  Administrators have access to a set of searches that are configured for their role. Depending on the search type, administrators use the searches to identify target profiles that match a source profile or search criteria that they enter manually. The search results identify the best matches generated by the search engine. Administrators can compare profiles listed in the search results or by using Compare Profiles (in Classic) or Profile Compare (in Fluid) to compare selected profiles.

- Match person competencies and other content types to the corresponding content in non-person profiles.

  Profile administrators can compare a person's competencies and other content types with those required by a non-person profile, or compare the competencies and other content types of a team with those required by a non-person profile.

- (GBR) Manage National Vocation Qualifications (NVQs).

  Manage Profiles provides content types and profile types for tracking and reporting employees who are enrolled in NVQs.

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

Manage Profiles Integrations

Manage Profiles integrates with other business processes within PeopleSoft HR, including:

- Plan Careers and Successions.

- Administer Training.

- Administer Workforce.

  This includes the process for adding employment instances for U.S. Federal government employees and military rank processing.

- Manage French Public Sector.

It also integrates with other PeopleSoft HCM applications, including

- eDevelopment

  eDevelopment provides the employee and manager self-service options that complement the administrator functionality in Manage Profiles.

- ePerformance
- Talent Acquisition Manager
- Candidate Gateway
- Campus Self Service

Manage Profiles also integrates with:

- PeopleSoft Enterprise Learning Management, Financials, CRM, and Enterprise Performance Management.

  For example, Enterprise Learning Management and Enterprise Performance Management leverage profile content as configured by those products. Financials Resource Management and Staffing leverage competency and accomplishment data via the legacy EIPS (such as PERSON_COMPETENCY_SYNC, PERSON_ACCOMP_SYNC, and so on).

  Note: The Financials and CRM integration references the legacy content based on the legacy competencies and accomplishments structure only; new content that is added to Profile Management is not leveraged by Financials or CRM.

- Third-party applications.

  You can integrate Manage Profiles with third-party content providers to load competency content into the content catalog. Profile data can be integrated with Clairvia (see “Understanding Integration with Clairvia” (Application Fundamentals)).

We discuss integration considerations in the implementation topics in this documentation.

Manage Profiles 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 documentation.

Manage Profiles also provides component interfaces to help you load data from your existing system into Manage Profiles tables. Use the Excel to Component Interface utility with the component interfaces to populate the tables.

This table lists all of the components that have component interfaces:

Component	***Component Interface***	***Usage***
JPM_CAT_ITEMS	CI_JPM_CAT_ITEMS_COMP	Add or update Competency content catalog items.
JPM_CAT_ITEMS	CI_JPM_CAT_ITEMS_CRITERIA	Add or update Criteria content catalog items.
JPM_CAT_ITEMS	CI_JPM_CAT_ITEMS_ELEMENT	Add or update Element content catalog items.
JPM_CAT_ITEMS	CI_JPM_CAT_ITEMS_GOAL	Add or update Goal content catalog items.
JPM_CAT_ITEMS	CI_JPM_CAT_ITEMS_HON	Add or update Honors and Awards content catalog items.
JPM_CAT_ITEMS	CI_JPM_CAT_ITEMS_LIC	Add or update Licenses and Certifications content catalog items.
JPM_CAT_ITEMS	CI_JPM_CAT_ITEMS_RESP	Add or update Responsibility content catalog items.
JPM_CAT_ITEMS	CI_JPM_CAT_ITEMS_SUBCOMP	Add or update Sub-competency content catalog items.
JPM_NON_PERS_PROFL	CI_JPM_NONPERS_PROFILE	Add or update non-person profiles. • Use ExcelToCI action CREATE to add new profiles. • Use ExcelToCI action UPDATE to add new profile items or identifiers. • Use ExcelToCI action UPDATEDATA to update an existing profile item.

Component	***Component Interface***	***Usage***
JPM_PERSON_PROFILE	CI_JPM_PERSON_PROFILE	Add or update person profiles. • Use ExcelToCI action CREATE to add new profiles. • Use ExcelToCI action UPDATE to add new profile items. • Use ExcelToCI action UPDATEDATA to update an existing profile item.

See Understanding the Content Catalog.

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.

Other Sources of Information

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

See the product documentation for

PeopleTools: Component Interfaces

and

PeopleTools: Setup Manager

Related Links

Application Fundamentals

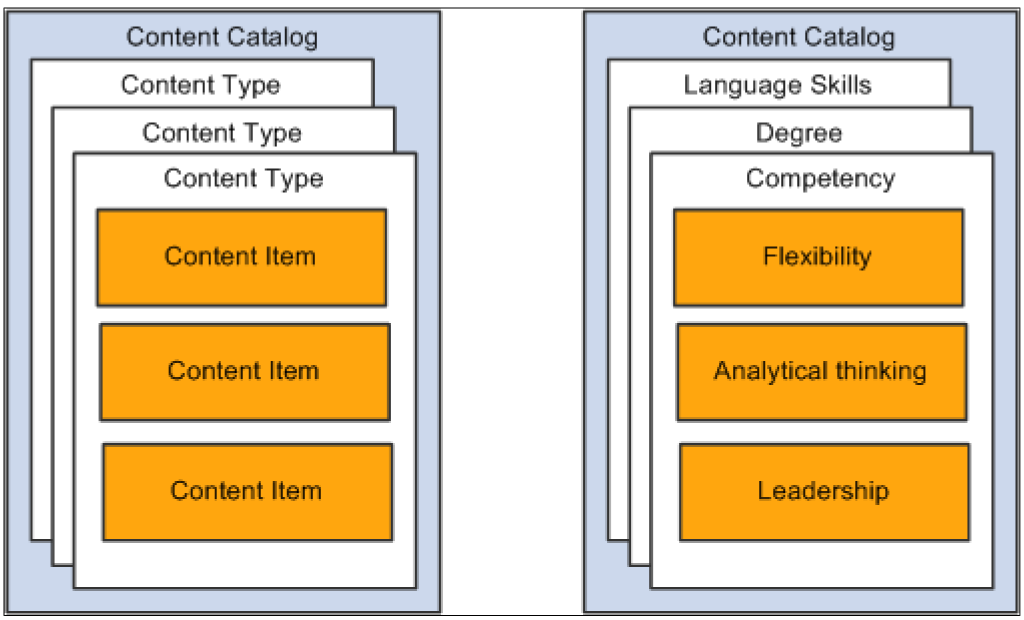
Chapter 2

Setting Up the Content Catalog

Understanding the Content Catalog

The content catalog is a repository of the data that can be associated with person and non-person profiles, and is used by other applications such as PeopleSoft ePerformance, Talent Acquisition Manager, Candidate Gateway, and Learning Management.

In PeopleSoft HCM, the content catalog provides a generic structure for setting up different types of information. The following diagram illustrates the generic structure in which the content catalog contains multiple content types and the content types contain content items. It also illustrates a specific example of where the content catalog contains content types for language skills, degrees, and competencies:



With the content catalog you define the different types of information (competency, degrees, languages, and so on) as *content types* and then set up the data for each content type as *content items.* For example, within the content type DEG (Degrees), a Bachelor of Arts degree (BA) is a content item.

The structure of the content catalog enables you to easily add new content types to your organization's profiles.

Content Catalog System Data

The PeopleSoft application delivers the content catalog already populated with a set of content types. You can add content types and content items to the content catalog to suit your organizational requirements.

Note: PeopleSoft delivers content items as sample data only.

The following content types are delivered as system data:

Content Type	***Description***
AREA STUDY	Areas of Study
COMPETENCY	Competencies
CRITERIA	Element Criteria
DEG	Degrees
EDLVLACHV	Education Level
EG SPCL PROJ	(E&G) Educ and Govt Special Projects
ELEMENT	Competency Elements
GEOG_PREF	Geography Preferences
GOAL	Goals and objectives
HON	Honors and awards
INITIATIVE	Initiatives
INTL_PREF	International Preferences
LIC	Licenses and certifications
LNG	Language skills
LOCATION	Current Location
LOCATN_PREF	Location Preferences
MEM	Memberships
MISSION	Mission Statements

Content Type	Description
NVQ	NVQs
NVQ UNIT	NVQ Units
NVQ ELEMENT	NVQ Elements
RANK	Military Rank.
RESP	Responsibilities
SPECL PROJ	Special Projects
SUB COMP	Sub-Competencies
TRAVEL	Travel Preferences
TST	Tests/Examinations

Note: The RANK content type is for military customers to record rank in profiles. You can integrate Manage Profiles with Job Data using the Event Manager, so that when a person's rank is updated in Job Data, the profile is automatically updated.

See “Job Data - Salary Plan Page” (PeopleSoft Human Resources Administer Workforce).

See “Understanding Event Setup” (Events and Notifications Framework).

Understanding Content Catalog Setup

To set up the content catalog you define the following:

- Content types.
- Content items.
- (Optional) Content group types and groups.

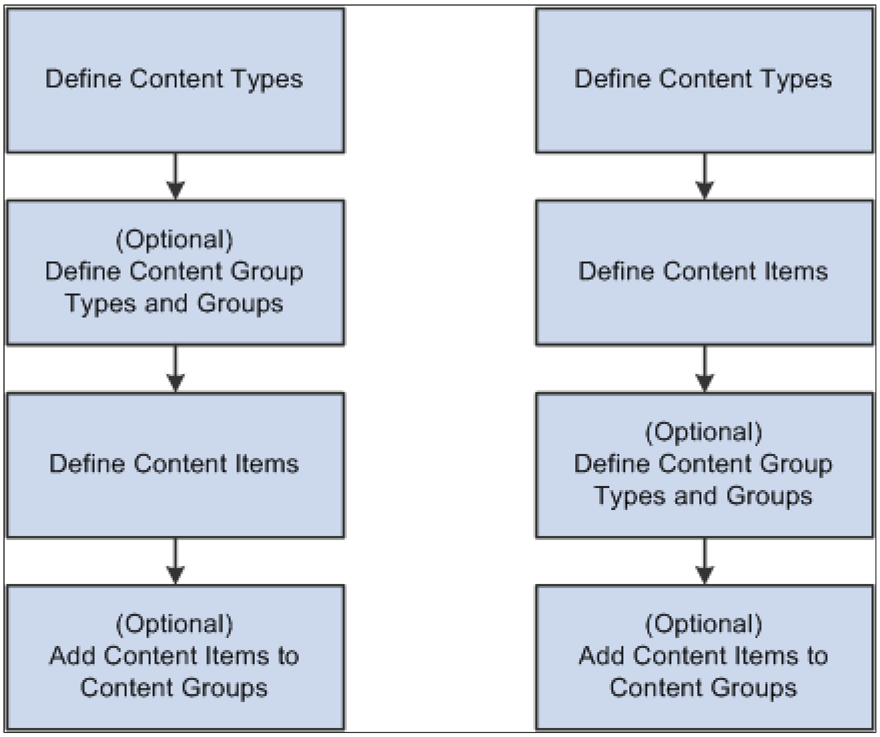
  Content groups enable you to categorize content items within a content type.

Note: If you want to use rating models with your content catalog, you must define these on the Rating Model page before you can associate content items with rating models.

See Defining Rating Models.

The first step in setting up the content catalog is to set up content types. After this, the order in which you set up content groups and content items does not matter. If you know how you want to group your content items, create the content groups first and then set up your content items. Conversely if you know which content items you want to add but haven't decided how to group those items, you can set up the content items first, then create the groups and add the items to the groups.

This diagram illustrates the two ways in which you can set up your content catalog: setting up content groups before setting up items, or setting up the items before the content groups:



Content Types and Content Items

The Content Type component (JPM_CAT_TYPES) has two pages:

- The Content Types page lists the properties (fields) for that content type.

  For each property, you define the attributes of the field, which determines how it will appear on the Content Items - Item Details page.

- The Relationship Rule page defines how the content type is related to other content types in the catalog.

The component for setting up content items is the same for all content types, but the pages and the fields that appear are determined by the content type definition. The Content Items component (JPM_CAT_ITEMS) has three pages:

- The Content Items - Item Details page is where you set up the main details for the content item.

- The Relationships page defines relationships between content items.

  The system hides this page if there are no relationship rules defined for the content type.

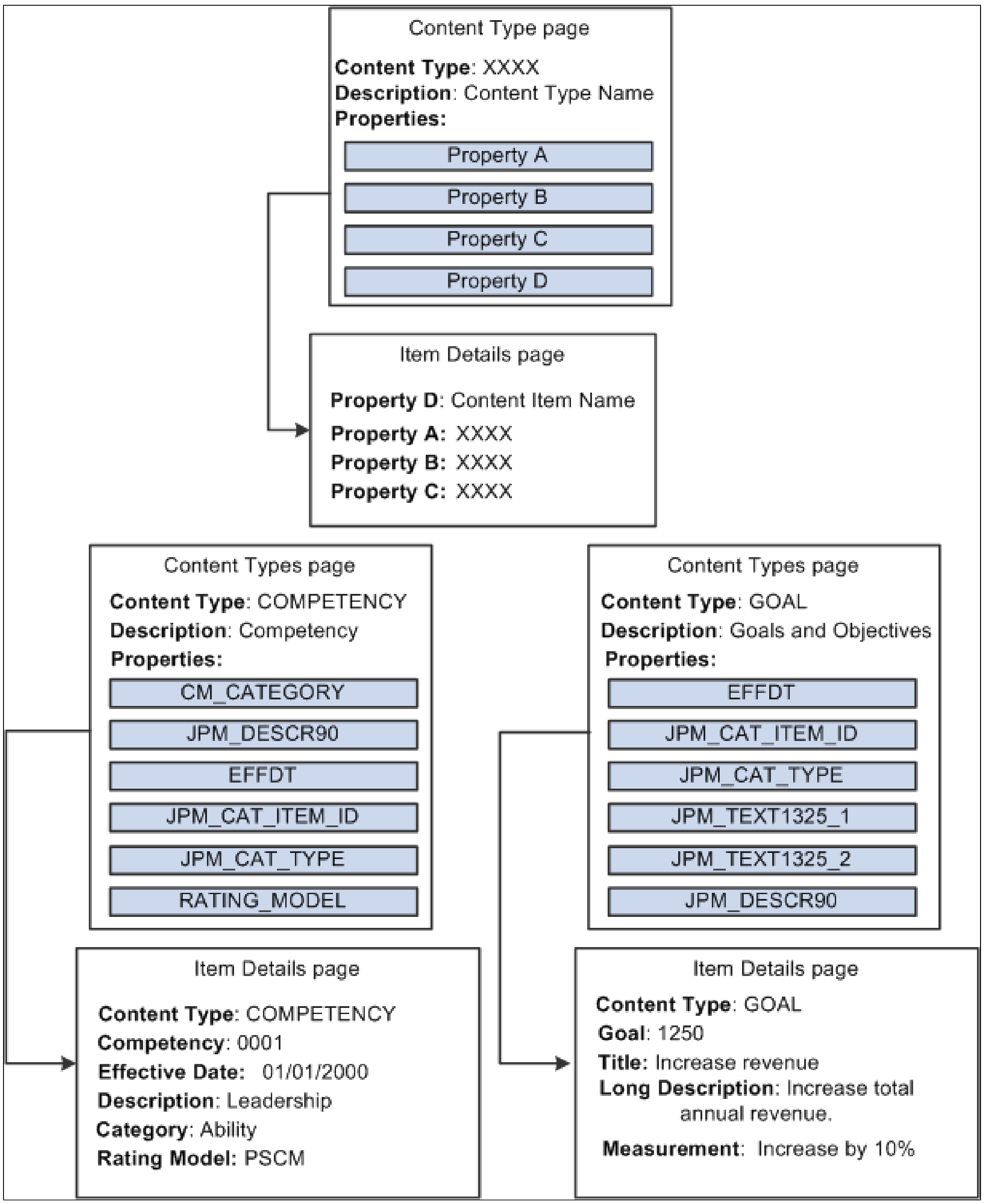
- The Group Memberships page defines the groups to which the content item belongs.

The system hides this page if there are no groups for the content type.

The fields on the Content Items - Item Details page are entirely dependent on the properties selected on the Content Types page.

Note: These fields have no impact on the configuration or display of an item in a profile.

The following diagram shows property selections on the Content Type page flowing though to become fields on the Content Items - Item Details page. The diagram includes a generic content type and two examples of content types (competencies and goals):



Note: For a limited set of profile type properties, the search indexes that you use for the search and compare profile feature store only code-based data.

Setting Up Content Types and Properties

To set up content types and properties, use the Content Types (JPM_CAT_TYPES) component.

These topics provide an overview for content type properties, free form content types, and discuss how to set up content types.

Pages Used to Set Up Content Types and Properties

Page Name	***Definition Name***	***Usage***
Content Types Page	JPM_CAT_TYPES	Define the properties of content types. The properties selected for a content type determine which fields appear on the Content Items - Item Details Page and the attributes of those fields.
Relationship Rule Page	JPM_CAT_TYPE_RLAT	Set up and review relationships between content types.

Understanding Content Type Properties

A content type is a broad definition of a group of items that can be added to the content catalog. Within a content type, specify the properties that all items of this type can or must have. Many of the delivered content types define legacy content originating from the Competency Management application. Many of these content types contain additional attributes that control functionality in other products. When defining new content types, attributes other than the default values and RATING_MODEL should not be added. The system displays the properties you define for a content type as fields on the Content Items - Item Details page. You can override the default label text, select default values, and indicate if the field should be available for entry, unavailable for entry, or hidden on the Content Items - Item Details page.

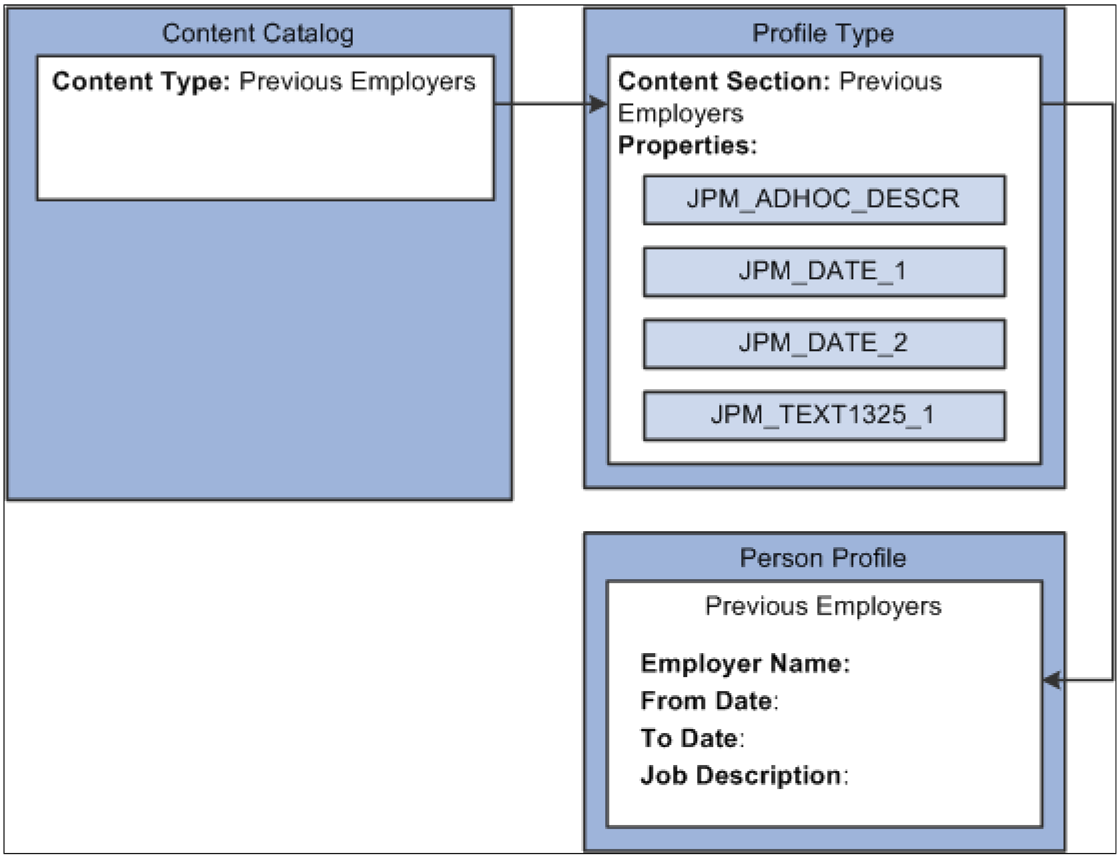
Related Links

Content Type Properties

Understanding Free Form Content Types

Depending on your organization's requirements, you may find that certain types of profile content are not suitable for storing in the content catalog due to the quantity or maintainability of the data. For example, you may want to include a section in person profiles for recording an employee's previous employers. However, employers are not stored in the database and the information is applicable to person profiles only. For this type of information, you can define free form content types that are basically empty placeholders. Free form content types do not include fields and you cannot create content items for them.

When you add a free form content type to a profile type, you add the properties (fields) that define the information entered for that specific profile type. This diagram illustrates how you could use free form content types to record previous employers and associated information such as the employment dates and a job description:



In the example, the content type definition for previous employers has no fields or content items. When this content type is added to the profile type, fields are added for employer name, job start and end dates, and a descriptive field for the job description. On the Person Profiles page, employees add their previous employer's information in these fields. There is no validation of the employers because it isn't defined as a record in the database.

To create a free form content type, select the **Free Form Type Only** check box on the Content Types page.

Note: You cannot include free form content sections when you use the search and compare profiles feature.

Content Types Page

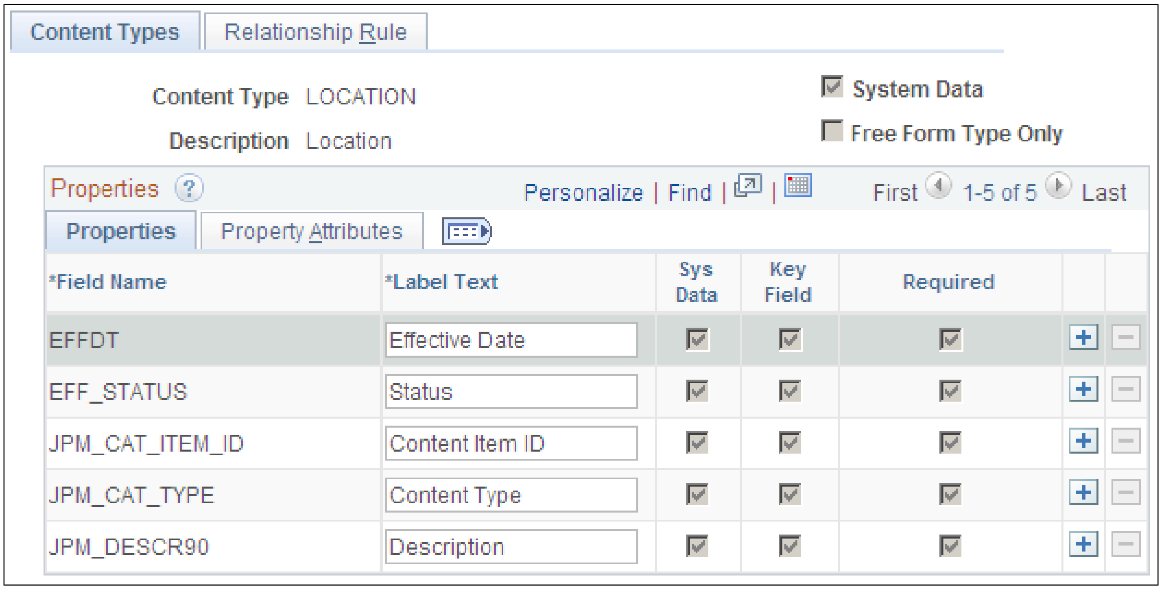
Use the Content Types page (JPM_CAT_TYPES) to define the properties of content types.

The properties selected for a content type determine which fields appear on the Content Items - Item Details page and the attributes of those fields.

Navigation:

Set Up HCM > Product Related > Profile Management > Content Catalog > Content Types > Content Types

This example illustrates the fields and controls on the Content Types page: Properties tab. You can find definitions for the fields and controls later on this page.



Use this page to define the property structure of a content item. The system displays the field properties you define for a content type as fields on the Content Items - Item Details Page.

Note: The Content Type structure is independent of the Profile Type structure and the properties defined for a Content Type apply to Content Items only. Fields for a person or non-person profile are defined at the Profile Type level, Content Section Page, and are not related to the field properties identified here.

Field or Control	***Description***
System Data	Content types with this check box selected are delivered with the system.
Free Form Entry Only	Select this check box if you want to create a free form content type. You cannot define properties or content items for free form content types. See Understanding Free Form Content Types.

Properties Tab

The system displays the properties that you select in this scroll area as fields on the Content Items - Item Details page. Use the properties to define content items for this content type.

All content types that are not defined as free from types automatically have the following five properties:

- Content Type (JPM_CAT_TYPE)
- Content Item ID (JPM_CAT_ITEM_ID)

- Effective Date (EFFDT)
- Status as of Effective Date (EFF_STATUS)
- Description (JPM_DESCR90)

When you create a new content type, the system automatically populates the grid with these properties and you can only edit the label text and the maximum length of the Content Item ID and the Description.

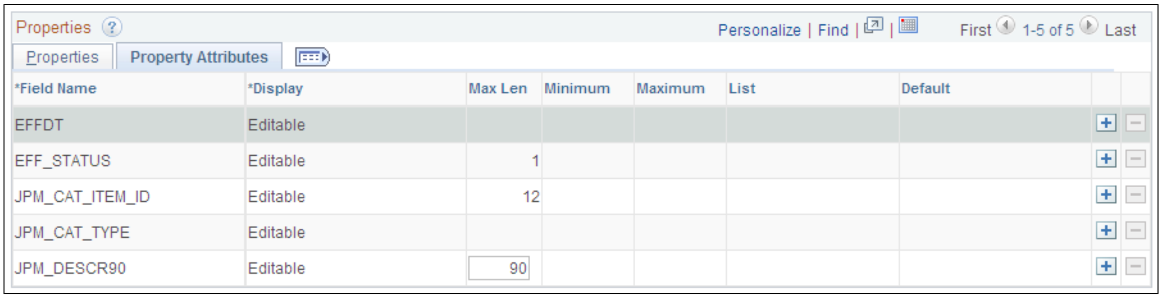
The RATING_MODEL properties can be optionally added if the items define content whose rating will be tracked in a profile.

Field or Control	*Description*
Property	Select the properties to add to this content type from the list of available options. For content types that are delivered as system data you cannot delete the properties delivered, but you can add other properties. See Content Type Properties.
Label Text	Displays the default label text for the selected property, but you can override it with a more meaningful label. The system displays the label text defined here on the Item Details page. **Note:** We strongly recommend that you choose a meaningful label for the property so that users clearly understand what kind of information to enter in the field on the Item Details page.
Sys Data (system data)	This field is display-only. PeopleSoft delivers some content types as system data. The system selects this check box if the property is delivered as part of this system data.
Key Field	This field is display-only. The system selects it if the property is a key field for the record.
Required	Select to make a property required when defining an item on the Item Details page.

Property Attributes Tab

Access the Property Attributes tab on the Content Types page.

This example illustrates the fields and controls on the Content Types page: Property Attributes tab. You can find definitions for the fields and controls later on this page.



Field or Control	***Description***
Display	Select whether the property should be available for entry *(Editable),* unavailable for entry *(Display Only),* or hidden *(Hidden)* on the Items Details page.
Max Len (maximum length)	Enter the field length of this property. **Note:** Although the *JPM_DESCR90* field value allows you to enter up to a 90 character maximum, a description length that is within a maximum of 30 characters is recommended for legacy content types but can be overridden. A description length that is longer than the specified maximum may be truncated when referenced by certain applications.
Minimum and **Maximum**	For numeric properties, enter the minimum and maximum values.
List	This option is available for the attribute EP_SUB_LEVEL only. This property is used for ePerformance processing. Select a custom list defined in the Custom List Values table. This field appears only when there is a custom list defined for the field (as delivered, EP_SUB_LEVEL). When a list value is selected, the **Default** field values are dynamically built from the list values associated with the custom list value assigned. See Custom Prompt Page.
Default	Enter the default value for this property. On the Item Details page, the system populates the field with this value. You should select a default value if the property is display only or hidden. The Default field is available for properties that have predefined values or are associated with a prompt table only.

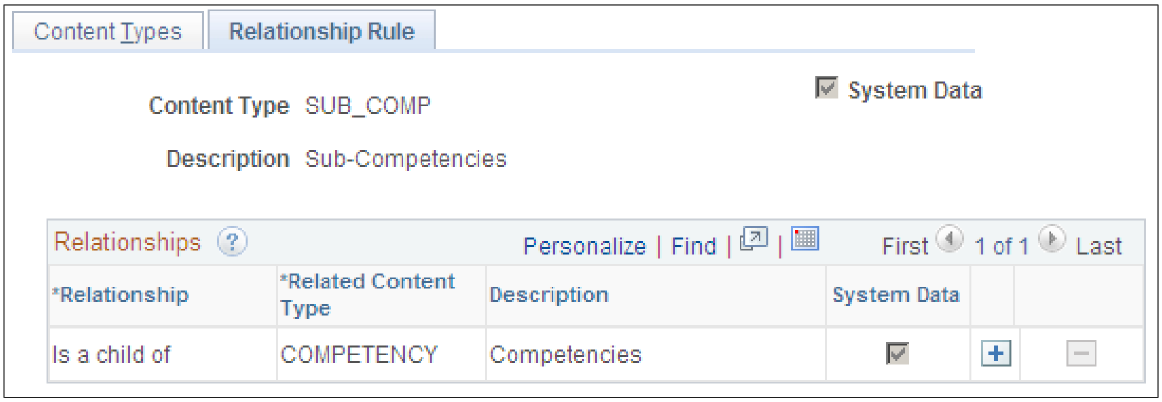
Relationship Rule Page

Use the Relationship Rule page (JPM_CAT_TYPE_RLAT) to set up and review relationships between content types.

Navigation:

Set Up HCM > **Product Related** > **Profile Management** > **Content Catalog** > **Content Types** > **Relationship Rule**

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



If a content type is related to other content types, define the relationship on this page. Leave the page blank if there are no relationship rules for the content type.

Field or Control	***Description***
Relationship	Select from one of the following relationships: *Is a parent of* or *Is a child of.* Child items are added to profiles under the parent items. These relationships create a hierarchy. (GBR) *Supports* or *Is Supported By* apply to the NVQ and NVQ Units content types. These are not in a hierarchical relationship with one another (that is, the support items do not have to go under the supported by items), but it enables you to apply the items of these types to a profile together and review them together.
Related Content Type	Select the content type to which this content type is related.
System Data	This field is display-only. The system selects this check box if the content type is system data delivered in the PeopleSoft application.

When you create a relationship here and save the content type, the system enters the opposite relationship for the related content type. For example, suppose you set up content type A and define the relationship:

Content type A *Is a parent of* content type B.

The system updates the content type B definition to define the relationship:

Content type B *Is a child of* content type A.

You cannot create two kinds of relationships between two types or create a relationship between a type and itself. The system displays a duplicate insert error when you attempt this. For example, the content type COMPETENCY cannot have both the relationship *Is a parent of* and the relationship *Is a child of* with the content type *SUB_COMP.*

Defining Content Items

To set up content items, use the Content Items (JPM_CAT_ITEMS) component.

These topics discuss how to define content items.

Pages Used to Define Content Items

Page Name	***Definition Name***	***Usage***
Content Items - Item Details Page	JPM_CAT_ITEMS	Define content items details for the selected content type.
Item Rating Descriptions Page	JPM_CAT_ITMRD_SEC	Define proficiency descriptions of the ratings for the content item. The **Proficiency Descriptions** link appears only if the RATING_MODEL property is included in the content type definition and a rating model is selected.
Content Items - Relationships Page	JPM_CAT_ITEM_RLAT	Set up and review the relationship between content items.
Content Items - Group Memberships Page	JPM_CAT_ITEM_GMEMB	Add the content item to existing content groups. From this page you can also view all the members of the selected content groups.

Content Items - Item Details Page

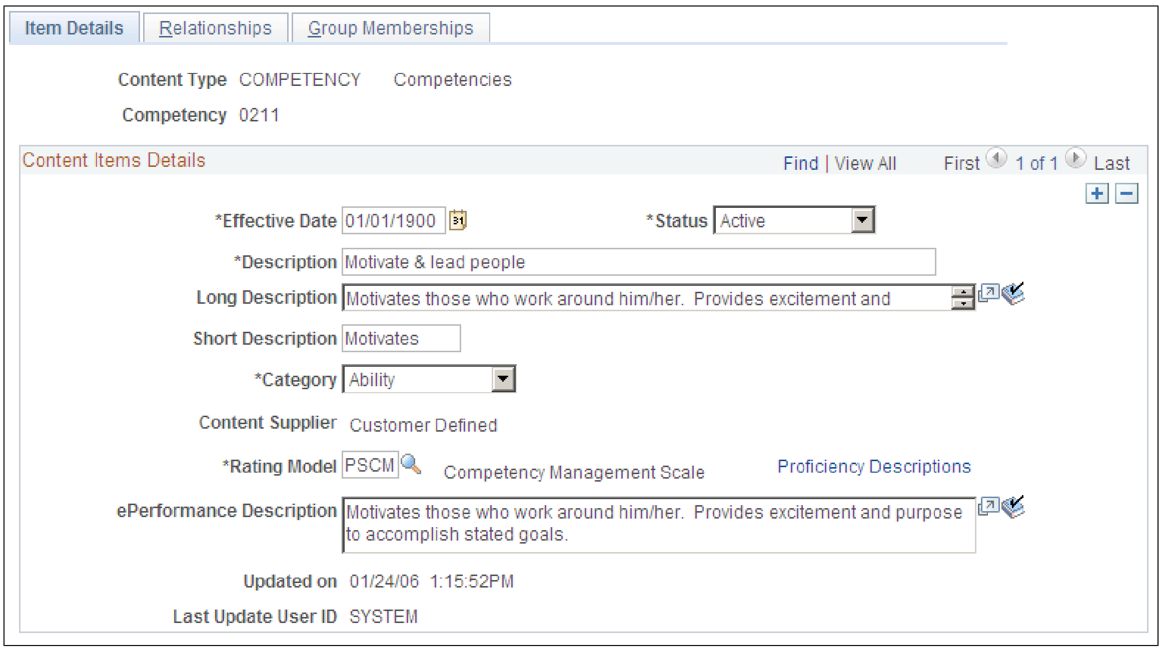
Use the Content Items - Item Details page (JPM_CAT_ITEMS) to define content item details for the selected content type.

Note: When creating new content item IDs for accomplishment-related content types (*DEG, HON, LIC, LNG, MEM, TST,* and *NVQ*) the ID must be unique across all accomplishment content types. For example, if you have a *DEG* content type that uses the content item ID *BA,* you cannot use the content item ID *BA* for a *LIC* or *TST* content type. However, you can use the content item ID *BA* for a *GOAL* item since this is not included in the accomplishment-related content type list.
User defined content item IDs do not need to be unique across content types.

Navigation:

Set Up HCM > **Product Related** > **Profile Management** > **Content Catalog** > **Content Items** > **Item Details**

This example illustrates the fields and controls on the Content Items - Item Details page. You can find definitions for the fields and controls later on this page.



Note: The fields on the page vary depending on the properties of the content type. Each content type property is a field on the Item Details page and the system labels the fields using the label you entered in the **Label Text** field on the Content Types page.

Field or Control	***Description***
Proficiency Descriptions	This link appears only if the RATING_MODEL property is included in the content type definition and a rating model is selected. Click the link to access the Item Rating Descriptions page, which you use to enter descriptions of the ratings for the content item. Proficiency descriptions are optional and are used by ePerformance only. They enable you to set up a rating description for a specific item. However, employees and managers can evaluate content items without proficiency descriptions. **Note:** If you change the rating model for an item that has proficiency descriptions associated with it, the system issues a warning indicating that the existing proficiency descriptions have been removed. Rating models are defined on the Rating Model page. See Defining Rating Models.

Related Links

Content Type Properties

Understanding Content Catalog Setup

Item Rating Descriptions Page

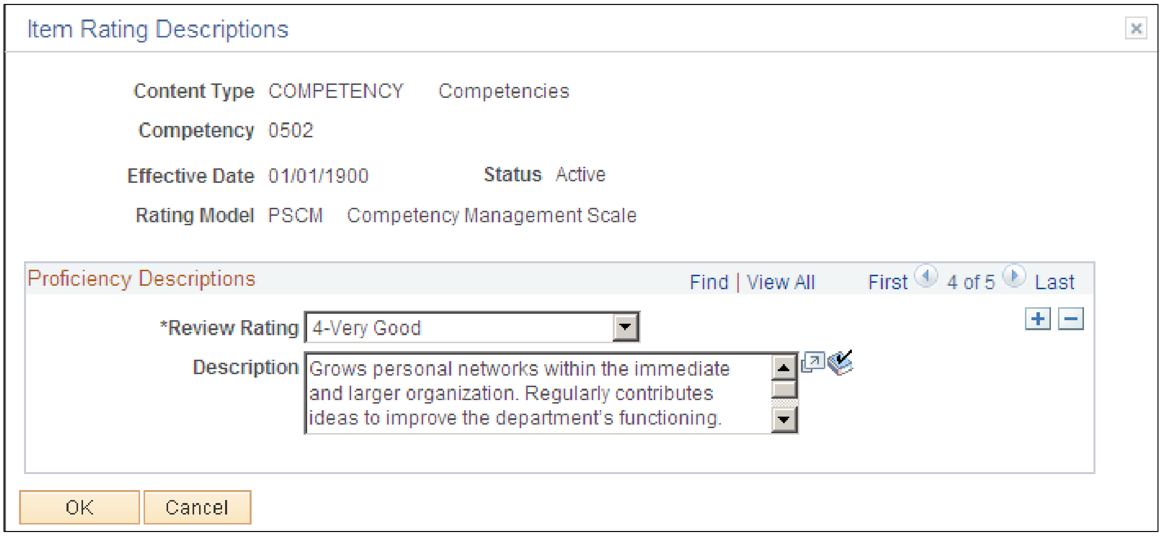
Use the Item Rating Descriptions page (JPM_CAT_ITMRD_SEC) to define proficiency descriptions of the ratings for the content item.

The **Proficiency Descriptions** link appears only if the RATING_MODEL property is included in the content type definition and a rating model is selected.

Navigation:

Click the **Proficiency Descriptions** link on the Item Details page.

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



Field or Control	Description
Review Rating	Select a review rating. The system prompts against the rating model that you assigned on the Content Items - Item Details page. For example, you can define what it means to be an *Expert* in communication (a 5 rating), or *Very Good* in communication (a 4 rating). This helps ensure that everyone in the organization knows what each rating means.

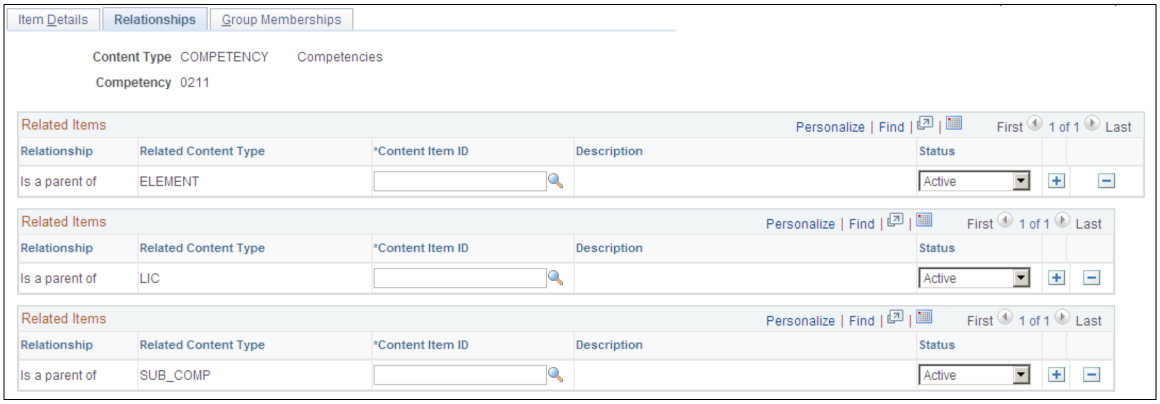
Content Items - Relationships Page

Use the Content Items - Relationships page (JPM_CAT_ITEM_RLAT) to set up and review the relationship between content items.

Navigation:

Set Up HCM > **Product Related** > **Profile Management** > **Content Catalog** > **Content Items** > **Relationships**

This example illustrates the fields and controls on the Content Items - Relationships page. You can find definitions for the fields and controls later on this page.



The Relationships page is displayed if there are relationship rules for the content type defined on the Content Types - Relationship Rule page. If there are no relationship rules for the content type, the system hides this page.

Note: It is not mandatory to define relationships at the content item level.

Related Items

Field or Control	***Description***
Relationship	Displays the relationship rule defined for the content type. You can't define relationships between content items that differ from the relationship rules for the content types. For example, the COMPETENCY type has a parent relationship with the SUB_COMP type. Therefore you can't set up a child relationship between a competency and a sub-competency when defining the competency content item.
Related Content Type	Displays the content type of the related item.
Content Item ID	Select the item to which this item is related. You can only select items of the type defined by the **Related Content Type** field.

Content Items - Group Memberships Page

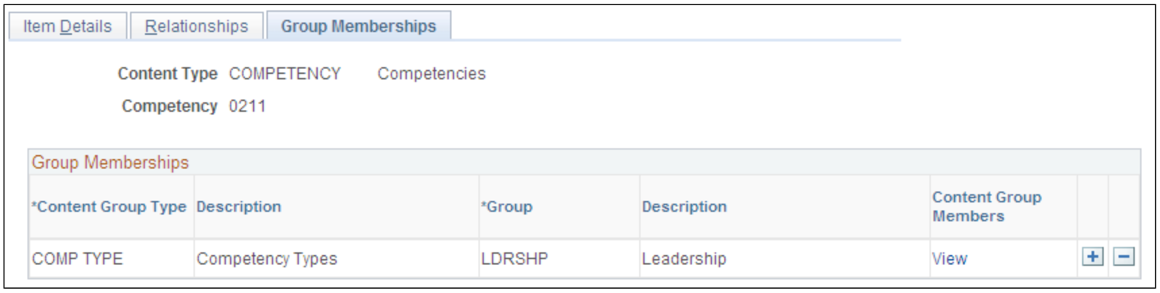
Use the Content Items - Group Memberships page (JPM_CAT_ITEM_GMEMB) to add the content item to existing content groups.

From this page you can also view all the members of the selected content groups.

Navigation:

Set Up HCM > Product Related > Profile Management > Content Catalog > Content Items > Group Memberships

This example illustrates the fields and controls on the Content Items - Group Memberships page. You can find definitions for the fields and controls later on this page.



The Group Memberships page is available if content groups have been set up for the content type. If there are no content groups, the system hides this page. Content groups are defined on the Content Group Types page.

Field or Control	***Description***
Content Group Type	Select the content group type.
Group	Select a group from the list of groups.
Content Group Members and **View**	Click the **View** link to access the Content Group Members page that lists the content items in the selected group.

Defining Content Groups

To set up content groups, use the Content Groups (JPM_CAT_GROUPS) and the Content Group Members (JPM_CAT_GMEMB) components.

These topics discuss how to define content groups.

Pages Used to Define Content Groups and Members

Page Name	***Definition Name***	***Usage***
Content Group Types Page	JPM_CAT_GROUPS	Define content group types and the groups within each content group type.

Page Name	***Definition Name***	***Usage***
Content Group Members Page	JPM_CAT_GMEMB	Define content group members. Add content items to the content groups that you have created on the Content Group Types page or view existing item members for a content group.

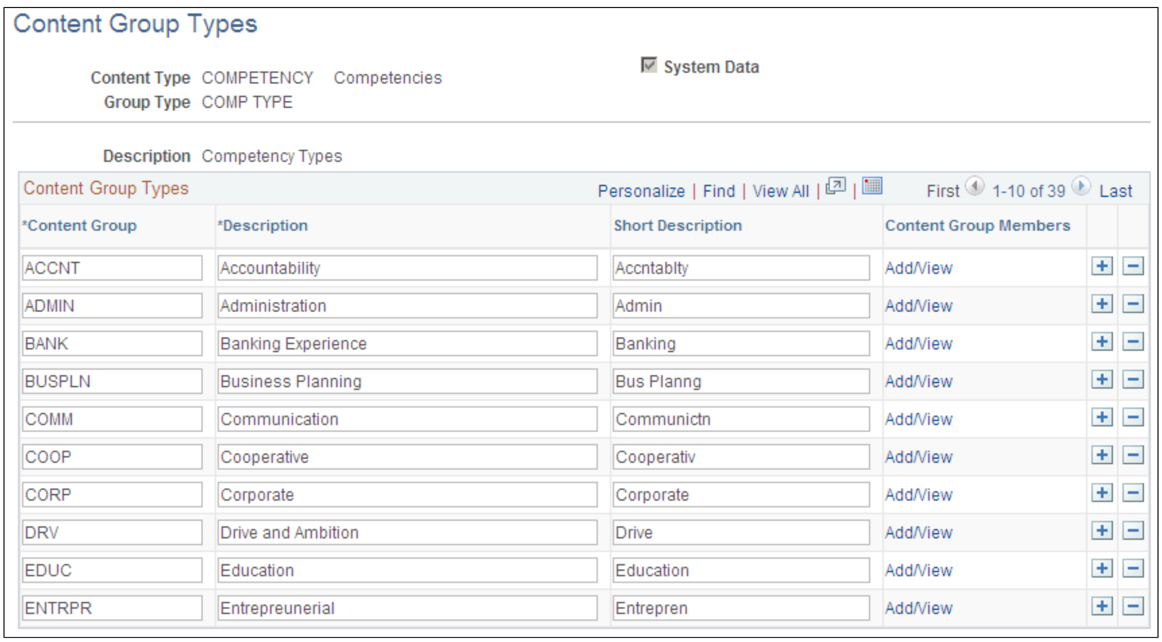
Content Group Types Page

Use the Content Group Types page (JPM_CAT_GROUPS) to define content group types and the groups within each content group type.

Navigation:

Set Up HCM > **Product Related** > **Profile Management** > **Content Catalog** > **Content Groups Types** > **Content Group Types**

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



Content Group Types

This group box lists all the content groups defined for the selected content group type.

Field or Control	***Description***
Content Group	Enter the name of the content group.

Field or Control	***Description***
Content Group Members	Click the **Add/View** link to access the Content Group Members page that lists the content items belonging to the group.

Content Group Members Page

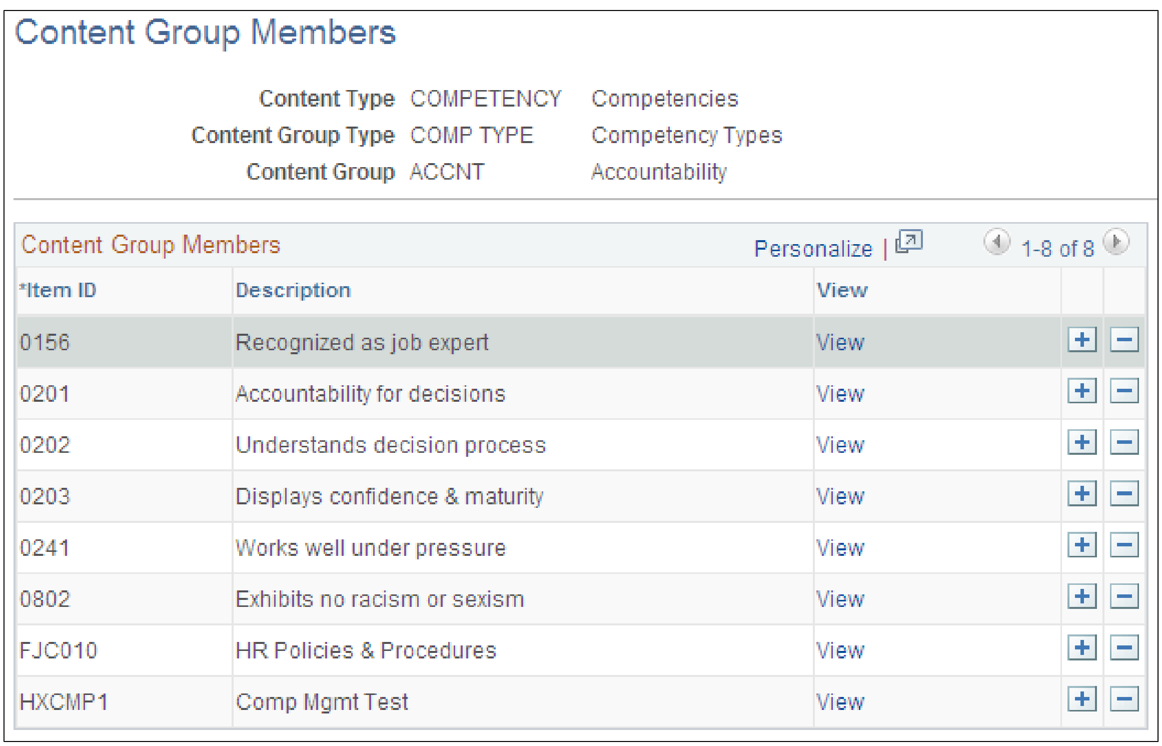
Use the Content Group Members page (JPM_CAT_GMEMB) to define content group members.

Add content items to the content groups that you have created on the Content Group Types page or view existing item members for a content group.

Navigation:

- **Set Up HCM** > **Product Related** > **Profile Management** > **Content Catalog** > **Content Group Members** > **Content Group Members**
- Click the **Add/View** link on the Content Group Types page.
- Click the **View** link on the Content Item - Group Memberships page.

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


Content Group Members

Content Type COMPETENCY Competencies
Content Group Type COMP TYPE Competency Types
Content Group ACCNT Accountability

Content Group Members Personalize | 1-8 of 8

*Item ID	Description	View
0156	Recognized as job expert	View
0201	Accountability for decisions	View
0202	Understands decision process	View
0203	Displays confidence & maturity	View
0241	Works well under pressure	View
0802	Exhibits no racism or sexism	View
FJC010	HR Policies & Procedures	View
HXCMP1	Comp Mgmt Test	View

Use this page to view, add, or delete items that are members of the content group.

Field or Control	*Description*
View	Click this link to view the item definition. When you click the link, the system displays the Content Items component.

Defining Rating Models

To set up rating models, use the Rating Model (RATING_MDL_TBL) component.

These topics provide overviews of rating models, (USF) rating models, and discuss how to define rating models.

Pages Used to Define Rating Models

Page Name	*Definition Name*	*Usage*
Rating Model Page	RATING_MDL_TBL	Set up ratings models that contain values used to rate an employee's proficiency level.
Review Rating Explanation Page	REVW_RATING_SEC	Add review rating explanations.

Understanding Rating Models

Rating models define the values that can be used to rate an employee's performance or level of proficiency. The rating model defines the qualitative values, such as A, B, C, or D, that the system uses to rate or score an employee's performance. Each qualitative value can have a numeric rating, review points, and a review band (range of points).

Rating models are used by several applications within HCM, including:

- Manage Profiles business process.

  In Manage Profiles, rating models are used to rate employees' proficiency level for items on their person profiles. In non-person profiles you can specify the proficiency levels expected for items in the profile. The RATING_MODEL property is associated with the rating model table. Add this property to your organization's content types and profile types that are measured using rating models and specify the rating model used at the content item level. The COMPETENCY content type includes the RATING_MODEL property.

- PeopleSoft ePerformance.

  In ePerformance, rating models are used to define values for the rating sections of a performance document as well as rating overall performance. The calculation method that you select for the overall rating (the **Overall Summary** section of the document) determines which of these values you must define in rating models. When you design document templates, you select the rating model that applies to each section of the document and to each item that is rated. You can use the same rating model for the entire document or select a different rating model for each item and section.

- Manage Employee Reviews business process.
- Plan Careers and Successions business processes.
- Manage Base Compensation and Budgeting business process.

Related Links

“Working with Manage Profiles” (PeopleSoft ePerformance)
PeopleSoft Human Resources Manage Employee Reviews
PeopleSoft Human Resources Manage Base Compensation and Budgeting
“Career Strength/Develop Areas Page” (PeopleSoft Human Resources Plan Careers and Successions)

(USF) Understanding Rating Models

The PeopleSoft HR product delivers two rating models that have specific uses:

- GUSF (goal status for USF).
- PIP (performance improvement plans).

These rating models define statuses, rather than ratings, that you can assign to goals and performance improvement plans in performance evaluations. GUSF values are *Not Met, Met,* and *Exceeded.* PIP values are *In Progress, Satisfactory,* and *Unsatisfactory.*

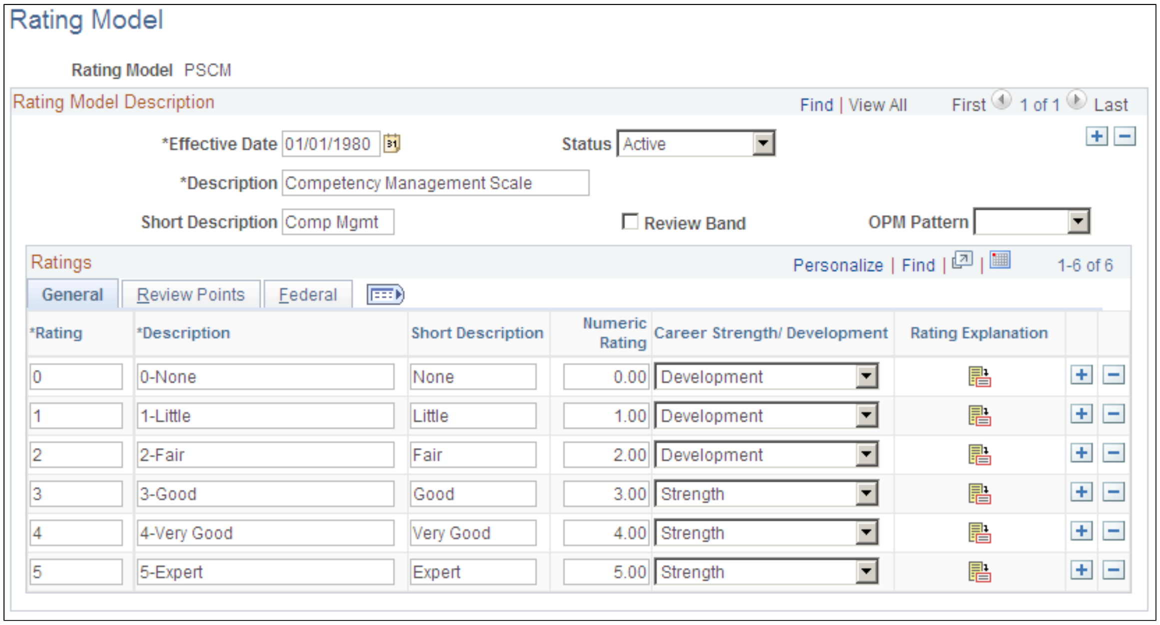
Rating Model Page

Use the Rating Model page (RATING_MDL_TBL) to set up ratings models that contain values used to rate an employee's proficiency level.

Navigation:

Set Up HCM > **Product Related** > **Profile Management** > **Content Catalog** > **Rating Model** > **Rating Model**

This example illustrates the fields and controls on the Rating Model page: General tab. You can find definitions for the fields and controls later on this page.



Rating Model Description

Field or Control	***Description***
Review Band	Select this check box if you want to define this rating model as a Review Band Rating model. **Note:** To use the JPN Grade Advance Candidate List and the JPN Salary Increase processes, the performance reviews in ePerformance must use a Review Band Rating model for overall review ratings. See "Understanding Updating Salaries for Japan" (PeopleSoft Human Resources Manage Base Compensation and Budgeting).
OPM Pattern (Office of Personnel Management pattern)	(USF) Select the pattern that applies to this rating model. This field appears for U.S. Federal users only.

General Tab

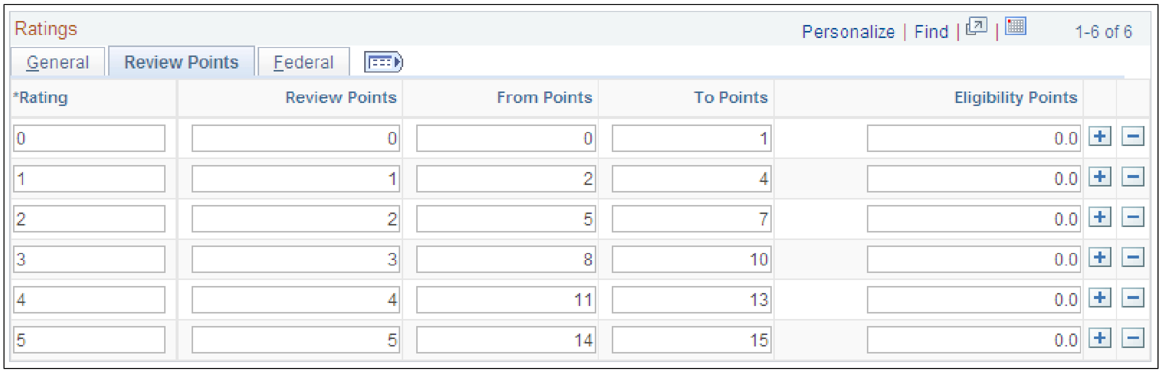
Define all possible rating levels that can be used to evaluate an employee when this rating model is used. At least two rating levels are required. You can add as many rows as necessary.

Field or Control	***Description***
Rating	Enter an alphabetic or numeric code for the rating. This is sometimes referred to as the qualitative rating.
Numeric Rating	This field is used by ePerformance only. Enter a numeric value for the rating, if applicable. The value you enter serves two purposes: • For sections of a performance document that use the average calculation method, the system uses this value to calculate the section's average or weighted average. It also uses this value to calculate the average rating for each item in the section (when sub-items exist). • If you select the Show Numeric Ratings/Points check box on the Rules/Roles page (EP_TMPL_DEFN3) of the Template Definition component, the value you enter here displays next to the rating on the performance document. This feature is useful when ratings are alphabetic.
Career Strength/Development	The system uses this value when defining competencies in the Plan Careers business processes using the Manage Profiles pages. Select: *Developmnt* (development) if the rating indicates an area that needs more skill development, education, or training. *Strength* if the rating indicates an area of strength. See “Career Strength/Develop Areas Page” (PeopleSoft Human Resources Plan Careers and Successions).
	Click to display the Review Rating Explanation Page.

Review Points Tab

Access the Rating Model page: Review Points tab.

This example illustrates the fields and controls on the Rating Model page: Review Points tab. You can find definitions for the fields and controls later on this page.



*Rating	Review Points	From Points	To Points	Eligibility Points
0	0	0	1	0.0
1	1	2	4	0.0
2	2	5	7	0.0
3	3	8	10	0.0
4	4	11	13	0.0
5	5	14	15	0.0

Complete the fields on this tab if you want to associate a number of points, or a points range with each rating level defined on the General tab.

<table>
<tr><th>Field or Control</th><th>Description</th></tr>
<tr><td>Rating</td><td>The rating entered on the General tab displays here. If you change this value, the system automatically updates the Rating field on the General tab to match.</td></tr>
<tr><td>Review Points</td><td>Enter a number from 0 to 999 for the rating. This field is used by both ePerformance and Manage Profiles.

• ePerformance uses this field for section calculation using the Summation method. The system uses the review points that you enter here in its calculations.

Note: To use the Automated Step Increase process, the Summation method is required.

• Manage Profiles uses the matching function to determine how well an employee profile matches the competencies for a non-person profile. The matching function uses the review points that you enter here. Review points are also used by the Search and Compare profiles scoring algorithm.

See Understanding Profile Comparisons and Understanding Profile Matching.

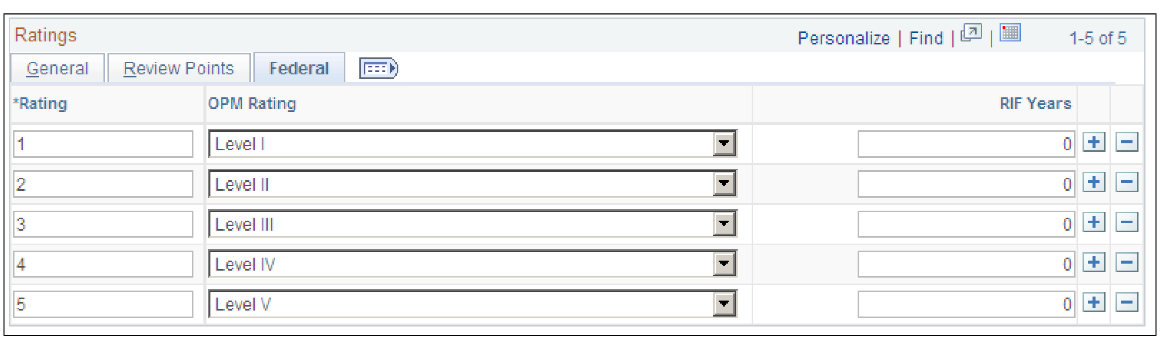
See “Understanding Salary Plans” (PeopleSoft Human Resources Manage Base Compensation and Budgeting) and “Understanding Salary Grades and Steps” (PeopleSoft Human Resources Manage Base Compensation and Budgeting).</td></tr>
</table>

Field or Control	*Description*
From Points and **To Points**	Define a range of points to associate with this rating. These points are used to convert summed-up points to either a Review Band or a qualitative rating. A Review Band is really the same as a qualitative rating. Instead of being directly assigned, it's calculated by summing points, then finding the entry in this table that contains a range of space From/To points that encloses the summed points. If **Review Band** is selected, you must enter a value in the **To Points** field. When the calculation method is Review Band, the system uses these fields to resolve the number of total points in a review to a qualitative rating. When the calculation method is Summation, the system uses these fields to resolve the number of total section points or total review points to a qualitative rating.
Eligibility Points	If applicable, enter the number of points used by the Shohkaku (JPN), or Grade Advance, eligibility feature of the Plan Salaries business process. This is used only if the **Appl for Grade Advance Prc** check box is selected on the JPN Review Definition. See "(JPN) Creating Review Identifiers" (PeopleSoft ePerformance). See "Understanding Updating Salaries for Japan" (PeopleSoft Human Resources Manage Base Compensation and Budgeting).

(USF) Federal Tab

Access the Rating Model page: Federal tab.

This example illustrates the fields and controls on the Rating Model page: Federal tab. You can find definitions for the fields and controls later on this page.



This tab appears only when **Federal** is selected on the Products page of the Installation Table and the user is logged on as a U.S. Federal user.

See "Products Page" (Application Fundamentals).

Field or Control	***Description***
OPM Rating (Office of Personnel Management rating)	Select the OPM rating that correlates with the rating level. This field is used for reporting to the Central Personnel Data File (CPDF)
RIF Years (Reduction in Force years)	Enter the number of RIF Years associated with this rating level.

Related Links

Understanding Profile Matching
Understanding Profile Comparisons
Maintaining Profiles as an Administrator

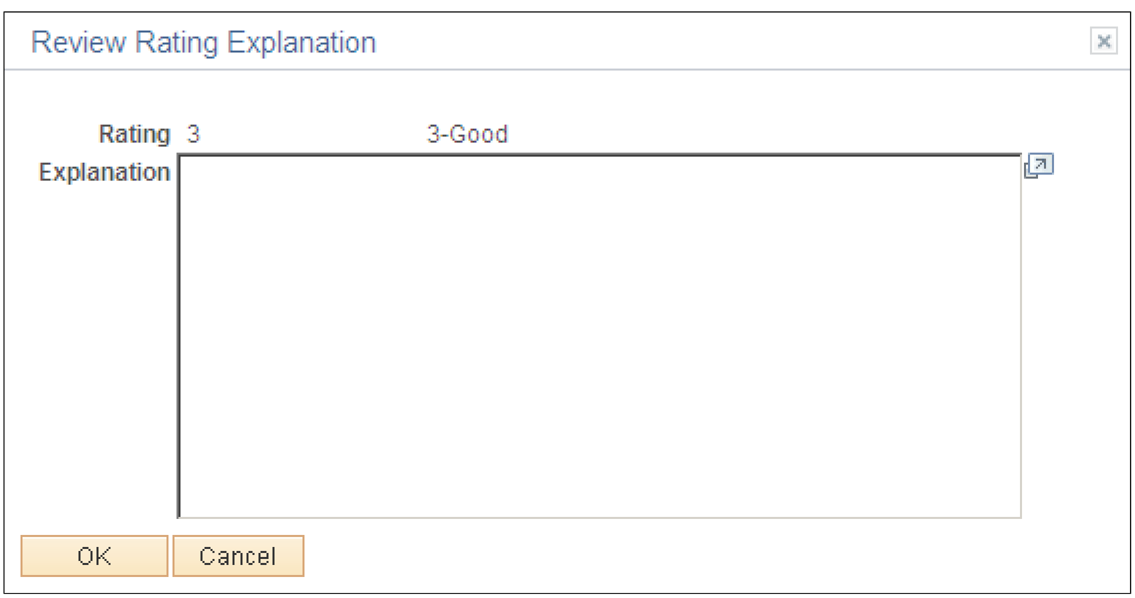
Review Rating Explanation Page

Use the Review Rating Explanation page (REVW_RATING_SEC) to add review rating explanations.

Navigation:

Click the **Rating Explanation** icon on the Rating Model page.

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



Field or Control	***Description***
Explanation	Enter a description for the rating. You can enter up to 1325 characters. This description is used by ePerformance on the performance document.

Chapter 3

Setting Up Profile Management

Understanding Profile Management

Organizations typically use two types of profile:

- Non-person profiles.

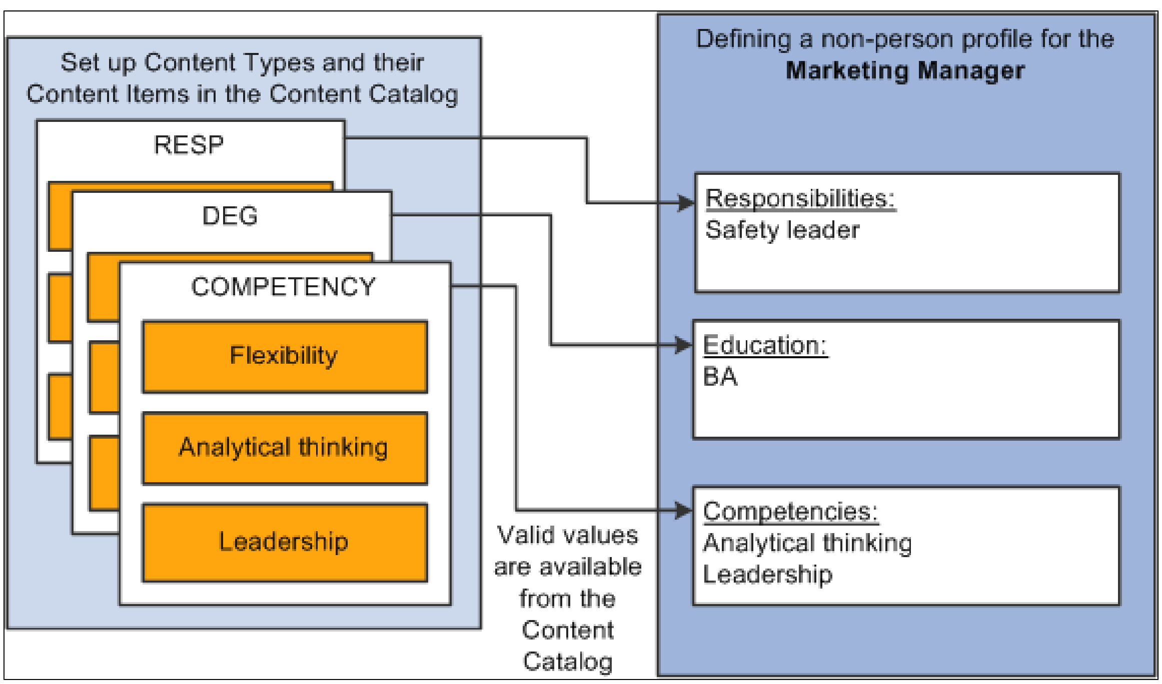
  These describe the competencies, qualifications, and responsibilities of a certain job code, position, job family, or salary grade, or other entities in the system.

- Person profiles.

  These describe people's skills, competencies, other content items such as accomplishments, and performance. Manage Profiles enables you to create profiles for employees and contingent workers. Persons of interest without a JOB record are not supported.

With the Manage Profiles business process, the content catalog provides the foundation for creating all profiles.

The following diagram provides an example of constructing a profile (a job profile for a marketing manager) by selecting from the content types and content items that are defined in the content catalog:



In the same way that you configure the content catalog to suit your organization, you define a set of profiles that are configured to your requirements. When employees, managers, and administrators create profiles they select the profile type that they want to use.

The profile type controls the following aspects of the new profile:

- The type of entities to which users can link the profile.
- The content of the profile.
- Profile security (who can update the profile).
- Whether approval is required for changes to the profile.

Entity Types

Profiles fall into two categories:

- Non-person profiles (also known as job profiles).

  These are profiles that are created for a business entity, such as a position or a job code.

- Person profiles.

  A person profile is created for a specific person ID.

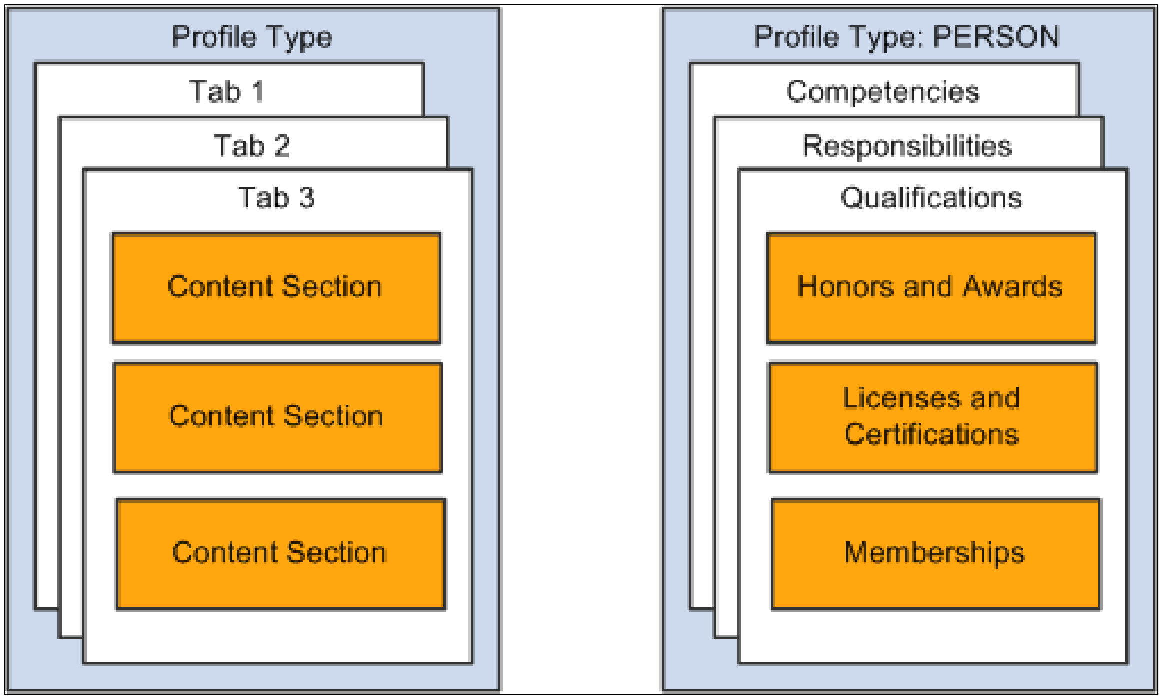
When you define a profile type, you specify the type of entities that the user can select when creating a profile. For example, suppose that you create a profile type and specify that it can be linked to job codes and salary grades. When users create a profile based on that profile type, they can only select job codes, salary grades, or both job codes and salary grades for the new profile. A profile type cannot be linked to both business entities and people. A person profile will automatically have an identifier added that is linked to the PERSON table. No other identifiers can be defined for a person profile.

The entities to which you can link a profile type are known as *profile identity options.* Use the Profile Identity Options page to maintain the list of profile identity options available.

In addition to profile identities, you can also link a profile type to entities outside the Manage Profiles business process. These entities are known as *profile association options.* ePerformance templates are linked to profile types in this way. The Association Option is used to find the ePerformance Template during the document creation process. The ePerformance template is currently the only supported external entity.

Profile Content

This diagram shows how the content of profile types (and profiles created from those profile types) is divided into tabs and content sections. The diagram shows both a generic architecture and an example where the tabs are responsibilities, competencies, and qualifications.



When you set up a profile type you define the name of each tab and the order in which they are displayed in the profile. You add one or more content types to each tab to create *content sections.* For example, the previous diagram shows a tab labelled **Qualifications** that has three content sections for three different content types or sections: Honors and Awards, Licenses and Certifications, and Memberships. When users create a profile using this profile type (PERSON), they can only add content items of the type LIC (Licenses and Certifications) to the Licenses and Certifications content section. You define the order in which the content sections are listed within the tab.

Each content section is made up of supporting properties, or fields. The content section enables you to identify fields such as the content item, such as the specific degree required or earned, and other associated data, such as the school name and dates. For example, you can enter that a person received a Bachelors of Science in June of 2007.

Note: The profile type definition does not include content items. The purpose of the profile type is to provide the structure for the new profile and not the detailed content. Users select content items from a prompt list when they create a profile.

Property categories are associated with each field property, which enables you to easily retrieve the fields you want to include in a content section. Profile properties are organized into the following property categories:

Property Category	***Usage***
Career Properties	Properties tied to the delivered Mobility content types: Location Preference, Geographic Preference, International Preference, and Travel Preference. (If properties are used in any custom content, then the defaulting behavior of some of these properties cannot be guaranteed.).
Common Properties	Properties used for multiple content sections. A specific set of translate values or a prompt table is tied to each property.
Country Properties	Properties tied to the delivered education content sections: School Education, Degrees, and Area of Study. These properties are organized in separate page country specific sections and most have specific translate values or prompt lists tied to them.
Education Properties	Non-country specific properties tied to the delivered education content sections: School Education, Degrees, and Area of Study.
Key Properties	Properties that are part of the record key structure and special process indicator properties.
User Defined Properties	Properties can be used for extending delivered content sections or defining new content sections. The following types are provided: Integer Decimal Percent Check box Date Text (254) Text (1325) Custom prompt (12 characters)

See also “Defining Education-Related Information” (Application Fundamentals).

Profile Security

When you set up a content section, you specify the Profile Management roles that can view that section of the profile. This enables you to display or hide sections to different types of users. There is an additional check box that enables you to control which roles can update the items in the section. There are three roles available:

- Administrator

  The administrator is any user who has access to the Profile Management menu in Workforce Development.

- Manager

  Managers are users that can access the self-service transactions for managing profiles, using the Manager Self Service menu.

- Employee

  Employees use employee self service to access the profile management self-service transactions.

The manager and employee self service transactions are delivered in PeopleSoft eDevelopment.

See PeopleSoft eDevelopment.

Profile Approvals

Approvals processing is an optional aspect of profile management. If you want to use approval workflow to control changes to profiles, you:

1. Set up approval processing using the standard Approvals Framework engine.
2. Associate the approvals definition with the profile type.

   On the Profile Type - Attributes page, you define one approvals workflow transaction and one approvals definition for the profile type.
3. Specify whether identities require approval (non-person profile types only).

   You can specify that approvals workflow is triggered when users add or change the profile identities associated with a non-person profile. To do this, select the **Approval Req'd for Identities** check box on the Profile Types - Identities page. This applies to non-person profile types only. The check box is not available when you are working with person profile types.
4. Specify which content section roles require approval.

   Each content section within a profile type has an **Approval Required** check box per security role that controls whether changes to that content section require approval by the designated person or role. If you have set up approval processing for a content section when users add items to a profile, delete existing items, or modify existing items, this initiates the approvals process.
5. (Optional) Add properties to content sections to track workflow status.

   You should add the workflow status property (JPM_WF_STATUS) to content sections that require approval to enable users to view the status of profile items as they are processed by the Approvals

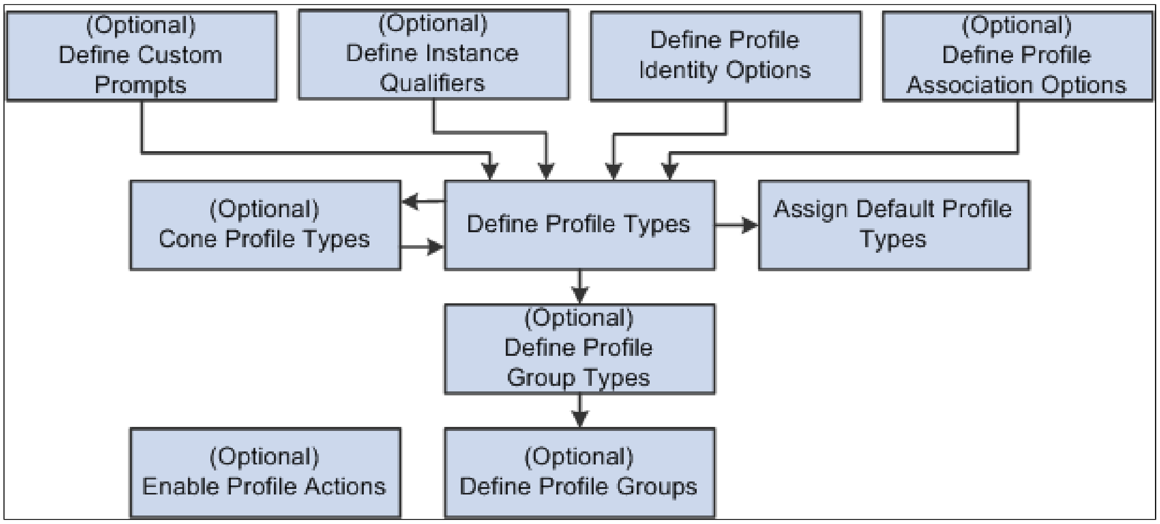
Framework. Other useful properties for tracking approval are the last updated date and time property (LASTUPDDTTM), and the last updated user ID property (LASTUPDOPRID).

See “Understanding Approvals” (Application Fundamentals).

See Content Section Page.

Manage Profiles Setup

This diagram illustrates the optional and required steps for setting up profile management:



To set up profile management you define the following:

- (Optional) Custom Prompts.
- Custom prompts are used to define the prompt list for the JPM_PROMPT properties which allows you to customize the list of values that is permitted to be entered.
- (Optional) Instance qualifiers.

  Instance qualifiers are used as additional key fields for a profile item. They can prompt off of a table or the valid values can be defined within the instance qualifier. Instance qualifiers are used to identify who updated the profile or the type of evaluation. You can also use instance qualifiers to restrict the profile item rows that are visible to employees and managers using self-service transactions.
- Profile Identity Options.
- (Optional) Profile Association Options.

  Note: You do not need to define profile association options for the Manage Profiles business process. However, if you have installed ePerformance and you want to use profile content to create performance or development documents, you must define profile association options for ePerformance.
- Profile Types and Clone Profile Types.

To facilitate profile type creation, the system enables you to copy an existing profile type through the Clone Profile Types Application Engine process. You can then modify the new profile type using the Profile Types component.

Note: Profile Type configurations are delivered for CLUSTER, ROLE, JOB, and PERSON. It is strongly recommended that if changes need to be made to these types, this should be done by adding a new effective dated entry for the profile type. Caution should be used when changing ROLE and PERSON content sections since there may be existing integration requirements. Refer to the topic Manage Profiles Integrations to determine the business processes that leverage profile content. Caution must be taken in the removal of delivered properties since there may be processing tied to the property.
New properties should not be specified with an attribute of **Required** if profile data already exists. It is recommended that the **Maximum Length** value not be changed to avoid possible truncation during integration with other products.

See Manage Profiles Integrations.

- Assign Default Profile Types.

  The system uses the primary person and non-person profile types for products that need to interact with Profile Management.

- (Optional) Profile Group Types and Profile Groups.

  Profile group types and profile groups enable you to categorize profile types. Profile group types are defined as either person or non-person. Profile groups are used as search criteria in the search and compare profiles feature to filter the search results.

- (Optional) Profile Actions (for Classic only)

  Profile actions enable administrators, managers, and employees to perform transactions directly from the non-person profile and person profile pages.

Note: Before you can use Manage Profiles, you must also set up the installation settings on the Profile Management Installation page. This is described in the next section.

Related Links

Understanding Setting Up Search and Compare Profiles

(Classic) Searching and Comparing Profiles

(Fluid) Searching and Comparing Profiles

Common Elements Used to Set Up Profiles

Field or Control	***Description***
Sys Data or **System Data** (system data)	This check box appears on setup pages for instance qualifiers, profile identities, profile associations, and profile types. It is system-maintained and indicates if the data is delivered as system data. When this check box is selected, the row of data is display-only.

Configuring Manage Profiles

To configure Manage Profiles, use the Profile Mgmt Installation (JPM_INSTALLATION) component.

This topic discusses how to configure Manage Profiles installation settings.

Page Used to Configure Manage Profiles

Page Name	***Definition Name***	***Usage***
Profile Management Installation Page	JPM_INSTALLATION	Define installation settings for the Manage Profiles business process. This includes setting up the profile ID length and the last numbers used for profile ID and approval transaction. You complete this page once during implementation only.

Profile Management Installation Page

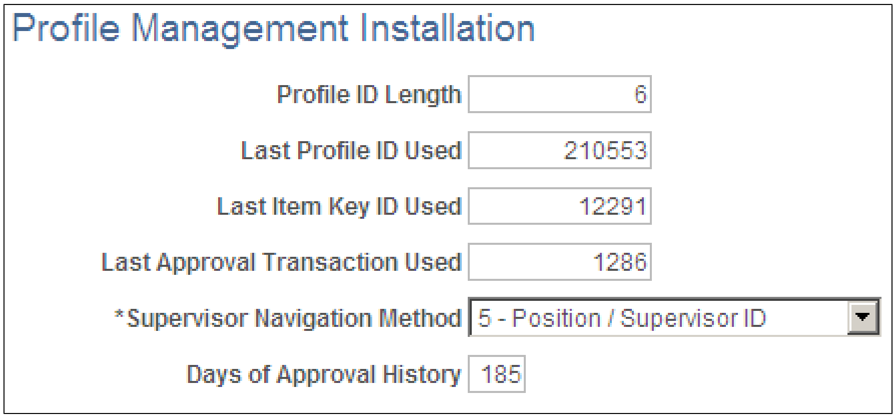
Use the Profile Management Installation page (JPM_INSTALLATION) to define installation settings for the Manage Profiles business process.

This includes setting up the profile ID length and the last numbers used for profile ID and approval transaction. You complete this page once during implementation only.

Navigation:

Set Up HCM > **Install** > **Product Specific** > **Profile Mgmt Installation** > **Profile Management Installation**

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



Field or Control	***Description***
Profile ID Length	Enter the number of characters in the profile ID. The maximum profile ID length is defined in Application Designer and the system displays an error message if you enter a length that exceeds this maximum.
Last Profile ID Used	To let the system assign numbers for profile IDs, enter the last number that you used. The system automatically increases the number in this field each time that it assigns a new profile ID. You can manually assign profile IDs to non-person profiles when you create the profile. **Note:** To avoid maintaining two different sets of numbers, either always assign profile IDs manually or always let the system do it.
Last Item Key ID Used	Displays the last number used to identify items on profiles. The system automatically assigns an item key ID to each content item added to a profile. The field is set to *1* at installation and the system automatically increases the number in the field each time you add content items to a profile. **Note:** The item key ID is not visible to users when setting up or using profiles.
Last Approval Transaction Used	Displays the last approval transaction number. The system automatically increases the number in the field each time that an approval transaction for Manage Profiles is generated. See “Understanding Approvals” (Application Fundamentals).

Field or Control	***Description***
Supervisor Navigation Method	Select the method that is used by the Schedule Search index process to determine supervisor relationships when building manager security for the Profile Management indexes. Select from these options: *2 - Supervisor Id, 3 - Department Manager ID, 4 - Reports To Position, 5 - Position / Supervisor ID,* or *6 - Position / Dept Manager.* See Understanding Setting Up Search and Compare Profiles.
Days of Approval History	Enter the number of days of approval history that is available from the Person or Non-person Profile pages. Links on the profile pages indicate how many profile items have been approved or denied approval over a period that is determined by the setting of **Days of Approval History** field. When users view a profile, the system checks the approval history for the period between the system date (current date) and the system date minus the number of days you specify in this field. For example, if you enter *31* days in this field and the system date is August 2, the system checks for profile items that have been approved or denied in the period July 2 to August 2.

Related Links

Understanding Managing Profiles

"Pending Items Page, Denied Items Page, or Approved Items Page" (PeopleSoft eDevelopment)

Defining Custom Prompts

To set up custom prompts, use the Custom Prompt (JPM_C_LIST_VALUES) component.

These topics provide an overview of custom prompts and discuss how to define custom list values.

Pages Used to Define Custom Prompts

Page Name	***Definition Name***	***Usage***
Custom Prompt Page	JPM_C_LIST_VALUES	Use the Content Prompt page (JPM_C_LIST_VALUES) to define customized prompt values that will be used to define valid values for custom lists, such as level of difficulty and ePerformance item statuses, or identify a prompt record from which to provide a list.

Understanding Custom Prompts

Prompt lists can be configured for certain properties. The Content Catalog contains a single property, EP_SUB_LEVEL (specific to ePerformance use), that permits a list of values to be configured. Profile Type content section definitions can leverage the special properties JPM_PROMPT_1 through JPM_PROMPT_20. These properties give you the ability of adding fields to a content section within the profile that have a customized list of values. The PeopleSoft application enables administrators the ability to define a customer list of values for the following fields:

- EP_SUB_LEVEL - This is the only Content Item property that leverages a custom prompt.
- JPM_PROMPT_1 through JPM_PROMPT_20.

The prompt list is defined separately from the property. This means that the property could have a different set of prompt values within each of the content sections in which it is used. For example, in one profile item a person may have the choice of selecting a level of difficulty *Advanced, Basic,* or *Intermediate,* while in another profile item a person may have the choice of selecting from values such as *Minimum, Basic,* or *Stretch.* The Custom Prompt page enables organizations to change or add prompt values for these fields. On the Content Types page: Property Attributes tab you select which custom list to use for the EP_SUB_LEVEL content item property. On the Profile Type - Content Section page, a custom list can be assigned to the properties JPM_PROMPT_1 through JPM_PROMPT_20 to configure the list of values for a profile item field.

The ePerformance business process also uses the Content Catalog to obtain content items. Through this integration, administrators can create custom lists for the EP_ITEM_STATUS and the **Level of Difficulty** (EP_SUB_LEVEL) fields on the ePerformance template and document. The EP_ITEM_STATUS field is used only by ePerformance and is not leveraged by the Content Type or Profile Type configurations.

This tables shows the custom lists delivered as system data:

Where you can add the custom prompt field	***Field Name***	***Prompt List Name***	***Description***	***List Values***
Content Types component	EP_SUB_LEVEL	EP_SUB_LEVEL	Level of Difficulty	• A - Advanced • B - Basic • I - Intermediate
Profile Types component - Content Sections page	JPM_PROMPT_1 through JPM_PROMPT_20	Varies based on custom prompt lists you have created.	Varies based on customer prompt list descriptions you have entered.	Varies based on customer prompt list values or record you have entered on the Custom Prompt page for the custom prompt.

Note: The EP_SUB_LEVEL field is delivered in the Content Catalog in the *SUB_COMP* (Sub-Competencies) content type only. You can create or update other content types to include this property, or field, if necessary.

Related Links

"Defining Sections" (PeopleSoft ePerformance)

Setting Up Profile Types

Setting Up Content Types and Properties

Content Section Page

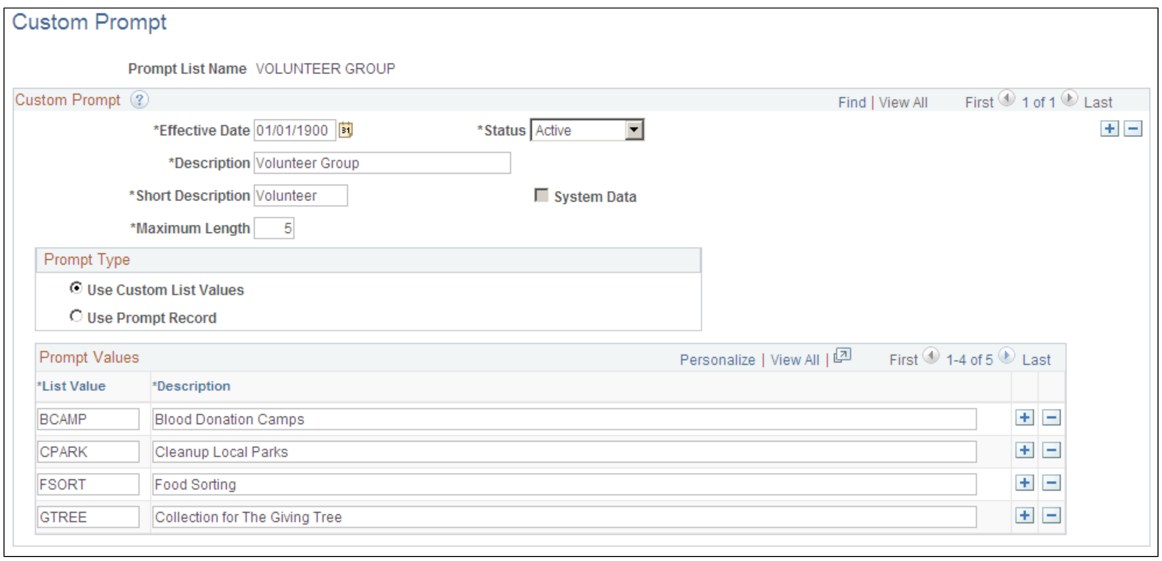
Custom Prompt Page

Use the Custom Prompt page (JPM_C_LIST_VALUES) to define customized prompt values that will be used to define valid values for custom lists, such as level of difficulty and ePerformance item statuses, or identify a prompt record from which to provide a list.

Navigation:

Set Up HCM > **Product Related** > **Profile Management** > **Profiles** > **Custom Prompt** > **Custom Prompt**

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



Field or Control	*Description*
Prompt List Name	Enter the code that identifies this custom list.
Description	Enter the description of the custom prompt list. The description will display in the **List** field under the Property Attributes tab on the Content Types page or the Content Section page of the Profile Type. See Content Types Page.
System Data	Indicates if this is delivered data. Custom prompt values with this check box selected are delivered with the system.

Field or Control	***Description***
Maximum Length	Enter the length of the custom list value. Defaults to 12, which is consistent with other profile item values. However, the delivered *EP_SUB_LEVEL* custom prompt has a length of 1. **Note:** If the custom prompt list is created for use in ePerformance as section item statuses, you must set the maximum length to *1*.

Prompt Type

Custom prompt definitions support two types of list formats: a customized list defined on the custom prompt or an external prompt record.

Field or Control	***Description***
Use Custom List Values	Select this type to identify an internal self-contained list maintained within the custom prompt definition. When you select this option, the page displays the Prompt Values group box, where you will enter a list of valid prompt values from which the user can select.
Use Prompt Record	Select this type to use an external prompt table that the custom definition is associated with. When you select this option, the page displays the **Record Name** field. **Note:** Only tables with a single key, other than SET ID or EFFDT, are supported.
Record Name	Indicate the external table that should supply the prompt values. **Note:** When using an external table as a prompt, consider the following: –The key field must be defined with the CHAR data type. –The key data length cannot be greater than the property data length. –The record must contain a description field. –When you select a record that uses a SET ID as a high-level key, the system determines the SET ID based on the default values from the Org Defaults by Permission List component (see “Setting Up Primary Permission List Preferences” (Application Fundamentals)).

Prompt Values

Use this section to enter the valid values you want to include in your custom prompt list.

Field or Control	*Description*
List Value	Enter a code, up to 12 characters, to identify the list value. Codes must be unique only within the same custom prompt definition. **Note:** If the custom prompt list is created for use in ePerformance as section item statuses, enter a 1-character code as the list value.
Description	Enter the name of the value that the system will display. This text appears when the page displays the custom prompt field as a drop down list.

Defining Instance Qualifiers

To define your instance qualifier sets, use the Instance Qualifiers (JPM_JP_INST_QUAL) component.

These topics provide an overview of instance qualifiers, instance qualifier integration, and discuss how to set up instance qualifiers.

Page Used to Define Instance Qualifiers

Page Name	*Definition Name*	*Usage*
Instance Qualifiers Page	JPM_JP_INST_QUAL	Define instance qualifiers for a content type, and define which instance qualifiers employees and managers can view.

Understanding Instance Qualifiers

Instance qualifiers, or instance qualifier sets, are an optional element of profile types, used to uniquely identify a profile item. They can be used to add an additional key to the profile item, where needed for a certain type of content. Normally, a profile item is uniquely identified by the content type and item identifier. In some cases, such as the Degree content, an additional key (Major) is required to uniquely describe the item.

Define instance qualifiers in one of two ways:

- By selecting a record in the database.

For example, if you specify the PERSON_NAME record, the person ID is the instance qualifier.

- By entering the values of each instance qualifier.

  When you define instance qualifiers in this way you can also specify those that employees and managers can view using self-service. This is useful if, for example, you don't want employees to view ratings given by peers, or you want to prevent employees and managers from viewing evaluations made by an executive committee.

Once you have set up instance qualifier sets you link them to content sections in the profile type. When users add a content item or update an item in a section that includes instance qualifiers, they select the instance qualifier that is inserted in that row. You can link a content section with up to two instance qualifier sets.

Note: The instance qualifier properties must be included in the content section definition in order for users to be able to select an instance qualifier when they add or update profile items.

These are the properties for instance qualifiers:

- JPM_CAT_ITEM_QUAL (instance qualifier 1).

  The instance qualifier 1 field can only be associated with instance qualifier sets where you define each value.

- JPM_CAT_ITEM_QUAL2 (instance qualifier 2).

  The instance qualifier 2 field can only be associated with instance qualifier sets defined by a record.

The delivered PERSON profile type includes three content sections, Competencies, Degrees, and NVQs, that are configured to use instance qualifiers.

This table lists the instance qualifier fields, the field name, and the instance qualifier sets for the Competencies section:

Field	***Field Label***	***Instance Qualifier Set***
JPM_CAT_ITEM_QUAL	Evaluation Type	EVAL_TYPE
JPM_CAT_ITEM_QUAL2	Reviewer ID	REVIEWER_ID

This table lists the instance qualifier field, the field name, and the instance qualifier set for the Degree section:

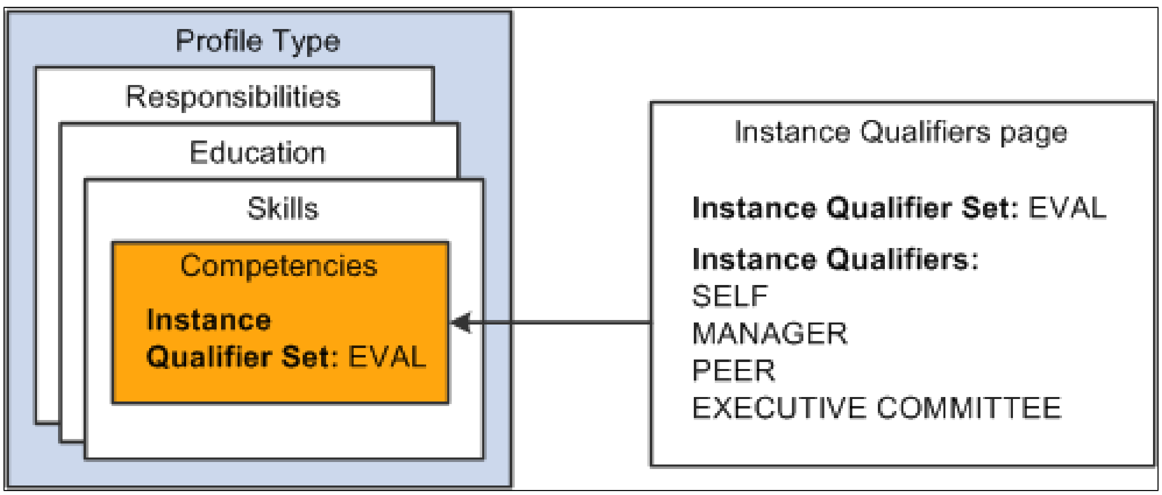
Field	***Field Label***	***Instance Qualifier Set***
JPM_CAT_ITEM_QUAL2	Major Code	MAJOR

This lists the instance qualifier fields, the field name, and the instance qualifier sets for the NVQ section:

Field	Field Label	Instance Qualifier Set
JPM_CAT_ITEM_QUAL	Review Type	REVIEW_TYPE
JPM_CAT_ITEM_QUAL2	Reviewer ID	NVQ_REVIEWER

Example: Using Instance Qualifiers

This diagram illustrates how a section within a profile can be linked to a set of instance qualifiers. In this example, the tab called Skills contains a content section for the COMPETENCY content type, and this section is linked to a set of instance qualifiers called EVAL with qualifiers that describe the source of the competency rating.



Suppose that an employee creates a profile, and he or she adds the competencies Abstract Thinking and Analytical Thinking to the profile, and enters a rating. The system creates two profile items with the following information:

Profile Item	Effective Date	Rating	Instance Qualifier
Abstract Thinking	April 16, 2014	3 (Good)	SELF
Analytical Thinking	April 16, 2014	5 (Expert)	SELF

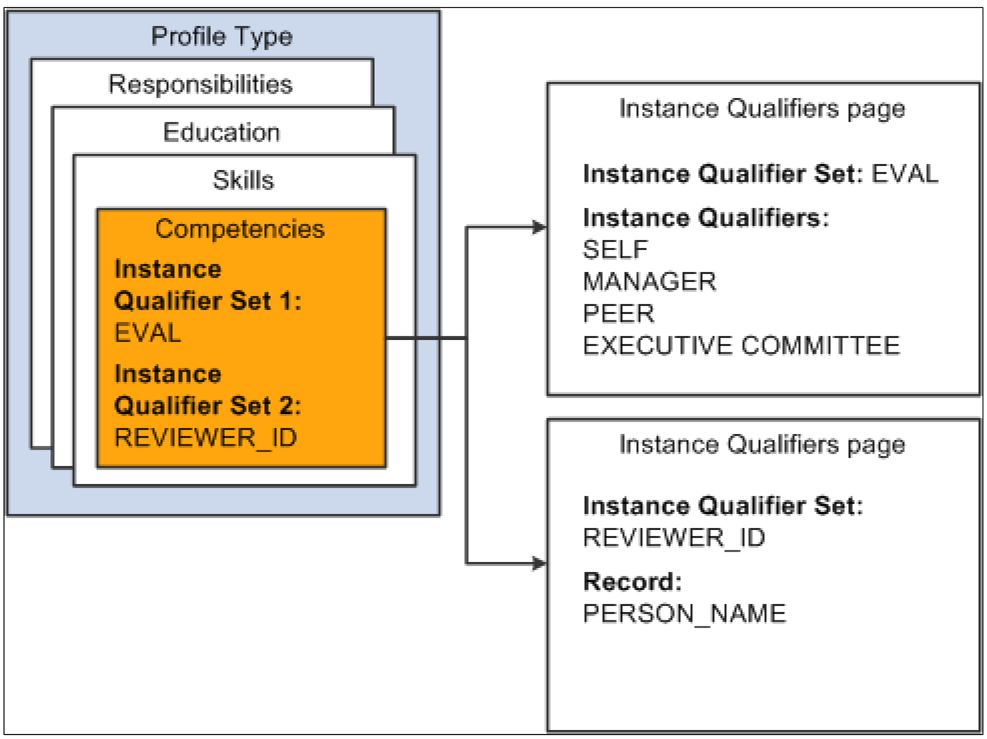
If the manager reviews the employee's profile and adds a rating for the competencies, the profile now contains these rows for the profile items:

Profile Item	Effective Date	Rating	Instance Qualifier
Abstract Thinking	April 16, 2014	3 (Good)	SELF

Profile Item	***Effective Date***	***Rating***	***Instance Qualifier***
Abstract Thinking	April 16, 2014	4 (Very Good)	MANAGER
Analytical Thinking	April 16, 2014	5 (Expert)	SELF
Analytical Thinking	April 16, 2014	4 (Very Good)	MANAGER

Example: Using Two Instance Qualifier Sets

You can link a content section with up to two instance qualifier sets. Using the previous example, suppose that the Competencies section is linked to the EVAL instance qualifier set and a second instance qualifier set (REVIEWER_ID) that is linked to the PERSON_NAME record, as illustrated in this diagram:



Using two qualifier sets you can uniquely identify rows that have the same instance qualifier 1. For example, if a person is evaluated by a committee you can use the instance qualifiers to record the ratings given by each member of the committee. This table shows the rows created for each committee member's evaluation of the same profile item:

Profile Item	***Effective Date***	***Rating***	***Instance Qualifier 1***	***Instance Qualifier 2***
Abstract Thinking	May 14, 2014	3 (Good)	EXECUTIVE COMMITTEE	KU0045

Profile Item	***Effective Date***	***Rating***	***Instance Qualifier 1***	***Instance Qualifier 2***
Abstract Thinking	May 14, 2014	5 (Expert)	EXECUTIVE COMMITTEE	KU0016
Abstract Thinking	May 14, 2014	4 (Very Good)	EXECUTIVE COMMITTEE	KU0119

Note: Since the Instance Qualifier defines key data, the profile type content section configuration should not be modified to remove an Instance Qualifier once profile items for that content type already exist. You cannot remove an Instance Qualifier value from the profile item retroactively.

Understanding Instance Qualifier Integration

Applications that publish data to Manage Profiles can use instance qualifiers. In ePerformance, when you define a document template, you can specify the instance qualifier to use for each role that participates in a performance or development document. When users complete the document, the system updates the person profile data in Manage Profile using the instance qualifier specified.

In PeopleSoft Enterprise Learning Management, you can also specify the instance qualifier that the system uses when publishing profile data to PeopleSoft HCM. When learners complete learning objectives that came from HCM, the system marks the objective as *Met* and publishes profile data to HCM, using the specified instance qualifier value.

See product documentation for *PeopleSoft Enterprise Learning Management*.

Related Links

"Section Definition Page" (PeopleSoft ePerformance)

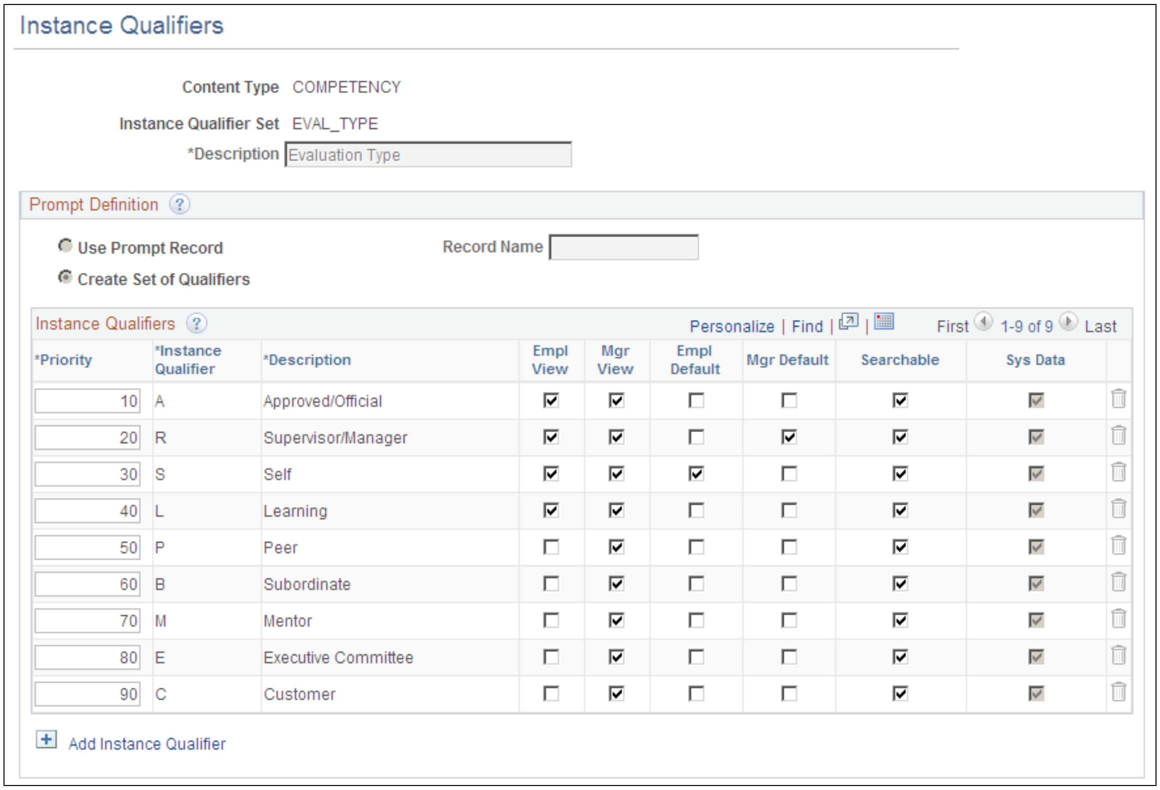
Instance Qualifiers Page

Use the Instance Qualifiers page (JPM_JP_INST_QUAL) to define instance qualifiers for a content type, and define which instance qualifiers employees and managers can view.

Navigation:

Set Up HCM > **Product Related** > **Profile Management** > **Profiles** > **Instance Qualifiers** > **Instance Qualifiers**

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



Field or Control	***Description***
Use Prompt Record	Select to use a record in the database as the instance qualifiers. For example, you might use the PERSON_NAME record as the instance qualifier. The system makes the **Record Name** field available and hides the **Instance Qualifiers** grid area. When you define a content section in a profile type, instance qualifiers that use a prompt record can be associated with the **Instance Qualifier 2** field only. You can't specify instance qualifiers that use a prompt record in the **Instance Qualifier 1** field.
Record Name	Select the record that contains the instance qualifiers. This field is available only if you select **Use Prompt Record.**
Create Set of Qualifiers	Select to create a new set of instance qualifiers in the Instance Qualifiers grid area. When you select this radio button, the **Record Name** field becomes unavailable and displays the Instance Qualifiers grid area. Instance qualifiers of this type can be associated with the **Instance Qualifier 1** field on the Content Section page; they can't be specified in the **Instance Qualifier 2** field.

Instance Qualifiers

Field or Control	***Description***
Priority	Enter a number that indicates the priority of the instance qualifier. The priority increases as the number decreases, so that the instance qualifier with the lowest number is considered the highest priority. The Schedule Search Index process that builds the search indexes for the Search and Compare Profiles feature also uses this field. The process uses the priority value to determine which profile item row is included in the index. The process includes the row that has the instance qualifier with the highest priority (lowest number). See Building the Search Indexes.
Instance Qualifier	Enter the instance qualifier code and enter a description in the **Description** field.
Empl View (employee view)	Select this check box to enable employees to view rows in a profile that are assigned the selected instance qualifier.
Mgr View (manager view)	Select this check box to enable managers to view rows in a profile that are assigned the selected instance qualifier.
Empl Default (employee default)	Select this check box to specify the instance qualifier that is automatically used in the employee self-service transactions. If you select a check box in this column, when employees add or update rows in self-service, the system inserts the selected instance qualifier and employees cannot change the instance qualifier.
Mgr Default (manager default)	Select this check box to specify the instance qualifier that is automatically used in the manager self-service transactions. If you select a check box in this column, when managers add or update rows in self-service, the system inserts the selected instance qualifier and managers cannot change the instance qualifier.

Field or Control	*Description*
Searchable	Select this check box if you want profile items with the selected instance qualifier to be included in the search indexes. The Schedule Search Index process uses this field to determine which profile item rows are included in the search indexes that are used by the Search and Compare Profiles feature. If the **Searchable** check box is not selected, any profile item rows that are assigned the selected instance qualifier are always excluded from the search index.

Setting Up Profile Identity and Association Options

To set up profile identity options and profile association options for your organization, use the Profile Identity Options (JPM_RLAT_SETUP) and the Profile Association Options (JPM_RLAT_ASC_SETUP) components.

These topics discuss how to set up profile identity and association options.

Pages Used to Define Profile Identity and Association Options

Page Name	*Definition Name*	*Usage*
Profile Identity Options Page	JPM_RLAT_SETUP	Define profile identity options, which can be linked to profile types. Entities include job codes, job functions, job families, people, and salary grades. The entities enabled on this page determine which options are available on the Identities page of the Profile Type component that defines the structure of a non-person profile. For example, if you enable Job Codes you can set up a profile type that is linked to job code. A set of default profile identity options is delivered but you can add to the list according to your requirements.
Profile Association Options Page	JPM_RLAT_SETUP	Define the entities external to the Manage Profiles business process to which you can link profile types. One association option is delivered that enables you to link a profile type to ePerformance templates. The addition of other associations would require customizations to leverage it.

Common Elements Used to Define Profile Identity and Association Options

Field or Control	***Description***
Identity Option	Enter the name of the entity to which you can link a profile. For the delivered identity and association options, this field is display-only. Identity options are entities within the Profile Management business process, such as job code or position, whereas association options are entities external to the Profile Management business process. One association option is delivered that enables you to associate a profile type to an ePerformance template to automatically resolves which template is selected during document creation process.
Enabled	Select this check box to allow profile types to be linked to the entity specified in the **Identity Option** field.
Record Name	Select the record that defines the entity specified in the **Identity Option** field. This field is display-only for identity options that are delivered as system data **(Sys Data** check box is selected).
Key 1 Field Name	Displays the key field for the record selected in the **Record Name** field.
Key 2 Field Name, Key 3 Field Name, Key 4 Field Name	Displays the additional key fields for the record. These fields are hidden if the record has one key field only.
SetID	Indicates if SetID is a key field for the selected record. The system automatically selects this check box based on the record definition and makes the field display-only.
Eff Date (effective date)	Indicates if the effective date field is a key field for the selected record. The system automatically selects this check box based on the record definition and makes the field display-only.

Profile Identity Options Page

Use the Profile Identity Options page (JPM_RLAT_SETUP) to define profile identity options, which can be linked to profile types.

Entities include job codes, job functions, job families, people, and salary grades. The entities enabled on this page determine which options are available on the Identities page of the Profile Type component that defines the structure of a non-person profile. For example, if you enable Job Codes you can set up a profile type that is linked to job code.

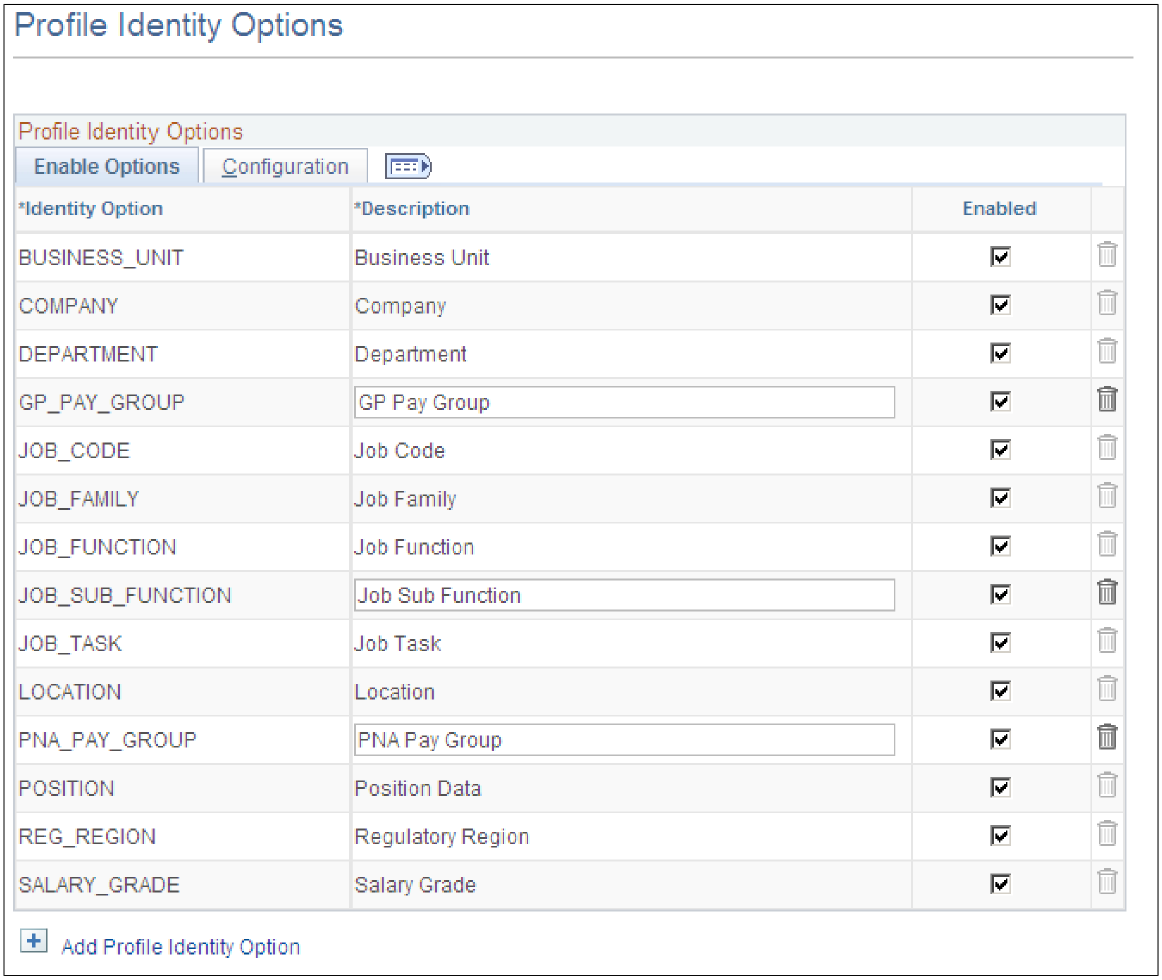
A set of default profile identity options is delivered but you can add to the list according to your requirements.

Only those records that are used for prompting on JOB and JOB_JR non-key record fields can be selected. Person profile identifiers cannot be defined.

Navigation:

Set Up HCM > Product Related > Profile Management > Profiles > Profile Identity Options > Profile Identity Options

This example illustrates the fields and controls on the Profile Identity Options page: Enable Options tab. You can find definitions for the fields and controls later on this page.



Field or Control	***Description***
Add Profile Identity Option	Click this link to add a new profile identity option.

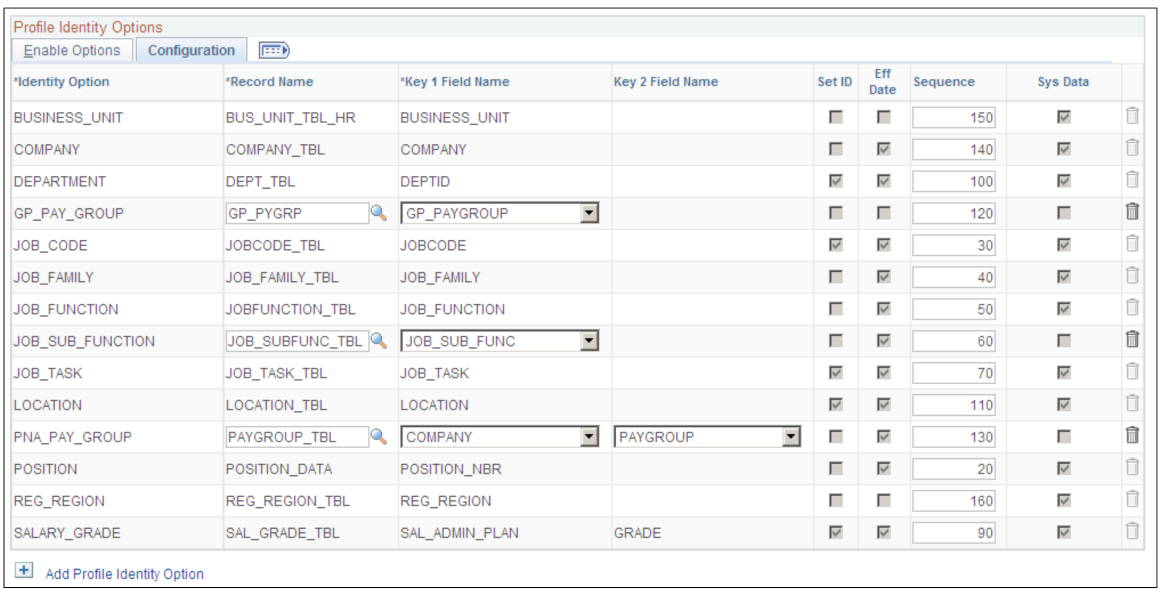
Enable Options Tab

Field or Control	***Description***
Enabled	Select this check box to allow profile types to be linked to the entity specified in the **Identity Option** field. If this check box is deselected, you cannot set up a profile type with this entity. For example, if you deselect the check box for the *Job_Sub_Function* option, you cannot define a profile type using the *Job_Sub_Function* profile identity option.

Configuration Tab

Access the Configuration tab on the Profile Identity Options page.

This example illustrates the fields and controls on the Profile Identity Options page: Configuration tab. You can find definitions for the fields and controls later on this page.



Profile Identity Options

Enable Options | Configuration

*Identity Option	*Record Name	*Key 1 Field Name	Key 2 Field Name	Set ID	Eff Date	Sequence	Sys Data
BUSINESS_UNIT	BUS_UNIT_TBL_HR	BUSINESS_UNIT				150	
COMPANY	COMPANY_TBL	COMPANY				140	
DEPARTMENT	DEPT_TBL	DEPTID				100	
GP_PAY_GROUP	GP_PYGRP	GP_PAYGROUP				120	
JOB_CODE	JOBCODE_TBL	JOBCODE				30	
JOB_FAMILY	JOB_FAMILY_TBL	JOB_FAMILY				40	
JOB_FUNCTION	JOBFUNCTION_TBL	JOB_FUNCTION				50	
JOB_SUB_FUNCTION	JOB_SUBFUNC_TBL	JOB_SUB_FUNC				60	
JOB_TASK	JOB_TASK_TBL	JOB_TASK				70	
LOCATION	LOCATION_TBL	LOCATION				110	
PNA_PAY_GROUP	PAYGROUP_TBL	COMPANY	PAYGROUP			130	
POSITION	POSITION_DATA	POSITION_NBR				20	
REG_REGION	REG_REGION_TBL	REG_REGION				160	
SALARY_GRADE	SAL_GRADE_TBL	SAL_ADMIN_PLAN	GRADE			90	

Add Profile Identity Option

Field or Control	***Description***
Sequence	Enter the number that determines the order in which non-person profiles related to a person's job are listed. The system uses the sequence value as follows: • On the Person Profile page, when you select *View Related Job Profiles* in the **Profile Actions** field, the system uses the sequence values to define the order in which the related profiles are listed. Profiles with the lowest sequence number are displayed first. • In eDevelopment, when employees select **My Job Profiles,** the system uses the sequence values to define the order in which the related profiles are listed. Profiles with the lowest sequence number are displayed first. • In ePerformance, when you are creating a document for an employee, the system retrieves all matching job profiles for an employee and then copies content from the profile with the highest priority (lowest sequence value).

See Common Elements Used to Define Profile Identity and Association Options.

Profile Association Options Page

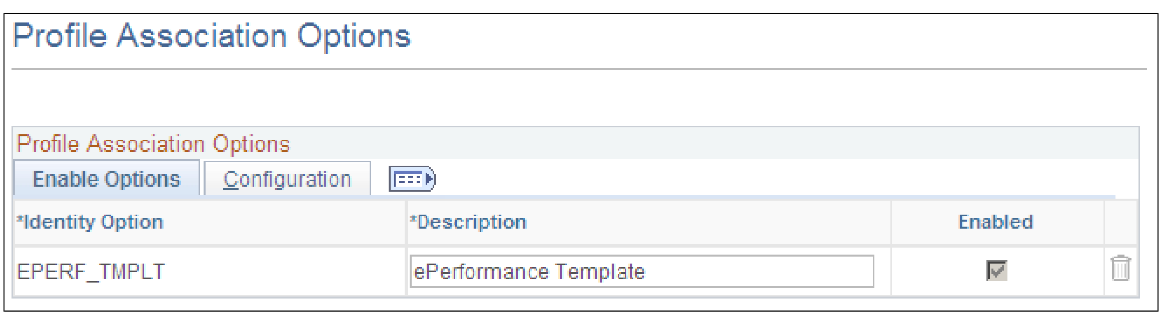
Use the Profile Association Options page (JPM_RLAT_SETUP) to define the entities external to the Manage Profiles business process to which you can link profile types.

One association option is delivered that enables you to link a profile type to ePerformance templates. The addition of other associations would require customizations to leverage it.

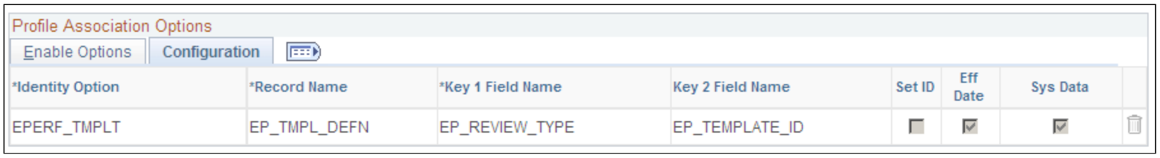
Navigation:

Set Up HCM > **Product Related** > **Profile Management** > **Profiles** > **Profile Association Options** > **Profile Association Options**

This example illustrates the fields and controls on the Profile Association Options page: Enable Options tab. You can find definitions for the fields and controls later on this page.



This example illustrates the fields and controls on the Profile Association Options page: Configuration tab. You can find definitions for the fields and controls later on this page.



Use this page to define the entities external to the Manage Profiles business process to which you can link profile types. ePerformance Template is a delivered profile association option. The addition of other associations would require customizations to leverage. Enter the identity option on the **Enable Options** tab. Enter the record name and key field information on the Configuration tab.

Field or Control	***Description***
Add Profile Association Option	Click this link to add a new profile association option.

See Common Elements Used to Define Profile Identity and Association Options.

Setting Up Profile Types

To set up profile types, establish the person and non-person profile types for other business modules, and assign the default person and non-person profile types, use the Profile Types (JPM_JP_TYPES), Clone Profile Types (RUNCTL_JPM_CLONE), and Assign Default Profile Types (JPM_DFLT_JP_TYPES) components.

These topics discuss how to set up profile types.

Pages Used to Set Up Profile Types

Page Name	***Definition Name***	***Usage***
Profile Types - Attributes Page	JPM_JP_TYPE_ATTRIB	Set up profile type attributes. Define basic details of the profile type identifying the type of profile. If the profile type is associated with approvals workflow, specify the transaction and the approval definition on this page.
Profile Types - Identities Page	JPM_JP_TYPE_IDENT	Define profile type identities by selecting the identity options to which the profile type is linked. You can also enable an identity to participate in the job profile acknowledgement process.

Page Name	**Definition Name**	**Usage**
Profile Types - Content Page	JPM_JP_TYPE_CONT	Define profile type content. The content of a profile is divided into tabs and each tab comprises one or more sections. Use the Content page to set up the tabs in the profile, and add content types to each tab.
Add Content Section Page	JPM_JP_ADD_CNT_SEC	Select content types. This page lists the content types available to add to the profile type. Select the content type you want to add and the system displays the Content Section page.
Content Section Page	JPM_JP_CONTENT_SEC	Define content section properties (fields) and the attributes of those properties. You also use this page to define the Profile Management roles that can access the content section when creating or updating profiles.
Profile Content Visualization Page	JPM_VISUAL_DTL_SEC	View the configuration of how the content section will render on the Add <content type> or Update <content type> pages.
Copy Content from another Profile Type Page	JPM_JP_CPY_CNT_SEC	Copy content properties of the content type for the section in which you are working from an existing profile type into the current profile.
Profile Type - Associations Page	JPM_JP_TYPE_ASSOC	Set up profile type associations. Select the associations to which the profile type is linked. Associations are entities external to the Profile Management business process. Define the association options enabled on the Profile Association Options page. This is only available for profile types with a *Non-Person* usage.
Clone Profile Types Page	RUNCTL_JPM_CLONE	Clone profile types. Create a new profile type by copying an existing profile type by running the Clone Profile Type process.
Assign Profile Type Defaults Page	JPM_DFLT_JP_TYPES	Assign profile type default person and non-person profile types available to other product features and services.

Profile Types - Attributes Page

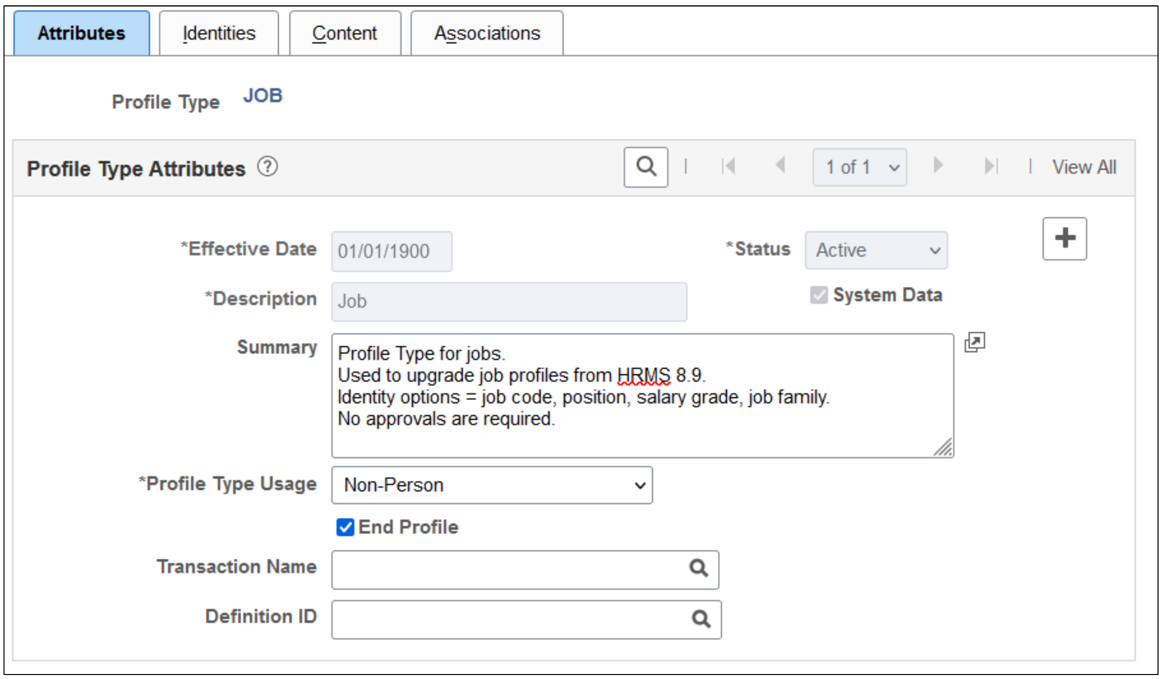
Use the Profile Types - Attributes page (JPM_JP_TYPE_ATTRIB) to set up profile type attributes.

Define basic details of the profile type. If the profile type is associated with approvals workflow, specify the transaction and the approval definition on this page.

Navigation:

Set Up HCM > **Product Related** > **Profile Management** > **Profiles** > **Profile Types** > **Attributes**

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



Field or Control	***Description***
Summary	Enter a brief description of the profile type.
Profile Type Usage	Select the usage value: *Person* or *Non-Person.* The usage will determine the **Profile Identity Options** values that can be selected on the Profile Types - Identities Page. If the **Profile Type Usage** field is *Person,* then a *Person* identifier is automatically added and no other identifiers can be added. If the usage is *Non-Person* then any enabled Identity Option can be added.
End Profile	Select this check box if the profile type is an end profile. The system displays end profiles in employee and manager self service and uses the end profiles in search, match, and browse.

Field or Control	*Description*
Transaction Name	Select the approvals workflow transaction associated with the profile type. You must complete this field if any of roles in the content sections in the profile type have the **Approval Required** check box selected or if the **Approval Req'd for Identities** check box on the Profile Type - Identities page is selected. See Content Section Page.
Definition ID	Select the approvals definition for the profile type. If you leave this field blank, the system uses the default approval definition ID for the approval process ID specified in the **Transaction Name** field. If multiple approval definition IDs exist, the approval framework will decide which approval definition ID to use, based on the criteria and priority configured on the Approval Process Definition component. For the definition IDs used for Manage Profiles approvals processing, the default definition has a priority of 1 and the non-default definitions have a priority of *9*.

Profile Types - Identities Page

Use the Profile Types - Identities page (JPM_JP_TYPE_IDENT) to define profile type identities by selecting the identity options to which the profile type is linked. You can also enable an identity to participate in the job profile acknowledgement process.

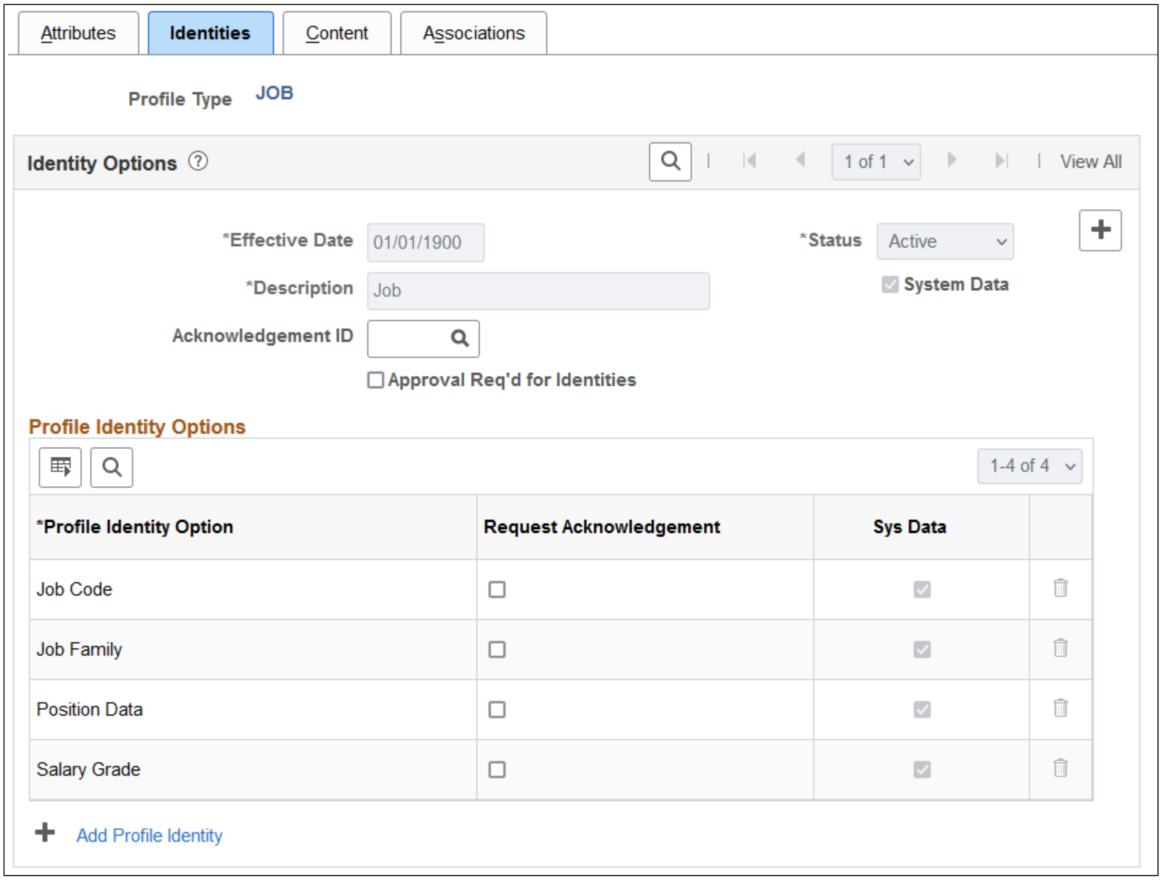
Identity options are entities such as a job code, position number, or person. When users create profiles based on a profile type, they can only create profiles for the entities that are defined on this page. Active profile types must have at least one identity option. Define the identity options enabled on the Profile Identity Options page. Identifiers can only be added for profile types with the non-person usage.

A *Person* identifier is automatically added for profile types with a **Person** usage. No other identifiers can be added for these.

Navigation:

Set Up HCM > **Product Related** > **Profile Management** > **Profiles** > **Profile Types** > **Identities**

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



Field or Control	*Description*
Acknowledgement ID	This field is available for *Non-Person* profile usage types only. Enter the acknowledgement ID to be used for the acknowledgement of a job profile. This is used for the “Acknowledge Profile Page (for Employees)” (PeopleSoft eDevelopment). You define valid acknowledgement IDs using the Acknowledgement Framework. For information on acknowledgements, see “Understanding the Acknowledgement Framework” (Enterprise Components). This field is required if you have selected the **Request Acknowledgement** options for an identity option.
Approval Req'd for Identities (approval required for identities)	(Classic) Select this check box if manager approval is required for changes to the profile identities associated with profiles of this profile type when using the classic pages.

Field or Control	***Description***
Profile Identity Option	Select one or more objects to which the profile type can be linked. The objects available are determined by the profile identity options enabled on the Profile Identity Options Page. Profile identity options can only be added for non-person profiles. A *Person* identifier is automatically added for person profiles and no further identifiers can be added. The system validates that there is only one active profile per profile identity key within a given profile type. For example, if the position Human Resources Administrator is listed as the identifier for a certain active JOB profile, then another JOB profile cannot be defined with the same position identifier.
Request Acknowledgement	This field is available for *Non-Person* profile usage types only. Select this check box to enable the Acknowledge Job Profile feature and indicate that the identity for this profile type participates in the acknowledgement process. When you select this option, the system displays a **Request Acknowledgements** button at the top of the manager's Maintain Job Profile page (see "My Job Profiles Page (for Employees), View Job Profiles Page (for Employees), and Maintain Job Profiles Page (for Managers)" (PeopleSoft eDevelopment)) and adds the *Request Acknowledgement* **Profile Action** value on the administrator Non-person Profile Page for profiles that have this profile type and identity. When viewing a job profile, this enables managers and administrators to submit a request to have all employees associated with this profile review and acknowledge the requirements of this job profile. **Important!** You must run the *Run Acknowledgements* process on the Run Acknowledgement Request Page to allow employees to acknowledge a job profile. When you select this option for an identity, you must also enter an ID in the **Acknowledgement ID** field.
+ **Add Profile Identity** link	Click to add another profile identity option to the page.

Related Links

Understanding Job Profile Acknowledgements

"My Job Profiles Tile (for Employees)" (PeopleSoft eDevelopment)

"My Job Profiles Page (for Employees), View Job Profiles Page (for Employees), and Maintain Job Profiles Page (for Managers)" (PeopleSoft eDevelopment)

"Acknowledgement Status Page" (PeopleSoft eDevelopment)

"Understanding the Acknowledgement Framework" (Enterprise Components)

Profile Types - Content Page

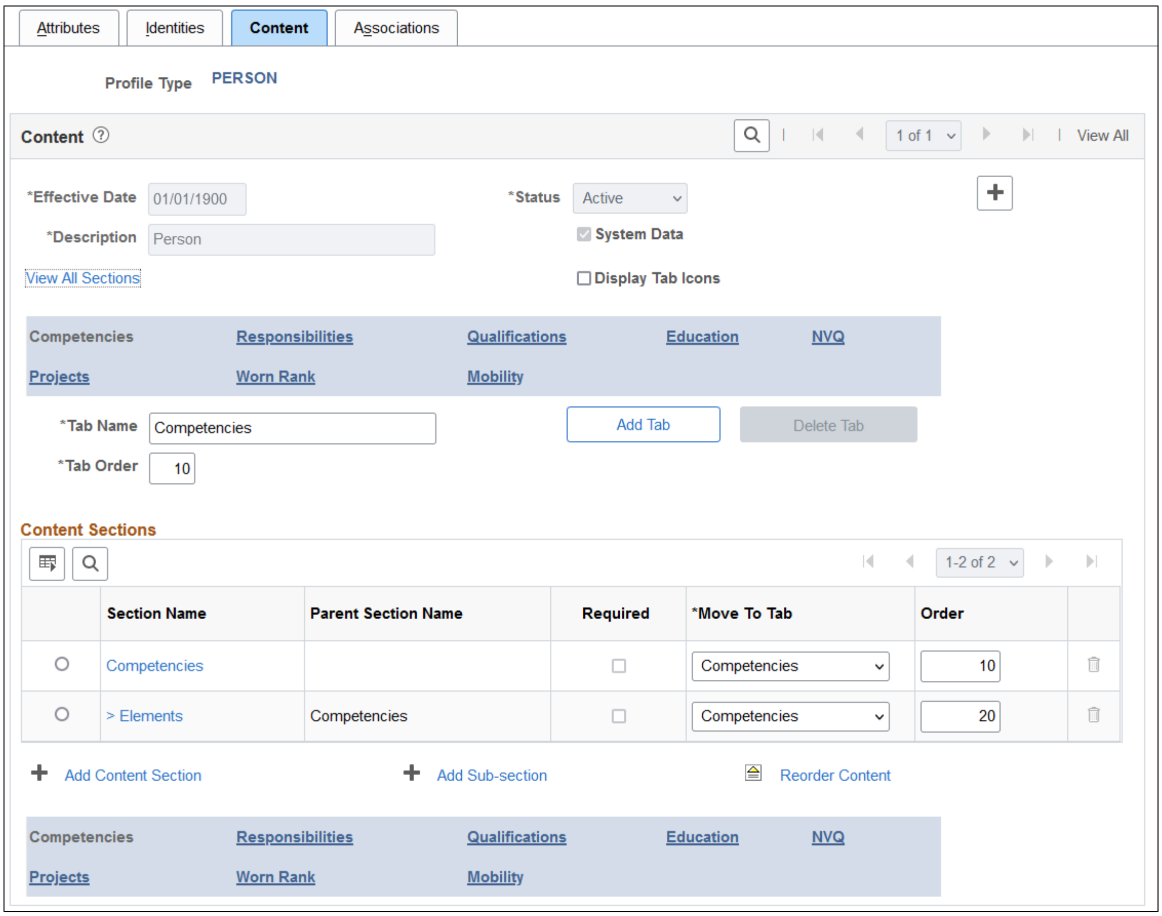
Use the Profile Types - Content page (JPM_JP_TYPE_CONT) to define profile type content.

The content of a profile is divided into tabs and each tab comprises one or more sections. Use the Content page to set up the tabs in the profile, and add content types to each tab.

Navigation:

Set Up HCM > **Product Related** > **Profile Management** > **Profiles** > **Profile Types** > **Content**

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



Use this page to define the content of a profile type.

The order in which the tabs are displayed is determined by the **Tab Order** field. Within each tab, you specify the content types in the **Content Sections** grid area. These links will appear as actual tabs to the user on the profile pages.

Field or Control	*Description*
View All Sections	Click this link to display the sections for all the tabs in the profile type. The system updates the **Content Sections** group box to list the sections from all tabs, and hides the **Tab Name** and **Tab Order** fields. To return to viewing a specific tab, click that tab link.
Display Tab Icons and **Tab Icon**	Select this check box if you want to associate tabs with icons that will appear within the PeopleSoft Fluid User Interface on the "Talent Profile Page (for Employees) or Team Talent Profile Page (for Managers)" (PeopleSoft eDevelopment). Employees use these self-service pages to update their own profiles. When you select this option the Tab Icon field appears where you can select the icon you want to display preceding the tab name.
Add Tab button	Click this button to add a new tab to the profile type.
Delete Tab button	Click this button to delete the selected tab. This option may not be available for system delivered profile types.
Tab Name	Enter a name for the tab. When users create a profile using this profile type, the tab name appears as a link in the profile. Therefore, it is important to use meaningful names and not leave the default name of *Tab 1, Tab 2,* and so on.
Tab Order	Enter a value to specify the order in which the system should display the tab links.
Tab Icon	This field is available when you have selected the Display Tab Icons option. Select the icon that represents this tab in the PeopleSoft Fluid User Interface (on the Talent Profile pages).

Content Sections

This grid area lists the sections in the selected tab. If you click the **View All Sections** link, this grid area lists the content sections for all the tabs in the profile type.

Field or Control	***Description***
Section Name	Click the section name to access the Content Section page and view and update details of the section or sub-section. **Note:** A ">" symbol preceding a section name indicates that the section is a child of the section above it. **Note:** Profile Type configurations are delivered for CLUSTER, ROLE, JOB, and PERSON. This can be changed by adding a new effective dated entry for the profile type. Caution should be used when changing ROLE and PERSON content sections since there may be existing integration requirements. Refer to the topic “Getting Started with Manage Profiles,” Manage Profile Integrations to determine the business processes that leverage profile content. Caution should be exercised when removing delivered properties. If profile content already exists for the property, then it should not be removed. See Manage Profiles Integrations.
Parent Section Name	Displays the name of the parent section for child sections.
Required	Select this check box if the section is a required section of the profile. When users create a profile, the system uses this check box to validate that required sections have at least one profile item.
Move To Tab	Displays the current tab name where this content section is located. Select the tab from the list and click the **Reorder Content** link to move a section to a different tab.
Order	Enter a value to specify the order in which the content sections are displayed within the tab in the profile.
Add Content Section	Click this link to add a new section to the **Content Sections** grid area. The system displays the Add Content Section page that lists all the content types available. Content types are defined using the Content Types component. See Setting Up Content Types and Properties.

Field or Control	***Description***
Add Sub-section	Add sub-sections to include content types that are related to the content type of an existing section. Select the radio button for the content section for which you want to create a sub-section, and click this link. Relationships between content types are defined on the Relationship Rules page in the Content Types component For example, if you add a Competencies section to a tab, you can add the Element or Sub-Competencies content type as sub-sections because these content types are related to the competencies type. When you click this link the system displays the Add Content Section page, which lists the content types that are defined as a child of the content type of the parent section. See Relationship Rule Page.
Reorder Content	Click this link if you have changed the **Tab Order** or the section **Order** field values. The system refreshes the page to show the new ordering of tabs or content sections.

Add Content Section Page

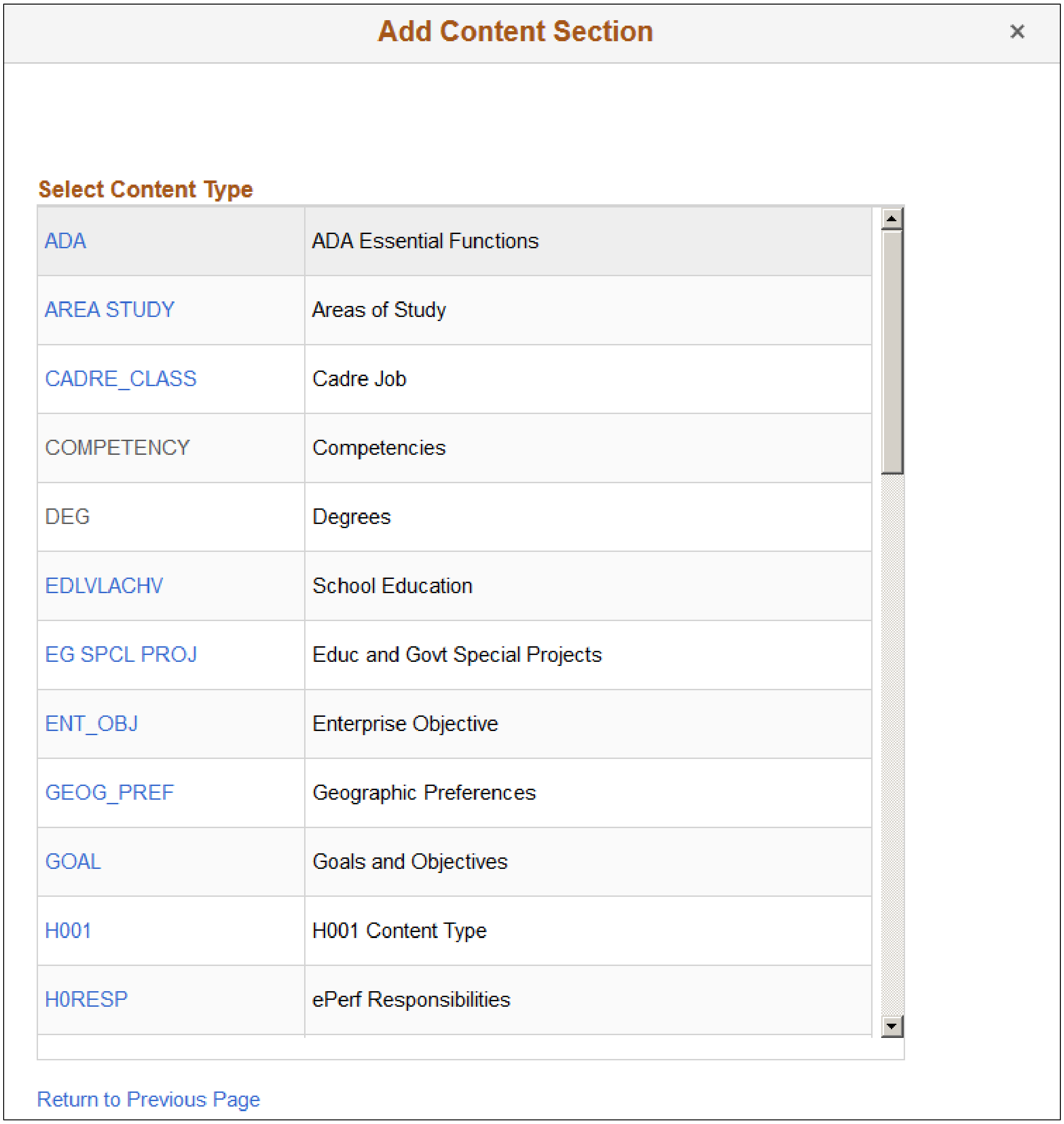
Use the Add Content Section page (JPM_JP_ADD_CNT_SEC) to select content types.

This page lists the content types available to add to the profile type. Select the content type you want to add and the system displays the Content Section page.

Navigation:

- Click the **Add Content Section** link on the Profile Types - Content page.
- Click the **Add Sub-section** link on the Profile Types - Content page.

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



This page lists the content types that you can add to the profile type. Those content types that are already included in the profile type are shown in normal text and do not have a link.

If you are adding a sub-section, the system displays the content types that have a subordinate relationship with the content type of the parent section.

See Profile Types - Content Page.

Click the link for the content type that you want to add, or click the **Return to Previous Page** link to cancel the addition.

Content Section Page

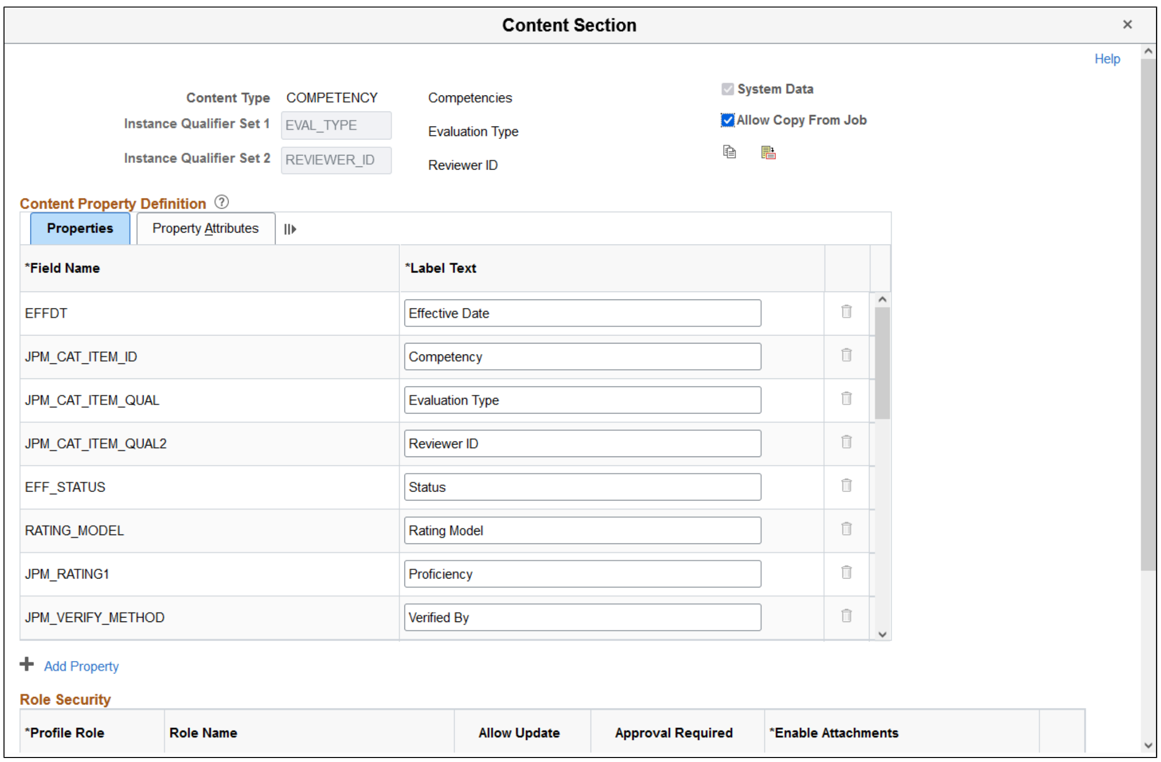
Use the Content Section page (JPM_JP_CONTENT_SEC) to define content section properties (fields) and the attributes of those properties.

You also use this page to define the users that can access the content section when creating or updating profiles.

Navigation:

- Select a content type on the Add Content Section page.
- Click the section name link on the Content page.

This example illustrates the fields and controls on the Content Section page showing the Properties tab. You can find definitions for the fields and controls later on this page.



Note: Profile Type configurations are delivered for CLUSTER, ROLE, JOB, and PERSON. This can be changed by adding a new effective dated entry for the profile type. Caution should be used when changing ROLE and PERSON content sections since there may be existing integration requirements. It is not recommended that delivered properties be removed.

Field or Control	*Description*
Instance Qualifier Set 1	(Optional) Select the instance qualifier set that you want to use with this section. You can only select instance qualifiers that are associated with the content type of the section and are defined as sets of values. You cannot select instance qualifier sets that are based on prompt records for this field. Define instance qualifiers using the Instance Qualifiers page. You will be required to add the property JPM_CAT_ITEM_QUAL. See Defining Instance Qualifiers.
Instance Qualifier Set 2	(Optional) If you want to define an instance qualifier that is based on a prompt record, then select an Instance Qualifier Set that has a prompt definition. You will be required to add the property JPM_CAT_ITEM_QUAL2.
Allow Copy From Job	This check box is available for *Person* profile types. Select to enable the functionality to select a non-person profile from a list of related profiles when maintaining a person's profile. The system determines which non-person profiles are related to an employee by searching the employee's job data record. If the employee has multiple jobs, the system checks all the person's active jobs for matching non-person profiles. For example, the system checks for active profiles that match the employee's job codes, positions, and salary grades. If this check box is not selected, these content types related to the person will not be copied from the non-person profile.
 Copy from another Profile Type	Click this icon to identify an existing profile type from which you want to copy content properties for the content type section you have selected. When you click this icon, the system displays the Copy Content from another Profile Type page. Enter the profile type to copy and click **OK** to have the system insert the properties into the content section definition.
 Visualize Profile Detail	Click this icon to access the Profile Content Visualization page to view how the content section configuration will render on the Add <content type> or Update <content type> pages.

Content Property Definition Group Box: Properties Tab

If you are setting up a content section, the **Content Property Definition** group box lists the key properties defined for the content type in the content catalog. You can add other properties as required.

Note: If the content type is a free form content type, a description field, JPM_ADHOC_DESCR, is included. You can add any other properties as required.
The Content Type structure is independent of the Profile Type structure and the properties defined for a Content Type apply to Content Items only. Fields for a person or non-person profile are defined at this Profile Type level, and are not related to the field properties identified on the Content Types Page.

See Understanding Content Type Properties.

See Profile Type Properties.

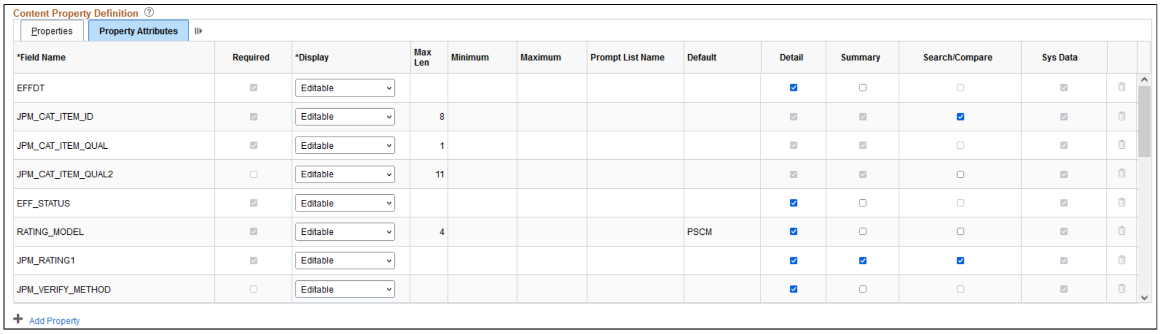
Field or Control	***Description***
Field Name	Displays the name of the field for the property that is part of the content type definition. If you are adding a new property, click the **Add Property** link to select a field name from the available options. Enter one or more of the twenty custom field values *JPM_PROMPT_1* through *JPM_PROMPT_20* to present to the user a list of values defined on the Custom Prompt Page.
Label Text	Displays the label specified for the field if the property is part of the content type definition. If you are adding a new property, enter the text that you want to appear for this field on the profile pages. **Note:** You should choose a meaningful label for the property so that users clearly understand what kind of information to enter in the field when they create profiles.
Add Property	Click this link to add a property to the section. Use the **Property Category** field to narrow your property search by category. You can also copy profile properties from another profile type using the **Copy from another Profile Type** icon. See profile content information under Understanding Profile Management.

See Profile Type Properties.

Content Properties Group Box: Property Attributes Tab

Access the Property Attributes tab on the Content Section page.

This example illustrates the fields and controls on the Content Section page: Property Attributes tab. You can find definitions for the fields and controls later on this page.



Note: New properties should not be specified with an attribute of *Required* if profiles already exist with that content. Caution should be used when changing the **Maximum Length** value. If integrations exist with other products that leverage the legacy COMPETENCIES and ACCOMPLISHMENTS data model, then truncation of data should be avoided.

See Manage Profiles Integrations.

Field or Control	***Description***
Required	Select to make a property required when creating a profile using this profile type. If the check box is selected, users must complete the field when they set up a profile.
Display	Select whether the property should be available for entry *(Editable),* unavailable for entry *(Display),* or hidden *(Hidden)* on the profile pages. The system populates the property with the value you enter in the **Default Value** field. If you select *Editable,* the system populates the default value at the profile, but users can override that value.
Max Len (maximum length)	This field applies to character properties only. If you added the property to the profile type, enter a value that is less than or equal to the field length of this property.
Minimum and Maximum	These fields apply to numeric properties only. If you added the property to the profile type, enter the minimum and maximum values allowed when a user adds a profile item.
Prompt List Name	Select a custom list for this field property. This field is available when you have selected from the user define properties *JPM_PROMPT_1* through *JPM_PROMPT_20* for a field property.

Field or Control	***Description***
Default	If you added the property to the profile type, enter the default value that will be assigned to this property when a user adds a profile item. When creating a profile item that contains the RATING _MODEL property, the system attempts to populate the RATING_MODEL property default first from the content catalog. If that does not exist, the default is assigned from this value entered for the Content Section.
Detail	Select this check box if you want the field to appear on the details page for the content section.
Summary	Select this check box to display the field within the summary grid when creating or viewing a profile. Fields that are marked as summary automatically appear within the summary grid on the classic administrator, employee self service, and manger self service profile pages (see Person Profile Page and “(Fluid) Maintaining Person Profiles” (PeopleSoft eDevelopment)). See Understanding Managing Profiles. **Note:** This option does not apply to the fluid Talent Profile and Team Talent Profile transaction summary grid as referenced in the “(Fluid) Maintaining Person Profiles” (PeopleSoft eDevelopment) documentation.
Search/Compare	Select this check box if you want to include the property in the search index that is used by the search and compare profiles feature. The check box is display-only if the property is not supported by this feature. **Note:** The item ID (JPM_CAT_ITEM_ID) is automatically set to searchable if you make other properties in the content section searchable.
Sys Data (system data)	Displays as selected if a PeopleSoft delivered and maintained value for this profile type. System data cannot be deleted. When you manually enter another property this check box is not selected.

Role Security

Access the Content Section page, Role Security section (select a content type on the Add Content Section page or click the section name link on the Profile Types - Content page).

This example illustrates the fields and controls in the Role Security section of the Content Section page. You can find definitions for the fields and controls later on this page.

The Role Security group box lists the Profile Management (Profile Role) and PeopleTools (Role Name) roles that can access the content section when creating or updating a profile.

Note: If you don't select a Profile Management role for any content section, then users can't view or create profiles using this profile type.

This video demonstrates the Profile Management role security feature:

Video: Image Highlights, PeopleSoft HCM Update Image 31: Enhanced Security for Profile Management

Field or Control	***Description***
Profile Role	Select the role that should have access to the content section according to the options you have selected here. **Note:** Profile Management roles should not be confused with PeopleTools role names. Profile Management roles correspond to certain profile pages in the system, and you use this section to further define which content sections they can view and manage from those pages. There are three Profile Management roles: • *Administrator:* Administrators view and create profiles using the options available in the classic (**Workforce Development** > **Profile Management)** or fluid (**Workforce Administrator** > **Profile Administration tile**) pages. • *Employee:* Employees view and create their own profiles using the options available in the classic (**Self Service** > **Learning and Development**) or fluid (**Employee Self Service** > **Talent Profile tile**) pages. • *Manager:* Managers use the manager self-service transactions available in the classic (**Manager Self Service** > **Learning and Development**) or fluid (Team Talent Profile tile) pages. **Note:** If a Profile Role type is not selected for a content section, this content section will be hidden for that user.

<table>
<tr><th>Field or Control</th><th>Description</th></tr>
<tr><td>Role Name</td><td>Associate PeopleTools security roles with Profile Management roles.

Note: PeopleTools roles are assigned to a user’s profile and identify data permission security.

Consider the following when linking PeopleTools role names with a profile role:

• No Role Name associated with a Profile Role: When the Role Name is left blank, any user in that Profile Management role will have access to this content section according to the role security options you have selected.

• One Role Name associated with a Profile Role: Only those users that have this PeopleTools role assigned to them in their user profile will be able to access this content section according to the role security options you have selected.

• Multiple Role Names associated with a Profile Role: Users that have any of these PeopleTools roles assigned to them in their user profile will be able to access this content section according to the role security options you have selected.

When a user is assigned to more than one of the PeopleTools security roles, the system will use the *highest level of security to determine the user’s access.

(See the * for the role security options and the “Understanding How the System Determines Role Security Access” subtopic that follow to see how the system determines the highest level of security).</td></tr>
</table>

Use these security option fields to determine what a role can perform for this content section. When none of the following options are selected, the user will be able to see the content section, but not be able to make any updates.

Field or Control	Description
Allow Update	Select this check box to enable these users to update the content section within a profile. If this check box is left deselected, users cannot add, update, or remove items for this content section in the profile. * The highest level of security for this option is *Selected* (the user is able to make updates to a content section). **Note:** This check box is not available for the NVQ, NVQ Units, or NVQ Elements content sections because it is not possible to update them within a profile.
Approval Required	Select this check box if approval is required for this role to add, update, or remove profile items. * The highest level of security for this option is *Deselected* (the user is not required to go through the approval process to add or delete a profile item). **Note:** Since the highest level of security is to *not require approvals*, you should take this into consideration when you are adding more than one PeopleTools security role for a profile role where one requires approvals and the other does not. **Important!** The Profile Management security does not define Approvals security. For example, a manager or administrator given access to approve profile requests may see the content items sent for approval, even if you did not give the manager or administrator access to this Profile Management content section for this profile.

Field or Control	***Description***
Enable Attachments	**Note:** This option is available for *Person* profile types only and is not available for *Non-Person* profile types. Profile Management supports attachments on the fluid manager and employee self service "<Content Type> (Item Details) Page" (PeopleSoft eDevelopment), and on the classic administrator Add New <content type>, Update <content type>, or View <content type> Page. The attachments functionality is not delivered for the classic self service and approvals pages. Identify if a role can use attachments when accessing the profile pages. Options include: • *No Attachments*: Select to indicate that this role cannot access attachments. • *Update Attachments*: Select to indicate that this role can add, view, or delete attachments . • *View Attachments*: Select to indicate that this role can view attachments but cannot add or delete them. * The highest level of security for this option is *Update Attachments* (the user is able to add, view, or delete attachments).
Add Role	Click this link to add another role to the list of roles that have access to the profile type content section.

Understanding How the System Determines Role Security Access

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 role associated with the profile role will have access to the content section according to the parameters set up here. However, sometimes a user may be associated with more than one PeopleTools role name.

The following scenario is an example of how the system determines security for the Profile Management data. The following table shows an example of the setup of the *PERSON* profile, *COMPETENCY* content section. In this scenario, the *Employee* Profile Management users that are associated with the PeopleTools *Role 1* are allowed to view, make updates, and add attachments to the **COMPETENCY** content section of their own profile. These users will also need to get approvals to make changes to the COMPETENCY section of their profile. Users that are associated with the PeopleTools *Role 2*, can only view the COMPETENCY content section within their own profile data and cannot add or delete information. Although they cannot make changes to their profile COMPETENCY items, the configuration for this content section does not require approvals.

Profile Role	***Role Name***	***Allow Update***	***Approval Required***	***Enable Attachments***
Employee	*Role 1*	Yes	Yes	*Update Attachments*
Employee	*Role 2*	No	No	*View Attachments*

Now let's say you have an employee who has been granted both *Role 1* and *Role 2* in his or her user profile. In this case, the system will give the user security access to the highest level security level based on these two security configurations, which are:

- **Allow Update** = Yes, the user can make changes to this content section (comes from *Role 1*).
- **Approval Required** = No, the user does not need approval to make changes to this content section (comes from *Role 2*).
- **Enable Attachments** = *Update Attachments*, the user can add and make changes to the attachments (comes from *Role 1*).

Note: If you wanted to ensure that users would still need to go through approvals, we recommend that you select **the Approval Required** option to accommodate for scenarios in which a user may have access to several PeopleTools security roles.

Profile Type - Associations Page

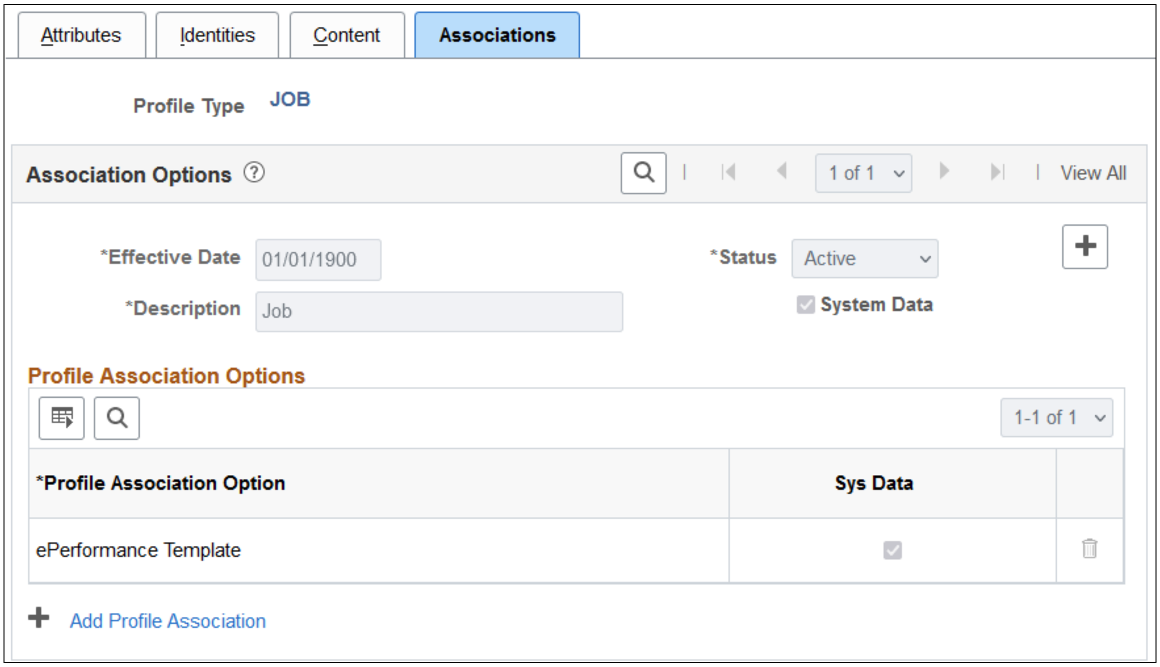
Use the Profile Type - Associations page (JPM_JP_TYPE_ASSOC) to set up profile type associations.

Select the associations to which the profile type is linked. Associations are entities external to the Profile Management business process. Define the association options available on the Profile Association Options page. This is only available for profile types with a *Non-Person* usage.

Navigation:

Set Up HCM > **Product Related** > **Profile Management** > **Profiles** > **Profile Types** > **Associations**

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



Field or Control	*Description*
Profile Association Option	Select the object you want to link to the profile type. The objects available are determined by the profile association options enabled on the Profile Association Options page. The system allows multiple active profiles per association within a given profile type. See Profile Association Options Page.
Add Profile Association	Click this link to add another association to the profile type.

Clone Profile Types Page

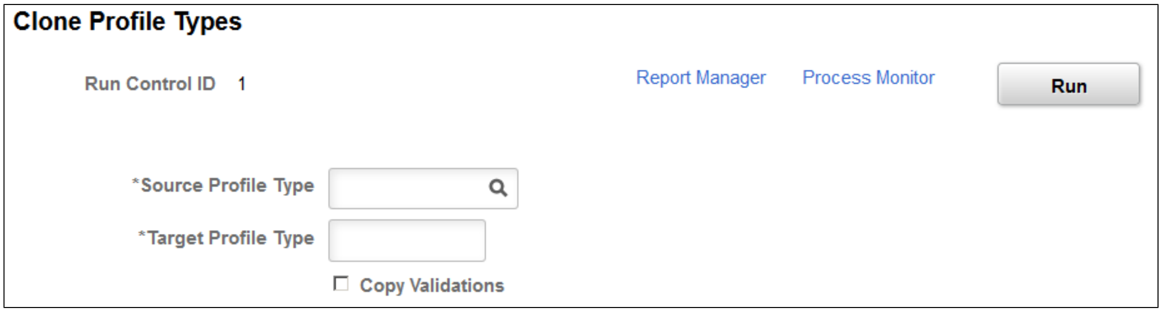
Use the Clone Profile Types page (RUNCTL_JPM_CLONE) to clone profile types.

Create a new profile type by copying an existing profile type by running the Clone Profile Type process.

Navigation:

Set Up HCM > **Product Related** > **Profile Management** > **Profiles** > **Clone Profile Types** > **Clone Profile Types**

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



Field or Control	***Description***
Source Profile Type	Enter the profile ID that you want to copy.
Target Profile Type	Enter the new profile ID that you want to create.
Copy Validations	Select this check box to copy the validations associated with the source profile type. Only the PERSON profile type has system delivered validations.

Assign Profile Type Defaults Page

Use the Assign Profile Type Defaults page (JPM_DFLT_JP_TYPES) to assign profile type default person and non-person profile types available to other product features and services.

Navigation:

Set Up HCM > **Product Related** > **Profile Management** > **Profiles** > **Assign Default Profile Types** > **Assign Profile Type Defaults**

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

The purpose of the Assign Profile Type Defaults page is to provide a primary person and non-person profile type for business processes within Profile Management and also the products that interface with Profile Management, such as Federal Hire, Military, NVQ, Talent Acquisition Management, and so forth.

If you change these profile types from the delivered profile types, be sure that the new profile types will support the interface of those workflows that you use. For instance, if you use Military Rank, make sure you have a content section that matches the Worn Rank content section in the PERSON profile type.

Important! Before making changes to this page, you must consider all integration points related to this data.
Additional setup may be required within the specific business processes to specify further interfacing options with Profile Management.

Field or Control	*Description*
Primary Person Profile Type	Specify the profile type that will serve as the default person profile for other business processes in the system interfacing with Profile Management. This default value can be overwritten at the individual business process level.
Primary NonPerson Profile Type	Specify the profile type that will serve as the default non-person profile for other business processes in the system interfacing with Profile Management. This default value can be overwritten at the individual business process level.

Creating Profile Group Types and Profile Groups

To set up profile groups, use the Profile Group Types (JPM_JP_GTYPE_GRP) and Profile Groups (JPM_JP_GROUPS) components.

These topics provide an overview of profile groups and group types, list prerequisites, and discuss how to create profile group types and profile groups.

Pages Used to Create Profile Group Types and Groups

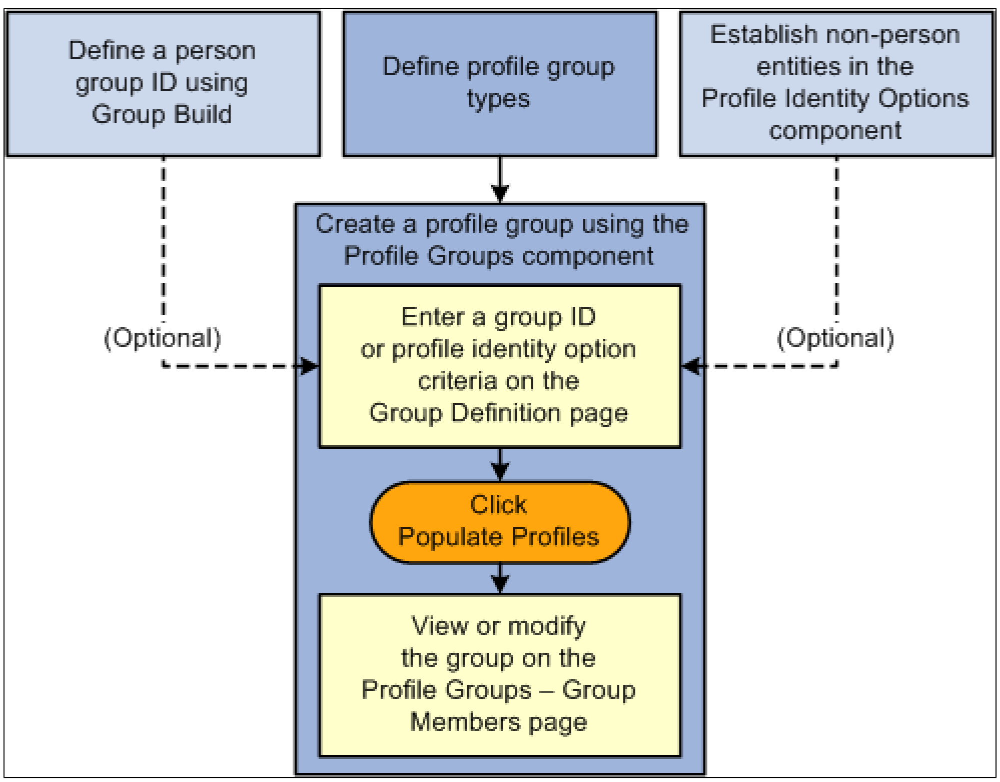
Page Name	*Definition Name*	*Usage*
Profile Group Types Page	JPM_JP_GTYPE_GRP	Set up profile group types.
Profile Groups - Group Definition Page	JPM_JP_GROUPS	Define criteria to create a profile group.
Profile Groups - Group Members Page	JPM_JP_GMEMB	View or add profiles to define members for a profile group.
Build Profile Groups Page	RUNCTL_JPM_GROUP	Run the Build Profile Groups process to create a profile group.

Understanding Profile Groups and Group Types

The PeopleSoft application provides the means of creating profile groups, either manually or by using group criteria, to provide filtering in the Search and Compare process. The Profile Group Types page enables you to identify a group and valid profile types for that group. It also specifies which profile types this profile group can be applied as a search filter in Search and Compare and self service. The profile group is an instance of the group type and specifies which profile IDs are members of this group.

The system uses profile group types of either *Person* or *Non-person* to drive the behavior of the criteria that is entered for each of the groups tied to the group type. It also controls the profile types that can be selected for the group type. The Profile Groups component enables you to include criteria to build a list of profile members for a person profile group, through the use of the Group Build feature, or for a non-person profile group, which uses criteria from the Profile Identity Options page.

To create the profile group, the administrator uses the Profile Groups component. The administrator can choose to select the group build identifier that he or she defined in the Group Build feature for person group type, or use field criteria from a profile identity. Upon clicking the **Populate Profiles** button on the Profile Groups - Group Definition page, the system uses the Build Profile Groups process to populate the Profile Groups - Group Members page. The administrator can also manually defines a profile group without entering any group criteria:



The system uses the Build Profile Groups process to create profile groups. This Application Engine program executes both online via the **Populate Profiles** button PeopleCode and in batch mode via Process Scheduler. It is possible to rebuild multiple groups of the same profile group type when you run the Application Engine program in batch mode. When this process is executed via the **Populate Profiles** button, the system will only build or rebuild a single group.

Since person and job attributes are frequently changing, person profile groups are a lot more volatile. You can schedule person profile group builds to run on a regular basis. As the profile group member list changes, the Last Update datetime stamp is updated for those profiles that are added or removed from the list. This will result in the profile automatically being selected by the next incremental Schedule Search Index process run. Only those profiles with group changes are rebuilt.

Prerequisites

To build profile groups, you must establish profile types. Optionally you can set up profile identity options and create groups using the Group Build functionality.

See Setting Up Profile Identity and Association Options.

See "Understanding Group Build" (Application Fundamentals).

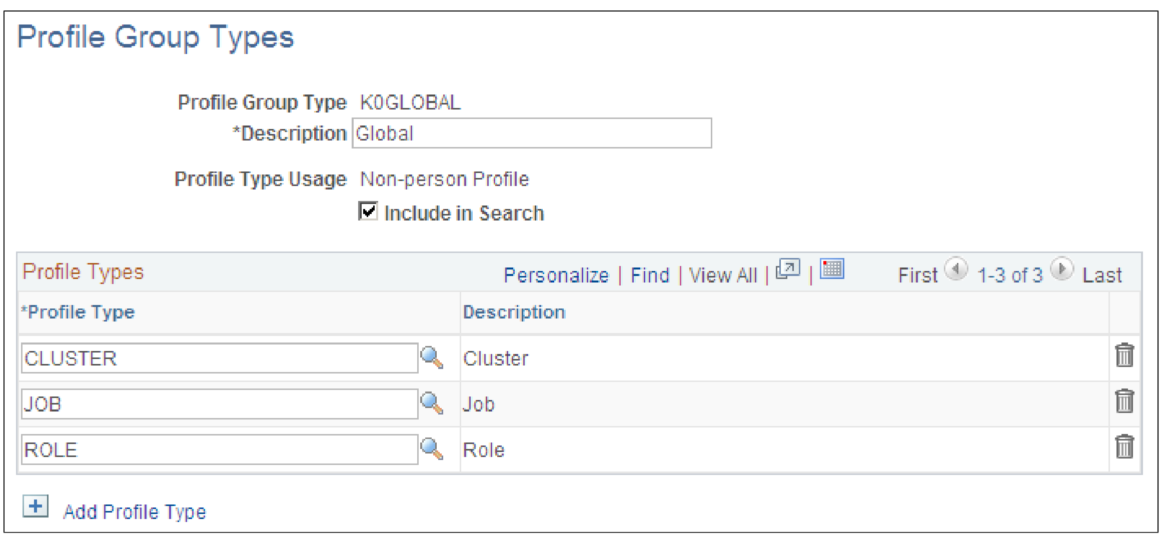
Profile Group Types Page

Use the Profile Group Types page (JPM_JP_GTYPE_GRP) to set up profile group types.

Navigation:

- **Set Up HCM** > **Product Related** > **Profile Management** > **Profiles** > **Profile Group Types** > **Profile Group Types**
-
- From the Administer Workforce home page in fluid select the **Profile Administration tile** > **Profile Configuration tile** > **Configure Profile Groups tab** > **Profile Group Types tab** > **Profile Group Types**.

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



Field or Control	*Description*
Profile Type Usage	Indicate the subordinate group that will contain profiles that are *Person Profiles* or a *Non-person Profiles.* Once this value is selected, the field becomes display only. This value controls which profile types you can select on this page.
Include in Search	Select this check box to include all profile groups within this profile group type in the search index.
Profile Type	Select the profile type to add to the profile group type. The profiles of the profile types defined for this group type are the only ones that can be assigned to the groups of this group type. Set up profile types using the Profile Types component. A profile can be tied to zero or many profile group IDs. See Setting Up Profile Types.
Add Profile Type	Click this link to add another profile type to the profile group type.

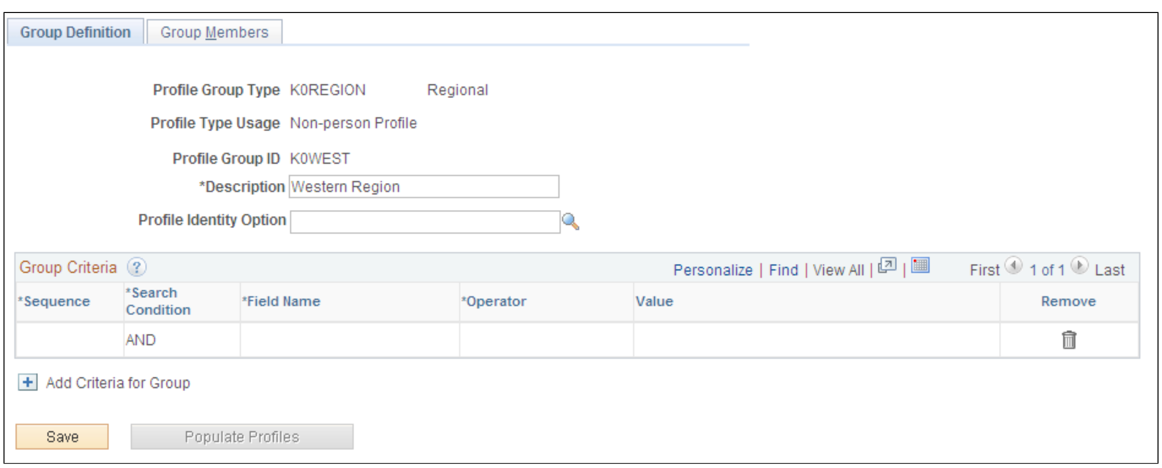
Profile Groups - Group Definition Page

Use the Profile Groups - Group Definition page (JPM_JP_GROUPS) to define criteria to create a profile group.

Navigation:

- **Set Up HCM** > **Product Related** > **Profile Management** > **Profiles** > **Profile Groups** > **Group Definition**
- From the Administer Workforce home page in fluid select the **Profile Administration tile** > **Profile Configuration tile** > **Configure Profile Groups tab** > **Profile Groups tab** > **Group Definition**.

This example illustrates the fields and controls on the Profile Groups - Group Definition page. You can find definitions for the fields and controls later on this page.



The page displays differently depending on if the profile type usage is *Person* or *Non-Person.*

For non-person groups, the **Profile Identity Options** field and **Group Criteria** grid display and criteria can be added to construct the group based upon the profile identity.

A person profile group displays the **Group ID** field that is part of the Group Build functionality, which lists the criteria for extracting an employee ID list.

Field or Control	***Description***
Profile Type Usage	Displays the group as a *Person* or a *Non-Person* profile, as defined for the profile group type on the Profile Group Types page. This value determines how you will select criteria that is entered for each of the groups tied to the group type.
Group ID	This field displays when the **Profile Type Usage** field is *Person.* The system uses the Group Build functionality to extract the group of people used to identify person profiles. The group build groups must be created prior to defining a profile group. The **Group ID** field lists the IDs defined through the Group Build business process. See "Setting Up Group Definitions" (Application Fundamentals). **Note:** Group definitions for this process should only include employees, contingent workers, and persons of interest having a JOB record. Profiles for persons of interest without a Job record are not supported. A group ID is not required. You may manually enter person profile IDs on the Profile Groups - Group Members page to create a group.
Profile Identity Option	This field displays when the **Profile Type Usage** field is *Non-Person.* Enter the non-person profile identity option. The **Profile Identity Option** field lists the non-person IDs defined in the Profile Identity Option component. Once you enter the profile identity option ID, the group criteria fields become available for entry. This criteria is not required. You may manually define a group on the Profile Groups - Group Members page.

Group Criteria

Use this section to identify group identifier criteria for a non-person group. The non-person profile group criteria uses fields from the Profile Identity Options record along with corresponding values and relational operators entered on this page to create a profile group. This grid becomes available when you enter a value in the **Profile Identity Option** field.

Field or Control	***Description***
Sequence	Specify the sequence order of the criteria.
Search Condition	Select either the connector value *AND* or *WHERE. AND* connectors are connected to the row with the sequence prior to it. *WHERE* connectors are independent of any rows with a sequence prior to it.
Field Name	Select the field that should be used to construct a filter for a non-person profile. Valid fields are defined in the Profile Identity Options component.
Operator	Define the field values to include in or exclude from the group. Valid operators include *equal to, greater than, greater than or equal to, is blank, is not blank, less than, less than or equal to, like,* and *not like.*
Value	Enter the value that should be used in filtering data for the non-person profile.
Add Criteria for Group	Click this link to add another criteria row.
Populate Profiles	Click this button to run the Build Profile Groups (JPM_BLD_GROUP) Application Engine process to build or rebuild the member list based on the group criteria defined. This process populates the group members on the Group Members page. This Application Engine program executes both online via the **Populate Profiles** button PeopleCode and in batch mode via Process Scheduler.

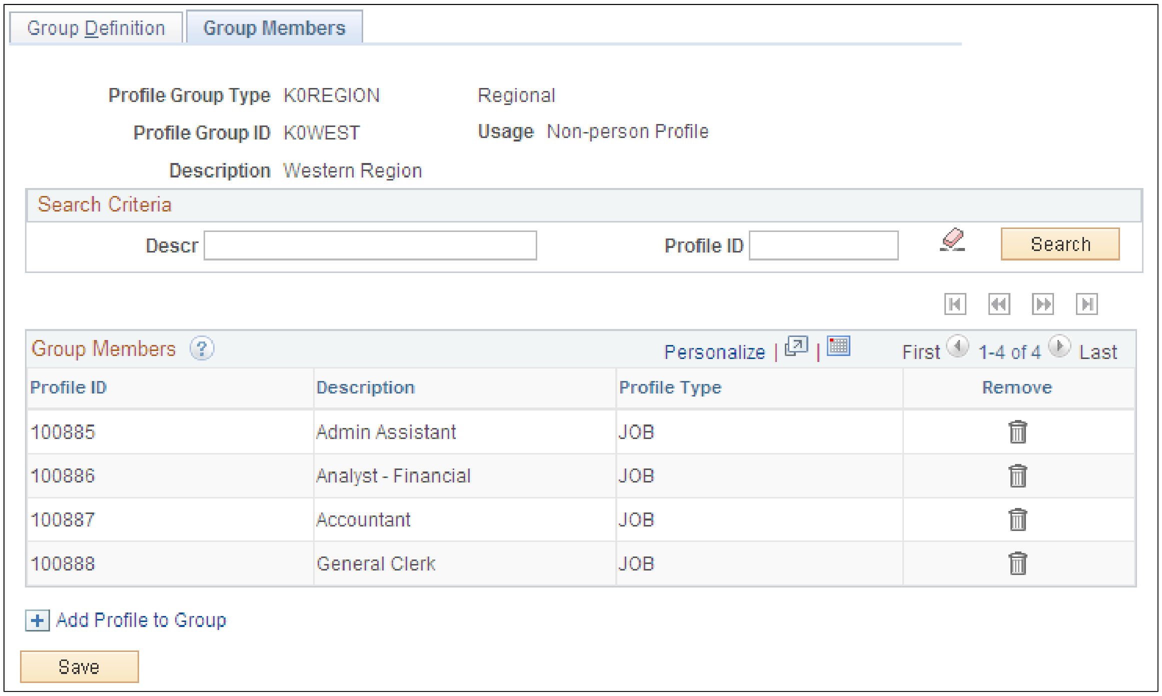
Profile Groups - Group Members Page

Use the Profile Groups - Group Members page (JPM_JP_GMEMB) to view or add profiles to define members for a profile group.

Navigation:

- **Set Up HCM** > **Product Related** > **Profile Management** > **Profiles** > **Profile Groups** > **Group Members**
- From the Administer Workforce home page in fluid select the **Profile Administration tile** > **Profile Configuration tile** > **Configure Profile Groups tab** > **Profile Groups tab** > **Group Members**.

This example illustrates the fields and controls on the Profile Groups - Group Members page. You can find definitions for the fields and controls later on this page.



The system automatically populates the **Group Members** grid when you click the **Populate Profiles** button on the Profile Group Definition page. You can also enter profiles manually on this page. When you have the system automatically rebuild profile group members according to the group criteria, any manual changes you have made to the group will be lost.

When the Profile Group component is saved, each profile that has been added or removed from the group will have its Last Update datetime stamp updated. This will cause the profile to automatically be selected by the next incremental Schedule Search Index process run so that the index profile document can be rebuilt.

Use the search fields to locate a specific profile id or profile description.

Field or Control	***Description***
Search On: Descr and **Search On: Profile ID**	Enter the description or profile ID of the profile you wish to locate.
Search	Click this button to search for the profile ID based upon the description or ID you entered in the search fields.
Profile ID	Select the profile that you want to add to the profile group. The system displays the profile description and type, as well at the employee name and ID, if applicable.
Add Profile to Group	Click this link to add another profile to the group.

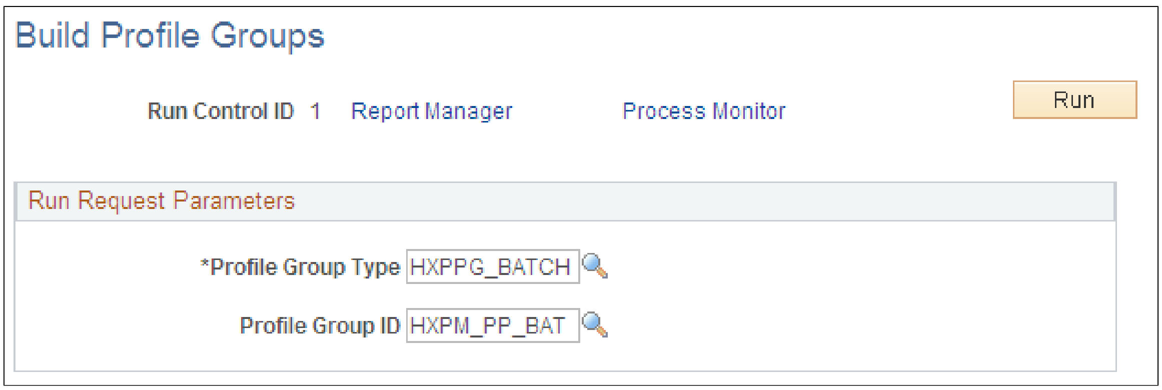
Build Profile Groups Page

Use the Build Profile Groups page (RUNCTL_JPM_GROUP) to run the Build Profile Groups process to create a profile group.

Navigation:

- **Set Up HCM** > **Product Related** > **Profile Management** > **Profiles** > **Build Profile Group** > **Build Profile Groups**
- From the Administer Workforce home page in fluid select the **Profile Administration tile** > **Profile Configuration tile** > **Configure Profile Groups tab** > **Build Profile Groups tab**.

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



Use this page to run the Build Profile Groups process. The RUNCTL_JPM_GRP record stores the requested profile groups to be built or rebuilt.

Field or Control	***Description***
Profile Group Type	Enter a profile group type you wish to build or rebuild. Only those profile groups that have criteria are available for selection. This field is required.

Field or Control	***Description***
Profile Group ID	Enter the profile group ID for the group type you wish to build or rebuild. This field is optional. When no profile group is specified, all groups for that profile group type are rebuilt.

(Classic) Enabling Profile Actions

To enable profile actions, use the Profile Actions (JPM_PROFILE_ACTION) component.

Note: Profile Actions are specific to the Classic Manage Profile pages and are not used in Fluid Manage Profiles pages.

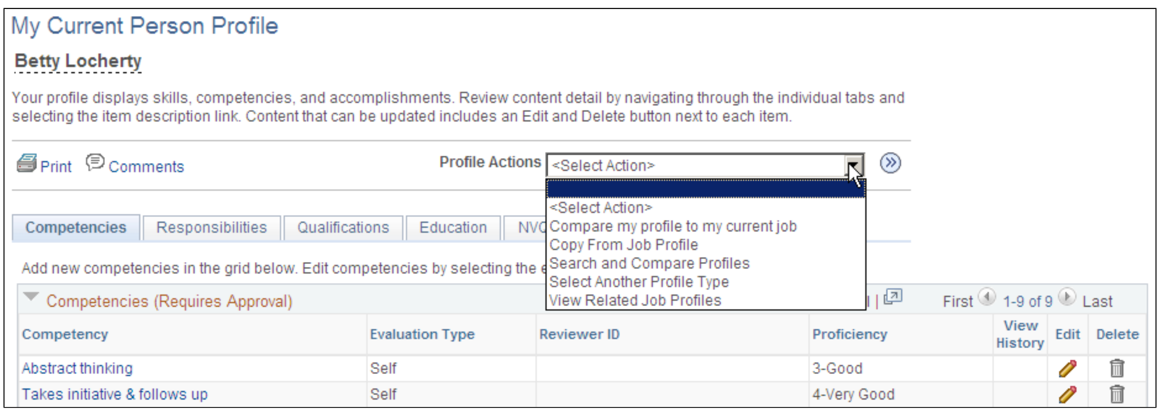
These topics provide an overview of profile actions, and discusses how to enable profile actions.

Pages Used to Enable Profile Actions

Page Name	***Definition Name***	***Usage***
Profile Actions Page	JPM_PROFILE_ACTION	Enable profile actions by person or non-person profile component for each role.

Understanding Profile Actions

The Profile Actions field appears on the Classic non-person profile and person profile pages. It enables administrators, managers, and employees to perform transactions directly from the profile pages, as shown in this example:



Use the Profile Actions component to modify action descriptions and to control which Profile Management roles within the organization (Administrator, Manager, or Employee) have access to specific actions. This functionality enables you to hide or display profile actions according to your organizational policies. For example, if your organization does not use the Search and Compare Profiles transaction, you can hide this option for each profile role.

Pages That Display the Profile Actions Field

The Profile Actions field is available on the Classic person and non-person profile pages throughout the system. The following pages display the Profile Actions field.

The administrator uses these pages to access profile data by navigating to **Workforce Development** > **Profile Management** > **Profiles**:

- Person Profiles
- Non-person Profiles

Note: The administrator can access the fluid **Workforce Administrator home page** > **Profile Administration tile** > **View Profiles tile** to access these classic components.

See Maintaining Profiles as an Administrator.

Employees use these self-service pages to access profile data by navigating to **Self Service** > **Learning and Development**:

- My Current Profile
- My Historical Profile
- My Job Profiles
- View Job Profiles

Managers use these manager self-service pages to access profile data by navigating to **Manager Self Service** > **Learning and Development**:

- Current Team Profiles
- Historical Team Profiles
- Maintain Job Profile

See “(Classic) Maintaining Person Profiles as an Employee or Manager” (PeopleSoft eDevelopment) and “(Classic) Viewing and Updating Job Profiles” (PeopleSoft eDevelopment).

Delivered Profile Actions

The following tables list the Profile Actions that are delivered with the Manage Profiles business process, although some of the actions are not available for all profile roles or pages.

This table lists the profile actions available for the Person profile transaction pages and the Profile Management roles that can perform these transactions:

Profile Action	*Usage*	*Administrator Pages*	*Employee Self Service Pages*	*Manager Self Service Pages*
Copy From Job Profile	Copy items from a non-person profile to the employee's profile using the Copy Items from Job Profile page, which lists the profiles related to the employee's active jobs.	Yes	Yes	Yes

Profile Action	***Usage***	***Administrator Pages***	***Employee Self Service Pages***	***Manager Self Service Pages***
Update Profile Groups	Categorize your profiles by profile groups using the Update Profile Groups page, which you use to list the profile group types and profile groups to which you want to add the profile.	Yes	No	No
Compare my profile to current job	Compare your own profile to your job profile. If more than one job profile applies to your job, select from a list of all applicable job profiles to compare.	No	Yes	No
Compare employee profile to current job	Compare an employee's profile items to his or her job profile items. If more than one job profile applies to the employee, select from a list of all applicable job profiles to compare.	Yes	No	Yes
View Related Job Profiles	View a list of non-person profiles that are related to the employee's job data. The system determines which non-person profiles are related to an employee by searching the employee's job data record. If the employee has multiple jobs, the system checks all the person's active jobs for matching non-person profiles.	Yes	Yes	Yes

Profile Action	***Usage***	***Administrator Pages***	***Employee Self Service Pages***	***Manager Self Service Pages***
Search and Compare Profiles	Select and perform a search on the Search for Profiles page	Yes	Yes	Yes

This table lists the profile actions available for the Non-Person profile transaction types:

Profile Action	***Usage***	***Administrator Pages***	***Employee Self Service Pages***	***Manager Self Service Pages***
Update Profile Groups	Categorize your profiles by profile groups on the Update Profile Groups page, which you use to list the profile group types and profile groups to which you want to add the profile.	Yes	No	No
Express Interest for Employee	Add a non-person profile to a person's interest list using the Person Search - Simple page, which you use to search for an employee whose interest list you want to update.	Yes	No	Yes
Express Interest	Add a job profile to your interest list using the Add to Interest List - Confirmation page.	No	Yes	No
Search and Compare Profiles	Select and perform a search on the Search for Profiles page	Yes	Yes	Yes

This table lists the profile actions available for the Historical profile transaction types:

Profile Action	***Usage***	***Administrator Pages***	***Employee Self Service Pages***	***Manager Self Service Pages***
View As Of Another Date	Indicate a new as of date on the Select New As Of Date page to view profile information as of a certain time.	No	Yes	Yes

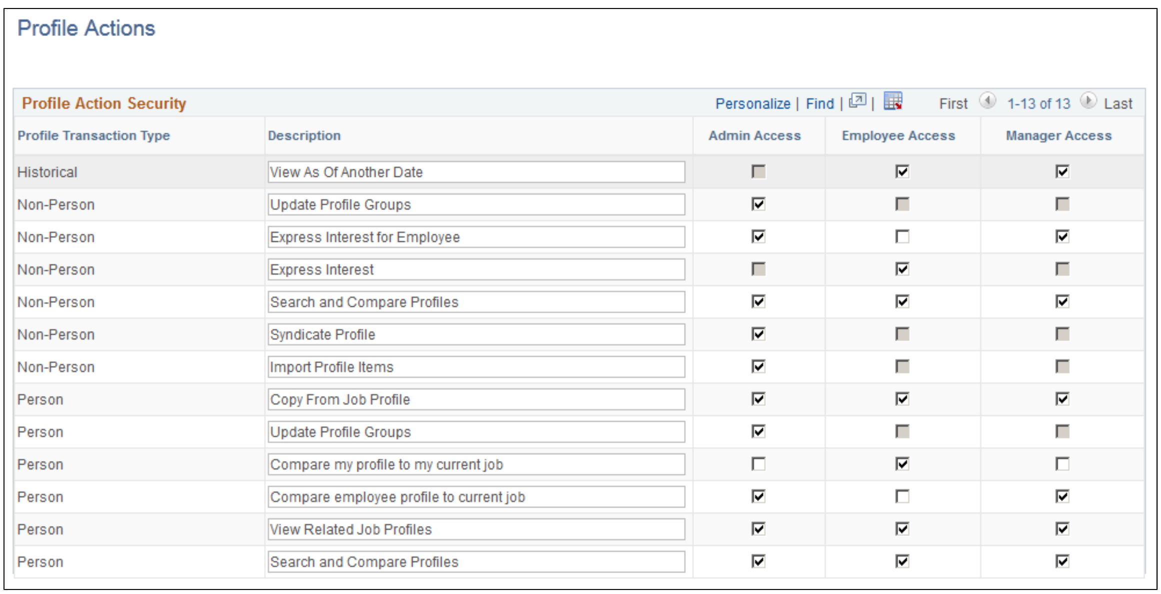
Profile Actions Page

Use the Profile Actions page (JPM_PROFILE_ACTION) to enable profile actions by person or non-person profile component for each role.

Navigation:

Set Up HCM > **Product Related** > **Profile Management** > **Profiles** > **Profile Actions** > **Profile Actions**

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



Note: This Profile Action list is maintained by PeopleSoft development. Changes to this list require code line modifications. For a list of all profile actions delivered with the system, see Delivered Profile Actions in the Understanding Profile Actions topic.

See Understanding Profile Actions.

Profile transaction types are not available for all roles. When the system does not allow a profile transaction for a specific role, the access check box for that role is not available for selection.

Field or Control	*Description*
Profile Transaction Type	Identifies the types of profile pages where this transaction can be used. This is also the high level key value for this table. Transaction types for Manage Profiles are: • *Person* • *Non-Person* • *Historical*
Description	View or modify the text that will appear in the Actions Type drop-down list.
Admin Access (administrator access)	Select to add this action type to the Actions Type drop-down list on the administrator profile pages in the system.
Employee Access	Select to add this action type to the Actions Type drop-down list on employee self-service profile pages in the system.
Manager Access	Select to add this action type to the Actions Type drop-down list on manager self-service profile pages in the system.

Note: Deselecting a <role> Access check box will remove the profile action option from the Profile Actions drop-down menu list. If all options that could appear for a role in the Profile Actions drop-down menu list are deselected, the Profile Actions field will be hidden on the page.

Managing Acknowledgement Requests for Job Profiles

Profile Management uses the Acknowledgement Framework to request that employees acknowledge their understanding of the profiles associated with their job.

To generate requests for job profile acknowledgements, use the Run Acknowledgement Request (JPM_ACK_REQ_RC) component.

This topic provides an overview of job profile acknowledgements and discusses how to run the Acknowledgement Request process.

Pages Used to Manage Acknowledgement Requests for Job Profiles

Page Name	*Definition Name*	*Usage*
Run Acknowledgement Request Page	JPM_ACK_REQ_RC	Create acknowledgement requests for all employees associated with job-related (non-person) profiles participating in the job profile acknowledgement process.

Understanding Job Profile Acknowledgements

To ensure employees are aware of the profile attributes associated with their jobs, Profile Management administrators can enable the **Request Acknowledgement** option for job-related (non-person) profile types for specific identities (such as job, job family, position data, and so forth). Administrators can configure the system to notify employees that they need to review and acknowledge the requirements of their job profiles. Managers and administrators can review the status of acknowledgements at any time and even submit a request to send out new acknowledgement requests, such as when they make updates to a profile.

Your organization can take advantage of the job profile Request Acknowledgement functionality through these pages and procedures:

1. Enable **Request Acknowledgements** for a non-person profile identity option on the Profile Types - Identities Page.

   All profiles with this profile type and identity are considered participants in the Request Acknowledgement process.

2. Use the Run Acknowledgement Request Page to schedule the *Run Acknowledgements* (*JPM_ACK_REQ*) process to create employee acknowledgement requests.

   All non-person profiles with the **Request Acknowledgements** selected for a profile type identity and those profiles added to the Request Acknowledgements temporary table (see item 5) will be picked up by the process. If the run control is configured to do so, employees associated with those job profiles will be notified via email. You can also send reminder notifications after a specified number of days.

   Note: You should run this process on a regular basis to pick up any new participating profiles, acknowledgement requests, and employees new to those profiles participating in job profile acknowledgements.

   ---

3. (Employees) Employees can review and acknowledge job profiles on the My Job Profiles pages (see "My Job Profiles Page (for Employees), View Job Profiles Page (for Employees), and Maintain Job Profiles Page (for Managers)" (PeopleSoft eDevelopment)).

   Note: When an employee needs to review a job profile, the "My Job Profiles Tile (for Employees)" (PeopleSoft eDevelopment) will display the **Action Required** notification.

   ---

4. As a manager or administrator, view the acknowledgement status of employees.

   - (Managers) Use the "Acknowledgement Status Page" (PeopleSoft eDevelopment) to view the acknowledgement status of your direct and indirect reports. You can also see if their job profiles are participating in the acknowledgement process or if the job has not been assigned a job profile.
   - (Administrators) Use the "Review Acknowledgements Page" (Enterprise Components) in the Acknowledgement Framework to see those employees that have acknowledged their job profiles.

5. As a manager or administrator, request acknowledgements for a specific job profile.

   This is helpful when you have updated a job-related profile and want employees to review the updated attributes.

Note: The request will be sent to all employees associated with this profile.

- (Managers) Select the **Request Acknowledgement** button on the Maintain Job Profiles page (see “My Job Profiles Page (for Employees), View Job Profiles Page (for Employees), and Maintain Job Profiles Page (for Managers)” (PeopleSoft eDevelopment)) to request employees acknowledge a specific profile.
- (Administrators) Select the *Request Acknowledgement* action item from **Profile Actions** drop-down menu on the Non-person Profile Page.

Important! You must first activate the *JPMRequestProfAcknowledgement* event and its handler in Event Manager.
When a user selects the **Request Acknowledgement** option, it raises the *JPMRequestProfAcknowledgement* event in Event Manager. The event handler processes the request and stores it for the next run of the *Run Acknowledgements* process (see item 2 in this list). The process will generate a new request for all employees tied to this job profile, even if they have acknowledged the profile previously.

Note: Oracle PeopleSoft delivers Notification Composer Framework to manage the setup and administration of all notifications in one central location.
Once you have adopted the Notification Composer feature, you must use it to create new notifications and manage your existing notifications.
Notifications delivered with HCM Image 47 or later must use Notification Composer.
For more information about Notification Composer Framework, see “Understanding Notification Composer” (Enterprise Components).

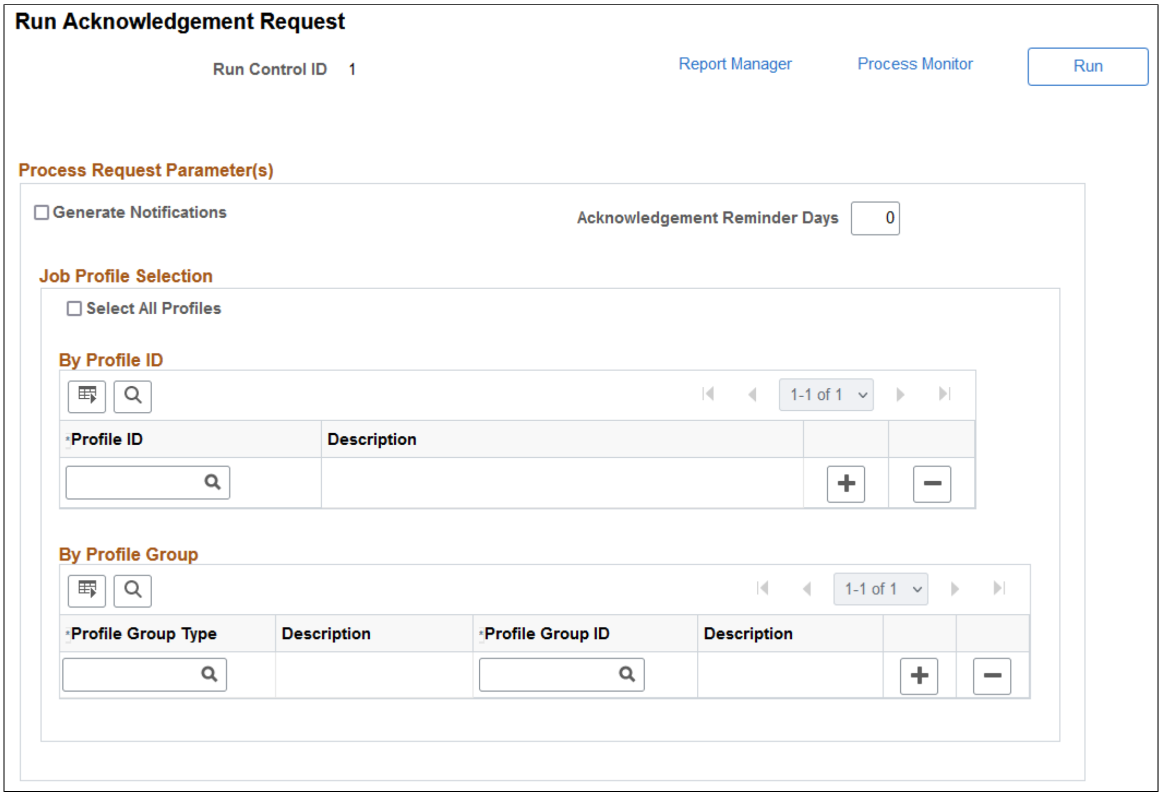
Run Acknowledgement Request Page

Use the Run Acknowledgement Request page (JPM_ACK_REQ_RC) to create acknowledgement requests for all employees associated with job-related (non-person) profiles participating in the job profile acknowledgement process.

Navigation:

- **Set Up HCM** > **Product Related** > **Profile Management** > **Profiles** > **Run Acknowledgement Request** > **Run Acknowledgement Request**
- From the Administer Workforce home page in fluid, select the **Profile Administration tile** > **Profile Configuration tile** > **Run Acknowledgement Request tab** > **Run Acknowledgement Request**.

This example illustrates the fields and controls on the Run Acknowledgement Request page.



This process identifies:

- Profile types with the **Request Acknowledgement** option enabled on the Profile Types - Identities Page and those non-person profiles to which they are associated.
- Manager or administrator requests made from the following locations:
  - (Manager) **Request Acknowledgement** button at the top of the Maintain Job Profiles page (see "My Job Profiles Page (for Employees), View Job Profiles Page (for Employees), and Maintain Job Profiles Page (for Managers)" (PeopleSoft eDevelopment)).
  - (Administrator) *Request Acknowledgement* action from the Non-person Profile Page, **Profile Actions** field.
- All employees tied to participating non-person profiles and sends a notification, if configured to do so.

After the process runs, the My Job Profile tile and pages will display **Action Required** badges and an **Acknowledge** button for participating job profiles.

Managers can view the status of these acknowledgements via the "Acknowledgement Status Page" (PeopleSoft eDevelopment).

Administrators use the "Review Acknowledgements Page" (Enterprise Components) in the Acknowledgement Framework to view job profile acknowledgements.

Field or Control	***Description***
Generate Notifications	Select this check box to send an email notification to employees to review their job profile. This notification will be sent only to those associated with the job profiles picked up by the Request Acknowledgement process.
Acknowledgement Reminder Days	Enter the number of days after the initial acknowledgement request was sent that a reminder notification should be sent to employees. For example, if you enter *5*, and the employee has not yet acknowledged the job profile after five days, then the system will send out the reminder email.

Job Profile Selection

Field or Control	***Description***
Select All Profiles	Select this check box to run the process for all participating job profiles. Participating profiles are non-person profiles that have the **Request Acknowledgement** option selected on the Profile Types - Identities Page for at least one of it's identities. When you select this option, the remaining fields in this section are hidden.
Profile ID and **Description**	Enter individual profile IDs for which you want to run the acknowledgement process. The process creates acknowledgement requests for employees associated with profiles that are configured for acknowledgements. For information on setting up non-person profiles, see the Non-person Profile Page documentation.
Profile Group Type and **Description**	Select a profile group that will contain the set of profiles for which you want to run the acknowledgement process. When you select a group type, you need to enter at least one group ID from that group type. For information on creating groups, see the Creating Profile Group Types and Profile Groups documentation.
Profile Group ID and **Description**	Select a group ID from the group type you entered. The process creates acknowledgement requests for employees associated with job-related profiles in the group that are configured for acknowledgements.

Setting Up to Use BI Publisher Reports and Profiles

These topics provide an overview of BI Publisher reports and templates, list prerequisites, and discuss how to set up for BI Publisher reports and profiles.

Pages Used to View and Modify BI Publisher Reports and Templates

Page Name	***Definition Name***	***Usage***
Definition Page	PSXPRPTDEFN	View the report properties and download or view the data schema and data source.
Template Page	PSXPRPTTMPL	View or update the existing template.
Design Helper Page	PSXPSETUPDWNLD	Download plug-ins to facilitate template design and modification.

Understanding BI Publisher Reports and Templates

Manage Profiles uses the PeopleTools BI Publisher to generate the Content Catalog Listing report as well as the online profiles and profile reports for person and non-person profiles.

Delivered Report Definitions

This table lists the delivered report definitions and data sources for the related RTF templates:

Report Name	***Description***	***Data Source Type***	***Data Source ID***
JPM_CATI_RPT	Content Items Reports	PS Query	JPM_CONTENT_ITEMS
JPM_JPNP_RPT	Non Person Profile Batch	XMLDoc	JPM_PROFILE
JPM_JPPP_RPT	Person Profile Batch	XMLDoc	JPM_PROFILE
JPM_NP_PROF	Non Person Profile Online	XMLDoc	JPM_PROFILE
JPM_PP_PROF	Person Profile Online	XMLDoc	JPM_PROFILE

Delivered Data Sources

This table describes each of the delivered data sources:

Data Source ID	***Description***
JPM_CONTENT_ITEMS	PS Query that is used only for content items reports.
JPM_PROFILE	BI document structured by row sets. All profile reports use the same data structure. All data elements are included in the data structure and are available for both person and non-person profile report templates.

Delivered Templates

To format the reports, we deliver three template files that specify the content and layout:

- One template file for the Content Items reports.
- One template file for both the online and batch Person Profile reports.
- One template file for both the online and batch Non-Person Profile reports.

You can modify the delivered template files to address your specific reporting requirements. After modifying each template, you must upload it to the corresponding report definition. You can modify one instance of each of the profile reports and attach that same updated template file to both of the corresponding report definitions.

See Template Page.

See Modifying an Existing Template.

Profile Report Nodes

This table describes the report nodes for profile reports:

Node	***Data Elements Summary***
JPM_PROFILE	High level data elements related to the profile.
JPM_IDENTITY_WK	Profile identities and associations.
JPM_JP_SECTION	Sections defined in the profile type.
JPM_JP_CRITM_VW	Profile content items in the sections in the profile. All properties are included whether the content type uses them or not.
JPM_CATITMAXD_VW	Definitions of the content items in the content catalog. All properties are included whether the content type uses them or not.

Node	Data Elements Summary
RUN_PARAMETERS	Criteria used to generate the report.

For more information, see the product documentation for *PeopleTools: BI Publisher for PeopleSoft.*

Related Links

Running Profile Reports
Understanding Managing Profiles
Understanding the Content Catalog

Prerequisites

To use BI Publisher reports, you must configure PeopleSoft Integration Broker and PeopleSoft Process Scheduler to implement PeopleSoft Report Manager.

For more information, see the product documentation for *PeopleTools: Integration Broker*, *PeopleTools: Process Scheduler*, and *PeopleTools: BI Publisher for PeopleSoft.*

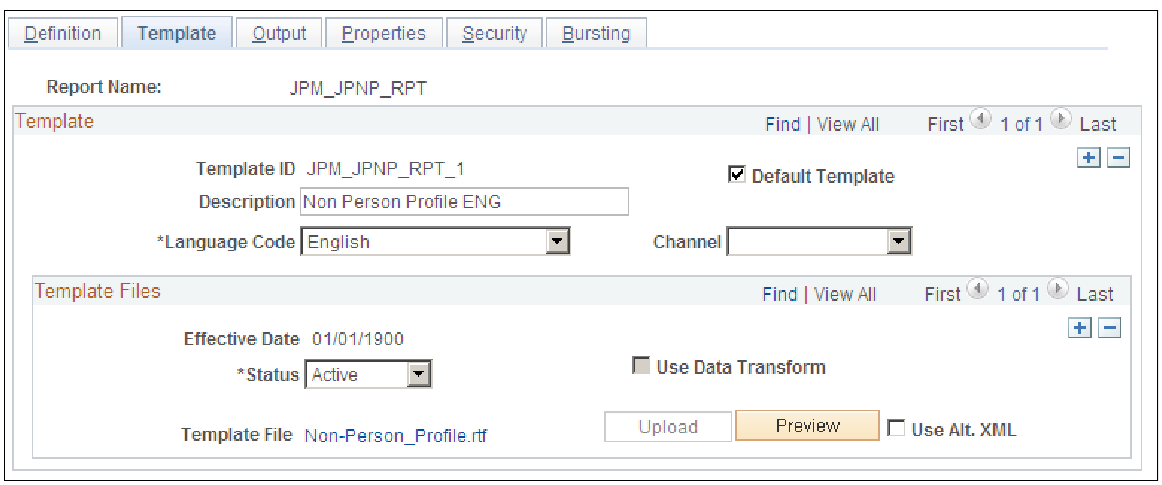
Template Page

Use the Template page (PSXPRPTTMPL) to view or update the existing template.

Navigation:

Reporting Tools > **BI Publisher** > **Report Definition** > **Template**

This example illustrates the fields and controls on the Report Definition - Template page. You can find definitions for the fields and controls later on this page.



Viewing the Existing Template

Field or Control	*Description*
Template File	Click this link to open or save the RTF template in a new window or save it to a location of your choice.
Preview	Click to view an example of the report using sample data registered with the data source.

Note: The person profile online and batch reports share the same person profile template file. Similarly, the non-person batch and online reports share the non-person profile template file.

For more information, see the product documentation for *PeopleTools: BI Publisher for PeopleSoft*.

Modifying an Existing Template

The existing templates contain two sections at the end to print out the ID and description of any additional items for content types that you added after the template was created. If you want to display more specific information about your new items, you must create an additional section in the template and define the data that you want to display.

The reports group and display content items in order of profile tab number and profile section sequence number based on the profile type definition that you set up for online display. Regardless of where you place a new section in the template, the report sorting order governs the order of display in the report. To change the report display order, you must edit the sorting. To sort new sections properly, you must also add within the correct loops in the report's driving logic.

Note: Become familiar with BI Publisher before modifying either of the delivered templates.

Setting Up to Modify a Template

To prepare to modify an existing template:

1. Access the Design Helper page **(Reporting Tools > BI Publisher > Setup > Design Helper > Design Helper)** and save the plug-in design helper for Microsoft Word to facilitate template modifications.
2. Access the Definition page **(Reporting Tools > BI Publisher > Report Definition > Definition)** for the appropriate report definition and click the links to download the data schema and sample data files.
3. Click **Template File** link on the Template page **(Reporting Tools > BI Publisher > Report Definition > Template)** and row for the existing RTF template that you want to edit.

Creating a New Section in a Template

To create a new section:

1. Copy an entire section defined by <?when: JPM_JP_SECTION.JPM_CAT_TYPE=…..end when?> and paste it into the template.

2. Modify the conditional statement to identify the item that you want to add.

3. Insert fields into the table to identify the data that you want to display on the report.

4. Save the revised template any file name and the .rtf file extension (*.rtf).

Uploading the Revised Template

To upload the revised template:

1. Add a new effective dated row in the **Template Files** scroll area on the Template page **(Reporting Tools > BI Publisher > Report Definition > Template).**

   Update these options:

Field or Control	***Description***
Effective Date	Enter the date that the system should begin to print and display reports and profiles with this template.
Status	Select the *Active* status for the new template.

2. Click **Upload** and select the revised template file.

3. Repeat the last two steps to provide the new template to both the online and the batch report definitions.

For more information, see the product documentation for *PeopleTools: BI Publisher for PeopleSoft.*

Chapter 4

Using the PeopleSoft Fluid User Interface to Manage Profile Administration Tasks

Managing Profile Administration Tasks Using Fluid

This topic lists the pages that administrators can access from a single location in the PeopleSoft Fluid User Interface to perform Profile Management-related transactions.

For general information about fluid pages in PeopleSoft HCM, see “Understanding PeopleSoft Fluid User Interface Homepages” (Application Fundamentals).

Pages Used to Manage Profile Administration Tasks Using Fluid

Page Name	***Definition Name***	***Usage***
Profile Administration Tile	HC_PROFILE_ADMIN_FL_LINK (this is the cref for this tile)	Access the Profile Administration dashboard where you can set up, view, or manage profile data.
Profile Administration Dashboard	HC_PROFILE_ADMIN_FL	Access Profile Management-related tiles and pages.

Profile Administration Tile

Use the Profile Administration tile to access the Profile Administration dashboard where you can set up, view, or manage profile data.

Navigation:

The Profile Administration tile is delivered as part of the Workforce Administrator home page, but the location can change if you change the delivered home pages or if administrators personalize their home pages.

This example illustrates the Profile Administration tile.

Click the Profile Administration tile to access the Profile Administration Dashboard, where you can perform tasks such as set up profile content and profiles, search and compare profiles, view profiles, run reports, and manage National Vocational Qualifications (NVQ) information for Great Britain.

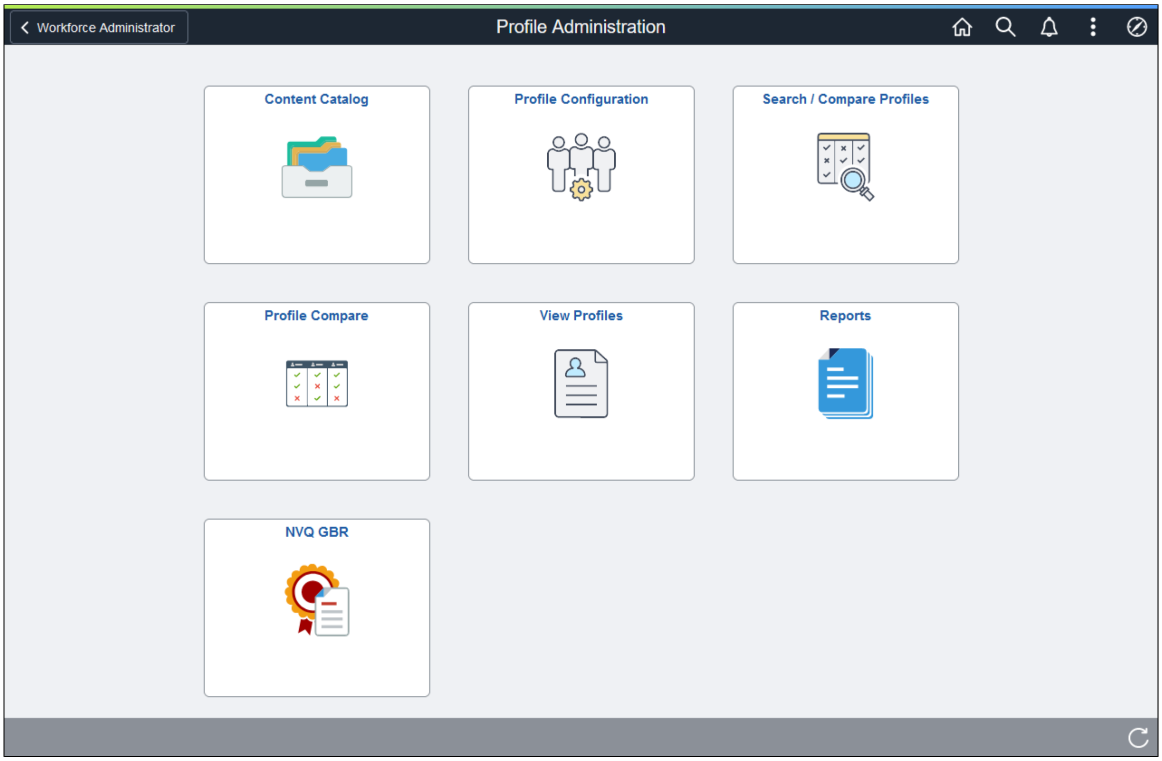
Profile Administration Dashboard

Use the Profile Administration dashboard (HC_PROFILE_ADMIN_FL) to access Profile Management-related tiles and pages.

Navigation:

Click the Profile Administration Tile, which is delivered as part of the Workforce Administrator home page, but the location can change if you change the delivered home pages or if administrators personalize their home pages.

This example illustrates the Profile Administration dashboard.



This Position Management dashboard enables administrators to access frequently-used Position Management components from one location.

The dashboard lists the components collected under these tiles:

Tile Name	***Usage***
Content Catalog Tile	Access the Content Catalog navigation collection to set up content types, items, groups, NVQ information, and reports.
Profile Configuration Tile	Access the navigation collection to configure profiles, profile groups, and search and compare.
Search / Compare Profiles Tile	Search for profiles that match selected search criteria and compare the profiles from the search results.
Profile Compare Tile	Select a source and target profiles that you want to compare.
View Profiles Tile	Access this navigation collection to view person or non-person profiles, approve profiles, syndicate (copy) profiles into other profiles, perform profile matching, create interest lists, and managing training.
Reports Tile	Access this navigation collection to run profile reports.

Tile Name	Usage
NVQ GBR Tile	Access this navigation collection to manage NVQ information for employee's in Great Britain.

Related Links

Understanding the Content Catalog

Understanding Profile Management

Understanding Setting Up Search and Compare Profiles

Understanding Managing Profiles

Running Profile Reports

Understanding NVQs

Setting Up the Content Catalog Using Fluid

The content catalog is a repository of the data that can be associated with person and non-person profiles. For an overview of working with and setting up the Content Catalog, see Understanding Content Catalog Setup.

This topic lists the pages that workforce administrators can access from a single location in the PeopleSoft Fluid User Interface to configure Content Catalog tables.

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

Pages Used to Set Up the Content Catalog Using Fluid

Page Name	Definition Name	Usage
Content Catalog Tile	HC_JPM_CCAT_NAVCOLL_FL (this is the cref for the tile)	Access the Content Catalog navigation collection to set up content types, items, groups, NVQ information, and reports.
Content Types • Content Types Page • Relationship Rule Page	JPM_CAT_TYPES JPM_CAT_TYPE_RLAT	Define the properties of content types. The properties selected for a content type determine which fields appear on the Content Items - Item Details page and the attributes of those fields. Set up and review relationships between content types.

Page Name	***Definition Name***	***Usage***
Content Items • Content Items - Item Details Page • Content Items - Relationships Page • Content Items - Group Memberships Page	JPM_CAT_ITEMS JPM_CAT_ITEM_RLAT JPM_CAT_ITEM_GMEMB	Define content item details for the selected content type. Set up and review the relationship between content items. Add the content item to existing content groups. From this page you can also view all the members of the selected content groups.
Rating Model Page	RATING_MDL_TBL	Set up ratings models that contain values used to rate an employee's proficiency level.
Content Group Types Page	JPM_CAT_GROUPS	Define content group types and the groups within each content group type.
Content Group Members Page	JPM_CAT_GMEMB	Define content group members. Add content items to the content groups that you have created on the Content Group Types page or view existing item members for a content group.
NVQ Award Bodies Page	NVQ_DETAILS	Specifying awarding bodies for NVQs that you have defined in the content catalog. You must set up NVQs and the NVQ Award Body Table values in before you can use this page.
NVQ Award Body Table Page	NVQ_AWARD_TBL	Define name and location information for NVQ awarding bodies. (See Setting Up NVQ Information)
Content Catalog Listing Page	JPM_CATLIST_RPT	Run the Content Catalog Listing report (JPM_CATI_RPT) that lists the content items that have been set up for a selected content type or for all content types. Access the report in Report Manager.
Competency Summary Page	CM_COMPETENCY_SUMM	Review the category that is assigned to competencies. You can view competencies in a selected competency category or a competency type.

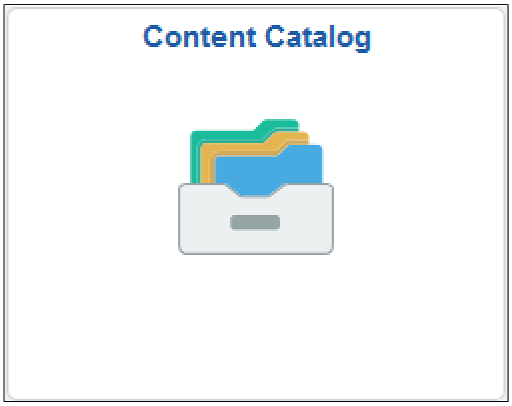
Content Catalog Tile

Administrators use the Content Catalog tile to access the Content Catalog navigation collection to set up content types, items, groups, NVQ information, and reports.

Navigation:

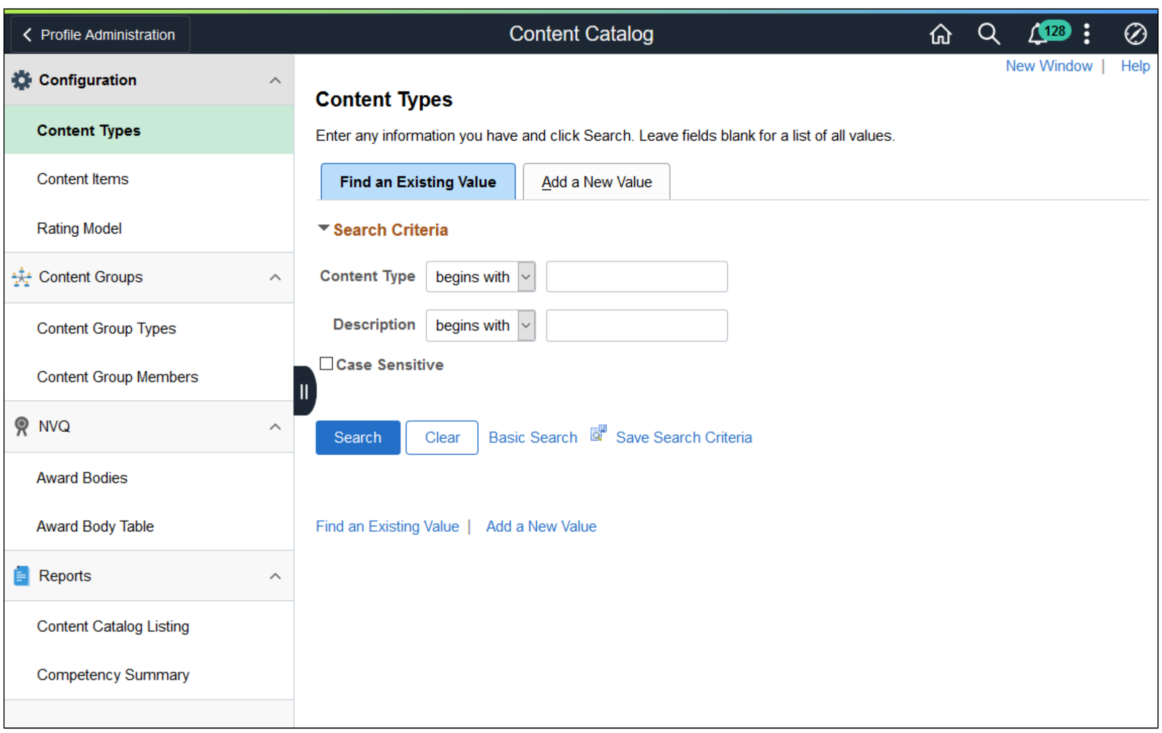
The Content Catalog tile is delivered as part of the Profile Administration Dashboard, but the location can change if you change the delivered home pages or if administrators personalize their home pages.

This example illustrates the Content Catalog tile.



Click the Content Catalog tile to access the Content Catalog application start page.

This example illustrates the Content Catalog application start page.



This application start page is a navigation collection that enables administrators to access frequently-used content catalog setup components from one location.

The application start page lists the components collected under these categories:

- Configuration
- Content Groups

- NVQ
- Reports

Rows that display a downward facing arrow are category headers. Select a category row to expand and view the component collection associated with that category.

When using a large form factor device, the right panel displays the component selected in the left panel.

Setting Up Profile Configuration Using Fluid

The profile configuration tables enable administrators to set up person and non-person profile configurations. For an overview of working with and setting up the profiles, see Understanding Profile Management.

This topic lists the pages that workforce administrators can access from a single location in the PeopleSoft Fluid User Interface to configure the profile tables.

For general information about fluid pages in PeopleSoft HCM, see “Understanding PeopleSoft Fluid User Interface Homepages” (Application Fundamentals).

Pages Used to Set Up Profile Configuration Using Fluid

Page Name	***Definition Name***	***Usage***
Profile Configuration Tile	HC_JPM_ADM_NAVCOLL_FL (this is the cref for this tile)	Access the navigation collection to configure profiles, profile groups, and search and compare.
Define Profile Types • Profile Types - Attributes Page • Profile Types - Identities Page • Profile Types - Content Page • Profile Type - Associations Page	JPM_JP_TYPE_ATTRIB JPM_JP_TYPE_IDENT JPM_JP_TYPE_CONT JPM_JP_TYPE_ASSOC	Set up profile type attributes, like the profile type, approvals information, identification options (such as a job code, position number, or person), profile content, and associations (entities external to the Profile Management business process).
Clone Profile Types Page	RUNCTL_JPM_CLONE	Clone profile types. Create a new profile type by copying an existing profile type by running the Clone Profile Type process.
Assign Profile Type Defaults Page	JPM_DFLT_JP_TYPES	Assign profile type defaults for person and non-person profile types available to other product features and services.

Page Name	***Definition Name***	***Usage***
Custom Prompt Page	JPM_C_LIST_VALUES	Use the Content Prompt page to define customized prompt values that will be used to define valid values for custom lists, such as level of difficulty and ePerformance item statuses, or identify a prompt record from which to provide a list.
Instance Qualifiers Page	JPM_JP_INST_QUAL	Define instance qualifiers for a content type, and define which instance qualifiers employees and managers can view.
Profile Identity Options Page	JPM_RLAT_SETUP	Define profile identity options, which can be linked to profile types. Entities include job codes, job functions, job families, people, and salary grades. The entities enabled on this page determine which options are available on the Identities page of the Profile Type component that define the structure of a non-person profile. For example, if you enable Job Codes you can set up a profile type that is linked to job code. A set of default profile identity options is delivered but you can add to the list according to your requirements.
Profile Association Options Page	JPM_RLAT_SETUP	Define the entities external to the Manage Profiles business process to which you can link profile types. One association option is delivered that enables you to link a profile type to ePerformance templates. The addition of other associations would require customizations to leverage it.
Profile Actions Page	JPM_PROFILE_ACTION	Enable profile actions by person or non-person profile component for each role.
Profile Group Types Page	JPM_JP_GTYPE_GRP	Set up profile group types.
Profile Groups • Profile Groups - Group Definition Page • Profile Groups - Group Members Page	JPM_JP_GROUPS JPM_JP_GMEMB	Define criteria to create a profile group. View or add profiles to define members for a profile group.

Page Name	***Definition Name***	***Usage***
Build Profile Groups Page	RUNCTL_JPM_GROUP	Run the Build Profile Groups process to create a profile group.
Define Search Configuration Page	JPM_SRCH_CFG	Set up profile search types or employees, managers, and administrators.
Fluid Compare Configuration • (Fluid) Fluid Compare Configuration - Page Display Page • (Fluid) Fluid Compare Configuration - Data Sources Page	JPM_CSC_DEFN JPM_CSC_FLD	Configure field display and label options for the Compare Results page in fluid. Set up profile search types for employees, managers, and administrators.
Run Acknowledgement Request Page	JPM_ACK_REQ_RC	Create acknowledgement requests for all employees who are associated job-related profiles (non-person) that are participating in the acknowledgement of job profile process.

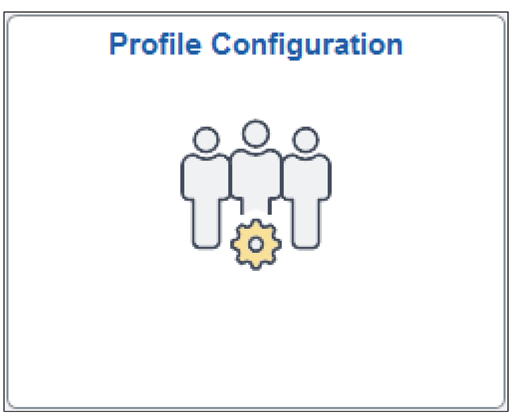
Profile Configuration Tile

Administrators use the Profile Configuration tile to access the navigation collection to configure profiles, profile groups, and search and compare.

Navigation:

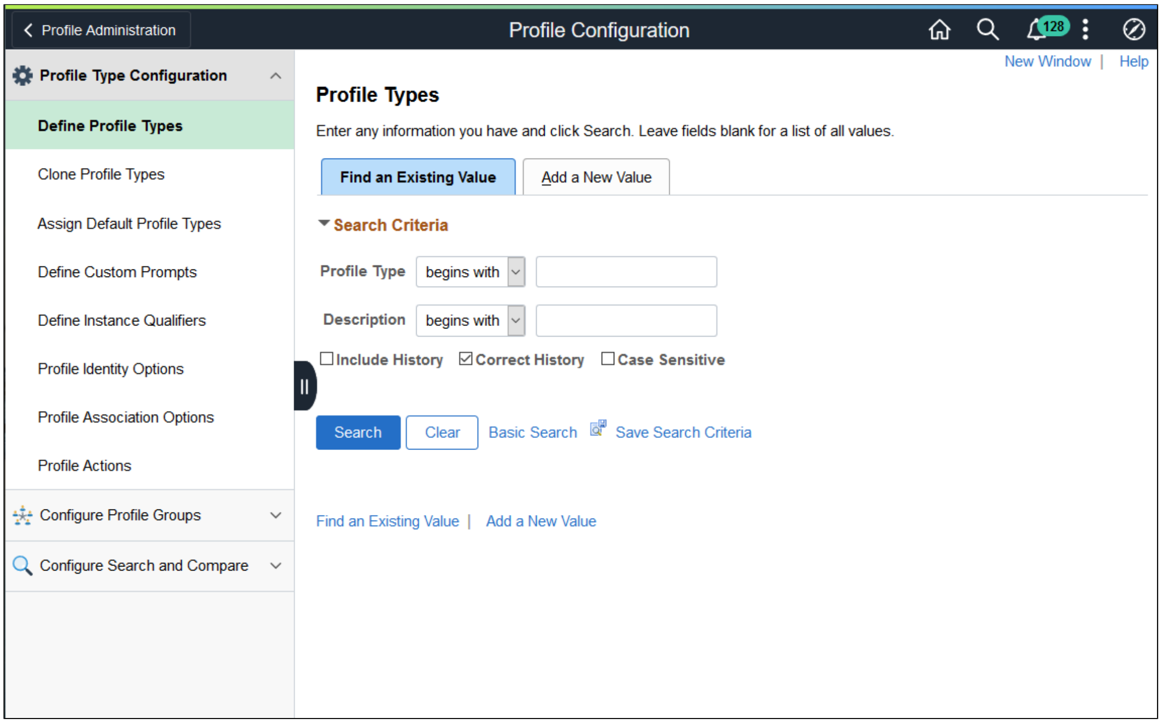
The Profile Configuration tile is delivered as part of the Profile Administration Dashboard, but the location can change if you change the delivered home pages or if administrators personalize their home pages.

This example illustrates the Profile Configuration tile.



Click the Profile Configuration tile to access the Profile Configuration application start page.

This example illustrates the Profile Configuration application start page.



This application start page is a navigation collection that enables administrators to access frequently-used profile setup components from one location.

The application start page lists the components collected under these categories:

- Profile Type Configuration
- Configure Profile Groups
- Configure Search and Compare
- Run Acknowledgement Request

Rows that display a downward facing arrow are category headers. Select a category row to expand and view the component collection associated with that category.

When using a large form factor device, the right panel displays the component selected in the left panel.

Viewing and Managing Profiles as an Administrator Using Fluid

The View Profiles navigation collection allows you to easily access various profile-related pages used to create and maintain profiles, review and approve changes, match profiles, and identify interest lists and training for individuals.

For an overview of creating and maintaining profiles for your workers and jobs, see Understanding Managing Profiles.

This topic lists the pages that workforce administrators can access from a single location in the PeopleSoft Fluid User Interface to view and manage profile-related data.

For general information about fluid pages in PeopleSoft HCM, see “Understanding PeopleSoft Fluid User Interface Homepages” (Application Fundamentals).

Pages Used to View and Manage Profiles as an Administrator Using Fluid

Page Name	***Definition Name***	***Usage***
View Profiles Tile	HC_JPM_VIEW_PROFILES_NAVCOL_FL (this is the cref for this tile)	Access this navigation collection to view person or non-person profiles, approve profiles, syndicate (copy) profiles into other profiles, perform profile matching, create interest lists, and managing training.
Person Profile Page	JPM_PROFILE_PERS	Create and update person profiles.
Non-person Profile Page	JPM_PROFILE1	Create and update non-person profiles.
Approval Profiles • Select Approval Transaction Page • Approve Profiles Page	JPM_JP_MNG_APPRVL JPM_JP_PERS_APPR	View a list of profiles waiting approval, with approved changes, or with changes that have been denied. View a list of the changes to a selected person profile. If the profile changes are pending approval, you can either approve or reject the changes.
Syndication Exceptions Page	JPM_JP_SYND_EXC1	Display the syndication exceptions for a profile. Syndication exceptions occur when a content item is syndicated from multiple source profiles but has different property values from each source profile.
Match Evaluation Types Page	CM_MATCH_INSTR	Define match evaluation types specifying the types of inquiries a user can run and the evaluation types a user can access. To run the match analyses, you must first set up evaluation types and user access.

Page Name	***Definition Name***	***Usage***
Employee Profile Matching • Employee Profile Matching - Summary Page • Employee Profile Matching - Competency Match Page • Employee Profile Matching - Other Items Match Page • Employee Profile Matching - Gap-Fit Measurement Page	CM_PROFILE_SUMM CM_PROFILE_MATCH CM_PROFILE_MATCH2 CM_PROFILE_MATCH3	Specify the employee, employee profile type and non-person profile with which you want to compare and view an analysis of the employee matches. View competency matches that display an analysis of how the employee matches the individual competencies required for a given non-person profile. Analyze other profile item matches for an employee. Review how well an employee matches individual content for a given non-person profile. Compare an employee's ratings in each required competency with the rating expected for the non-profile, and view the percentage difference. The sum of these percentages provides an overall indication of how well the employee matches the requirements.
Create Teams Page	EE_TEAMS	Set up employee teams.
Compare Team to Job Task • Compare Team to Job Task - Competency Match Page • Compare Team to Job Task - Other Items Match Page	CM_TEAM_ROLE CM_TEAM_ROLE2	Analyze team competency matches. Compare the competencies assigned to a job task with the competency profiles of team members. Compare the content items other than competencies required by a job task with the team members' profile items.
Interest List by Person Page	JPM_INTEREST_PERS	View an employee's interest list and add profiles to the list.
Interest List by Profile Page	JPM_INTEREST_PROF	View a list of employees who have a selected profile on their interest list. You can also add the selected profile to an employee's interest list.
Training Page (see "Course Student Enrollment Page" (PeopleSoft Human Resources Administer Training))	COURSE_STUDNT_ENRL	View details of training courses that the employee has completed, enrolled in, or on the waiting list. This page displays course sessions that you manage using the Administer Training business process.
"Review Competency Training Page" (PeopleSoft Human Resources Administer Training)	COMP_TRAINING	Search for training courses that address a selected competency.

Page Name	*Definition Name*	*Usage*
Professional Training Page or Global Assignments Training Page	EDUCAT_TRAIN_GBL	Record employee training that is not maintained using the Administer Training business process.

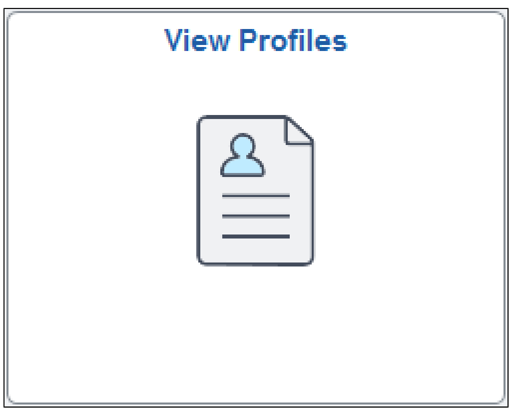
View Profiles Tile

Administrators use the View Profiles tile to access the navigation collection to view person or non-person profiles, approve profiles, syndicate (copy) profiles into other profiles, perform profile matching, create interest lists, and managing training.

Navigation:

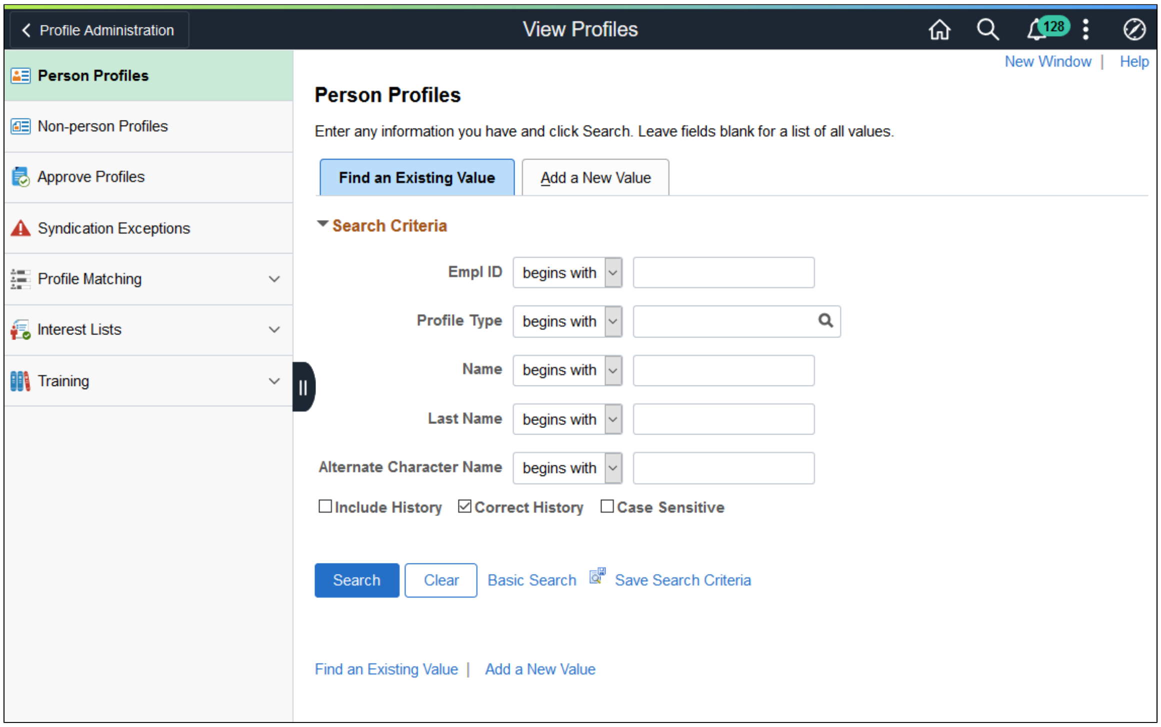
The View Profiles tile is delivered as part of the Profile Administration Dashboard, but the location can change if you change the delivered home pages or if administrators personalize their home pages.

This example illustrates the View Profiles tile.



Click the View Profiles tile to access the View Profiles application start page.

This example illustrates the View Profiles application start page.



This application start page is a navigation collection that enables administrators to access frequently-used profile components from one location.

The application start page lists the components collected under these categories:

- Person Profiles
- Non-person Profiles
- Approve Profiles
- Syndication Exceptions
- Profile Matching
- Interest Lists
- Training

Rows that display a downward facing arrow are category headers. Select a category row to expand and view the component collection associated with that category.

When using a large form factor device, the right panel displays the component selected in the left panel.

Running Profile Reports Using Fluid

This topic lists the pages that workforce administrators can access from a single location in the PeopleSoft Fluid User Interface to run profile reports.

For general information about fluid pages in PeopleSoft HCM, see “Understanding PeopleSoft Fluid User Interface Homepages” (Application Fundamentals).

Pages Used to Run Profile Reports Using Fluid

Page Name	***Definition Name***	***Usage***
Reports Tile	HC_JPM_REPORTS_NAVCOLL_FL (this is the cref for this tile)	Access the navigation collection to run profile reports.
Competency Inventory Page	RUNCTL_PER011	Run the Competency Inventory report (PER011) that lists employees in a department and their competencies. Run the Refresh Employees Table Application Engine process (PER099) before running this report to include any new employees and their associated competencies. To run this process navigate to **Set Up HCM** > **System Administration** > **Database Processes** > **Refresh EMPLOYEES Table**. Use the same run control ID for both the Refresh Employee Table process and the Competency Inventory report.
Internal Resume	RUNCTL_PER034	Run the Internal Resume report (PER034) that creates a resume-like document from the data contained in PeopleSoft tables, including the employee's PERSON profile. Sections of the report include: employee name and address, prior work history, education, salary history, job performance, training, special projects, competencies, languages, citizenship, visa/work permits, licenses and certificates, professional memberships, and honors and awards.
License/Certificate Renewal Page	RUNCTL_CMM007	Run the License/Certificate report (CMM007) that lists employees who need to renew a license or certificate.
Person Profile Report Page	JPM_PPROF_RPT	Run the Person Profile report (JPM_JPPP_RPT) to generate a PDF file for each person listed in the run parameters. Each report shows all items in the person's profile that are effective as of the date specified in run parameters. The Report Manager lists each report file separately with the employee ID in brackets in the report description.

Page Name	***Definition Name***	***Usage***
Non-Person Profile Report Page	JPM_NPPROF_RPT	Run the Non-Person Profile report (JPM_JPNP_RPT) to generate a PDF file for each profile listed in the run parameters. Each report shows all items in the profile that are effective as of the date specified in run parameters. The Report Manager lists each report file separately with the profile ID in brackets in the report description.

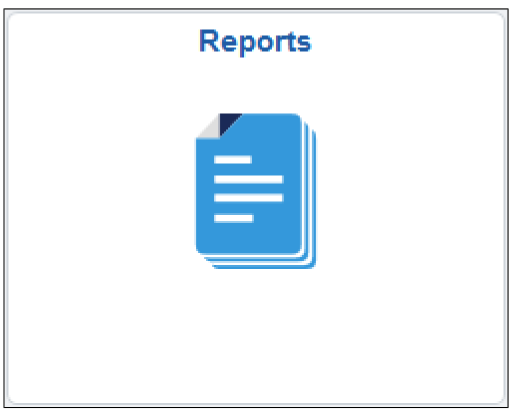
Reports Tile

Administrators use the Reports tile to access the navigation collection to run profile reports.

Navigation:

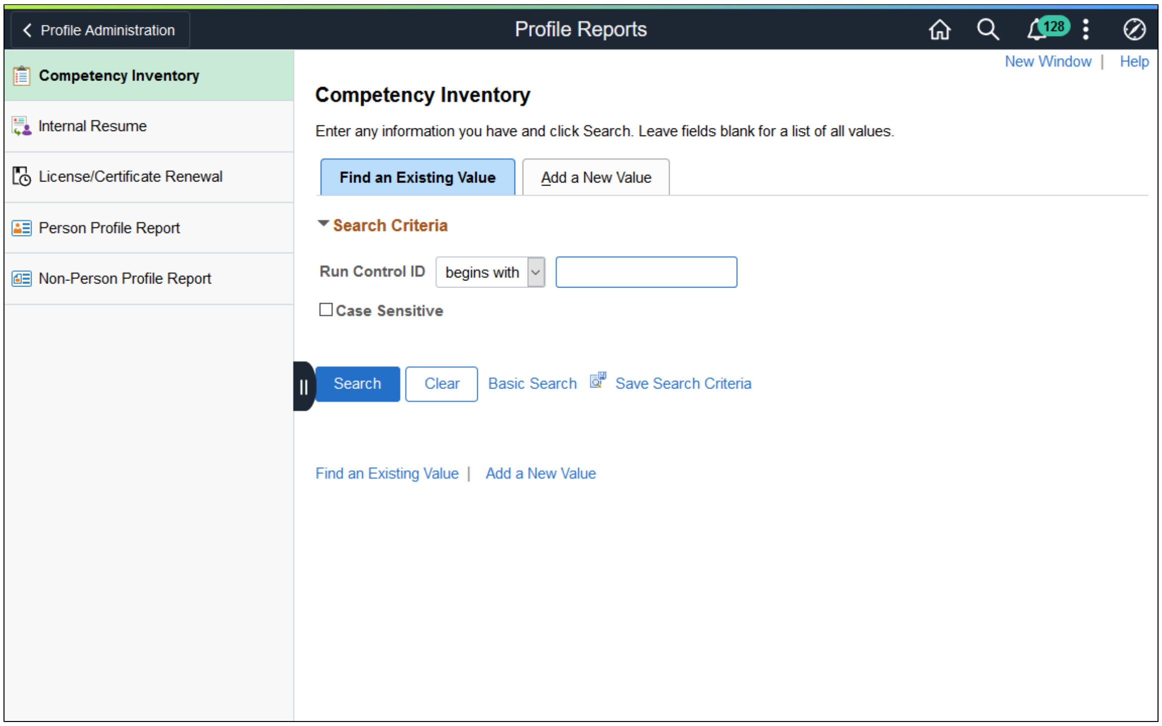
The Reports tile is delivered as part of the Profile Administration Dashboard, but the location can change if you change the delivered home pages or if administrators personalize their home pages.

This example illustrates the Reports tile.



Click the Reports tile to access the Profile Reports application start page.

This example illustrates the Profile Reports application start page.



This application start page is a navigation collection that enables administrators to access frequently-used profile reporting components from one location.

The application start page lists the components collected under these categories:

- Competency Inventory
- Internal Resume
- License/Certificate Renewal
- Person Profile Report
- Non-Person Profile Report

When using a large form factor device, the right panel displays the component selected in the left panel.

(GBR) Managing NVQ Data Using Fluid

This topic lists the pages that workforce administrators can access from a single location in the PeopleSoft Fluid User Interface to manage National Vocational Qualifications (NVQs) information.

For an overview of NVQ, see Understanding NVQs.

For general information about fluid pages in PeopleSoft HCM, see “Understanding PeopleSoft Fluid User Interface Homepages” (Application Fundamentals).

Pages Used to Run Profile Reports Using Fluid

Page Name	***Definition Name***	***Usage***
NVQ GBR Tile	HC_JPM_NVQ_NAVCOLL_FL (this is the cref for this tile)	Access the navigation collection to manage NVQ information for employee's in Great Britain.
Enroll NVQ Page	NVQ_EMPLNVQS	Register employees for NVQ programs.
Track NVQ • NVQ Review Page • NVQ Unit Plan Page	NVQ_REVIEW NVQ_UNIT_PLAN	Enter an NVQ review then populate and track unit status for an NVQ review.
NVQs by Employee Page	NVQ_SUMMARY1	Review all NVQs associated with an employee.
NVQs by Qualification Page	NVQ_SUMMARY2	View the employees associated with an NVQ.
Initialize Plan Page (NVQ005)	RUNCTL_NVQ005	Run the Initialize Plan process (NVQ005) for a selected employee. This SQR process compiles the data required for the Employee Unit Plan report (NVQ006).
Employee Plan - NVQ006 Page	PRCSRUNCNTL	Run the Employee Unit Plan report (NVQ006). This report summarizes an employee's NVQ Unit plan. You must run the Initialize Plan process (NVQ005) before you can generate the report.
Employee Status - NVQ001 Page	PRCSRUNCNTL	Run the NVQ - Employee Status report (NVQ001). This report lists employees assigned to an NVQ and their status.
NVQ Listing - NVQ003 Page	PRCSRUNCNTL	Run the NVQ - NVQ Listing report (NVQ003) that lists all defined NVQs.
Unit Listing - NVQ002 Page	PRCSRUNCNTL	Run the NVQ - Unit Listing report (NVQ002) that lists all defined NVQ units.
Unit/Element - NVQ004 Page	PRCSRUNCNTL	Run the NVQ − Unit/Element Listing report (NVQ004) that lists the elements associated with NVQ units.

NVQ GBR Tile

Administrators use the NVQ GBR tile to access the navigation collection to manage NVQ information for employees in Great Britain.

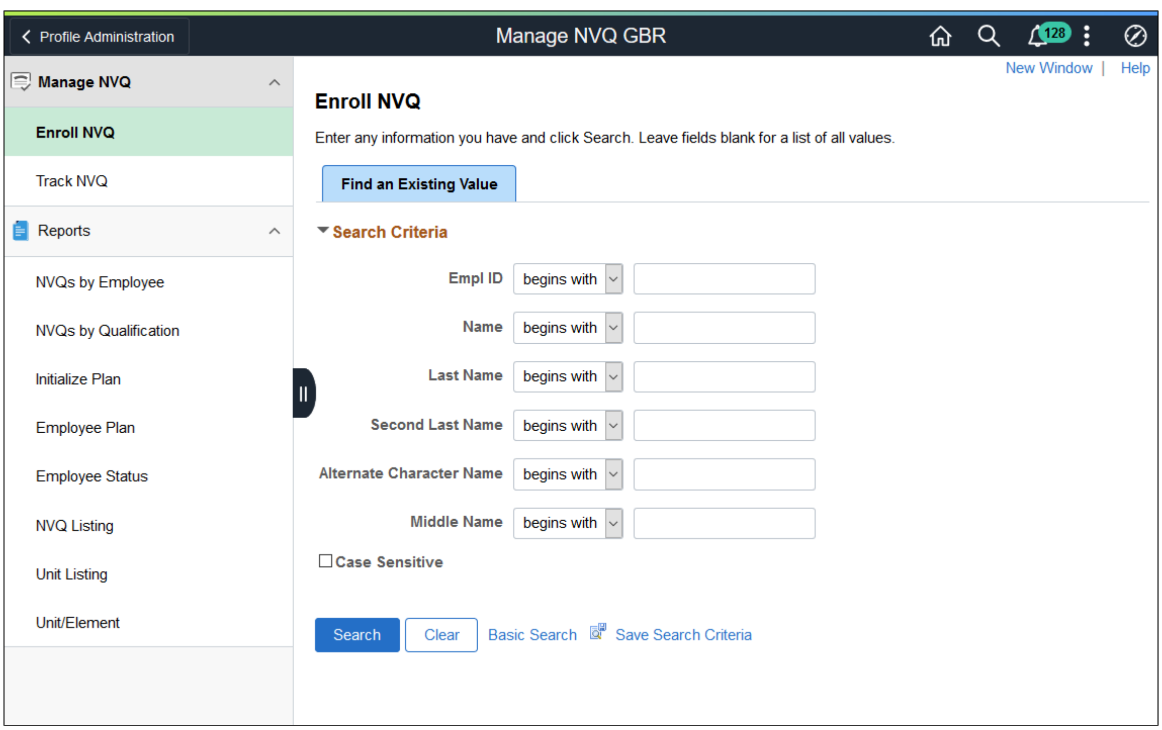
Navigation:

The NVQ GBR is delivered as part of the Profile Administration Dashboard, but the location can change if you change the delivered home pages or if administrators personalize their home pages.

This example illustrates the NVQ GBR tile.

Click the NVQ GBR tile to access the Manage NVQ GBR application start page.

This example illustrates the Manage NVQ GBR application start page.



This application start page is a navigation collection that enables administrators to access frequently used NVQ-related components from one location.

The application start page lists the components collected under these categories:

- Manage NVQ
- Reports

Rows that display a downward facing arrow are category headers. Select a category row to expand and view the component collection associated with that category.

When using a large form factor device, the right panel displays the component selected in the left panel.

Chapter 5

Managing Profiles

Understanding Managing Profiles

These topics discuss the profile management options available to profile administrators that enable them to:

- Create and maintain person and non-person profiles.

  Person profiles are those profiles that are linked to a person ID, while non-person profiles describe business entities such as job codes, positions, and salary grades. These changes can be performed by accessing the profile pages directly or by using the Smart HR Transactions or Smart HR for Managers components to add or update a person's profile.

- Review and approve changes to profiles.

  Depending on the configuration of your profile types, approvals workflow is triggered when employees update their personal profiles and managers make changes to non-person profiles. Typically, managers approve changes to their employees' person profiles and administrators approve non-person profile changes.

- Complete searches for profiles that match certain criteria.

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

- Compare profiles.

  Administrators can compare the content of a source profile with one or more target profiles. The Compare Profiles (in Classic) or Profile Compare (in Fluid) provides a summary of the common content sections in a simple readable format along with a score (Classic) or match percentage (in Fluid) for each content or criteria item indicating the degree of fit.

- Manage interest lists.

  An interest list is a collection of non-person profiles that is associated with an employee. Any profile can be added to an interest list, but it is typically used to identify jobs that an employee is interested in applying for, or jobs that match an employee's profile. Employees maintain their own interest list using a self-service transaction. However, an employee's manager and administrators can also add profiles to an interest list or remove profiles from them.

- Track training.

  Manage Profiles provides profile administrators access to employees' training history for training that is managed by the Administer Training business process. In addition, Manage Profiles enables you to track external training that is not managed using Administer Training.

For information about the employee and manager self-service transactions, see PeopleSoft eDevelopment.

Related Links

"Understanding Smart HR Templates and Transactions" (PeopleSoft Human Resources Administer Workforce)

"(Classic) Maintaining Person Profiles as an Employee or Manager" (PeopleSoft eDevelopment)

"(Fluid) Maintaining Person Profiles" (PeopleSoft eDevelopment)

"(Classic) Viewing and Updating Job Profiles" (PeopleSoft eDevelopment)

"(Fluid) Viewing and Updating Job Profiles" (PeopleSoft eDevelopment)

Prerequisites

Before administrators can create profiles, approve changes to profiles, or run searches for profiles you must:

- Define the content catalog.
- Define your profile types.
- (Optional) Set up Smart HR templates using profiles.
- (Optional). Define and configure approvals for profiles.

  The use of approval processing for profiles is optional. You associate approvals workflow to profile types.
- Configure search queries and run the Direct Reports Tables Build and Schedule Search Index processes required by the Search and Compare Profiles feature.

Related Links

Understanding the Content Catalog

Setting Up Profile Types

"Setting Up Smart HR Templates" (PeopleSoft Human Resources Administer Workforce)

Understanding Setting Up Search and Compare Profiles

"Understanding Approvals" (Application Fundamentals)

Maintaining Profiles as an Administrator

These topics provide an overview of profiles and profile types, profile copy, import, and syndication, list prerequisites and common elements, and discuss how to maintain profiles using the administrator pages.

This video demonstrates the Profile Management role security for content sections:

Video: Image Highlights, PeopleSoft HCM Update Image 31: Enhanced Security for Profile Management

Pages Used to Maintain Profiles as an Administrator

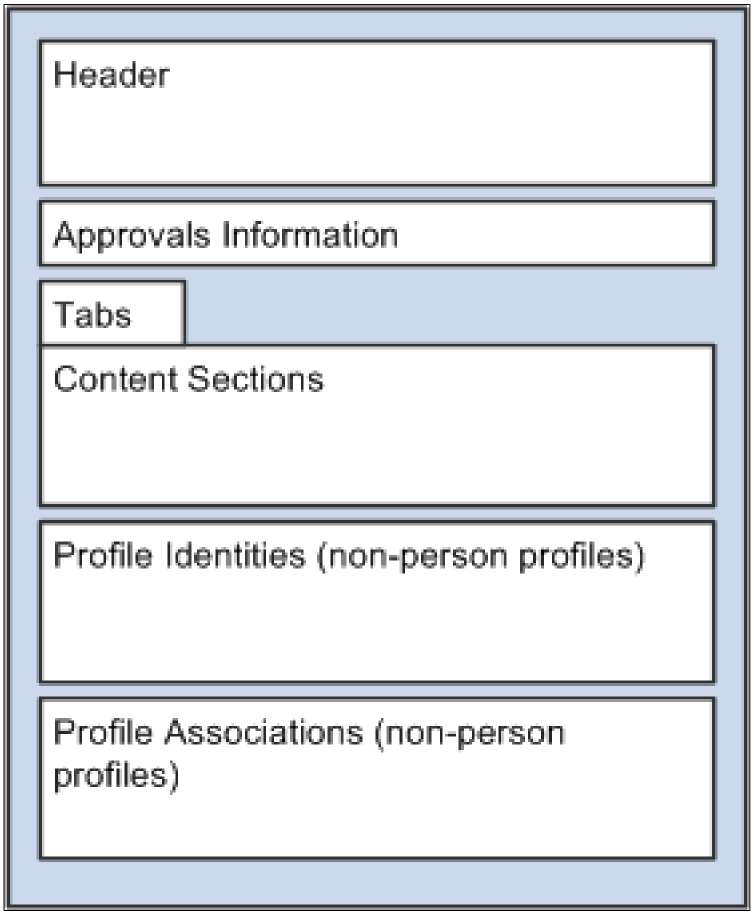
Page Name	***Definition Name***	***Usage***
Person Profile Page	JPM_PROFILE_PERS	Create and update person profiles.
"Smart HR Transactions Page" (PeopleSoft Human Resources Administer Workforce)	HR_TBH_EULIST	Select a template or person that is associated with a profile-related template to add or update a person's profile using the Smart HR pages. For more information on using Smart HR templates and transactions, see "Using Smart HR Templates and Transactions" (PeopleSoft Human Resources Administer Workforce).
Non-person Profile Page	JPM_PROFILE1	Create and update non-person profiles.
Search for Profiles Page	JPM_SRCH_TRANSFER	Lists the profile search queries that are defined for administrators. Select the search query that you want to run.
Update Profile Groups Page	JPM_UPD_GROUP_SEC	Add and update profile groups for a profile.
Profile Comments Page	JPM_PROF_INFO_SEC	Enter additional profile information such as comments or the owner ID for non-person profiles.
Add New <content type>, Update <content type>, or View <content type> Page	JPM_PROF_DTL_SEC	Add, update, and view profile item details.
Content Item Details Page	JPM_CAT_ITEMS_DSP	View details about a specific content item.
Profile Item Attachments Page	JPM_PROF_ATTACH	Add, view, or delete attachments associated with a specific profile content item.
Rating Model Page	HCR_RATEMDL_POPUP	Displays the rating model details of the selected profile item. When accessing the page from the update or add new pages, you can modify the rating as well.
Related Items Page	JPM_PROF_DETAIL	Add, update, or view profile items that are related to a selected profile item.

Page Name	***Definition Name***	***Usage***
View Profile Item History Page	JPM_PROF_HIST_SEC	View profile item rows for different effective-dates.
Items Awaiting Submission Page Pending Items Page Denied Items Page	JPM_JP_PRF_VW_CHGS	Lists the profile items that are awaiting submission for approval, pending approval, or have been denied approval. Items that have been submitted for approval can't be changed until they have been approved. Items awaiting submission can be deleted but not updated.
View <content type> Page	JPM_APR_DTL_SEC	View details of a profile item.
Copy Items from Job Profile Page	JPM_COPY_PROFL_SEC	View a list of job profiles from which you can copy profile items. Select the profile from which you want to copy profile items and click the Select button. The system adds the profile items to the employee's profile. If only one job profile exists, the system automatically copies the items to the profile and displays a message saying how many items were copied.
Select Profile Page	JPM_JP_REL_PRF_EMP	View a list of the job profiles that are related to an employee's job data. Select the profile that you want to view and click the **Continue** button. The Non-person Profile page appears.
Person Search - Simple Page	HR_PSS_SEARCH	Search for and select a person.
Profile Syndication Page	JPM_PROF_SYND_SEC	View the syndication source and target profiles. You can also add and remove syndicated content on this page.
Syndicate Profiles Page or Import Profile Items Page	JPM_PROF_SRCH_SEC	Select the profiles from which content will be imported or syndicated.
Profile Identity Page	JPM_JP_PID_SEC	Add or edit profile identities associated with the profile.
Profile Association Page	JPM_JP_ASSC_SEC	Add or update profile associations for the profile.

Page Name	Definition Name	Usage
Person Profile - Summary of Changes Page	JPM_JP_PERSUMM_SEC	View a list of changes that have been made to the person profile that require approval. You can also enter comments for the approver. Click the **Submit** button to submit the changes for approval or click **Cancel** to return to the Person Profile page and not submit the items for approval. These items will not be available to other processes until they have been submitted for approval and approved.
Non-person Profile - Summary of Changes Page	JPM_JP_NPSUMM_SEC	View a list of changes that have been made to the non-person profile that require approval. You can also enter comments for the approver. Click the **Submit** button to submit the changes for approval or click **Cancel** to return to the Non-person Profile page not submit the items for approval.
Submit Confirmation Page	JPM_JP_PROFL_APPR	View confirmation messages of changes that have been submitted. The Approval Routing group box provides a summary of the approval path. It shows the number of approvers and the sequence of approvals.
Syndication Exceptions Page	JPM_JP_SYND_EXC1	Display the syndication exceptions for a profile. Syndication exceptions occur when a content item is syndicated from multiple source profiles but has different property values from each source profile.
Exception Details Page	JPM_JP_SYND_EX_SEC	Display details of profile items with exceptions.

Understanding Profiles and Profile Types

Administrators use the Person Profile page and the Non-person Profile page to create and maintain profiles. Both pages have a similar format. This diagram and the following text identify the elements in these pages:



Here is a description of the parts of a profile:

- Header.

  The header includes general information such as the profile ID, profile type, profile status, and effective date. For a person profile, the header includes the person ID.

- Approvals Information.

  This section includes links that indicate how many profile items are saved (but not submitted for approval), pending approval, approved, or were denied approval.

  Note: The content section on the profile pages displays approved items only. Any new profile items, changes to existing items, or deletions that have not been approved do not appear in the content sections. Use the links in this area of the profile to view the changes that are unapproved.

- Tabs.

  Profiles are grouped together by tabs. When you select a tab, the system displays the content sections defined for that tab. The naming and order of the tabs in a profile are determined by the profile type.

- Content sections.

  Tabs consist of one or more content sections. Profile types define the content sections and are secured by profile and PeopleTools role security for each content section. Users with the proper role security access can view or add profile items to the content sections. For pages discussed in these topics, the system uses the *Administrator* profile role.

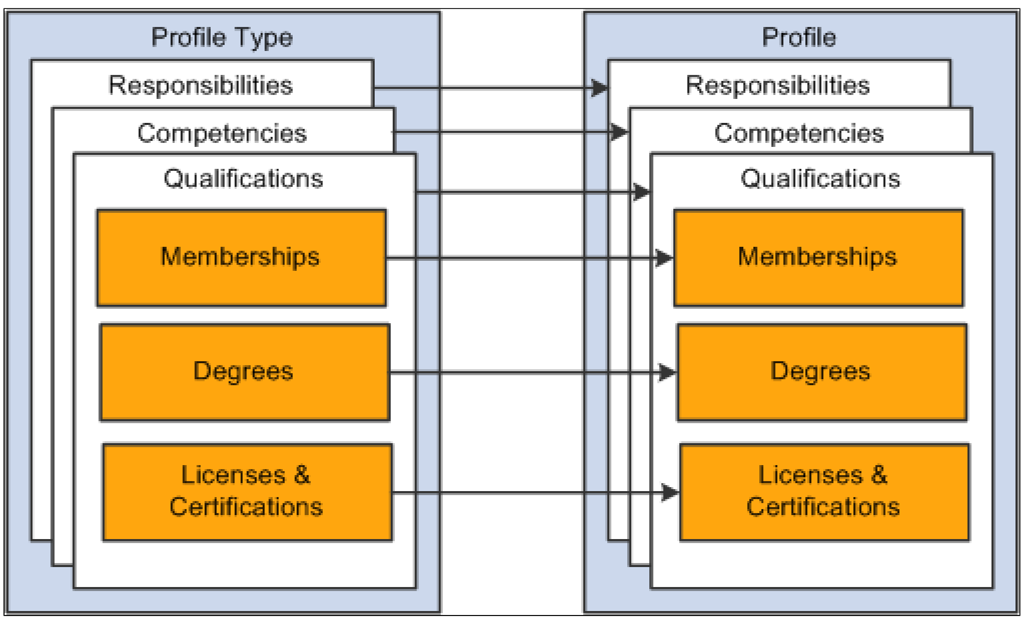
- Profile identities (non-person profiles only).

  On the Non-person Profile page, the Profile Identities grid lists the entities to which the profile is linked. The type of profile identities available are controlled by the profile type selected. For example, if the profile type allows job codes to be linked to the profile, users can insert a row for a job code for the profile, but they cannot link the profile to a position number. An active profile must be linked to at least one profile identity.

- Profile Associations (non-person profiles only).

  On the Non-person Profile page, the Profile Associations grid lists any entities to which the profile is associated. Profile associations are entities, such as ePerformance templates, that are outside of the Manage Profiles business process. The profile type defines the profile associations available.

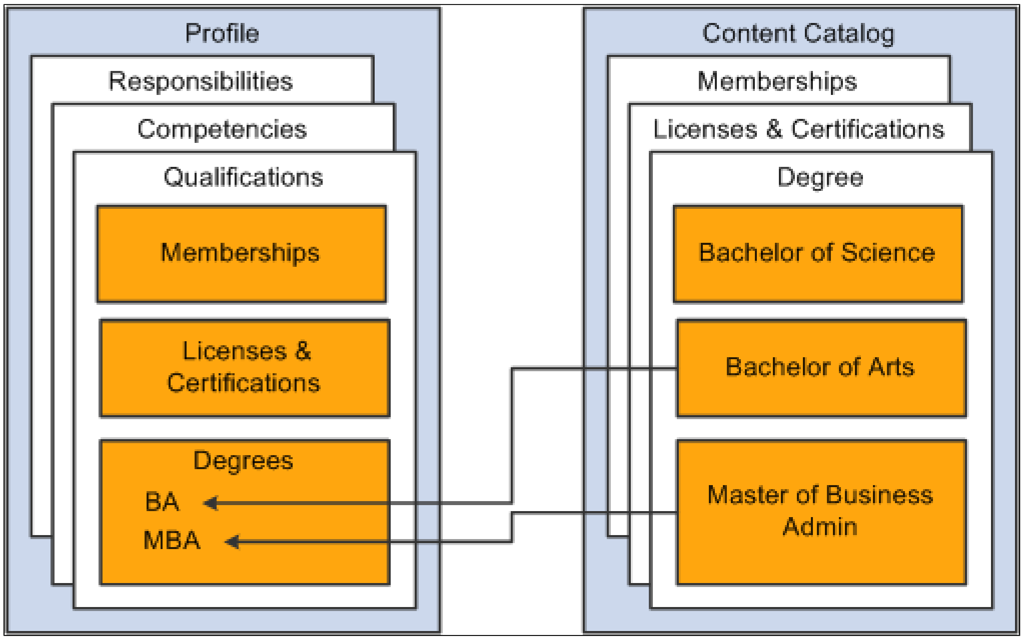
This diagram shows how the tabs and content sections of a profile are determined by the tabs and content sections of the profile type; in this example, the three tabs in the profile type automatically exist in the related profile, as do the content sections within the tabs:



The profile type provides the structure for a profile, it does not provide the actual content. To complete the profile, users add profile items, such as competencies or education information, by selecting from the content items available in the content catalog.

Note: The structure of the content items and their data (other than the content item ID) do not have any impact on the profile item structure.

This diagram illustrates how you complete the Degrees content section by selecting from degrees such as Bachelor of Science, Bachelor of Arts, and Master of Business Administration, all of which are defined in the content catalog:



Note: The profile type controls whether approvals workflow is triggered when the profile is updated, and the Profile Management roles that can view and update each section of the profile.

See Setting Up Profile Types.

Understanding Profile Copy, Import, and Syndication

Often the same profile items appear in related profiles. For example, employees' profiles may contain profile items that also appear in the profiles for their job code or position. Non-person profiles for similar or related jobs may have common profile items. To streamline the process of creating and maintaining profiles, Manage Profiles provides three ways to copy profile items. You can:

- Load profile items into a person profile from a related non-person profile.

  The **Profile Actions** field on the classic Person Profile page has an option, *Copy from Job Profile,* that enables you to select a non-person profile from a list of related profiles. The system determines which non-person profiles are related to an employee by searching the employee's job data record. If the employee has multiple jobs, the system checks all the person's active jobs for matching non-person profiles. For example, the system checks for active profiles that match the employee's job codes, positions, and salary grades.

- Import content into a non-person profile from another profile or from the content catalog.

  When you import content, the system copies the profile items from the source profile into the target profile. Any changes made to the source profile or content items after the import do not affect the target profile. Use the **Import Content** link on the Non-person Profile page to import content.

- Syndicate content into a non-person profile from another profile.

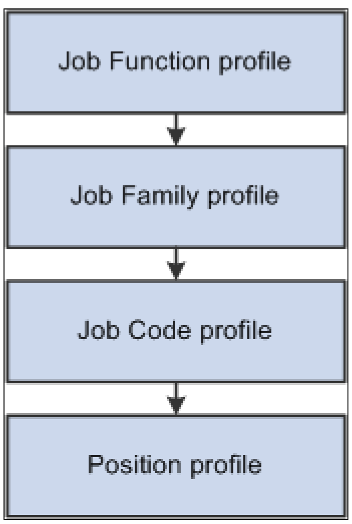
When you syndicate content, the system copies profile items from the source profile into the target profile. However, it also sets up a relationship between the source profile and the target profile that contains the syndicated content. Whenever syndicated content is updated, the changes are incorporated into the target profiles automatically. Use the *Syndicate Profile* profile action on the Non-person Profile page to syndicate content.

Note: The copy from job profile, import, and syndicate actions copy profile content that is not defined as free form content. Import and syndicate copy the properties that are defined in the target profile type definition only. Additional properties in the non-person (source) profile type are not copied. If the target profile has additional properties that are not used in the source profile, the system uses the default values defined for these properties. The default values can be defined for that property in the content section of the profile type.

Setting Up Syndication

Syndication reduces maintenance by enabling administrators to set up common content once in a source profile and copy it to multiple target profiles. You can also syndicate content through a series of related profiles.

This diagram shows how you could set up a job function profile and syndicate the content through the hierarchy to job family, job code, and position number profiles:



If you set up cascading syndication, we recommend that you use it in a similar hierarchical method.

When setting up syndication, you should consider what happens when the target profile already includes an item that is in the syndicate source profile. For example, if you syndicate content from more than one source profile into a target profile, it is possible for the same item to occur in the source profiles but with different values. These are known as syndication exceptions. In this situation, the system updates the target profile with the values from the source profile, effectively overriding the existing values.

View syndication exceptions using the Syndication Exceptions page.

Prerequisites

Before you can syndicate content:

- Configure the application server for publish/subscribe.
- Configure the integration broker and make it active.

  Ensure that the:

  - The EOEN_MSG_CHNL queue is running.
  - The service operation EOEN_MSG is active.
  - The associated routing definitions are active.

- Set up the Event Manager.

  Make the event JPMProfileItemsUpdated and the associated event handlers active. We also recommend that you enable logging for the event and handler.

See *PeopleTools: Integration Broker* and *PeopleTools: System and Server Administration*.

Related Links

Events and Notifications Framework

Common Elements Used in Managing Profiles

Field or Control	***Description***
Status	Select one of these values: *Active:* If the profile type does not require approval, update the status to *Active* to make the profile available to other users. *Inactive:* Profiles that are inactive are not available to employees and managers in self-service. When you update the status to *Inactive,* the system removes the profile from the profile groups to which it belongs. When you create a non-person profile, the default status is *Inactive.* You can only update the status to *Active* when the profile is linked to one or more profile identities and approved. Employees can view active non-person profiles only. Managers can view both active and inactive non-person profiles.
Profile Type	Select the profile type for the new profile. When you update an existing profile, the **Profile Type** field is display-only. The profile type determines the tabs that appear in the profile. See Setting Up Profile Types.

Field or Control	Description
Profile Actions	(Classic) This field appears on the Non-person Profile and Person Profile classic pages. Select an action and click the **Go** icon if you want to do one of the following, if the action has been enabled on the Profile Actions Page: • *Compare employee profile to current job:* To compare an employee's profile items to his or her job profile items. This profile action is available from the Person Profile page only. If more than one job profile applies to the employee, select from a list of all applicable job profiles to compare. • *Copy From Job Profile:* To copy items from a non-person profile to the employee's profile. This profile action is available from the Person Profile page only. The system displays the Copy Items from Job Profile page, which lists the profiles related to the employee's active jobs. • *Express Interest for Employee:* To add the profile to a person's interest list. This profile action is available from the Non-person Profile page only. The system displays the Person Search - Simple page, which you use to search for the employee whose interest list you want to update. • *Import Profile Items:* To import content from another profile or the content catalog. This profile action is available from the Non-person Profile page only. The system displays the Import Profile Items page, which you use to search for and add the types of item you wish to import into a profile. • *Search and Compare Profiles:* To run a search. This profile action is available from the Non-person Profile page and the Person Profile page. The system displays the Search for Profiles page. • *Syndicate Profile:* To syndicate content from another profile or the content catalog. This profile action is available from the Non-person Profile page only. The system displays the Profile Syndication page, where you can add or view the source profiles that provide syndicated content for the profile and view the target profiles that contain content syndicated from the profile. • *Update Profile Groups:* To categorize your profiles by profile groups. This profile action is available from the Non-person Profile page and the Person Profile page when the profile is active and the page is not display only. The system displays the Update Profile Groups page, which you use to list the profile group types and profile groups to which you want to add the profile. This action is not available if the profile status is inactive See Update Profile Groups Page. • *View Related Job Profiles:* To display a list of non-person profiles that are related to the employee's job data. This profile action is available from the Person Profile page only. The system determines which non-person profiles are related to an employee by searching the employee's

Field or Control	Description
	job data record. If the employee has multiple jobs, the system checks all the person's active jobs for matching non-person profiles. See Profile Actions Page.

Person Profile Page

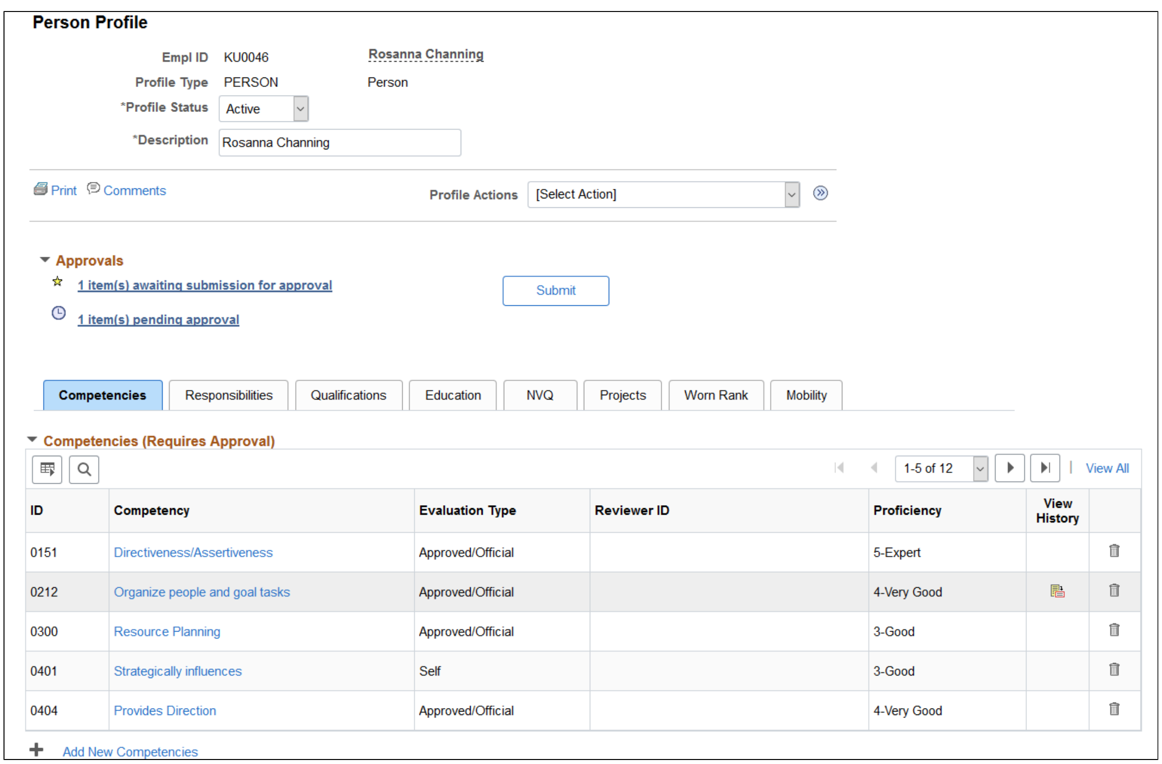
Use the Person Profile page (JPM_PROFILE_PERS) to create and update person profiles.

Navigation:

- **Workforce Development** > **Profile Management** > **Profiles** > **Person Profiles** > **Person Profile**
- From the Workforce Administrator home page in fluid, select **Profile Administration tile** > **View Profiles tile** > **Person Profiles tab**
- **Workforce Administration** > **Global Assignments** > **Assignee Qualifications** > **Person Profiles** > **Person Profile**
- **Organizational Development** > **Succession Planning** > **Manage Person Profiles** > **Incumbent Profiles**

  This menu navigation returns profiles only for people who already have a succession plan defined.

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



Note: A Job Data row is required to create a Person profile for an individual. Therefore, when creating a profile for a person of interest (POI), he or she must also have a Job Data record.

Field or Control	*Description*
Profile Status	Select the status of the profile. Options are *Active* or *Inactive.* When a worker's job is terminated, the Event Manager event InactivatePersonProfile event is raised to determine if all the worker's job assignments are inactive. If all job assignments are inactive, then all person profiles for that employee ID are also changed to *Inactive.* See Events and Notifications Framework, “Setting Up Events”.
Print	Click the **Print** link to display the profile in a PDF file that you can print from Adobe Acrobat. BI Publisher technology generates the printable file using the same template and layout as the Person Profile batch report. See Setting Up to Use BI Publisher Reports and Profiles.
Comments	Click the **Comments** link to display the Profile Comments page and enter additional comments about the profile.
Profile Actions and	Select an action you want to perform and click the **Go** icon. Values on the Person Profile page include those profile actions that are enabled on the Profile Actions Page for the administrator. Each of these actions opens a corresponding page where you can view or update information related to the action. **Note:** When during setup there are no action types enabled for a profile user role, the Profile Actions field is hidden on the page. See Common Elements Used in Managing Profiles. See Update Profile Groups Page.

Approvals

Note: The Person Profile page displays approved items only. Any new profile items, changes to existing items, or deletions that have not been approved do not appear on the profile content sections. Instead links appear on the page that indicate how many items have been saved but not submitted, are pending approval, or denied approval. Use these links to view the changes.

Field or Control	*Description*
<number> item(s) awaiting submission for approval	Click this link to access the Items Awaiting Submission page and view the profile items that have been saved but not submitted for approval. This includes profile items that have been added, amended, or deleted. When a profile item has been saved but not submitted, the **Submit** button appears after the **<number> item(s) awaiting submission for approval** link. When you click the **Submit** button, the system displays the Summary of Changes page (Person Profile - Summary of Changes Page or Non-person Profile - Summary of Changes Page), where newly added items can be submitted for approval. The system will also display the Summary of Changes page upon saving the profile page when there are items awaiting submission. If approval is not required, the system automatically changes the status of the items approved.
Submit	Click this button if there are any items awaiting to be submitted for approval. The Person Profile - Summary of Changes page appears and lists the new, deleted, and changed items requiring approval. This button appears only when there are items awaiting submission for approval.
<number> item(s) pending approval	Click this link to access the Pending Items page and view the profile items that have been submitted for approval but are pending approval.
<number> item(s) approved (since <date>)	Displays the number of items that have been approved. The date displayed is determined by the value in the **Days of Approval History** field on the Profile Management Installation Page.
<number> items denied (since <date>)	Click this link to access the Denied Items page and view the profile items that have been submitted for approval but the approver denied. The date displayed is determined by the value in the **Days of Approval History** field on the Profile Management Installation page.

Tabs and Content Sections

The system enables the profile administrator to group profile content sections into separate tabs when configuring a profile type (see the Profile Types - Content Page). When you select a tab within this administrator component, the page displays content sections to which you have been granted role security access under the *Administrator* profile role (see the Role Security configuration on the Content Section Page).

The tabs, content sections, and many of the columns will vary based on the configuration of the profile type you have selected and the configuration of the content type.

Field or Control	***Description***
<content item> links	Click a content item link to access the Update <content type> or View <content type> page. You will be able to update the content on this page if the profile type configuration for this content section has the **Allow Update** selected for the *Administrator* profile and you have been assigned to the corresponding PeopleTools role. If it is not selected, you will only be able to view the details of the content item. See Add New <content type>, Update <content type>, or View <content type> Page.
View History	This column and icon appears when a profile item has more than one effective-dated row. Click the **View History** icon to access the View Profile Item History Page.
Attachments	This column will display on this page if the profile type configuration for this content section has attachments enabled for the *Administrator* profile role and you have been assigned to the corresponding PeopleTools role for the profile type setup. Click this icon to access the Profile Item Attachments Page and add, view, or delete attachments. For information on how to enable attachments for profile types, see the Content Section Page.
+ Add New <content type>	This option will display on this page if the profile type configuration for this content section has the **Allow Update** selected for the *Administrator* profile and you have been assigned to the corresponding PeopleTools role. Click this link to access the Add <content type> page and add a content item. See Add New <content type>, Update <content type>, or View <content type> Page.

Saving and Submitting Person Profile Data

Field or Control	*Description*

Save	Click this button to save the changes you have made. The system updates the Person Profile page to display approved items or items not requiring approval within the profile content sections. Pending items and items awaiting to be submitted do not appear in the profile content sections. If you are creating a new profile that requires approval of all it's items, no profile items will appear in the content sections upon saving. However, the system displays the **item(s) awaiting submission for approval** or **item(s) pending approval** links to enable you to view the changes you have saved but not submitted or that are pending approval. Once these items have been approved, then they will appear in the content sections.
	
	Upon saving, the system does the following:
	
	• For items that do not require approval, the system saves them to the page and a message appears saying you have successfully saved those profile changes that do not require approval. These items will appear in the profile tab item list.
	
	• For items that require approval, the system displays the Person Profile - Summary of Changes page, which provides a list of the items requiring approval.
	
	    • Click **Submit** to route items to an approver. The system will then display the **<number> item(s) pending approval link** on the Person Profile page, which you can click to view pending items.
	
	    • Click **Cancel** to save your items without submitting them for approval. The system will then display the **<number> item(s) awaiting submission for approval** link and the **Submit** button on the Person Profile page, where you can view the items awaiting submission or submit items for approval at a later time.
	
	Note: The Approval Framework is configured for automatic approval of administrators. Even if a content section is defined in the profile type configuration as requiring approval for the administrator, when you save you will see the change displayed on the Summary of Changes page; however, when the administrator clicks **Submit,** the system display a message that no approvals are required, and changes will be immediately reflected in the profile.

Related Links

Setting Up Profile Types

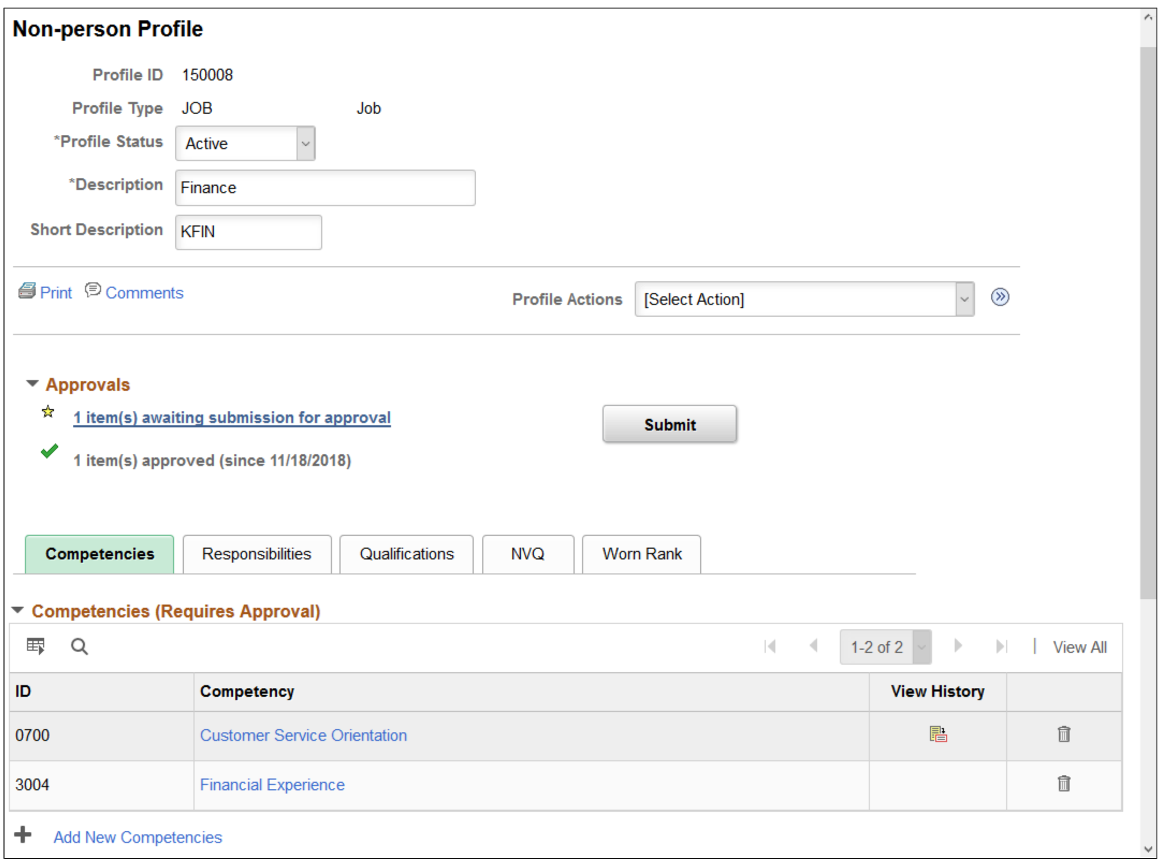
Non-person Profile Page

Use the Non-person Profile page (JPM_PROFILE1) to create and update non-person profiles.

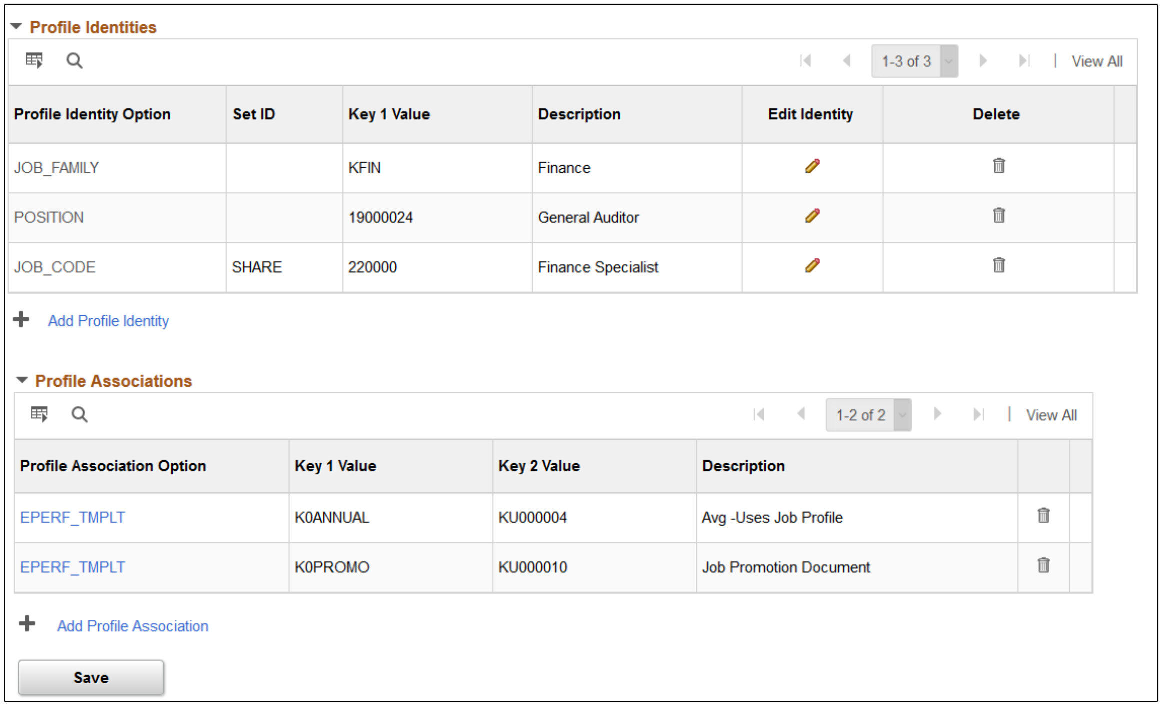
Navigation:

- **Workforce Development** > **Profile Management** > **Profiles** > **Non-person Profiles** > **Non-person Profile**
- From the Workforce Administrator home page in fluid, select **Profile Administration tile** > **View Profiles tile** > **Non-person Profiles tab**

This example illustrates the fields and controls on the Non-person Profile page (1 of 2). You can find definitions for the fields and controls later on this page.



This example illustrates the fields and controls on the Non-person Profile page (2 of 2). You can find definitions for the fields and controls later on this page.



The tabs, content sections, and many of the columns will vary based on the configuration of the profile type you have selected.

Field or Control	***Description***
Print	Select the **Print** icon to display the profile in a PDF file that you can print from Adobe Acrobat. BI Publisher technology generates the printable file using the same template and layout as the Non-Person Profile batch report. See Setting Up to Use BI Publisher Reports and Profiles.
Comments	Select the **Comments** link to display the Profile Comments page and enter the employee owner ID as well as additional comments about the profile.

Field or Control	***Description***
Profile Actions and 	Select an action you want to perform and click **Go.** Values on the Non-person Profile page include those profile actions that are enabled on the Profile Actions Page for the administrator. Each of these actions opens a corresponding page where you can view or update information related to the action. The list will also include a *Request Acknowledgement* value when a profile is associated with a non-person profile type and identity that has the **Request Acknowledgement** option enabled on the Profile Types - Identities Page. This features enables you to submit a request that all employees associated with this job profile review and acknowledge their job requirements. **Important!** Before an employee can be notified or acknowledge a profile, you must first run the *Run Acknowledgements* process on the Run Acknowledgement Request Page. The process will enable **Action Required** notifications and an **Acknowledge** button on the My Job Profile tile and pages. Managers can view the status of these acknowledgements via the "Acknowledgement Status Page" (PeopleSoft eDevelopment). Administrators use the "Review Acknowledgements Page" (Enterprise Components) in the Acknowledgement Framework to view job profile acknowledgements. **Note:** When during setup there are no action types enabled for a profile user role, the Profile Actions field is hidden on the page. See Common Elements Used in Managing Profiles. See Profile Actions Page. See Update Profile Groups Page. See Profile Syndication Page. See Syndicate Profiles Page or Import Profile Items Page. See Setting Up Profile Types See Understanding Job Profile Acknowledgements.

Approvals

Note: The Non-person Profile page displays approved items only. Any new profile items, changes to existing items, or deletions that have not been approved do not appear within the profile content sections. Instead, links appear on the page that indicate how many items are awaiting submission, are pending approval, or have been denied approval. Use these links to view the changes.

Field or Control	*Description*
<number> item(s) awaiting submission for approval	Click this link to access the Items Awaiting Submission page and view the profile items that have been saved but not submitted for approval. This includes profile items that have been added, amended, or deleted. When a profile item has been saved but not submitted, the **Submit** button appears after the **<number> item(s) awaiting submission for approval** link. When you click the **Submit** button, the system displays the Non-person Profile - Summary of Changes page, where changes to items requiring approval can be submitted. The system will also display the Non-person Profile - Summary of Changes page upon saving the profile page when there are items awaiting submission for approval.
Submit	Click this button if there are any items awaiting to be submitted for approval. The Non-person Profile - Summary of Changes page appears and lists the new, deleted, and changed items requiring approval. This button appears only when there are saved items awaiting submission for approval.
<number> item(s) pending approval	Click this link to access the Pending Items page and view the profile items that have been submitted for approval but are pending approval.
<number> item(s) approved (since <date>)	Displays the number of items that have been approved. The date displayed is determined by the value in the **Days of Approval History** field on the Profile Management Installation page. See Profile Management Installation Page.
<number> items denied (since <date>)	Click this link to access the Denied Items page and view the profile items that have been submitted for approval but the approver denied. The date displayed is determined by the value in the **Days of Approval History** field on the Profile Management Installation page.

Tabs and Content Sections

The system enables the profile administrator to group profile content sections into separate tabs when configuring a profile type (see the Profile Types - Content Page). When you select a tab on this page, the page displays content sections to which you have been granted role security access under the *Administrator* profile role (see the Role Security configuration on the Content Section Page).

Field or Control	***Description***
<content item> link	Click a content item link to access the Update <content type> or View <content type> page. You will be able to update the content on this page if the profile type configuration for this content section has the **Allow Update** selected for the *Administrator* profile and you have been assigned to the corresponding PeopleTools role. If it is not selected, you will only be able to view the details of the content item. See Add New <content type>, Update <content type>, or View <content type> Page.
Source Profile	Click the source profile link to view details about the source profile from which this item was syndicated. The system displays this field only when items have been syndicated into the profile.
View History	This column and icon appears when a profile item has more than one effective-dated row. Click the **View History** icon to access the View Profile Item History Page.
+ Add New <content type>	This option will display on this page if the profile type configuration for this content section has the **Allow Update** selected for the *Administrator* profile and you have been assigned to the corresponding PeopleTools role. Click this link to access the Add <content type> page and add a content item. See Add New <content type>, Update <content type>, or View <content type> Page.

Profile Identities

Expand this section to view a lists of the profile identities information to which the profile is linked.

Field or Control	***Description***
Edit Identity	Click the **Edit Identity** icon to open the Profile Identity page and update an existing identity.

Field or Control	***Description***
+ Add Profile Identity	Click this link to add a profile identity to this profile. The system displays the Profile Identity page.

See Profile Identity Page.

Profile Associations

Expand this group box to view a list of the associations for the profile. Profile associations are entities outside the Manage Profiles business process. PeopleSoft ePerformance templates are linked to profiles in this way.

Note: If a non-person profile type does not have an association specified in its configuration then the page will not display the Profile Associations grid.

Field or Control	***Description***
Profile Association Option link	Select the profile association ID link to view association details or update the effective date or status. The options available are determined by the profile type definition. See Profile Type - Associations Page.
+ Add Profile Association	Click to add a new profile association to this profile. The system displays the Profile Association page.

See Profile Association Page.

Saving and Submitting Non-person Profile Data

<table>
<tr><th>Field or Control</th><th>Description</th></tr>
<tr><td>Save</td><td>
Click this button to save the changes you have made. The system updates the Non-person Profile page to display approved items or items not requiring approval within the profile content sections. Pending items and items awaiting to be submitted do not appear in the profile content sections. If you are creating a new profile that requires approval of all it's items, no profile items will appear in the content sections upon saving until they have been approved.
Upon saving, the system does the following:

For items that do not require approval, the system saves them to the page and a message appears saying you have successfully saved those profile changes that do not require approval. These items will appear in the profile content section.
For items that require approval, the system displays the Non-person Profile - Summary of Changes page, which provides a list of the items requiring approval.

Click Submit to route to the approver. The system will then display the <number> item(s) pending approval link on the non-person Profile page, which you can click to view pending items.
Click Cancel to save your items without submitting them for approval. The system will then display the <number> item(s) awaiting submission for approval link and the Submit button on the Non-person Profile page, where you can view the items awaiting submission or submit items for approval at a later time.

Note: The Approval Framework is configured for automatic approval of administrators. Even if a content section is defined in the profile type configuration as requiring approval for the administrator, when you save you will see the change displayed on the Summary of Changes page; however, when the administrator clicks Submit, the system display a message that no approvals are required, and changes will be immediately reflected in the profile.
</td></tr>
</table>

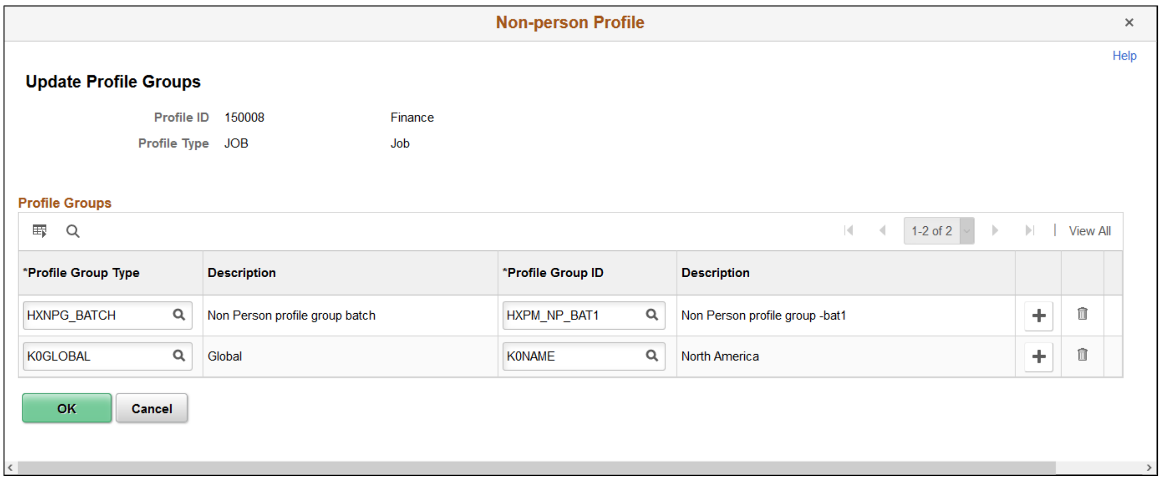
Update Profile Groups Page

Use the Update Profile Groups page (JPM_UPD_GROUP_SEC) to add and update profile groups for a profile.

Navigation:

Select the *Update Profile Groups* value in the **Profile Actions** field on the Person Profile page or the Non-person Profile page and click **Go.**

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



This page lists the profile groups to which the profile belongs.

Field or Control	***Description***
Profile Group Type	Select the profile group type.
Profile Group ID	Select the profile group you want to add to the profile.
Add Profile to Group	Click this link to add another profile group to this profile.

See Creating Profile Group Types and Profile Groups.

Note: Manually entered profiles may be deleted when this group is repopulated. This group is populated using preset group criteria. When the group is rebuilt the manually entered profiles will be deleted if they do not fit the criteria.

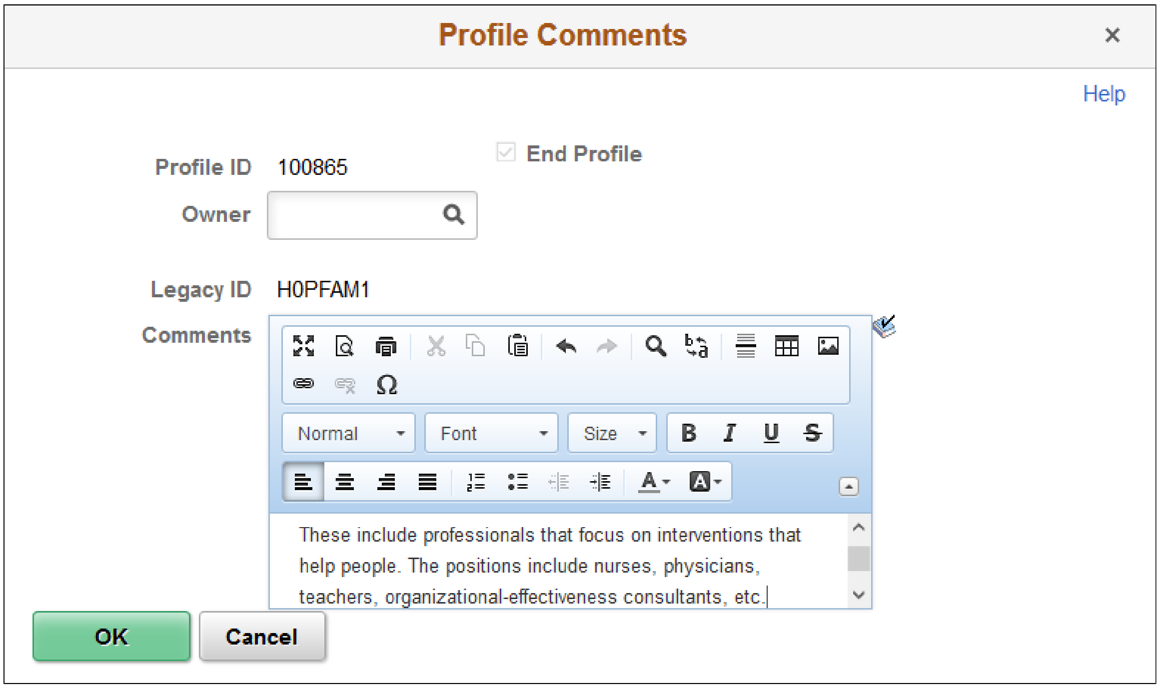
Profile Comments Page

Use the Profile Comments page (JPM_PROF_INFO_SEC) to enter additional profile information such as comments or the owner ID for non-person profiles.

Navigation:

Select the **Comments** link on the Person Profile page or the Non-person Profile page.

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



Note: The fields on the Profile Comments page for a Person Profile and a Non-person Profile vary only slightly.

Field or Control	***Description***
End Profile	This field is available on the Non-Person Profile - Profile Comments page. Displays whether the profile type is used for end profiles or not. End profiles can be viewed from self service and must have a profile identity before they can be set to a status of active.
Legacy Profile ID	This field is available on the Non-Person Profile - Profile Comments page. Displays the legacy profile ID assigned to the profile during upgrade. This field is displayed for some types of profiles that existed in earlier versions of PeopleSoft HR.
Owner	This field is available on the Non-Person Profile - Profile Comments page. Select the employee ID of the profile owner. Use this field if you want to assign owners to profiles for reporting or other purposes.

Field or Control	***Description***
Comments	Enter additional comments about the profile.

Add New <content type>, Update <content type>, or View <content type> Page

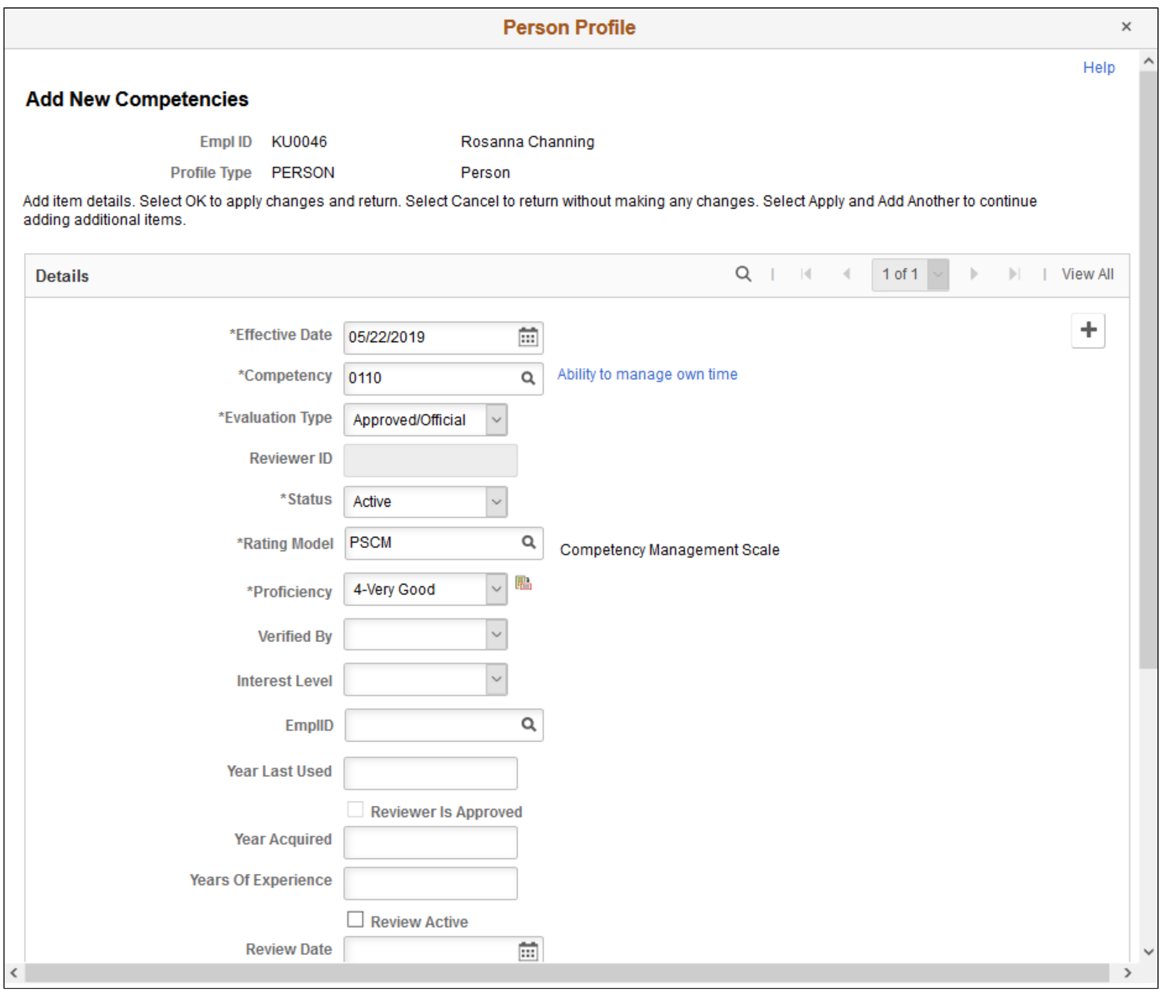
Use the Add New, Update, or View <content type> pages (JPM_PROF_DTL_SEC) to add, update, and view profile item details.

Navigation:

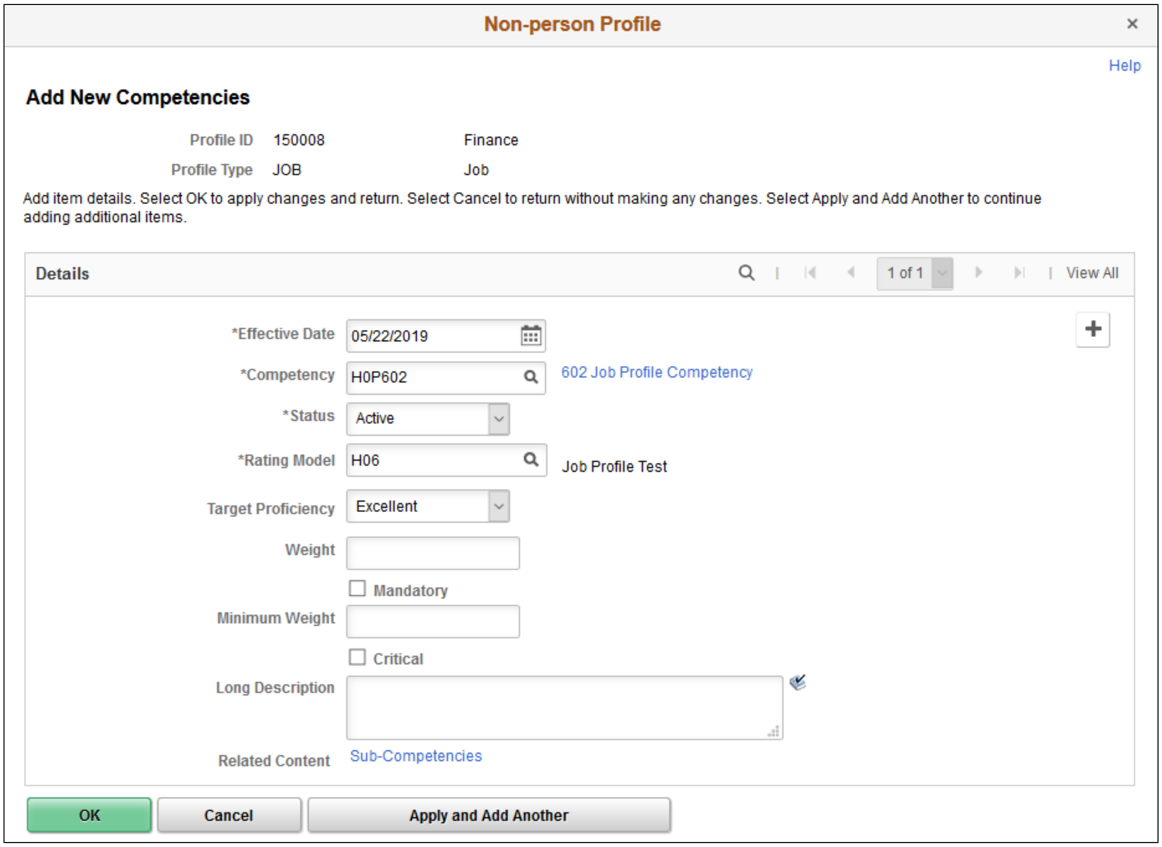
Click a content item link or the **Add New <content type>** link for a profile content item ID on the Person Profile page or the Non-person Profile page.

Note: Add, update and view options will vary based on your Role Security access (see the Role Security subtopic under the Content Section Page topic).

This example illustrates the fields and controls on the Add New <content type> page for a person profile. You can find definitions for the fields and controls later on this page.



This example illustrates the fields and controls on the Add New <content type> page for a non-person profile. You can find definitions for the fields and controls later on this page.



Note: The fields and field labels that appear on this page vary according to the item's content type and the content section definition in the profile type. Define content sections using the Profile Types - Content Page.

See Setting Up Profile Types.

In the administrator profile pages, when you look up a content item ID, the system enables you to use these items as part of the search criteria:

- Content item ID
- Content group type
- Content group
- Description

The content item name, such as the *601 Job Profile Competency* shown in the previous screen shot example, appears as a link. Select this link to open the Content Item Details page to view more information about this item.

Field or Control	*Description*
 (Rating Detail icon)	Select this icon button to open the Rating Model page and view rating model details of the selected item. When accessing the page from the update or add new pages, you can modify the rating as well.
Related Content	Click the link associated with this field to access the Related Items Page where you can add, update, and view items that are related to the selected profile item. This link appears only for items with a child relationship in the Content Catalog where the child content section is included in the profile type definition. **Note:** If you are adding a parent item, the system does not automatically add related items for it unless you click the **Related Content** link.
OK	Click to keep any updates that you make on the profile detail or on the related items pages. If you deleted a parent item row, the system deletes all of its related items.

Related Links

Relationship Rule Page

Content Items - Relationships Page

Profile Types - Content Page

Profile Item Attachments Page

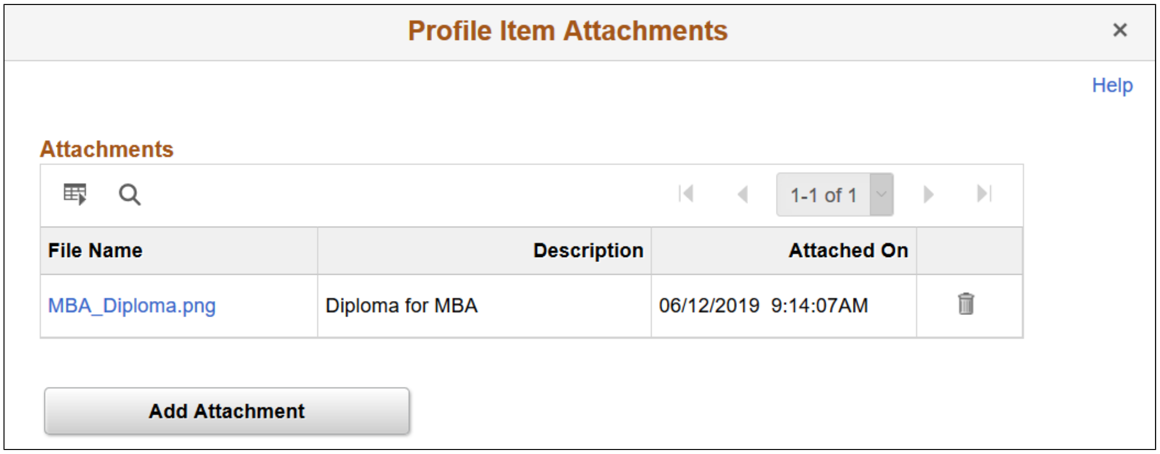
Use the Profile Item Attachments page (JPM_PROF_ATTACH) to add, view, or delete attachments associated with a specific profile content item.

Navigation:

Click the Attachments icon from a row on the Person Profile Page.

Note: The Attachments column and icon appear when attachments have been enabled for the *Administrator* role and you have the role security access as define on the Content Section Page, Role Security section. Add, update and view options will vary based on the Role Security access as well.

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



Field or Control	***Description***
File Name	Displays the file link to the attachment. Click this link to view the file attachment.
Description	Enter a short description to identify the file. If you do not enter a description when adding the file, this field will be blank.
Delete icon	Click this icon button to remove the attachment from the profile content item.
Add Attachment	Click this button to open the File Attachment page to upload files.

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

Video: Image Highlights, PeopleSoft HCM Update Image 27: Attachment Capability Added to Profile Management

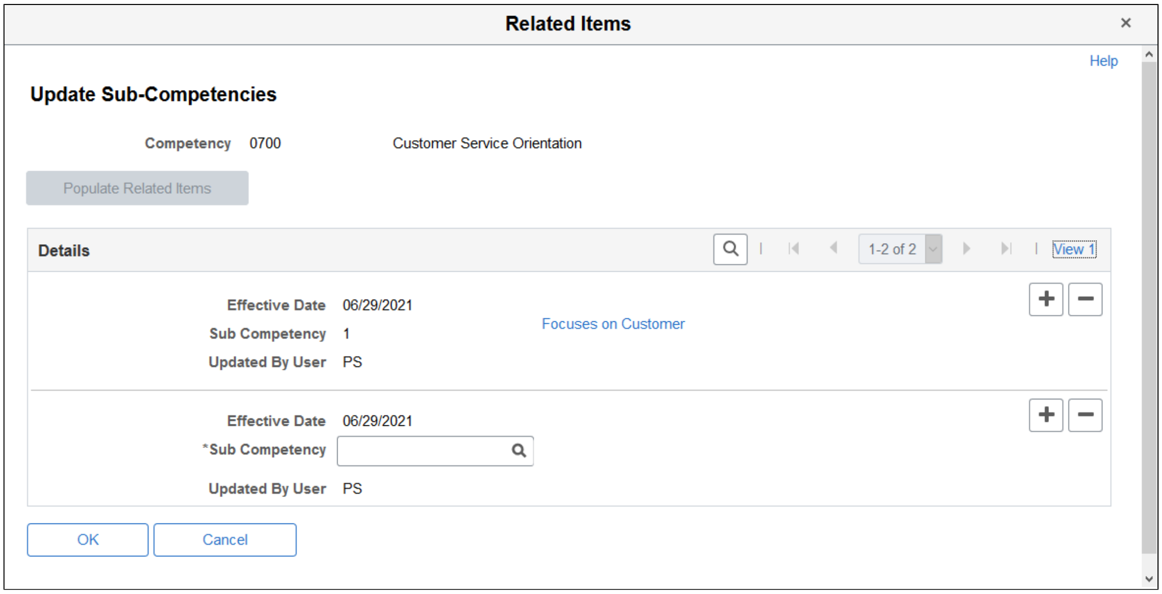
Related Items Page

Use the Related Items page (JPM_PROF_DETAIL) to add, update, or view profile items that are related to a selected profile item.

Navigation:

Click the related content link on the Add New <content type>, Update <content type>, or View <content type> Page.

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



Use this page to include related profile items that are related to an existing profile item to a profile. The related items that you can add to a profile are determined by the content section definitions in the profile type and the relationships defined in the content catalog.

Note: The fields and field labels that appear on this page vary according to the related item's content type and the content section definition in the profile type.

Field or Control	***Description***
Populate Related Items	Click to have the system automatically insert all related items defined in the content catalog.
Sub Competency or **Element**	Manually select individual items from those defined in the content catalog.
OK	Click OK to save the updates made on this page. The system does not merge the updates with the profile items until you click the **OK** button on the parent item page (Update <content type>or Add New <content type>).

Related Links

[Relationship Rule Page]
[Content Items - Relationships Page]
[Content Section Page]

View Profile Item History Page

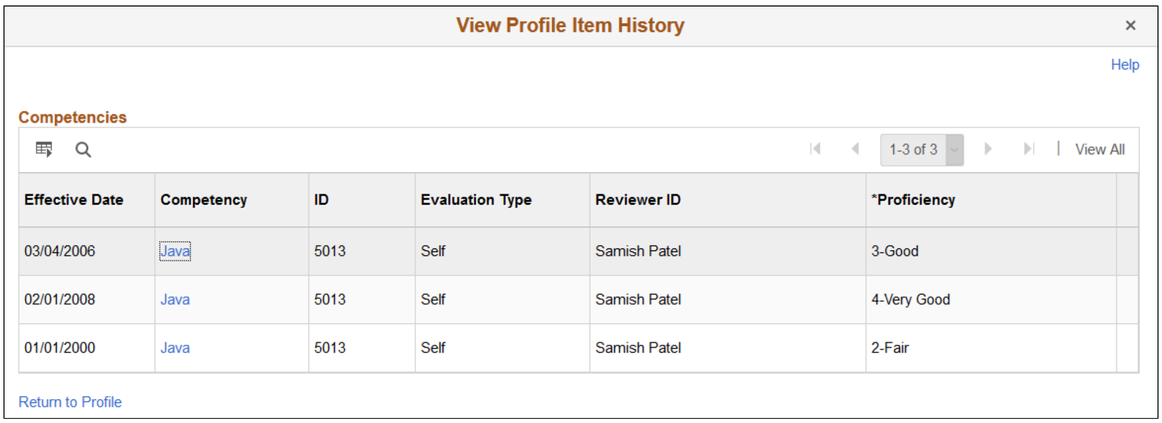
Use the View Profile Item History page (JPM_PROF_HIST_SEC) to view profile item rows for different effective-dates.

Navigation:

Click the icon in the **View History** column on the Person Profile page or Non-person Profile page.

Note: Click the content type item to update historical information on the Update <content type> page by using the scroll arrows.

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



Note: The fields that appear on this page are configured in the Profile Type definition and are indicated as Summary.

This page lists the current, future, and historical rows for an item in a person or non-person profile, enabling you to track the history of a profile item. For example, you can use this page to review the changes to an employee's rating for a profile item, or the desired rating of an item in a job profile. Click the profile item link to view details of the profile item for the selected effective date.

Click **Return to Profile** to return to the Person Profile page or the Non-person Profile page, depending on the profile type.

Profile Syndication Page

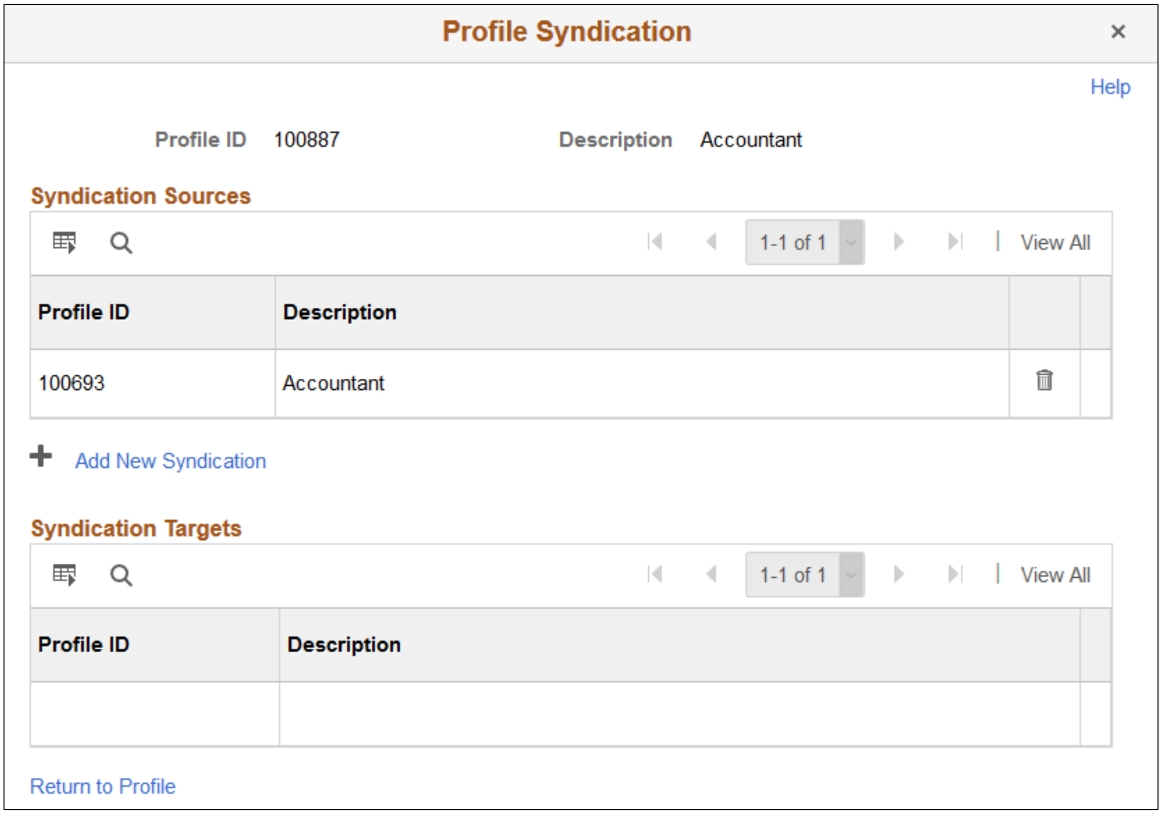
Use the Profile Syndication page (JPM_PROF_SYND_SEC) to view the syndication source and target profiles.

You can also add and remove syndicated content on this page.

Navigation:

Select the Profile Action *Syndicate Profile* from the Non-person Profile page and click the **Go** icon.

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



Field or Control	***Description***
Syndication Sources	Lists the profiles that provide content for the selected profile. If you want to remove syndicated content, select the trash can icon.
Add New Syndication	Click this link to open the Syndicate Profiles page to select the profiles from which content will be syndicated.
Syndication Targets	Displays the profiles that are targets for syndication. These profiles contain content from the selected profile. If you make changes to the selected profile, the syndicated profiles are automatically updated.

Syndicate Profiles Page or Import Profile Items Page

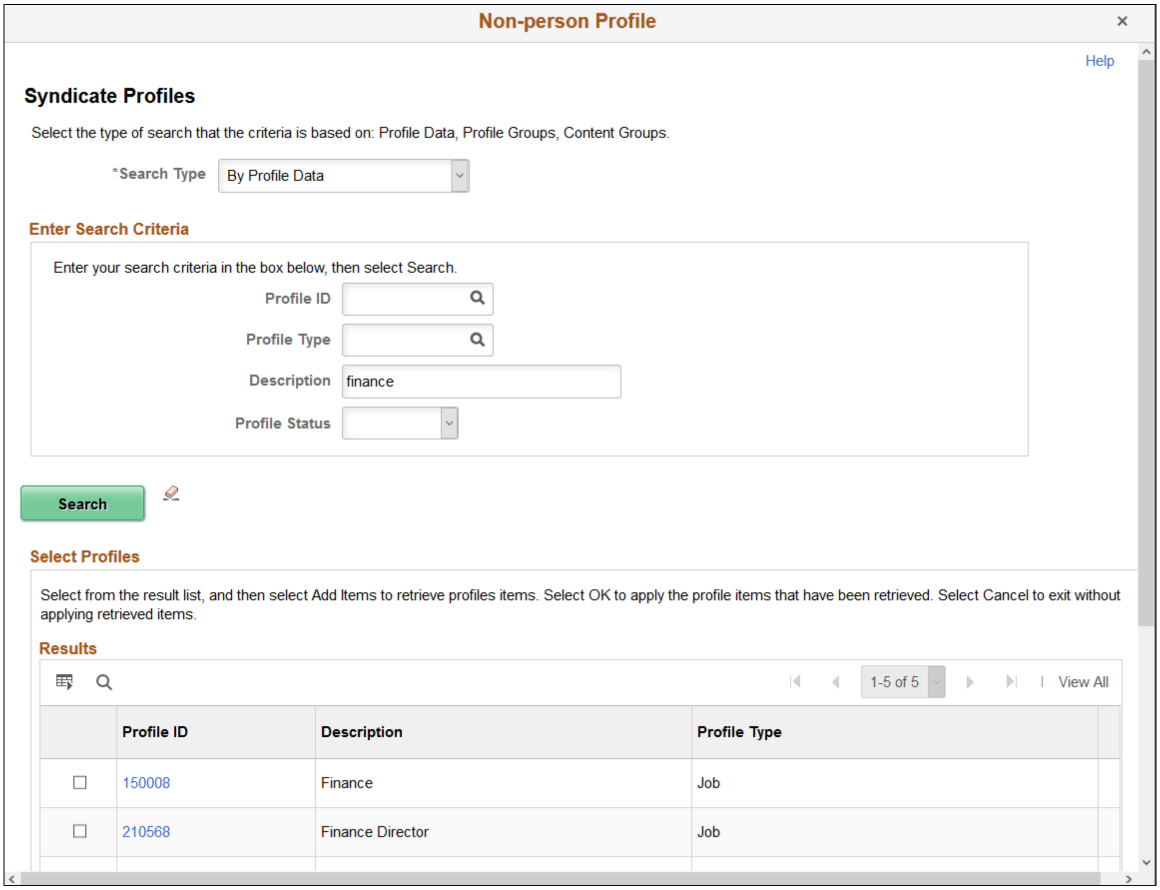
Use the Syndicate Profiles or Import Profile Items pages (JPM_PROF_SRCH_SEC) to select the profiles from which content will be syndicated or imported.

Navigation:

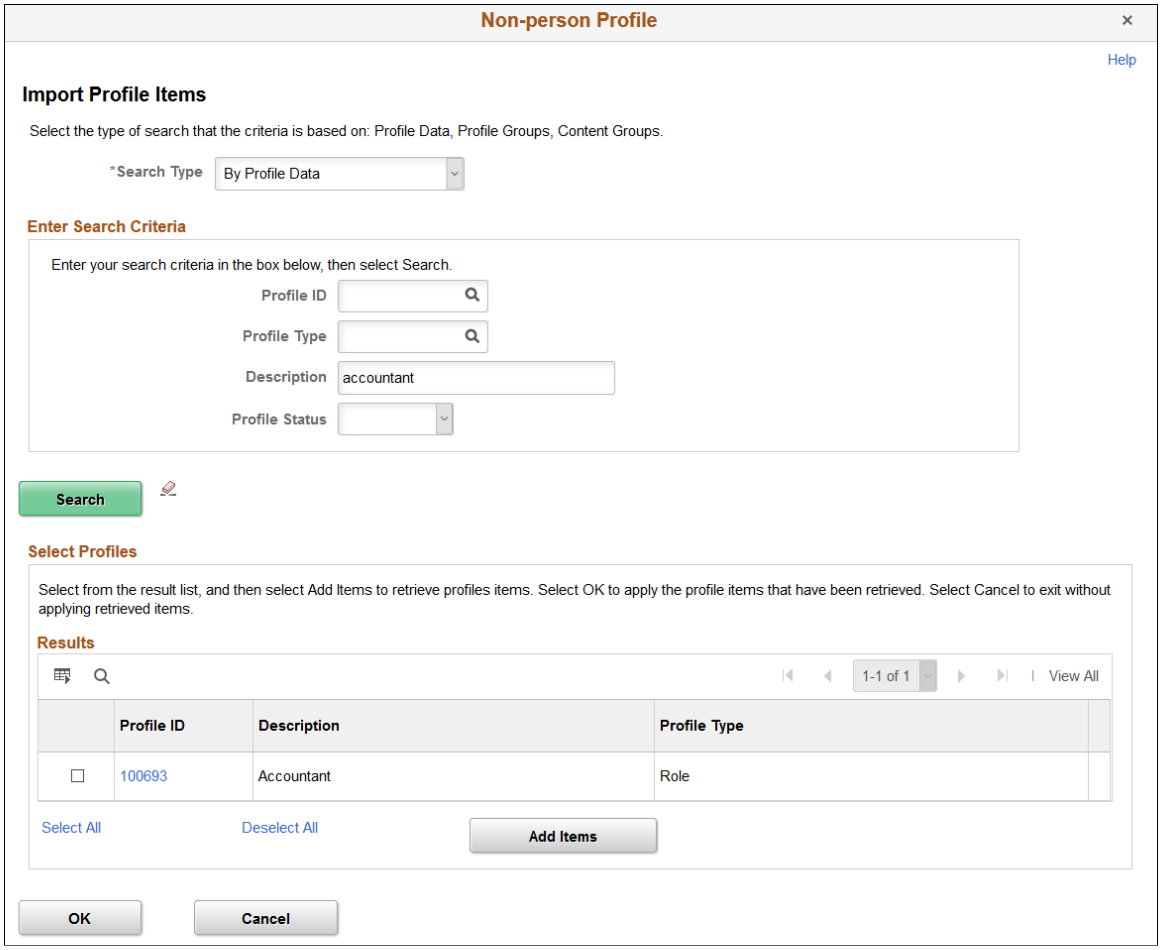
- Select **Add New Syndication** on the Non-person Profile - Profile Syndication page.

- Select the Profile Action *Import Profile Items* from the Non-person Profile page and click the **Go** icon.

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



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



Note: The Syndicate Profiles page works the same as the Import Profile Items page where you select a search type and enter your search criteria.
The search types for the Syndicate Profiles page are *By Profile Data* and *By Profile Groups*.
The search types for the Import Profile Items page are **By Content Groups,** *By Profile Data,* and *By Profile Groups.*

When you syndicate content, you establish a relationship between the source profile and the target profile, such that changes to the source profile result in the same changes in the target profiles. View syndication relationships on the Profile Syndication page.

When you import profile items, the system does not establish a link between the source profile or content item and the target profile. This means that changes to the content of the source profile or item made after the import action do not affect the target profile.

Selecting a Search Type

When you first enter the page, it lists the search types available:

Field or Control	***Description***
By Profile Data	Select to search for a non-person profile by profile ID, profile type, description, and status. This option is available on the Import Profile Items page and the Syndicate Profiles page.
By Profile Groups	Select to search for a profile by limiting the search to a profile group type or profile group. This option is available on the Import Profile Items page and the Syndicate Profiles page.
By Content Groups	Select to search for content items within a content group. This enables you to import multiple items within a content group in one step. This option is available on the Import Profile Items page.

When you select the search type the **Enter Search Criteria** group box appears. When you enter search criteria and click **Search,** the **Select Profiles** and **Results** group boxes appear.

Enter Search Criteria

Select the search criteria and click the **Search** button to search for profiles that you want to use for the import or syndication. The fields in this group box vary depending on the search type you select.

Select Profiles

The **Results** group box lists the profiles or items that meet your search criteria. Select the profiles from which you want to import or syndicate content by selecting the check box next to the profile ID, profile group type, or catalog item.

Field or Control	***Description***
Profile ID or **Content Item ID**	Click the profile ID or content item ID to view the profile or item.
Add Items	Click to import or syndicate content from the profiles or content items you selected. A message will appear indicating how many profile items will be imported. Click **OK** to merge imported items in content sections of profile. The **Cancel** button returns to the profile without merging items.

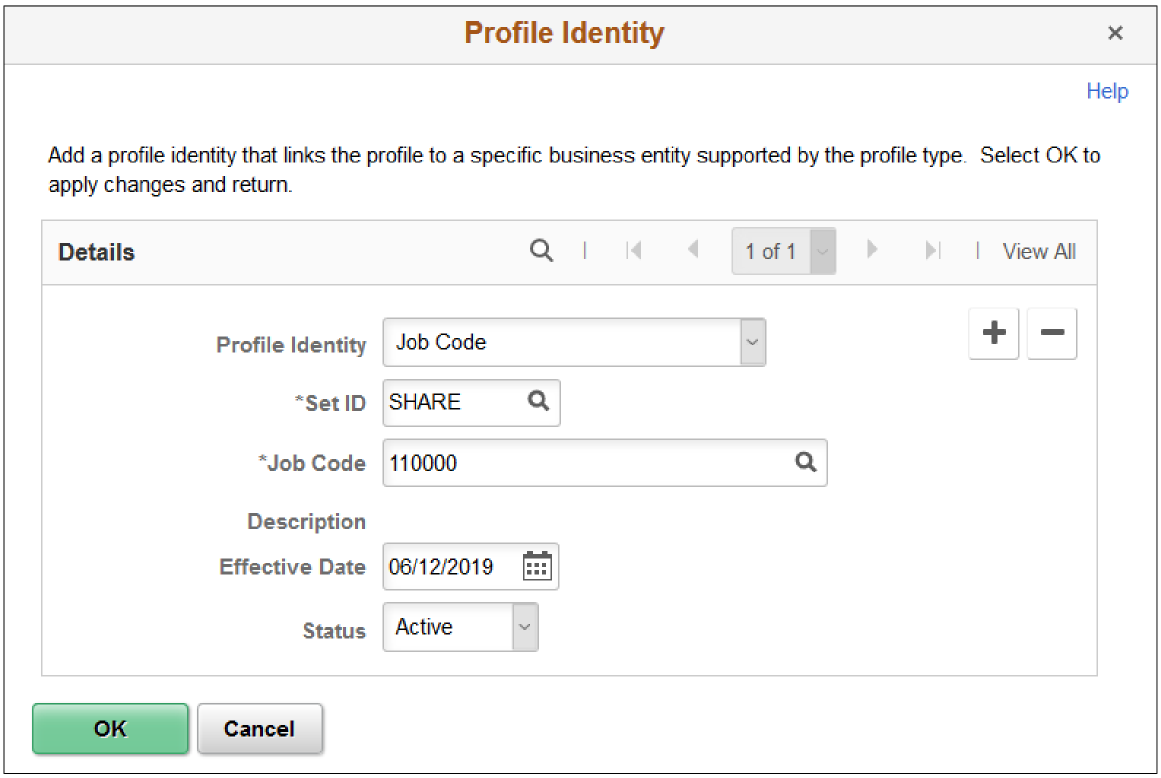
Profile Identity Page

Use the Profile Identity page (JPM_JP_PID_SEC) to add or edit profile identities associated with the profile.

Navigation:

Click the **Add Profile Identity** link or the **Edit Identity** icon in the Profile Identities grid area on the Non-person Profile page.

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



Field or Control	*Description*
Profile Identity	Select the profile identity. The options available are determined by the profile type definition. See Profile Types - Identities Page.
Set ID	Select the Set ID for the profile identity you want to link to this profile. This field appears if the profile identity selected has Set ID as a key field. Set ID is a key field for job codes and salary grades.

Field or Control	*Description*
Job Data, Job Family, Position Number, Salary Administration Plan, and **Salary Grade**	Select the profile identity you want to link to the profile. The number of fields that appear depends upon whether the profile identity has one or up to four key fields. For example, if you select *Salary Grade* in the **Profile Identity** field, you can enter a salary administration plan and grade. The system displays the **Key 1 Value** and **Key 2 Value** fields for the salary administration plan and salary grade on the Non-person Profile page.

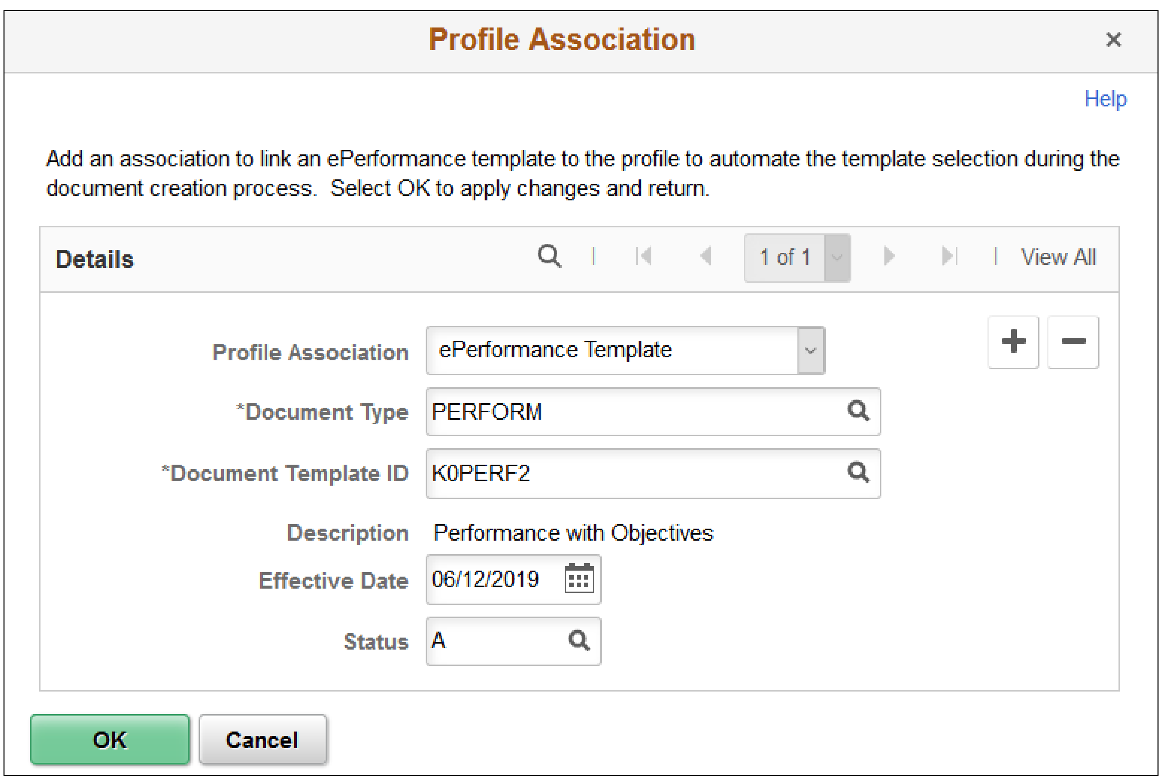
Profile Association Page

Use the Profile Association pages (JPM_JP_ASSC_SEC) to add or update profile associations for the profile.

Navigation:

Click the **Add Profile Association** link or the **Profile Association Option** name link in the **Profile Associations** grid area on the Non-person Profile page.

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



Profile associations are entities outside the Manage Profiles business process. PeopleSoft ePerformance templates are linked to profiles in this way.

Field or Control	*Description*
Profile Association	Select the profile association that you want to link to the profile.
Document Type and **Document Template ID**	Enter the document type and template ID that you want to link to the profile. The system displays these fields as the **Key <number> Value** fields on the Non-person Profile page. You can have up to four key fields. For example, if you select ePerformance in the field, the **Key 1 Value** field is for the Document Type and the **Key 2 Value** field is for document template ID.

Person Profile - Summary of Changes Page

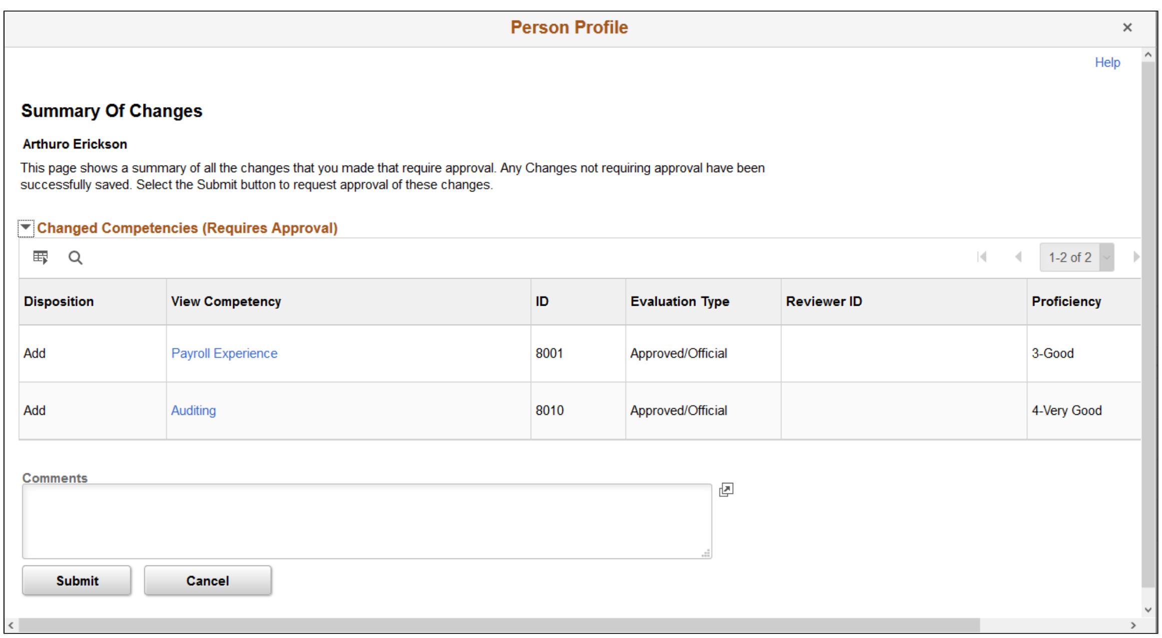
Use the Person Profile - Summary of Changes page (JPM_JP_PERSUMM_SEC) to view a list of changes that have been made to the person profile that require approval.

You can also enter comments for the approver. Click the Submit button to submit the changes for approval or click Cancel to return to the Person Profile page and not submit the items for approval. These items will not be available to other processes until they have been submitted for approval and approved.

Navigation:

Click the **Save** button or the **Submit** button on the Person Profile page when there are items that need to be submitted for approval.

This example illustrates the fields and controls on the Person Profile - Summary of Changes page. You can find definitions for the fields and controls later on this page.



This page lists the changes that have been made to the person profile that require approval. The title of the scroll areas indicate that content sections that require approval. The fields displayed on this page are determined by the definition of the content section in the profile type. The properties in the content section with the **Approval Required** check box selected are displayed on this page only.

See Content Section Page.

Field or Control	*Description*
Profile Type	Displays the profile type for the profile.
Disposition	Displays the type of change made: *Add:* If it is a new profile item *Change:* If you have made any changes to the item properties. *Delete:* If you have deleted a profile item.
Comments	Enter comments for the approver, if applicable.
Submit	Click this button to submit the changes for approval. The system then displays the Submit Confirmation page. The Submit Confirmation page displays the approval routing. When the system needs to route items to an approver, the item's status is changed to pending. If the items do not require approval, the approval routing specifies that no approvals are required. **Note:** The Approval Framework is configured for automatic approval of administrators. Even if a content section is defined in the profile type configuration as requiring approval for the administrator, when you save you will see the change displayed on the Summary of Changes page; however, when the administrator clicks **Submit,** the system display a message that no approvals are required, and changes will be immediately reflected in the profile.
Cancel	Click this button to return to the Person Profile page without submitting the items for approval.

Non-person Profile - Summary of Changes Page

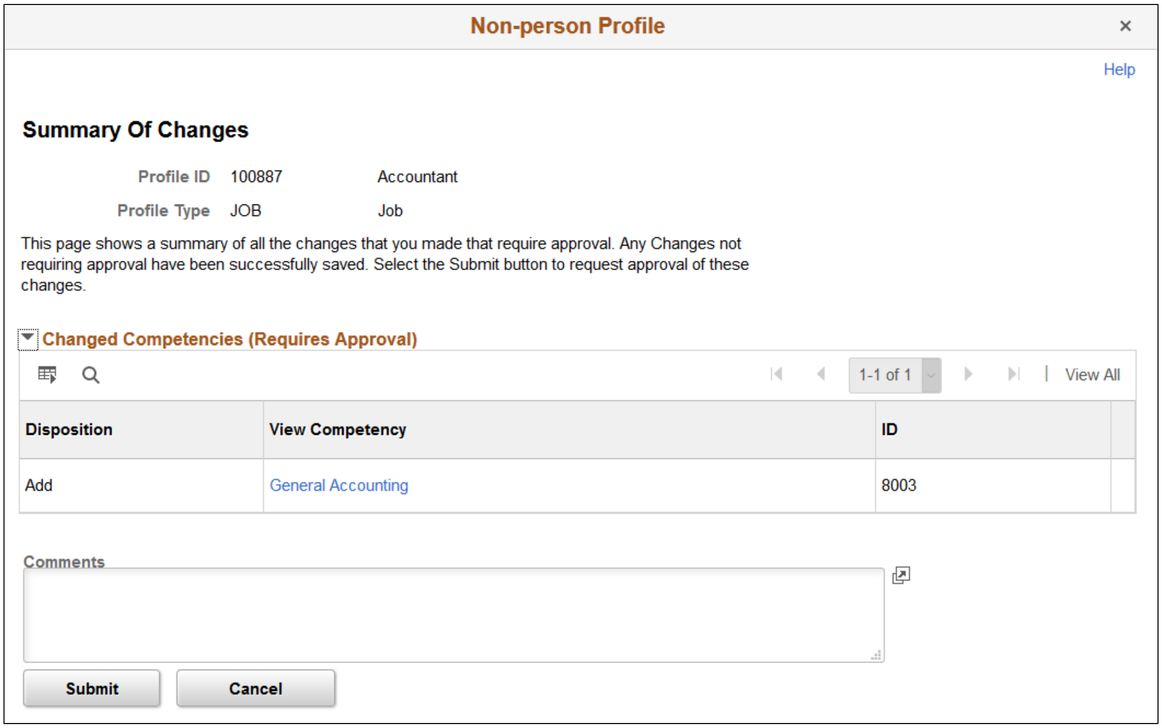
Use the Non-person Profile - Summary of Changes page (JPM_JP_NPSUMM_SEC) to view a list of changes that have been made to the non-person profile that require approval.

You can also enter comments for the approver. Click the Submit button to submit the changes for approval or click Cancel to return to the Non-person Profile page not submit the items for approval.

Navigation:

Click the **Save** button or the **Submit** button on the Non-person Profile page when there are items that need to be submitted for approval.

This example illustrates the fields and controls on the Non-person Profile - Summary of Changes page. You can find definitions for the fields and controls later on this page.



This page lists the changes to the non-person profile shown in the Profile ID field. The fields on this page are similar to the Person Profile - Summary of Changes Page.

Syndication Exceptions Page

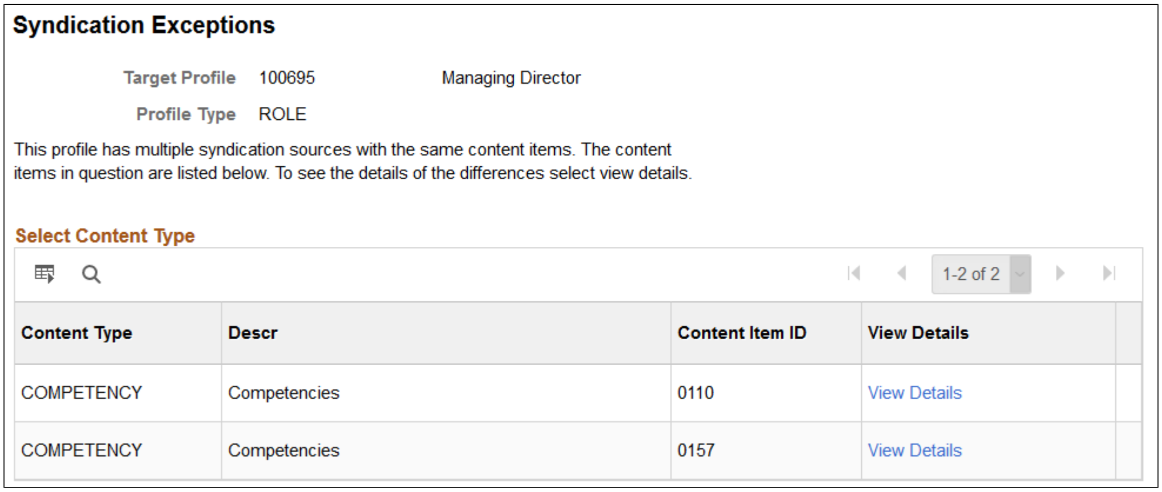
Use the Syndication Exceptions page (JPM_JP_SYJPM_JP_SYND_EXC1ND_EXC1) to display the syndication exceptions for a profile.

Syndication exceptions occur when an content item is syndicated from multiple source profiles but has different property values from each source profile.

Navigation:

- **Workforce Development** > **Profile Management** > **Profiles** > **Syndication Exceptions** > **Syndication Exceptions**
- From the Workforce Administrator home page in fluid, select **Profile Administration tile** > **View Profiles tile** > **Syndication Exceptions tab**

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



This page lists the content types that include syndication exceptions. Click the **View Details** link to access the Exception Details page that lists the profile items with syndication exceptions.

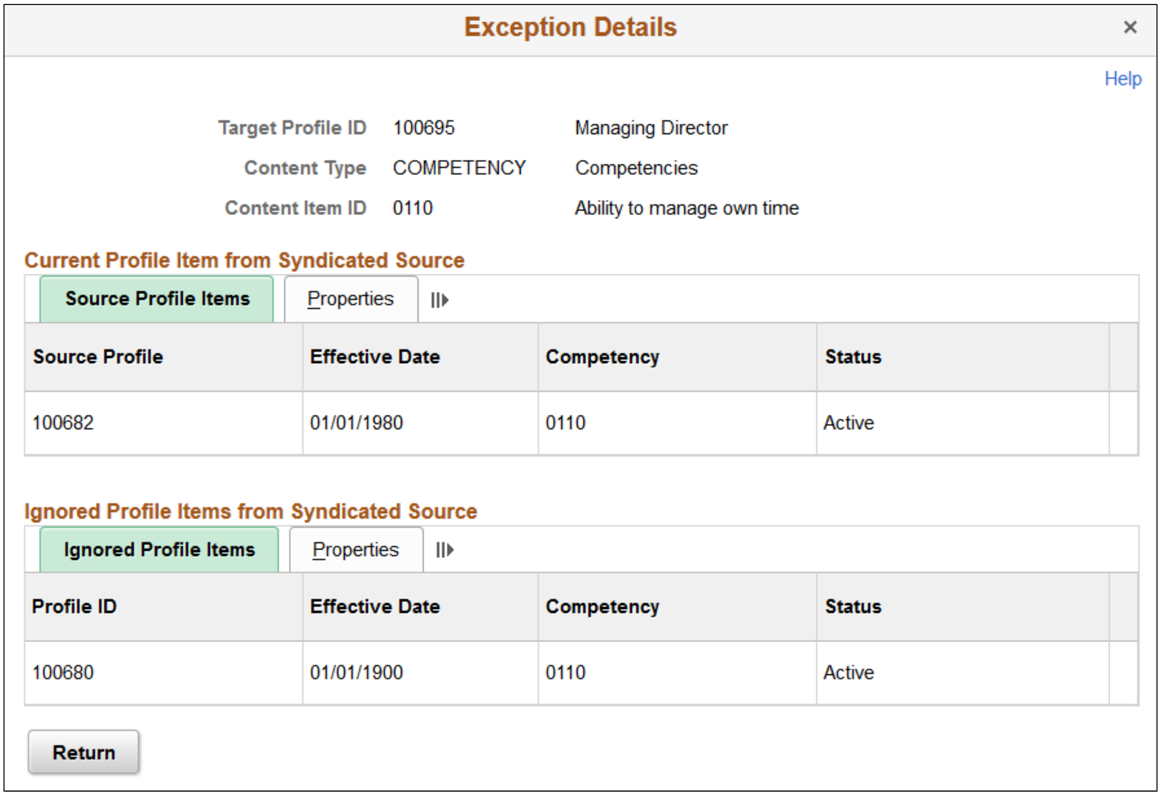
Exception Details Page

Use the Exception Details page (JPM_JP_SYND_EX_SEC) to display details of profile items with exceptions.

Navigation:

Click the **View Details** link on the Syndication Exceptions page.

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



Current Profile Item from Syndicated Source

This tab displays the details of the source profile and profile items that have been syndicated into the target profile.

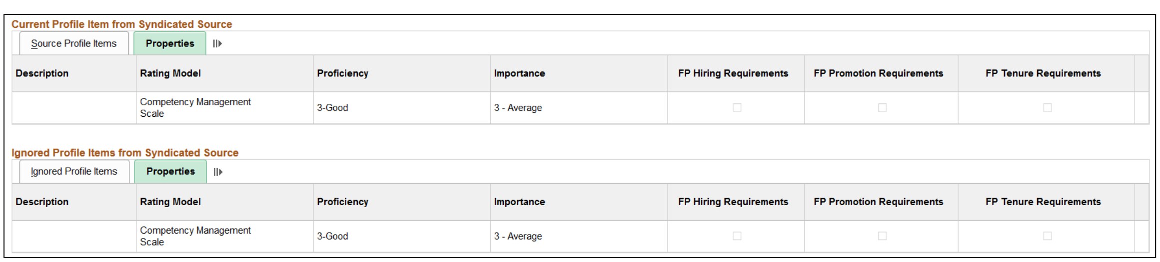
Ignored Profile Items from Syndicated Source

This tab displays the details of the source profile that conflicts with the syndicated profile items specified in the Source Profile Items tab.

Properties

Access the Properties tab.

This example illustrates the fields and controls on the Exception Details: Properties tabs. You can find definitions for the fields and controls later on this page.



The Properties tabs display the field values in the syndicate source profiles. In the example shown, the **Target Proficiency** field has different values in the two source profiles. The values shown for the Source Profile Items are those inserted into the target profile.

Approving Profile Changes

These topics provide an overview of profile approval processing and discuss how to view profile changes.

Pages Used to Approve Profiles

Page Name	***Definition Name***	***Usage***
Select Approval Transaction Page	JPM_JP_MNG_APPRVL	View a list of profiles waiting approval, with approved changes, or with changes that have been denied.
Approve Profiles Page	JPM_JP_PERS_APPR	View a list of the changes to a selected person profile. If the profile changes are pending approval, you can either approve or reject the changes.
Non-person Profile - Approval Page	JPM_JP_NONPER_APPR	View a list of the changes to a selected non-person profile. If the profile changes are pending approval, you can either approve or reject the changes.
View <content type> Page	JPM_APR_DTL_SEC	View details of a profile item that has changed.
Approval Confirmation Page Deny Confirmation Page	JPM_JP_PER_APR_CNF	Displays a confirmation message. When you click OK, you return to the Select Approval Transaction page.

Understanding Profile Approval Processing

You can use approval processing to control:

- Updates to profile items on person profiles.

  If approval processing is configured for a content section, when profiles items are added, deleted, or updated, it triggers approval processing.

- Updates to profile items and profile identities associated with non-person profiles.

  If approval is required for profile identities, any changes to the list of profile identities associated with the profile triggers approval processing.

Configure profile approvals at the profile type level. You associate an approval definition with the profile type and then specify which content sections in the profile type require approval. For non-person profiles, you can also specify whether profile identities require approval.

Profile approvals uses the Approval Framework for managing approval of person and non-person profiles. The delivered approvals definitions provide the following profile approval processing:

- When employees make changes to their person profiles, the changes are routed to their manager for approval.

  When managers or administrators update person profiles, these changes do not require approval.

- When managers create or update non-person profiles, the changes are routed to the profile administrator for approval.

  When administrators update non-person profiles, the changes do not require approval.

You can use the delivered definitions or set up new approval definitions for managing profiles, according to your business needs.

Note: Profile Management does not support delegation and push back of approval transactions. All profile changes submitted together as a group for approval cannot be approved or denied at the line item level. The entire group must either be approved or denied.

Related Links

"Understanding Approvals" (Application Fundamentals)

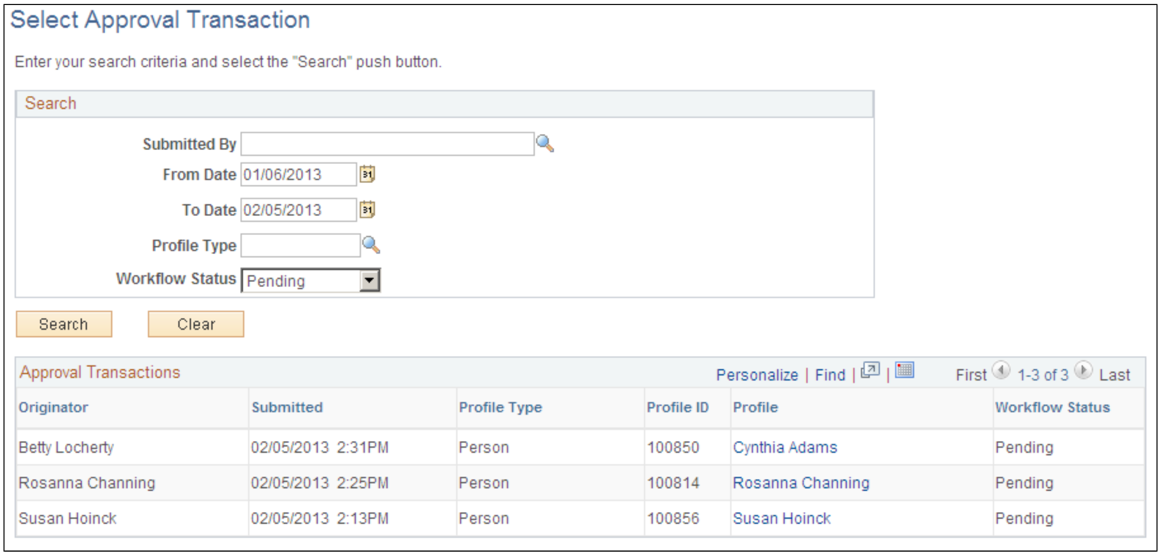
Select Approval Transaction Page

Use the Select Approval Transaction page (JPM_JP_MNG_APPRVL) to view a list of profiles waiting approval, with approved changes, or with changes that have been denied.

Navigation:

- **Workforce Development** > **Profile Management** > **Profiles** > **Approve Profiles** > **Select Approval Transaction**
- From the Workforce Administrator home page in fluid, select **Profile Administration tile** > **View Profiles tile** > **Approve Profiles tab**

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



Field or Control	***Description***
Originator	Select an employee ID to search for profile changes submitted by that employee.
From Date, To Date	Enter period begin and end dates to search for approvals that were submitted between the selected dates.
Profile Type	Select a profile type to search for approvals for a specific profile type.
Workflow Status	Select the status of the approvals you want to view: *Pending:* To view profile changes that have been routed to you for approval. *Approved:* To view profile changes that you have previously approved. *Denied:* To view profile changes that you rejected.
Search	Click to populate the Approval Transaction scroll area with profiles that match your search criteria.

Approval Transactions

Field or Control	***Description***
Submitted	Displays the date that the profile changes were submitted for approval.

Field or Control	Description
Profile	Click the profile link to view the changes to the profile that require approval. The system displays the Approve Profiles page.

Approve Profiles Page

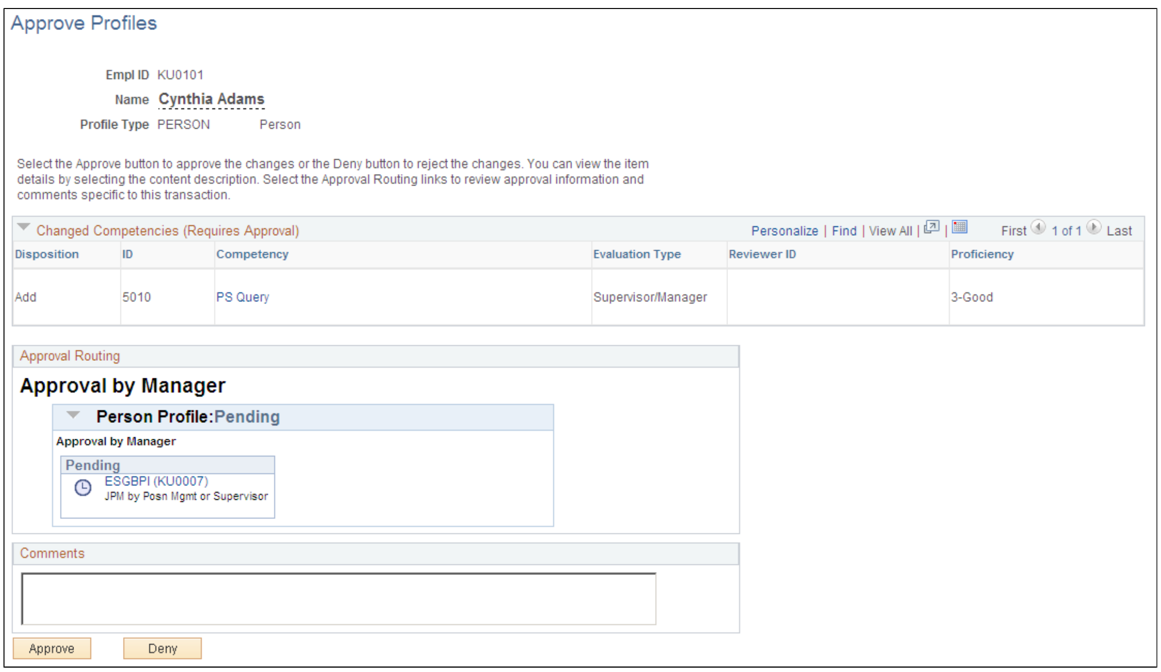
Use the Approve Profiles page (JPM_JP_PERS_APPR) to view a list of the changes to a selected person profile.

If the profile changes are pending approval, you can either approve or reject the changes.

Navigation:

Click a person profile ID on the Select Approval Transaction page.

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



Note: Profile Management does not support delegation and push back of approval transactions. All profile changes submitted together as a group for approval cannot be approved or denied at the line item level. The entire group must either be approved or denied.

Field or Control	***Description***
Disposition	Displays one of these values to indicate the type of change: *Add:* Indicates a new profile item. *Change:* Indicates that the originator changed one or more properties for the profile item. *Delete:* The originator has deleted the profile item.
<content item>	Click a content item link to view details of the changes to the profile item. The item properties are determined by the profile type definition.
Comments	Enter any comments for the originator relating to this approval transaction. The comments field is available only if the profile changes require approval. For profile items that have been denied or approved, an expandable **Comments** section appears in the **Approval Routing** group box where you can view comments that may have been entered by the originator.
Approve	Click this button to approve the profile changes. This button appears only for profile changes with a *Pending* workflow status.
Deny	Click this button to reject the profile changes. This button appears only for profile changes with a *Pending* workflow status.
 (View Profile as Printable Page icon)	Click the **View Profile as Printable Page** icon to display the profile in a PDF file that you can print from Adobe Acrobat. BI Publisher technology generates the printable file using the same template and layout as the Non-Person Profile batch report. The printable file displays approved items only. See Setting Up to Use BI Publisher Reports and Profiles.

Approval Routing

This group box displays the routing information from the Approval Framework.

Field or Control	***Description***
View/Hide Comments	Click to view or hide the comments entered by the originator when he or she submitted the profile changes for approval.

Managing Interest Lists

These topics provide an overview of interest lists, list common elements, and discuss how to manage interest lists.

Pages Used to Manage Interest Lists

Page Name	***Definition Name***	***Usage***
Interest List by Person Page	JPM_INTEREST_PERS	View an employee's interest list and add profiles to the list.
Interest List by Profile Page	JPM_INTEREST_PROF	View a list of employees who have a selected profile on their interest list. You can also add the selected profile to an employee's interest list.

Understanding Interest Lists

Interest lists enable employees to maintain a list of the non-person profiles that are of interest. They can also compare the added profile to their own profile to determine degree of a fit. The interest list can include any profile. For example, employees could add profiles for jobs that they want to include in their career planning, or job profiles that are similar to their own profile. Each employee has one interest list that can be modified by the employee, the employee's manager, and the profile administrator:

- Employees maintain their own interest list using the self-service options provided in eDevelopment.

  The interest list shows who added each profile to the interest list, and employees can remove any profiles that they added. Employees cannot remove profiles added by their manager or the profile administrator.

- Managers can view and modify interest lists for their direct reports using the manager self-service options in eDevelopment.

  Managers can remove profiles that they added to an interest list only. They cannot remove profiles that are added by the employee or the profile administrator.

- Administrators have access to interest lists based on the row-level security permissions associated with their role.

  Administrator can remove any profile from an interest list, including those added by the employee and manager.

Related Links

“(Classic) Maintaining Interest Lists” (PeopleSoft eDevelopment)

“(Fluid) Maintaining Interest Lists” (PeopleSoft eDevelopment)

Common Elements Used to Manage Interest Lists

Field or Control	***Description***
Profile	Click the profile link to view the profile. From the Interest List page, the link takes you to the Non-person Profile page and from the Interest List - View by Profile page, the link takes you to the Person Profile page.
Assigned By	Displays the name of the person who added the profile to the interest list. This can be the employee, the employee's manager, or an administrator.

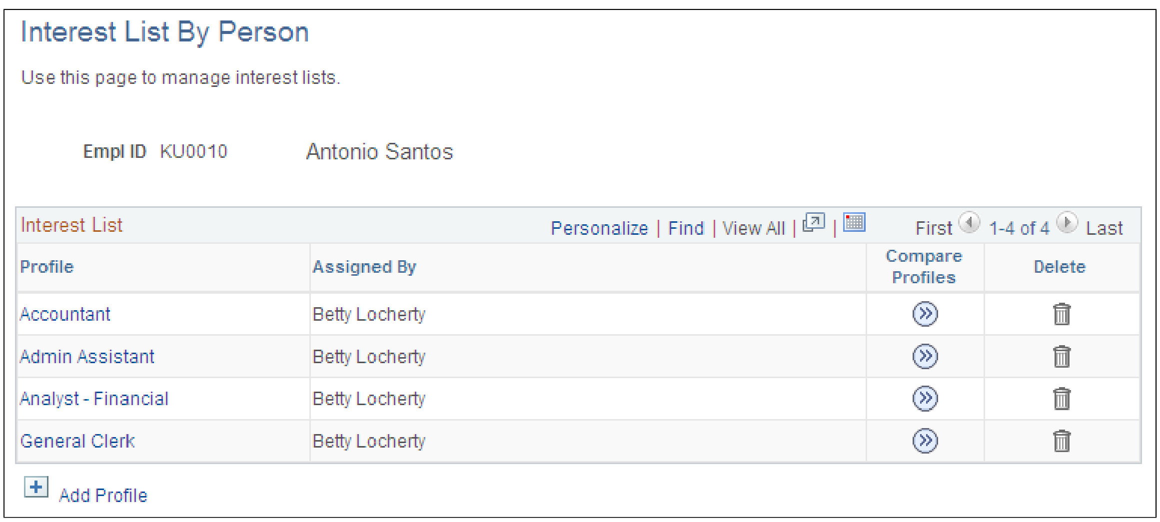
Interest List by Person Page

Use the Interest List by Person page (JPM_INTEREST_PERS) to view an employee's interest list and add profiles to the list.

Navigation:

Workforce Development > **Profile Management** > **Profiles** > **Interest List by Person** > **Interest List by Person**

This example illustrates the fields and controls on the Interest List by Person page. You can find definitions for the fields and controls later on this page.



Field or Control	***Description***
Add Profile	Click this link to add another profile to the employee's interest list.
Compare Profiles	Click this icon to access the Compare Results page. In order to use the compare process, you must first build the appropriate search indexes. See. Building the Search Indexes.

Interest List by Profile Page

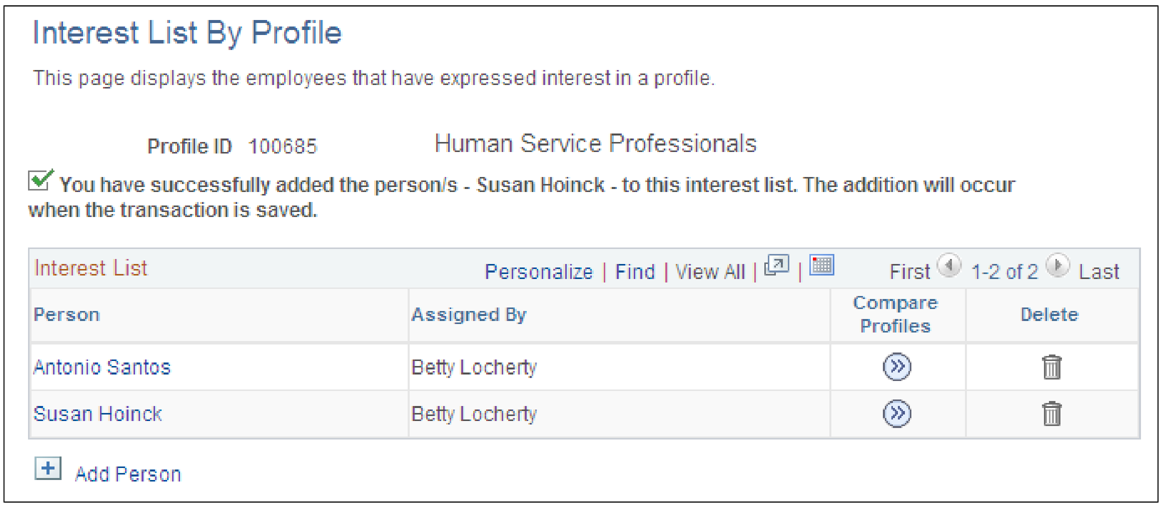
Use the Interest List by Profile page (JPM_INTEREST_PROF) to view a list of employees who have a selected profile on their interest list.

You can also add the selected profile to an employee's interest list.

Navigation:

Workforce Development > **Profile Management** > **Profiles** > **Interest List by Profile** > **Interest List by Profile**

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



Field or Control	***Description***
Add Person	Click this link to add the profile to another employee's interest list.
Compare Profiles	Click this icon to access the Compare Results page. In order to use the compare process, you must first build the appropriate search indexes. See. Building the Search Indexes.

Tracking Training

These topics provide an overview of how to track employee training and discuss how to track employee training.

Pages Used to Track Employee Training

Page Name	***Definition Name***	***Usage***
Training Page (see "Course Student Enrollment Page" (PeopleSoft Human Resources Administer Training))	COURSE_STUDNT_ENRL	View details of training courses that the employee has completed, enrolled in, or on the waiting list. This page displays course sessions that you manage using the Administer Training business process.
Professional Training Page or Global Assignments Training Page	EDUCAT_TRAIN_GBL	Record employee training that is not maintained using the Administer Training business process.

Understanding How to Track Employee Training

The Administer Training business process enables you to set up training courses and manage course sessions. If you use Administer Training to manage your training courses, the Training page (COURSE_STUDNT_ENRL) gives you a summary of employees' training history.

Use the Professional Training page (EDUCAT_TRAIN_GBL) to track other training that is not managed using Administer Training. You can use this page to track training that an employee is enrolled in, or has completed.

This topic discusses how to record employee training.

Related Links

"Course Student Enrollment Page" (PeopleSoft Human Resources Administer Training)

Professional Training Page or Global Assignments Training Page

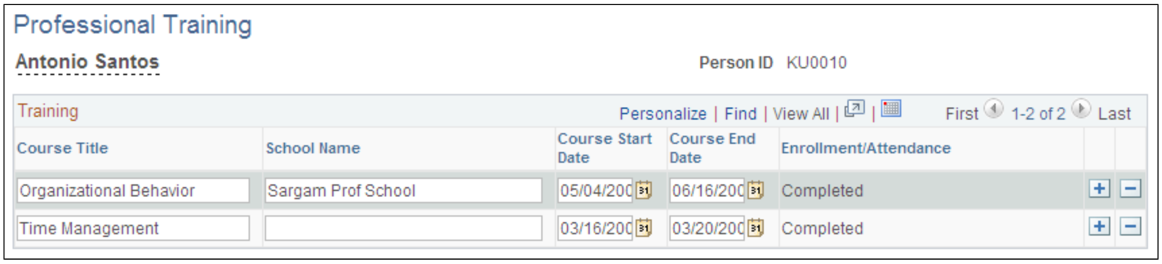
Use the Professional Training or Global Assignments Training page (EDUCAT_TRAIN_GBL) to record employee training that is not maintained using the Administer Training business process.

Navigation:

- **Workforce Development** > **Profile Management** > **Profiles** > **Professional Training** > **Professional Training**
- **Administer Training** > **Result Tracking** > **Manage Person Profiles** > **Professional Training** > **Professional Training**

  Workforce Administration > **Global Assignments** > **Assignee Qualifications** > **Global Assignments Training** > **Global Assignments Training**

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



Field or Control	***Description***
Course Title	Enter the name of the training course.
School Name	Enter the name of educational establishment or training company that runs the course.
Course Start Date and **Course End Date**	Enter the date on which the course was started and completed.

Chapter 6

Working with Search and Compare Profiles

Understanding Setting Up Search and Compare Profiles

The Search and Compare Profiles feature uses the PeopleTools Search Framework to search and compare profiles. Search and Compare Profiles enables employees, managers, and administrators to search for profiles that match selected search criteria and compare those profiles. Here are examples of the types of searches that are possible:

- Employees can search for jobs that match their own personal profile.
- Managers can select an employee who reports to them and search for other direct or indirect reports with similar skills.
- Managers can search for direct or indirect reports who match the profile for a job opening that they want to fill.
- Administrators can select a job profile and search for similar job profiles.

Note: Before users can run any searches, administrators must build the indexes and define the search queries available on the Search Configuration page. For a limited set of profile type properties, the indexes store only code-based data. These indexes support search word matching only on the property data.
(Fluid) For fluid Search and Compare, additional filters are provided for the Person Profile index on Regulatory Region, Business Unit, Department, Location, Job Title, Regular/Temporary, and Full/Part-time, where a full or partial description can be entered.

Note: To use Fluid Search and Compare you need to be on PeopleTools 8.57 or higher.

Defining Search Configurations

Define search types for your organization on the Define Search Configuration Page and (Fluid) Fluid Compare Configuration - Page Display Page. The high level keys for a search configuration are the object owner identifier, the sub application id, and the search ID. The object owner identifier enables other products to easily interface with the PeopleSoft Manage Profiles search engine. For Manage Profiles searches, select the *HCM Profile Management* (JPM) in the **Object owner identifier** field. The **Sub Application Id** field indicates other products using the Search and Compare processes, such as Succession Planning.

For each search configuration, you define:

- Search Properties (source and target profile types)

  The source and the target profile types are the two profile types that are being compared in the search. The source is the profile type that forms the basis for the search criteria and the target is the profile type being searched for matching profiles. These profile types (source and target profile types) must share a common set of content types (for Classic) or criteria (for Fluid), otherwise no search criteria items can be entered. For example, if an employee searches for jobs that match his or her personal profile, the source is the employee's person profile type and the target is the job profile type. All content types or criteria shared by both the person profile type and the job profile type are exposed as search criteria content sections.

- Criteria Rule

  The **Criteria Rule** field defines two aspects of the search: whether the system populates the search criteria based on the profile that the user selects for the search and whether users can view and adjust the search criteria.

  There are three types of criteria rules:

  - *Default, No Display:* The system populates the search criteria from the source profile and runs the search without displaying the search criteria page. If you select any other criteria rule, the system displays the search criteria page and users can adjust the criteria before running the search.
  - *Default and Display:* The system populates the search criteria using the source profile and displays the search criteria so users can view and adjust the data before running the search.
  - *No Default, Display (Adhoc):* The search does not have default search criteria and users define the search criteria manually. For this type of search, the source and target profile types are not mandatory in the configuration. However, if these fields are blank, users must select source and target profile types before they define the search criteria.

- Display Max

  You can indicate the maximum number of profiles per page returned by the search query.

- Roles (who can run the search)

  You can set up searches for one or more of the roles: *Employee*, *Manager*, and *Administrator*. Users can only run the searches that are defined for their role. In addition, the search results list only those profiles to which the user has the appropriate security. For example, if a manager searches for employees that match a job profile, the search results include those employees that are direct or indirect reports of the manager.

- Fluid Display Options

  Specify the default sorting order of the search results. You can also identify a profile compare configuration ID that defines additional data to display for a person or non-person profile on the compare page.

Viewing Search Results

The profile type definitions are the basis for Search and Compare Profiles so it's important to understand how they affect the search results. When users select a search, to build the search criteria, the system:

1. Identifies the content sections to include in the search criteria.

   The system compares the source and target profile types to identify which content sections appear in both source and target. Only the content sections that are common to the source and target profile types are included in the search criteria.

2. Identifies the properties to include in the search criteria for each of the content sections identified in the previous step.

   The properties included are those defined as searchable in the target profile type.

See Setting Up Profile Types.

Example: Search Criteria

To illustrate how Search and Compare Profiles works, consider the example of an administrator searching for employees who match a given job profile. In this example:

- Source profile type is *JOB*.
- Target profile type is *PERSON*.

Suppose that the *JOB* profile type has the following content sections and properties that are defined as searchable:

Content Section	***Searchable Properties***
Competencies	JPM_CAT_ITEM_ID (Competency) JPM_RATING1 (Target Proficiency)
Degrees	JPM_CAT_ITEM_ID (Degree) COUNTRY (Country)
Test/Examinations	JPM_CAT_ITEM_ID (Test)
Responsibilities	JPM_CAT_ITEM_ID (Responsibility) JPM_YN_2 (Critical)

Suppose that the *PERSON* profile type has the following content sections and properties that are defined as searchable:

Content Section	***Searchable Properties***
Competencies	JPM_CAT_ITEM_ID (Competency ID) JPM_RATING1 (Proficiency) JPM_INTEREST_LEVEL (Interest Level)

Content Section	***Searchable Properties***
Degrees	JPM_CAT_ITEM_ID (Degree) COUNTRY (Country) MAJOR_CODE (Major Code)
School Education	JPM_CAT_ITEM_ID (Education Level) SCHOOL CODE (School Code) COUNTRY (Country) AVERAGE_GRADE (Average Grade)
Test/Examinations	JPM_CAT_ITEM (Test)

In this example, the search criteria are:

Content Section	***Properties***
Competencies	JPM_CAT_ITEM_ID (Competency) JPM_RATING1 (Target Proficiency) JPM_INTEREST_LEVEL (Interest Level)
Degrees	JPM_CAT_ITEM_ID (Degree) COUNTRY (Country) MAJOR_CODE (Major Code)
Test/Examinations	JPM_CAT_ITEM_ID (Test)

Notice that:

- Responsibilities and School Education are missing because these content sections do not appear in both the source and the target profile types.
- The properties included in the search criteria are those defined as searchable in the target profile type.
- The labels displayed on the Search Criteria page are those defined in the source profile type for those properties that are defined in both the source and the target profile type.

In the example, the label for the property JPM_RATING1 is **Target Proficiency** in the source profile type and **Proficiency** in the target profile type. When users run the search, the JPM_RATING1 field is labelled **Target Proficiency** on the Search Criteria page.

(Classic) Importance and Mandatory Properties

The classic pages allow you to use the **Importance** and **Mandatory** properties when retrieving results. These properties are not used in the Fluid pages.

The **Importance** (JPM_IMPORTANCE) and **Mandatory** (JPM_MANDATORY) properties appear on the Search Criteria page for each of the content sections included in the search criteria. The system automatically adds these fields to enable users to adjust the search as follows:

- The **Mandatory** check box enables users to specify profile items that must appear in the matching profiles.

  If the **Mandatory** check box is selected for any profile item, the search results include only those profiles containing that profile item and having the same property values as those in the search criteria. For example, if the search criteria includes an item *0100 - Abstract Thinking* and a proficiency of *Good* for the item, if you specify that the item is mandatory, the search results include only profiles that contain both the *0100 - Abstract Thinking* item AND a proficiency equal to *Good*. Any profiles that have the item but with a lower or higher proficiency value are not included in the search results.

  If the **Mandatory** property is included in a content section definition, the system uses the setting of the property in the profile as the default value in the search criteria, but users can override the default.

- The **Importance** field is a way to define the profile items that are most or least important.

  When the search runs, the search framework uses the **Importance** field to determine the ranking of matching profiles. The default value is *3 - Average,* but users can override this value.

  For searches with a criteria rule of *Default, No Display* that do not allow users to modify the search criteria, the system automatically assigns the default importance value *(3 - Average)*.

If the **Mandatory** property is included in a content section definition, the system uses the **Mandatory** setting in the profile as the default value for the **Mandatory** field in the search criteria, but users can override the default.

See (Classic) Searching and Comparing Profiles.

(Fluid) Exact Match Property

The Fluid Search and Compare process uses the **Exact Match** property.

The **Exact Match** property appears on the Search Criteria page for each of the content sections included in the search criteria and enables users to specify profile items that must appear in the matching profiles.

When an exact match is specified for a criteria item, the search process incorporates the boolean logic to determine if a match occurs. When you use the OR operator between items or groups, the results can still return a profile if matches occur on other criteria items. However, when there is only one criteria group and the items are connected with the AND operator, then the results will not return the profile if the property or rating do not match exactly for that item.

If the **Mandatory** property is included in a content section definition, the system uses the **Mandatory** setting in the profile as the default value for the **Exact Match** field in the search criteria, but users can override the default.

See also (Fluid) Searching and Comparing Profiles.

Search Filters and Advanced Filters

The Search Criteria page includes filters if you have set up searchable profile group types for the target profile type. Search filters enable you to narrow the search to specific data and will vary based on your user interface.

- (Classic) When using the classic Search Criteria pages, the top of the page will display a collapsible Search Filters section. You use this section to narrow your search to specific profile groups, locations, or travel preferences.
- (Fluid) When using the fluid Search Criteria pages, the page will display an Advanced Filters tab. Access this page to narrow your search by advanced filters (regulatory region, business unit, department, location, job title, regular/temporary status, and full/part time status) and by profile groups.

To illustrate how this works, consider the following example:

- The profile group type GLOBAL includes the profile type JOB.
- The profile groups for GLOBAL are REGION1, REGION2, and REGION3.

When users select a search where the target profile type is JOB, the search filter link enables users to select one or more of the profile groups REGION1, REGION2, and REGION3. The search results are limited to profiles that belong to the selected profile groups. The Search Filter feature is particularly useful if your organization has large numbers of profiles.

(Classic) Current Location and Travel Preferences filters are only available in the classic pages if the target profile is configured to include those content sections. Current Location and Travel Preferences do not display in the Advanced Filters section of the fluid pages.

See (Classic) Searching and Comparing Profiles and (Fluid) Searching and Comparing Profiles.

See Creating Profile Group Types and Profile Groups.

Setting Up Searches

Use the Define Search Configuration (JPM_SRCH_CFG) and Fluid Compare Configuration (JPM_CSC_DEFN) components to define the search types for your users.

Note: Users must be assigned the *Profile Administrator* or *JPM Administrator* roles to access these pages.

This topic discusses how to set up profile search types.

Page Used to Set Up Search Types

Page Name	***Definition Name***	***Usage***
(Fluid) Fluid Compare Configuration - Page Display Page	JPM_CSC_DEFN	Create compare group headings that define additional data to display for the profile when viewing the Compare Results page in fluid.
(Fluid) Fluid Compare Configuration - Data Sources Page	JPM_CSC_FLD	Select the fields that should appear within the Compare Results group headings in fluid.
(Fluid) Configure Compare Field Page	JPM_CSC_FLD_SEC	Configure field display and label options for the Compare Results page in fluid.
Define Search Configuration Page	JPM_SRCH_CFG	Set up profile search types for employees, managers, and administrators.

(Fluid) Fluid Compare Configuration - Page Display Page

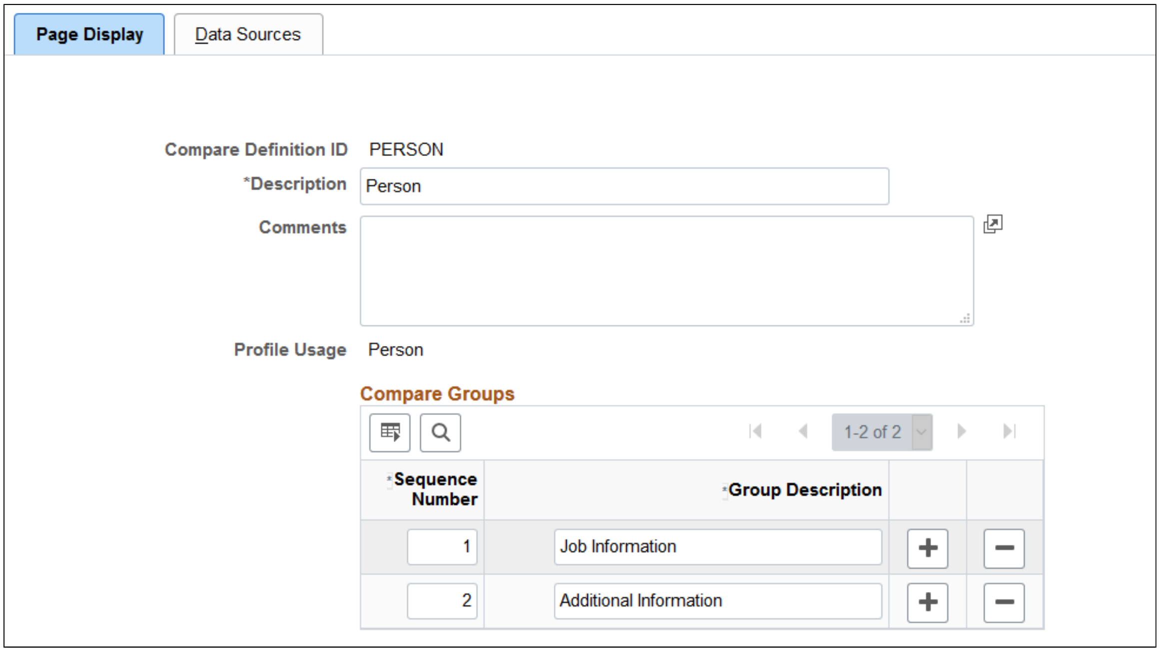
Use the Fluid Compare Configuration - Page Display page (JPM_CSC_DEFN) to create compare group headings that define additional data to display for the profile when viewing the Compare Results page in fluid.

Note: This configuration is used to display data on the fluid pages only.

Navigation:

- **Set Up HCM** > **Product Related** > **Profile Management** > **Profiles** > **Fluid Compare Configuration** > **Page Display**
- From the Workforce Administrator home page in fluid select the **Profile Administration tile** > **Profile Configuration tile** > **Configure Search and Compare tab** > **Fluid Compare Configuration** > **Page Display**.

This example illustrates the fields and controls on the Fluid Compare Configuration - Page Display page. You can find definitions for the fields and controls later on this page.



Field or Control	*Description*
Profile Usage	Select the usage value: *Person* or *Non-Person*. The usage will determine the valid person or non-person compare IDs on the Define Search Configuration Page.
Sequence and **Group Description**	Enter the group headings and the order in which they should appear on the (Fluid) Compare Results Page. The groups allow you to combine like fields that describe the profiles that a user is comparing.

After you have created compare definition IDs, associate them with search types on the Define Search Configuration Page.

(Fluid) Fluid Compare Configuration - Data Sources Page

Use the Fluid Compare Configuration - Data Sources page (JPM_CSC_FLD) to select the fields that should appear within the Compare Results group headings in fluid.

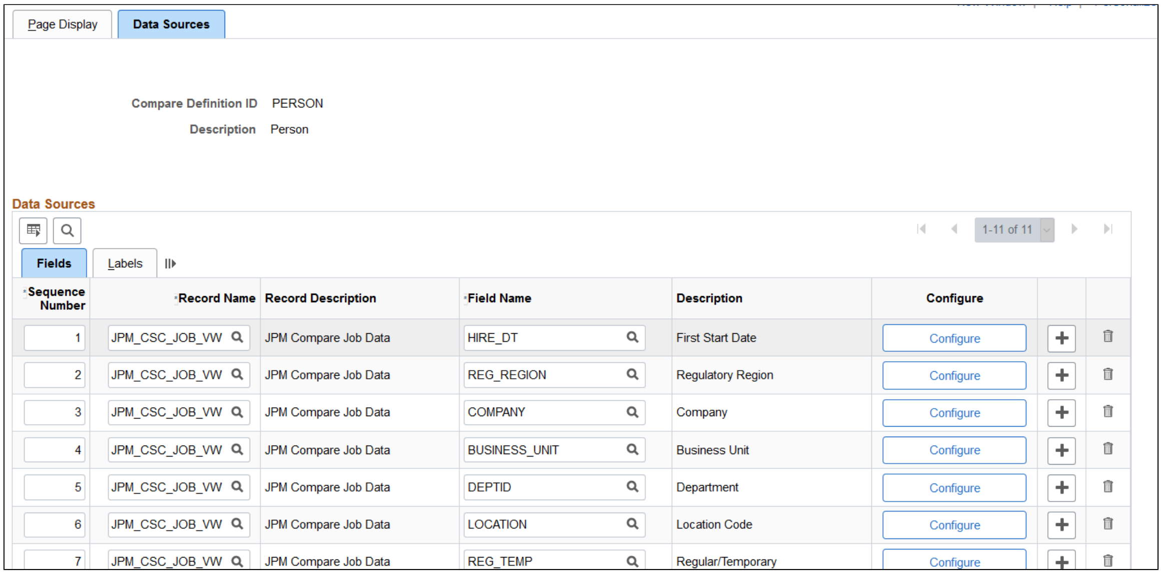
Note: This configuration is used to display data on the fluid pages only.

Navigation:

- **Set Up HCM** > **Product Related** > **Profile Management** > **Profiles** > **Fluid Compare Configuration** > **Data Sources**

- From the Workforce Administrator home page in fluid select the **Profile Administration tile** > **Profile Configuration tile** > **Configure Search and Compare tab** > **Fluid Compare Configuration** > **Data Sources**.

This example illustrates the fields and controls on the Fluid Compare Configuration - Data Sources page. You can find definitions for the fields and controls later on this page.



Field or Control	***Description***
Record Name	Enter the record that the system will use to retrieve the employee or non-person information.
Field Name	Specify the field from the record that should appear on the Compare Results page.
Configure	Click this button to open the (Fluid) Configure Compare Field Page and define the field display and label options.

Use the Labels tab to view the field labels and the Compare Group to which it belongs.

After you have created compare definition IDs, associate them with search types on the Define Search Configuration Page.

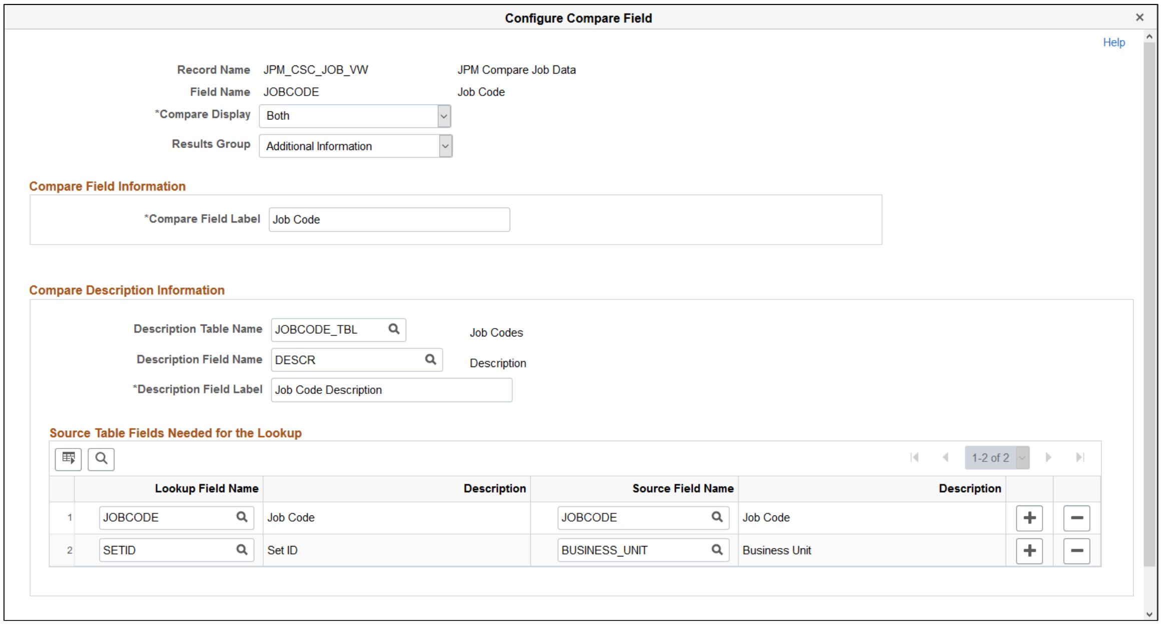
(Fluid) Configure Compare Field Page

Use the Configure Compare Field page (JPM_CSC_FLD_SEC) to configure field display and label options for the Compare Results page in fluid.

Navigation:

Click the **Configure** button on the (Fluid) Fluid Compare Configuration - Data Sources Page.

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



The information you set up on this page will appear on the Labels tab of the Data Sources page.

Field or Control	***Description***
Compare Display	Select how the field and label should display. Options include: • *Both*: Displays two fields on the Compare Results page; one that shows the code and one the description of the field value. For example, using the preceding screen shot, the following rows will appear: Job Code *13055* Job Code Description *Finance Manager* This option will display both the **Compare Field Information** and **Compare Description Information** sections on this page. • *Display Field*: Displays the field item code of the field value on the Compare Results page. This option will display the **Compare Field Information** section on this page. • *Display Field Description*: Displays the field description of the field value on the Compare Results page. This option will display the **Compare Description Information** section on this page.

Field or Control	***Description***
Results Group	Indicate the group in which this field will appear. Groups are defined on the (Fluid) Fluid Compare Configuration - Page Display Page.

Compare Field Information

This section is available when the Compare Display value is *Display Field* or *Both*.

Field or Control	***Description***
Compare Field Label	Enter the label of the field that will appear in the results page. This label is associated with the *Display Field* option and the field value will only display the code of the item.

Compare Description Information

This section is available when the Compare Display value is *Display Field Description* or *Both*.

These fields and label are associated with the *Display Field Description* option and the field value will display the description instead of the code.

Field or Control	***Description***
Description Table Name	Enter the record table name to specify what data the system will display.
Description Field Name	Enter the field name, typically a DESCR-related field, that should be used for the description.
Description Field Label	Enter the label for the field that will appear in the results page.

Source Table Fields Needed for the Lookup

This section is available as part of the Compare Description Information section when you need to identify the look up and source table fields. The fields are based off of the values entered in the **Description Table Name** field.

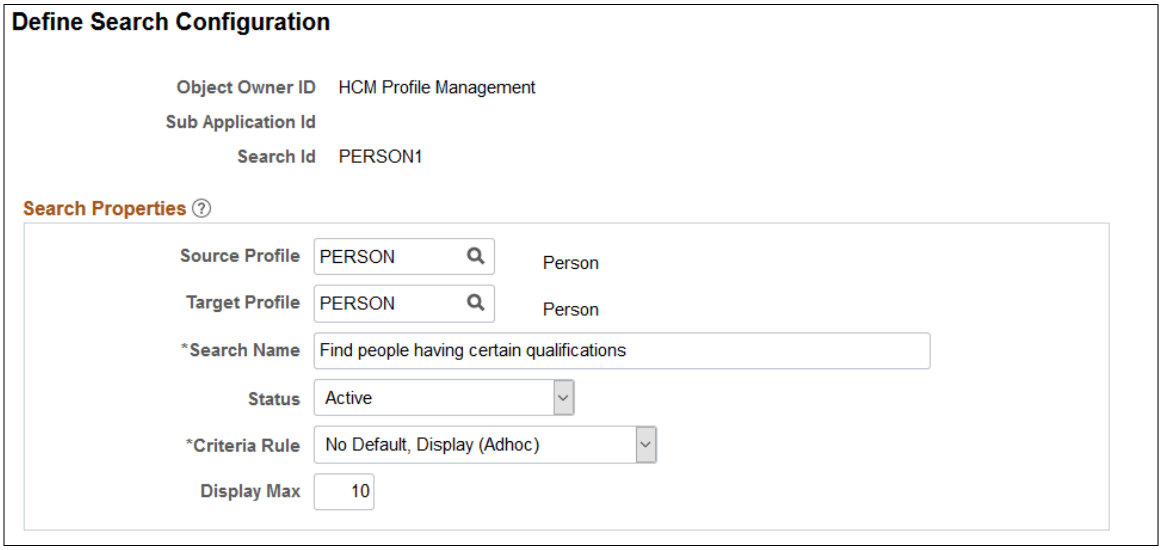
Define Search Configuration Page

Use the Define Search Configuration page (JPM_SRCH_CFG) to set up profile search types for employees, managers, and administrators.

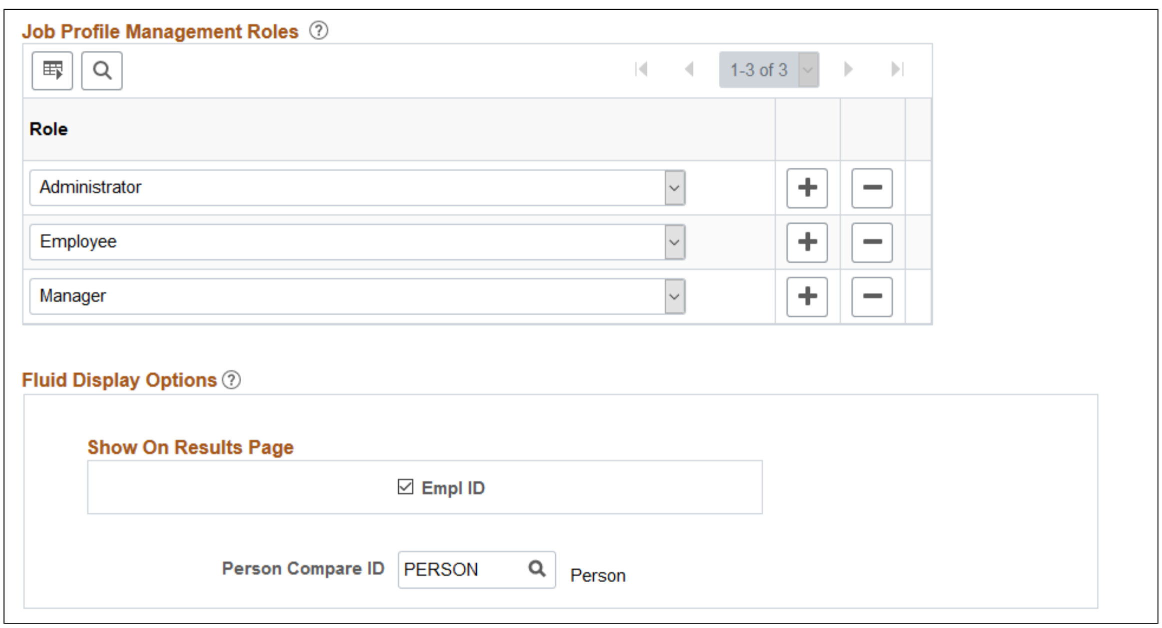
Navigation:

- **Set Up HCM** > **Product Related** > **Profile Management** > **Profiles** > **Define Search Configuration**
- From the Administer Workforce home page in fluid select the **Profile Administration tile** > **Profile Configuration tile** > **Configure Search and Compare tab** > **Define Search Configuration**.

This example illustrates the fields and controls on the Define Search Configuration page (1 of 2). You can find definitions for the fields and controls later on this page.



This example illustrates the fields and controls on the Define Search Configuration page (2 of 2). You can find definitions for the fields and controls later on this page.



Field or Control	*Description*
Object Owner ID	Select *HCM Profile Management* to view and define searches for profile management.

Field or Control	***Description***
Sub Application Id	Leave this field blank for all profile searches. It is not used by Profile Management.
Search Id	Enter a search key unique to the object owner ID and sub application ID.

Search Properties

Note: Caution should be used when identifying a property in the profile type configuration as searchable. Consideration needs to be given to the types of searches this property will be included in to ensure that the property in both the source and target profile of the search have been defined with the same meaning.

Use this section to define search types for your organization.

Field or Control	***Description***
Source Profile	Select the profile type to use as the basis for the search criteria.
Target Profile	Select the profile type that you want to search for matching profiles and to which you want to compare.
Search Name	Enter a descriptive name for the search. Employees, managers, and administrators see the search name when they select the Search and Compare Profiles option. Therefore, it's important that the name accurately describes the search.
Criteria Rule	Select one of these options: • *Default and Display:* The system populates the search criteria using data from the selected profile and displays the Search Criteria page. This option enables users to adjust the search criteria before running the search. • *Default, No Display:* The system generates the search criteria using data from the selected profile and immediately runs the search without first displaying the Search Criteria page. • *No Default, Display (Adhoc):* The system displays the Search Criteria page without populating the search criteria. The user has to set up the search criteria from scratch for this type of search, which requires knowledge of the profile types. Typically, you use this option to enable administrators to run adhoc searches.

Field or Control	*Description*
Display Max (display maximum)	Enter the maximum number of profiles to be returned by the search query. For example, if you specify a maximum of ten (10), the search query will return only 10 results on the page, even though the document match count may be greater. Users will then use options on the page to view additional results.

Job Profile Management Roles

Field or Control	*Description*
Job Profile Management Roles	Add the Profile Management roles that have access to the search. The options are: *Administrator, Manager,* and *Employee.* Users can run the searches that are defined for their role only. The search results will display only those profiles to which the user has the appropriate security.

Fluid Display Options

(Fluid) Use this section to configure additional fields used only in fluid Search and Compare.

Field or Control	*Description*
Empl ID	This option appears when the target profile identifies a person profile or is blank. Select this option to display the employee ID in the search results.
Add to Interest List Button	This option appears when the target profile identifies a non-person profile. Select this option to display this button on the search results page.

Field or Control	*Description*
Sort By	This field is not available when the source and target profiles are of the same profile type (Nonperson-to-Nonperson or Person-to-Person). Select a default sorting method for the search results. When the search criteria includes one or more of the Rating properties for an item, the target rating impacts the profile search ranking based on the following methods: For searches where the Target Profile type is *NON-PERSON*: • *Job Rating with Closest Fit*: The closer the job profile results are to the search criteria rating the higher the ranking. • *Lowest to Highest Job Rating*: Job ratings that are at or below the person rating will be ranked higher. For searches where the Target Profile type is *PERSON*: • *Person Rating with Closest Fit*: The closer the person profile results are to the search criteria rating the higher the ranking. • *High to Low Person Rating*: Person ratings that are at or above the job rating will be ranked higher. For searches where the Target Profile type is blank: • *Closest Fit*: The closer the target profile results are to the source search criteria rating the higher the ranking. • *Relative to Person Rating*: The rating depends on how the profile results compare to the person. When you select this option, the (Fluid) Search Results Page will provide by default the **Sort By** option relative to the source and target profile search types entered by the end user and described above (either *Lowest to Highest Job Rating* or *High to Low Person Rating*).
Person Compare ID	Identify the profile compare configuration ID that defines additional data to display for a person on the Compare Results page in fluid. Valid values for this field are defined using the Fluid Compare Configuration component for IDs that have a profile usage type of *Person*.

Field or Control	***Description***
Non-Person Compare ID	Identify the profile compare configuration ID that defines additional data to display for a non-person profile on the Compare Results page in fluid. Valid values for this field are defined using the Fluid Compare Configuration component for IDs that have a profile usage type of *Non-Person*.

See also (Fluid) Fluid Compare Configuration - Page Display Page, (Fluid) Fluid Compare Configuration - Data Sources Page, and (Fluid) Compare Results Page.

The following fields appear based on the source and target profiles you select:

Source = Person ***Target = Non-Person***	***Source = Non-Person*** ***Target = Person***	***No target profile selected*** ***(Adhoc searches)***
Empl ID **Sort By** (with the following options): • *Job Rating with Closest Fit* • *Lowest to Highest Job Rating* **Person Compare ID**	**Add to Interest List Button** **Sort By** (with the following options): • *Person Rating with Closest Fit* • *High to Low Person Rating* **Non-Person Compare ID**	**Empl ID** **Add to Interest List Button** **Sort By** (with the following options): • *Closest Fit* • *Relative to Person Rating* **Person Compare ID** **Non-Person Compare ID**

Building the Search Indexes

These topics provide an overview of the search indexes and index maintenance, list prerequisites, and discuss how to:

- Run the Direct Reports Tables Build process.
- Schedule a search index build.

Pages Used to Build the Search Indexes

Page Name	***Definition Name***	***Usage***
Direct Reports Tables Build Page	RUNCTL_HR_DR	Run the Direct Reports Tables Build process to build the reporting relationships for a single access type or all access types. This will fully or incrementally load all or a selected access type. "Understanding Direct Reports Functionality" (Application Fundamentals), "Understanding the Direct Reports Performance Tables" (Application Fundamentals), and "Direct Reports Tables Build Page" (Application Fundamentals).
Build Profile Groups Page	RUNCTL_JPM_GROUP	Run the Build Profile Groups process to create a profile group. See Understanding Profile Groups and Group Types.
Deploy Search Definition Page	PTSF_DEPLOY_SBO	Deploy the person and non-person profile search definitions.
Deploy Search Category Page	PTSF_DEPLOY_CAT	Deploy the person and non-person profile search categories.
Build Search Index Page	PTSF_SCHEDULE_SI	Run the process that builds the search index for a person or non-person profile search definition.

For more information on deploying search definitions and categories, as well as building the search index, see the product documentation for *PeopleTools: PeopleSoft Search Technology,* PeopleSoft Search Framework content.

Understanding the Search Indexes

Search and Compare Profiles uses the PeopleTools Search Framework (PTSF) by way of Integration Broker to generate search results and perform comparisons between matching profiles. In order to complete searches, the search engine uses a set of indexes that contain data about the profiles in your system; it does not search the database tables directly.

The PTSF creates the search objects, and two source objects are supported for Profile Management. One source object contains person profile documents and the other contains non-person profile documents.

Creating the source objects involves the following sequence of steps:

1. Deploy the Search Definition.
    - Person Profile search definition

- Non-person Profile search definition

2. Create Search Index Schedule.

    - For the person profile search definitions.

      (Fluid only) Build the Person Profile index by selecting the **All Languages** option if multiple languages are enabled for the PS environment.

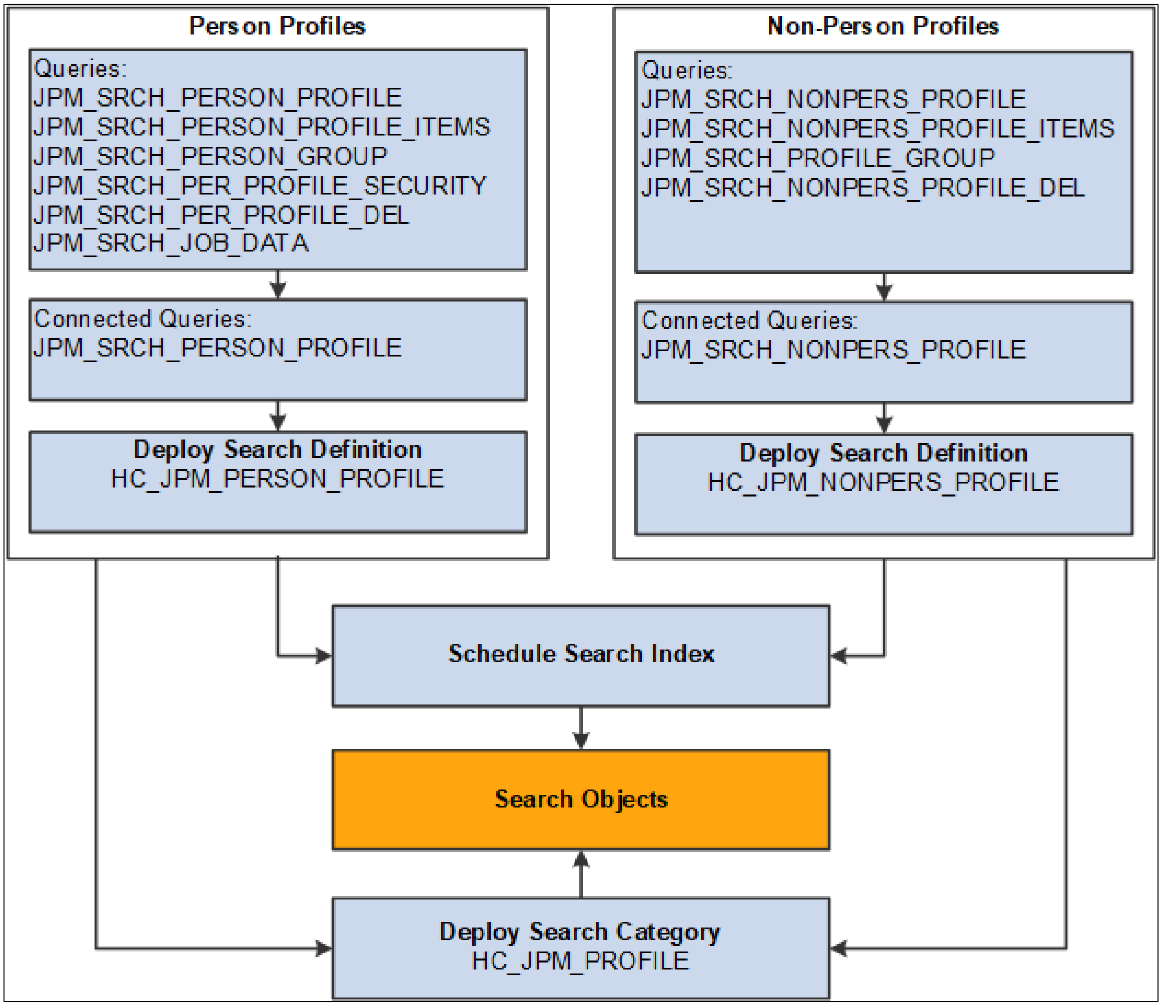
    - For the non-person profile search definition.

      Run the Schedule Search Index process with the **Base Language** option for the Non-person Profile index.

3. Deploy the profile Search Category that combines the non-person and person profile documents into a single searchable object.

    Warning! This is required for the Search and Compare Profiles transaction. The Search and Compare Profile process requires that the Search Categories be used as delivered and should not be renamed.

The diagram illustrates how the queries, search definitions, search category, and search index schedule relate to each other:



Note: It is recommended that the incremental Schedule Search Indexes process be scheduled to run following the completion of the Direct Reports Table Build Process.

Direct Reports Tables Build

The Build Direct Reports Tables process maintains the direct reports tables by updating the direct reports for managers with current information used in the in Profile Search and Compare process.

Note: The Direct Reports Tables Build process is required to build the manager security for the Search and Compare Profiles transaction. If you are not using the Manager Self Service Search and Compare Profiles transaction, then this process is not needed. The incremental updating of the Profile indexes leverages the manager hierarchy that is built based on the **Access Type** value specified on the Profile Management Installation page. It is required that the Direct Reports Tables Build process be scheduled to run on an interval to capture the latest organization changes.

See “Configuring Direct Reports Functionality” (Application Fundamentals)

As shown in this table, running the Direct Reports Tables Build process in incremental mode updates only the manage list information for the relevant job record.

Person ID	***Employee Record Number***	***Manager Data Updated***
12000	1	Manager data for the reporting structure for record 1.
12000	2	Manager data for the reporting structure for record 2.

Deploying the Search Definitions and Search Category

Before end users can run the Profile Search and Compare process against the search indexes, the Profile Management search definitions (HC_JPM_PERSON_PROFILE and HC_JPM_NONPERSON_PROFILE) need to be deployed to the search engine. Once the search definitions are deployed, you use categories to group search definitions within logical, manageable groups.

You do this by navigating to the **PeopleTools** > **Search Framework** > **Administration** > **Deploy Search Definition** component, and then:

1. Select one or several of the following search definitions from the Deploy Search Definition page and select Deploy:
   - HC_JPM_NONPERSON_PROFILE
   - HC_JPM_PERSON_PROFILE
   - HC_JPM_PROFILES
2. Access the Deploy Search Category page to select and deploy search categories.

Before end users can submit search requests against the Search Framework deployed objects, the search indexes must first be built. Prior to the index being built, a deployed search definition contains no searchable data. Therefore, a search index needs to be built for each individual search definition.

Invoke a search index build for one or several search definitions from the Build Search Index page.

Schedule Search Process

The Schedule Search Index Application Engine process (PTSF_GENFEED) builds an index for person or non-person profile types. Select the search definition HC_JPM_PERSON_PROFILE if building the index for person profile types. Select the search definition HC_JPM_NONPERSON_PROFILE for non-person profile types. You cannot create an index for a profile type if it:

- Is inactive.
- Is a not an end profile type.

  When you set up a profile type, you can specify if the profile type is an end profile on the Profile Types - Attributes page. The delivered CLUSTER profile type is an example of a profile type that is not an end profile.

- Does not have searchable properties.

  When you set up content sections for a profile type, you select the **Searchable** check box for the properties that you want to include in the index. If none of the content sections contain searchable properties, you can't create an index.

The process uses the profile type definition to determine what profile information is included in the index. Only those properties defined as searchable in the profile type are selected for indexing. The process retrieves active profiles, the active profile items in those profiles, and the searchable properties to include in the index. For profile types with a profile type of *Person,* the Schedule Search Index process retrieves manager hierarchy data and row level security for the person ID associated with the profile. If a profile type belongs to a profile group type that is defined as searchable, the profile group is also included in the index.

The index created by this process is separate from the database. It is a snapshot of the database at one point in time and does not remain synchronized with the profile data in the database unless you routinely update the index.

When the Schedule Search Index is run, the application engine process PTSF_GENFEED generates an XML feed and creates a schedule in the search engine, which in turn crawls the XML feed and builds the search index.

With the exception of facets for the Fluid search, searching is language-independent since only the codes and not the associated descriptions are indexed. For example, if a user searches for the competency *Forecasting* whose content item ID is *1000,* then the search query will look for item ID *1000* and not for the word *Forecasting.*

Understanding Index Maintenance

The indexes represent a snapshot of the profile data and security as of the date that you last ran the Direct Reports Tables Build, Build Profile Groups, and Schedule Search Index processes. To ensure that your Search and Compare Profiles results are accurate, run these processes periodically to update the indexes and its security.

You can run the Schedule Search Index process in two modes:

- *Full Index:* creates or recreates the index for the selected search definition.
- *Incremental Index:* updates profile documents for an existing index based on the profile update datetime stamp (LASTUPDDTM). If the profile has been updated since the last incremental run, then this profile will be selected for re-indexing.

  Run the process according to a frequency that balances frequency of profile updates with the need to search on the most up-to-date information. You can select this process to run immediately or schedule it to run at intervals using Process Scheduler when the system usage is low.

  Run the Schedule Search Index process with the *Base Language* option for the Non-person Profile index.

  (Fluid only) Build the Person Profile index by selecting the All Languages option if multiple languages are enabled for the PS environment.

Run the Schedule Search Index process using the *Full Index* mode when any of the following changes are made:

- A new profile type is defined that has searchable properties.
- The **Searchable** check box for a property is selected.

  When you select the **Searchable** check box for a property that previously was not searchable, the index must be recreated to include the property in the index for profiles of that type.
- The **Priority** field for an Instance Qualifier is changed.

  The Maintain Profile Indexes process uses the priority field to determine which profile item row is included in the index when instance qualifiers are associated with a content section of a profile type. The row with the highest priority and highest effective date for that priority is selected for indexing only.
- A large reorganization has occurred that impacts the manager reports or administrator row level security.

To illustrate how the Schedule Search Index process selects rows in the profile for indexing, suppose that you have defined an Instance Qualifier Set to identify the evaluation type. This table lists the instance qualifier values and their assigned priorities:

Instance Qualifier	***Description***	***Priority***	***Searchable***
A	Approved	10	Y
R	Supervisor/Manager	20	Y
S	Self	30	Y

Note: The priority decreases as the value in the **Priority** field increases. In this example, the instance qualifier with the highest priority is *A* and the instance qualifier with the lowest priority is *S.*

In this example, the employee's profile has three profile items for competencies 0010, 0200, and 0120. This table lists the profile item rows:

Competency	***Date***	***Proficiency***	***Evaluation Type***
0010	May 1, 2019	3 - Good	A
0010	June 21, 2019	4 - Very Good	S
0200	June 21, 2019	4 - Very Good	S
0200	June 21, 2019	5 - Expert	R
0120	January 30, 2019	2 - Fair	A

Competency	***Date***	***Proficiency***	***Evaluation Type***
0120	May 1, 2019	2 - Fair	A

This table lists the rows that are included in the index for this profile:

Competency	***Date***	***Proficiency***	***Evaluation Type***
0010	May 1, 2019	3 - Good	A
0200	June 21, 2019	5 - Expert	R
0120	May 1, 2019	2 - Fair	A

Notice that:

- For competency 0010, the row with the highest priority (lowest sequence number) instance qualifier *(A)* is selected even though the effective date for this row is earlier than the row dated June 21, 2019.
- For competency 0200, the two rows have the same effective date. In this case the system selects the row that is assigned the instance qualifier with the highest priority *(R* - Supervisor/Manager).
- For competency 0120, the system selects the row with the highest effective date.

Note: Instance qualifiers that are defined by a prompt record are not searchable and not included in indexes.

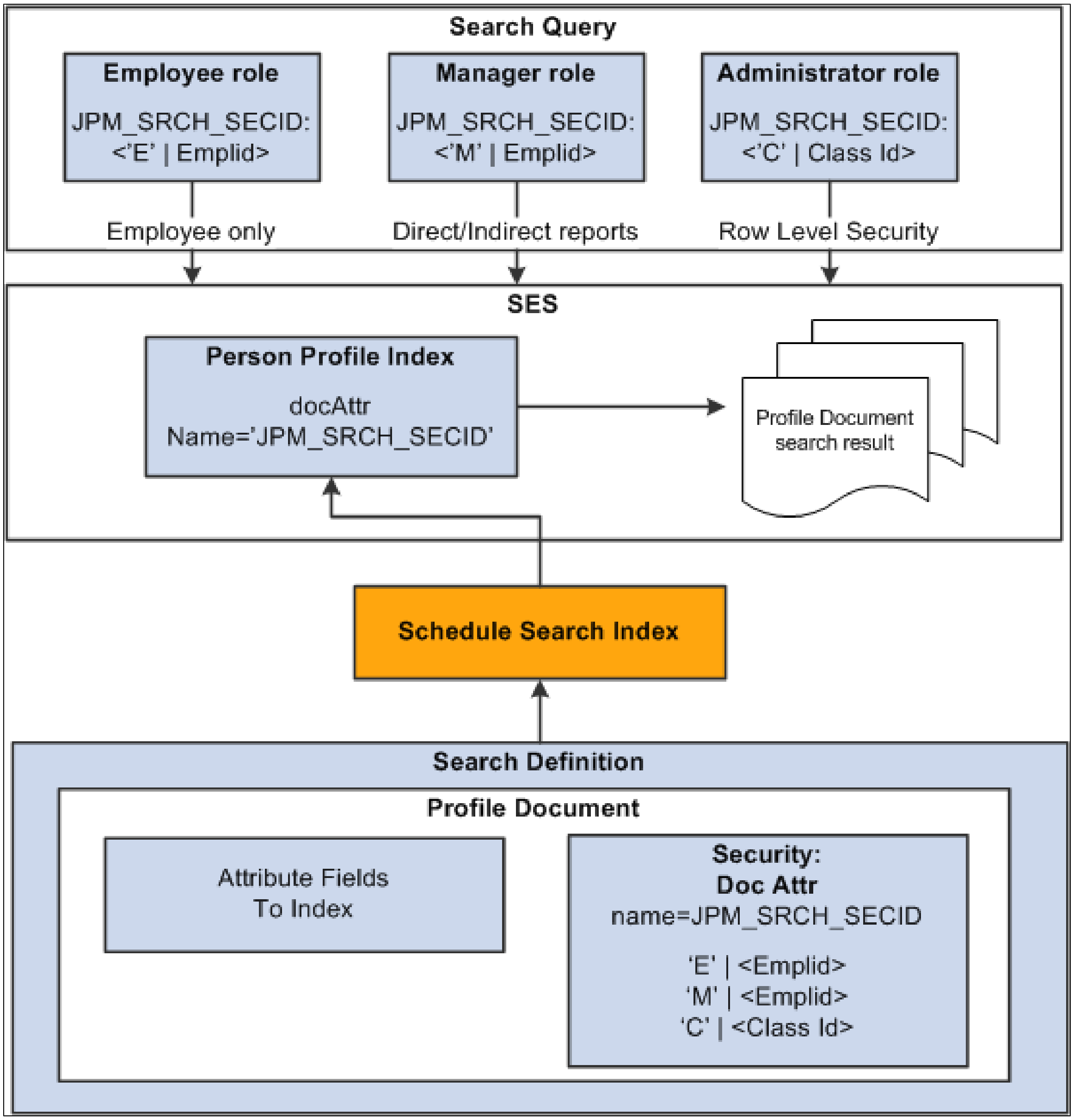
See Defining Instance Qualifiers.

Understanding PeopleTools Search Framework Profile Document Security for Person Profiles

Document level security exists for Person Profiles. The administrator can only view profiles for employees in their range of HCM row-level security. Managers can only view profiles for direct and indirect reports. Employees can only view their own profile.

The list of “manager access” EmplIDs and “administrator access” Class Ids is merged into a single Document Security Attribute called JPM_SRCH_SECID. When a search is executed against the Person Profile Index, this security attribute is automatically filtered based on the Profile Management role that issues the query.

This diagram illustrates how document level security will add security attributes to the profile document and search framework will automatically apply a list of values to be matched against the security attributes of those documents returned by the search query.



Prerequisites

Before you run the Schedule Search Index process, you must define the **Supervisor Navigation Method** field on the Profile Management Installation page and run the Direct Reports Tables Build process for at least that access type specified. The **Supervisor Navigation Method** field value specifies the reporting structure (access type) for your organization.

Before you run the Schedule Search Index process, you must set up the content catalog, define your profile types, and set up the Integration Broker.

For more information on the Search Framework, see the product documentation for *PeopleTools: Search Technology*.

Related Links

Understanding the Content Catalog

Understanding Profile Management

Direct Reports Tables Build Page

Use the Direct Reports Tables Build page (RUNCTL_HR_DR) to run the Direct Reports Tables Build process to build the reporting relationships for a single access type or all access types. This will fully or incrementally load all or a selected access type.

Navigation:

Set Up HCM > **Common Definitions** > **Direct Reports for Managers** > **Direct Reports Table Build** > **Direct Reports Tables Build**

This example illustrates the fields and controls on the Direct Reports Tables Build page. You can find definitions for the fields and controls later on this page.

Field or Control	Description
Build Mode	Select one of these modes: *Full - Complete Rebuild:* Created the full organizational hierarchy. Any existing data is overwritten by this process. *Incremental - Current Date Upd:* Detects where the organization hierarchy has changed and updates those changes in the tables.
Access Method	Select the access method that was defined on your Profile Management Installation Page.

Related Links

"Configuring Direct Reports Functionality" (Application Fundamentals)

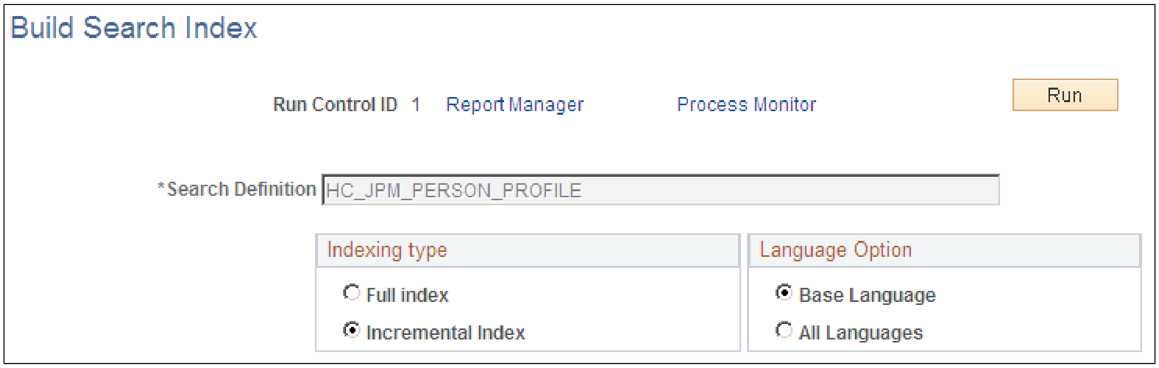
Build Search Index Page

Use the Build Search Index page (PTSF_SCHEDULE_SI) to run the process that builds the search index for a person or non-person profile.

Navigation:

PeopleTools > **Search Framework** > **Administration** > **Schedule Search Index** > **Build Search Index**

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

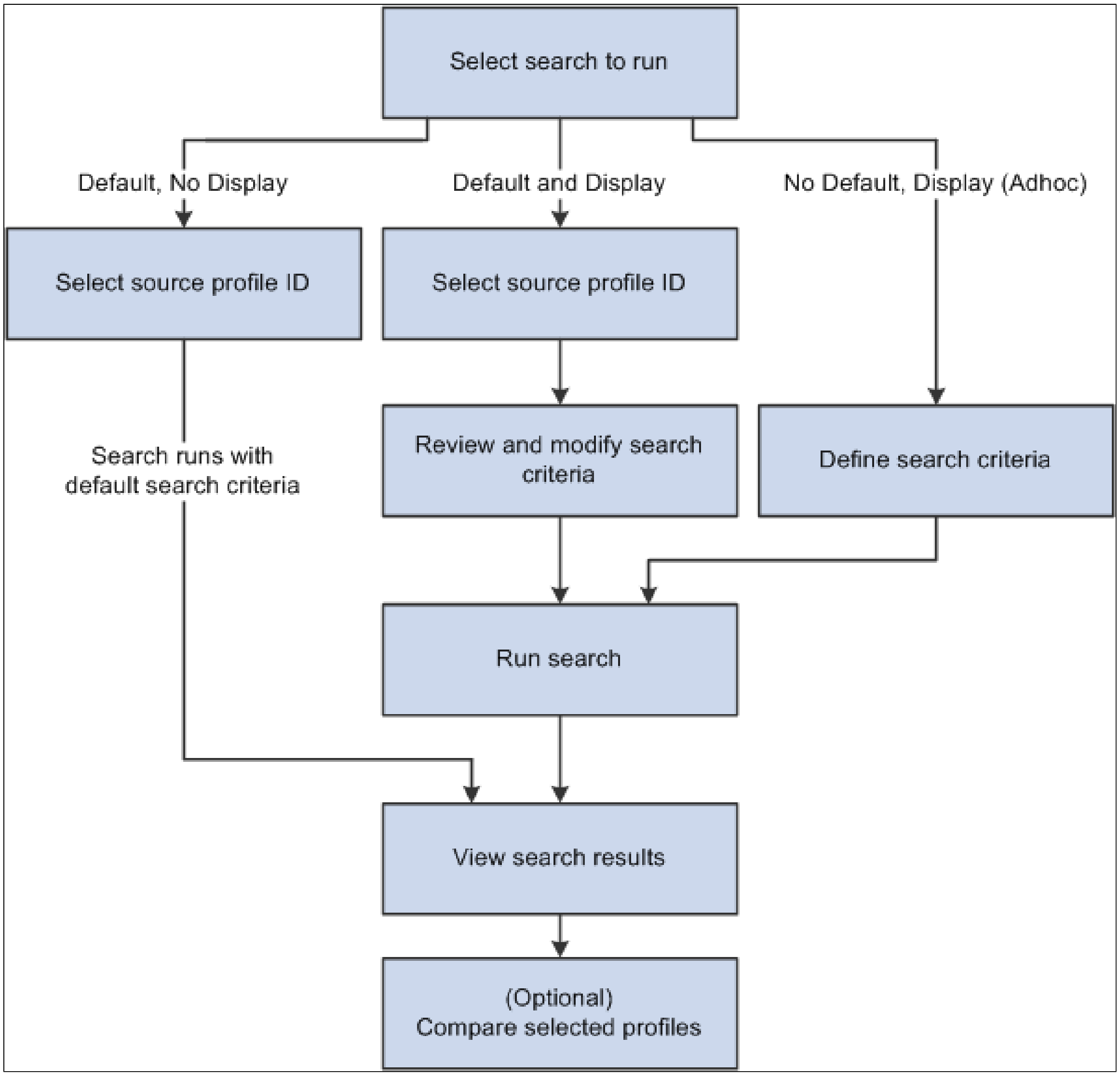


Field or Control	***Description***
Search Definition	Select *HC_JPM_NONPERSON_PROFILE* for non-person profiles, or *HC_JPM_PERSON_PROFILE* for person profiles. **Note:** These search definitions must be deployed prior to running this process.
Indexing type	Select on of these values: **Full index**: Builds a new index for the selected search definition. Incremental Index: Updates the existing index for the selected search definition.
Language Option	Select the **Base Language** option for the Non-person Profile index and when using classic Profile Management. (Fluid only) Select the **All Languages** option to build the Person Profile index if multiple languages are enabled for the PS environment

Understanding the Search and Compare Profiles Process

Users accessing the Search and Compare Profile pages will walk through a series of steps to define and generate the search and compare results.

This diagram illustrates the steps for Search and Compare Profiles for each type of search. The steps are discussed in detail in the topics that follow:



1. Selecting a Search

Users can run search and compare profiles in various ways:

- By selecting the Search and Compare Profiles component from the Profiles menu.
- By selecting *Search and Compare Profiles* in the **Profile Actions** field on the (Classic) Person Profile or Non-person Profile pages.
- Select as a related action item from the Talent Profile.

Whichever navigation you use, the system displays only those searches that are configured for your role. Roles are associated with searches on the Define Search Configuration page. In addition, if you run search and compare profiles from the Person Profile or Non-person Profile page, the list of searches is restricted to those that have a source profile type that matches the profile you are viewing.

Note: The use of special characters in searchable property data can lead to incorrect search results. Special processing has been added to handle special characters for the content type and content item codes.

This table lists the search configurations delivered for the various roles with the system:

Object Owner Identifier	***Sub Application ID***	***Search ID***
HCM Profile Management (JPM)	NA	PERSON1 - Find people having certain qualifications
HCM Profile Management (JPM)	NA	PERSON2 - Find people that fit this job
HCM Profile Management (JPM)	NA	ADHOC3 - Adhoc search
HCM Profile Management (JPM)	NA	JOB4 - Find jobs that fit my qualifications
HCM Profile Management (JPM)	NA	JOB5 - Find jobs for a team member
HCM Profile Management (JPM)	NA	PERSON6- Find similar people on team
HCM Profile Management (JPM)	NA	PERSON7- Find team member for a specific job profile
HCM Profile Management (JPM)	NA	JOB8 - Find jobs
HCM Profile Management (JPM)	NA	JOB16 - Find jobs like my job
HCM Profile Management (JPM)	NA	JOB17 - Find jobs for this person
Human Resources (Human Res)	Success Planning (Succ Plan)	PLANINC – For people with profile matches to plan incumbent
Human Resources (Human Res)	Success Planning (Succ Plan)	PLANJOB – For people with profile matches to plan/pool job code
Human Resources (Human Res)	Success Planning (Succ Plan)	PLANPOS – For people with profile matches to plan/pool position

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Note: NA means it is not applicable.

The “(Classic) Searching and Comparing Profiles” (PeopleSoft eDevelopment) and “(Fluid) Searching and Comparing Profiles” (PeopleSoft eDevelopment) documentation also discusses the search and compare for employees and managers.

2. Selecting a Source Profile ID

If you select a search with a criteria rule of *Default, No Display* or *Default and Display,* you must select a source profile ID that provides the default search criteria for the search and compare. The **Source Profile** field on the Define Search Configuration page defines the profile type that you can select for the search.

Note: If you run the search from the profile pages, the system automatically uses the profile that you were viewing as the source profile ID and therefore you are not prompted for a source profile ID.

If the search has the criteria rule of *Default, No Display,* the system automatically runs the search after you select the source profile ID. For this type of search, the search criteria is based on the profile items that default from the source profile and you can't adjust the criteria before running the search.

3. Defining Search Criteria (where applicable)

When you run a search with a criteria rule of *Default and Display* or *No Default, Display (Adhoc),* you define or modify the search criteria using the Search Criteria page.

If you are running a search with a criteria rule of *Default and Display,* the page has default criteria based on the source profile type defined in the configuration. You can modify the default search criteria and add other criteria before you run the search.

If the search has a criteria rule of *No Default, Display (Adhoc),* no default criteria is provided; use the Search Criteria page to define the items you want to search for in the target profiles. You are prompted for the source and target profile types if these are not defined for the search. The system then refreshes the Search Criteria page with the criteria sections and search filters that you can use for the search.

The Search Criteria page may include search filters (**Search Filters** group box section for classic pages, Advanced Filter tab for fluid pages). Search filters enable you to narrow the search, such as to specific profile groups.

When you have defined the search criteria, click the **Search** button to run the search.

4. Viewing Search Results

The Search Results page lists the profiles that match the search criteria. Results will vary by user interface:

- (Classic) Matching profiles are ranked according to the profile scores calculated by the system. Profile scores are in the range 0 to 100, where a score of 100 means that the profile meets all the search criteria. Profile scores are discussed in the Understanding Search and Compare Profile Scores Using the Classic Pages topic. The travel preferences and current location filters are used to filter the target profile candidates but do not contribute to the overall search score.
- (Fluid) Matching profiles are ranked according to the sort by option (see also Fluid Display Options on the Define Search Configuration Page) and display the results based on this value.

Note: Only profiles that you are authorized to access are listed among the search results.

If you want to adjust the search criteria and rerun the search, click the **Modify Search Criteria** link (Classic) or **Search Results** back button (Fluid) on the page to return to the Search Criteria page. You can also run a new search by clicking the **Return to Search For Profiles** (Classic) or **Search and Compare Profiles** (Fluid) back button in the banner.

5. Comparing Profiles

The profiles shown on the Search Results page give an overall indication of how closely each profile matches the search criteria. However, you can also view a breakdown of the information at the item or criteria level. From the Compare Results page you can compare profiles and item from your search results.

Interfacing with Profile Management Search and Compare

PeopleSoft Profile Management delivers these interfaces to perform Search and Compare for other business processes:

- Employee Self Service Career Progression Chart

  Compare the person's profile to their job profile.

- Administer Succession Planning - Succession 360 Degree

  Compares the person's profile to their job profile.

(Classic) Searching and Comparing Profiles

These topics provide an overview of search and compare profiles scores and discuss how to search for and compare profiles using the classic user interface.

For an overview of search and compare, setup steps, and the process flow of using the Search and Compare Profile pages, see Understanding Setting Up Search and Compare Profiles and Understanding the Search and Compare Profiles Process.

Pages Used to Search and Compare Profiles Using the Classic User Interface

Page Name	***Definition Name***	***Usage***
(Classic) Search for Profiles Page	JPM_SRCH_TRANSFER	Select from the list of search queries that are defined for administrators. Use the Search Configuration page to set up searches for administrators, employees, and managers.

Page Name	***Definition Name***	***Usage***
(Classic) Select a Profile Page	JPM_COM_PROF_SRCH	Select the profile that you want to use as the source of criteria for the search. The source profile that you select provides the default search criteria. This page is displayed only if the search selected has a criteria rule of *Default, No Display* or *Default and Display* and the source profile type is a non-person profile type. If the criteria rule is *No Default, Display,* you enter the search criteria manually on the Search Criteria page.
(Classic) Person Search - Simple Page	HR_PSS_SEARCH	Select the person profile that you want to use as the source for the search criteria. This page is displayed only if the search selected has a criteria rule of *Default, No Display* or *Default, Display* and the source profile type is for a person profile.
(Classic) Search Criteria Page	JPM_SRCH_CRITERIA	View and modify the search criteria for the search and compare. If the search selected on the Search for Profiles page has a criteria rule of *Default and Display* or *No Default, Display (Adhoc),* this page is displayed before you run the search. If the criteria rule is *Default, No Display,* the system runs the search without first displaying the Search Criteria page.
(Classic) Related Items Criteria Page	JPM_SRCH_RELITMS	Enter the related items to be included as search criteria. These are from a parent item that has been defined with related items in the Content Catalog.
(Classic) Search Results Page	JPM_SRCH_RESULT	Displays the results of the search.
(Classic) Add to Interest List - Confirmation Page	JPM_INT_CONFIRM	Confirm that the non-person profiles that you selected on the Search Results page have been added to the person's interest list. The **Add to Interest List** button is available only if the search that you ran has a target profile type that is a non-person profile type.
(Classic) Compare Profiles Page	JPM_COMPARE_MAIN	Select the source and the target profile types that you want to compare.

Page Name	Definition Name	Usage
(Classic) Compare Results Page	JPM_COMPARE_RESULT	View a summary of the comparison of the profiles you selected.

Note: The JPM Person Profile (HC_JPM_PERSON_PROFILE) search index supports real time indexing (RTI) with PeopleTools version 8.59.10 or higher. When enabled, RTI allows real-time updates to the indexed data to provide job search using the latest information.
For more information about Real Time Indexing, refer to PeopleTools Search Technology, "Administering PeopleSoft Search Framework", Using Real Time Indexing.

Understanding Search and Compare Profile Scores Using the Classic Pages

These topics discuss:

- The scoring calculation.
- Calculating property and item scores.
- Calculating item weighting based on the Importance field.
- Calculating the rating property score.
- Calculating the interest level property score.
- Calculating item scores for mandatory items.

Overview of the Scoring Calculation

This topic discusses how the system calculates scores for target profiles to determine the profiles that best match the search criteria. Search and compare profiles uses the search engine to determine which profiles most closely meet the specified criteria. The search query is constructed of search elements generated from each profile item property in the search criteria. A full text search is performed to return matching profiles with a score which represents the match percentage. The scores are displayed in descending order with the profile having the best fit listed first.

To calculate the score for a target profile, the system calculates:

- Property scores for each property associated with an item.

  The search criteria comprises a set of profile items that you want to search for in the target profile. However, items in the search criteria can have multiple properties. For example, if you add a competency to the search criteria you can also specify the desired rating for the competency, or if you add a language skill you can specify the desired writing proficiency for that language. The competency rating and the writing proficiency are properties of the competency and language skill profile items. The system calculates a property score for each property that you specify in the search criteria and these contribute to the item scores.

- Item scores for each item in the search criteria.

  The item score is an average of the property scores for the properties associated with an item.

- Weighted item scores based on the **Importance** field.

  The **Importance** field is used to denote the relative importance of each item in the search criteria. The system applies a weighting to item scores that reflect the Importance values assigned to the items. The default for the **Importance** field is *3 - Average,* but this can be changed.

- The sum of the weighted item scores.

  The overall profile score is the sum of the weighted item scores. This is the value that you see on the Search Results page.

Profile scores are also determined by the setting of the **Mandatory** check box. This is discussed later in this topic under the Calculating Item Scores for Mandatory Items section.

Calculating Property and Item Scores

The property score varies according to the property. For most properties, profiles with matching properties score 100 and those that don't score 0. However, properties with a rating scale such as the rating property and the interest level property have scores that are in the range 0–100 according to how closely the source and the target match. This is discussed later in this topic in the Calculating the Rating Property section.

To calculate the item score the system calculates the average of the property scores as follows:

Total Property Score/ Property Count

In this example, the source profile contains three profile items for these content types:

Content Type	***Item ID***	***Other Properties***
Degree	BA (Bachelor of Arts)	Country: USA
Language	DU (Dutch)	
Tests/Examinations	1006 (Accounting Aptitude Test)	

For the degree item BA (Bachelor of Arts), the system searches for two properties, the item ID and the country. Therefore, the score for the degree item is calculated as follows:

(Property score item ID + Property score Country) / 2

This means that only profiles with the degree *BA* and country *USA* have an item score of *100.*

To show how the system calculates the property scores, this example compares the source profile with three person profiles, for Nicola Edwards, Rachel Norris, and Helen Scott.

This table lists the items in the person profile for Nicola Edwards:

Content Type	***Item ID***	***Other Properties***
Degree	BA (Bachelor of Arts)	Country: USA
Tests/Examinations	1006 (Accounting Aptitude Test)	

This table lists the items in the person profile for Rachel Norris:

Content Type	***Item ID***	***Other Properties***
Language	DU (Dutch)	
Tests/Examinations	1006 (Accounting Aptitude Test)	

This table lists the items in the person profile for Helen Scott:

Content Type	***Item ID***	***Other Properties***
Degree	BA (Bachelor of Arts)	Country: GBR
Tests/Examinations	1006 (Accounting Aptitude Test)	

This table lists the item scores for each person profile:

Item ID	***Country Property***	***Person Profile***		
		Nicola Edwards	Rachel Norris	Helen Scott
BA	USA	100 = (100+100)/2	0	50 = (100+0)/2
DU (Dutch)		0	100	0
1006		100	100	100

Calculating Item Weighting Based on the Importance Field

The system automatically includes the **Importance** field for each item in the search criteria and assigns the default value of *3-Average,* which means that each item is of equal importance. Depending on the search type, you can override the default importance to specify the relative importance of each profile item. When you run the search, the system applies a weighting to each item score according to the importance that you assigned to that item. The result is that profiles that include the most important items are assigned a higher score than profiles that only include the least important items.

The system calculates the weighting for each item as follows:

Importance % = (Item Importance / Total Importance) × 100

To show how this works, suppose you specify the following Importance values to items in the search criteria:

Content Type	***Item ID***	***Importance***
Degree	BA (Bachelor of Arts)	4-Above Average
Language	DU (Dutch)	3-Average
Tests/Examinations	1006 (Accounting Aptitude Test)	1-Low

In this example, the total importance points is 8 = 4 + 3 + 1

This table shows how the weighting is calculated for each item in the search criteria:

Item ID	***Importance***	***Weighting***
BA (Bachelor of Arts)	4-Above Average	4/8 × 100 = 50%
DU (Dutch)	3-Average	3/8 × 100 = 37.5% = 38 rounded
1006 (Accounting Aptitude Test)	1-Low	1/8 × 100 = 12.5% = 13 rounded

The system uses the item weighting value to calculate the weighted item score using this formula:

Item Score (weighted) = Item score × Importance %

Using the person profiles from the earlier examples you can see how the weighting affects the overall score. This table lists the item scores and the weighted scores for Nicola Edwards:

Item	***Item Score***	***Item Score (weighted)***
BA (Bachelor of Arts) /USA	100	50 = 100 × 50%
DU (Dutch)	0	0
1006 (Accounting Aptitude Test)	100	12.5 = 100 × 12.5% = 13 rounded

Nicola's overall score is the sum of the weighted item scores:

Total score = 50 + 12.5 = 62.5 (63 rounded)

Note: The system rounds the score to the nearest integer value.

This table lists the item scores and the weighted scores for Rachel Norris:

Item	***Item Score***	***Item Score (weighted)***
BA (Bachelor of Arts) / USA	0	0
DU (Dutch)	100	37.5 = 100 ×37.5% = 38 rounded
1006 (Accounting Aptitude Test)	100	12.5 = 100 ×12.5% = 13 rounded

Total score = 37.5 + 12.5 = 50

This table lists the item scores and the weighted scores for Helen Scott:

Item	***Item Score***	***Item Score (weighted)***
BA (Bachelor of Arts) / USA	50	25 = 50 × 50%
DU (Dutch)	0	0
1006 (Accounting Aptitude Test)	100	12.5 = 100 × 12.5% = 13 rounded

Total score = 25 + 12.5 = 37.5 = 38 rounded

Calculating the Rating Property Score

If the search criteria includes items with the rating or interest level property (JPM_RATING1, JPM_RATING2, JPM_RATING3, or JPM_INTEREST_LEVEL), the system calculates this property score differently than other properties. Instead of scoring 100 or 0, the system assigns a score that depends on how closely the rating or interest level in the target profile matches the rating or interest level specified in the search criteria.

The following use cases illustrate the scoring methodology which is tied to the profile usage (*PERSON* and *JOB*) of the search source and target profile types:

1. Person looking for a job match:
    - If target (job) profile has a matching item with a higher rating, then score < 100%.
    - If target (job) profile has a matching item with the same or lower rating, then score 100%.

- If the target (job) profile has a matching item with a lower rating, then the "person overqualified" symbol will be displayed on the Compare page for that target profile item.

2. Job needs to be filled with the best person match:
   - If target (person) profile has a matching item with the same or higher rating, then score 100%.
   - If target (person) profile has a matching item with a lower rating, then score < 100%.
   - If the target (person) profile has a matching item with a higher rating, then the "person overqualified" symbol will be displayed on the Compare page for that target profile item.
3. Look for people with certain qualifications: (uses fit-gap scoring method)
   - If target (person) profile has a matching item with the same rating, then score 100%.
   - If target (person) profile has a matching item with a lower or higher rating, then score < 100%.
   - The Compare page will not display the "person overqualified" symbol in the legend since this does not apply.
4. Look for jobs with certain criteria: (uses fit-gap scoring method)
   - If target (job) profile has a matching item with the same rating, then score 100%.
   - If target (job) has a matching item with a lower or higher rating, then score < 100%.
   - The Compare page will not display the "person overqualified" symbol in the legend since this does not apply.

The interest level property is discussed in the Calculating the Interest Level Property Score section later in this topic.

The system calculates the rating property score based on the number of levels in the rating model defined for that item.

Important! When running a search and compare, the rating models used for the profile items in the source and target profiles must have the same number of rating levels. If the rating models are not consistent, the scores will not be accurate.

This table shows an example of a rating model and the rating levels that are assigned by the system for the search and compare:

Rating	***Description***	***Rating Level***
A	Excellent	5
B	Very Good	4

Rating	***Description***	***Rating Level***
C	Good	3
D	Fair	2
E	Poor	1

When you assign a rating to a profile item, the system compares the level of the requested rating to the target rating level in the search and compare. For this example, the source profile has the following item and associated rating:

Item ID	***Rating***	***Rating Level***
0102 (Conceptual thinking)	B (Very Good)	4

This table lists target profiles that include the same item and the ratings for that item:

Profile	***Item ID***	***Rating***	***Rating Level***
01000	0102 (Conceptual thinking)	B (Very Good)	4
02000	0102 (Conceptual thinking)	A (Excellent)	5
03000	0102 (Conceptual thinking)	C (Good)	3

The system calculates the difference between the desired rating level (in the source) and the actual rating level in the target profiles as follows:

ABS (Desired Rating Level – Actual Rating Level)

ABS (absolute value) means that the system ignores the sign of the number that results from the calculation of Desired Rating Level – Actual Rating Level. By calculating the difference in this way, if the actual rating has a higher value than the desired rating the system doesn't use a negative number in the calculation of the rating score.

Note: This ABS calculation applies only to Use Cases 3 and 4 mentioned below. Use Cases 1 and 2 use a separate calculation algorithm.

This example demonstrations a search query using the Rating property. The Rating Model contains the following entries in its rating scale:

1–Little

2–Fair

3–Good

4–Excellent

Incremental weighting = 100 / 4 scale entries = .25

Search criteria is looking for profiles having a matching item whose rating is *3-Good.*

1. *Use Case 1: Person looking for a Job match*

   This use case measures how closely the job requirements match a person's qualifications indicating overqualification for those items where the person's skill level exceeds the job requirement.

   The default logic for assigning the weights is as follows:

   - Find entry number in scale (i.e. 3 is the 3rd scale entry).
   - Calculate incremental weighting for each scale entry: 100 / total scale entries = n% (i.e. 100/4 = .25).
   - If the target rating is greater than (>) the desired rating, the score calculation is:

     1 – [(Target rating – desired rating) * incremental weight]
   - If Target rating less than or equal to (<=) the desired rating, a score of 100% is assigned.

   The scores generated based on the search criteria rating value *3-Good* are:

   Target rating of 1-Little = 100%

   Target rating of 2-Fair = 100%

   Target rating of 3-Good = 100%

   Target rating of 4-Excellent = 1 – [(4 – 3) * .25] = 75%

2. *Use Case 2: Job looking for a Person match*

   This use case measures how closely the person's qualifications match the job's requirements indicating an overqualification for those items where the person's skill level exceeds the job requirement.

   The scores generated based on the search criteria rating value *3-Good* are:

   Target rating of 1-Little = 1 – [(3 – 1) * .25] = 50%

   Target rating of 2-Fair = 1 – [(3 – 2) * .25] = 75%

   Target rating of 3-Good = 100%

   Target rating of 4-Excellent = 100%

   - Calculate incremental weighting: 100 / total scale entries = n% (i.e. 100/4 = .25).
   - If target rating >= desired rating, a score of 100% is assigned.
   - If target rating < desired rating, the score calculation is:

1 – [(desired rating – target rating) * incremental weight]

3. *Use Case 3 and 4: Person compared to other people* or *Job compared to other jobs.*

   This use case measures how closely the qualifications of several people match or the requirements of several jobs match (i.e. "fit-gap" scoring).

   The scoring algorithm can be calculated as follows:

   - Calculate incremental weight = 100 / total scale entries = n% (i.e. 100/4 = .25).
   - Score = 1 – (ABS(target rating level – desired rating level) * incremental weight)

   The scores generated based on the search criteria rating value 3-Good are:

   Target has rating = 1-Little: 1 – (ABS(1 – 3) * .25) = 50%

   Target has rating = 2-Fair: 1 – (ABS(2 – 3) * .25) = 75%

   Target has rating = 3-Good: 1 – (ABS(3 – 3) * .25) = 100%

   Target has rating = 4-Excellent: 1 – (ABS(4 – 3) * .25) = 75%

   This table lists the difference between the desired rating and the actual rating in the example profiles:

Profile	***Item ID***	***Desired Rating Level***	***Actual Rating Level***	***ABS (Desired – Actual Rating)***
01000	0102	4	4	0
02000	0102	4	5	1
03000	0102	4	3	1

This difference value is used in the calculation of the rating score, which the system calculates using the following formula:

Rating Score = 100 – ABS (Desired Rating Level – Actual Rating Level) × Rating Weight

The Rating Weight is calculated as follows:

Rating Weight = 100 / (total number of rating levels in rating model)

In the example rating model, the total number of rating levels is 5 and the rating weight is therefore 20 = 100/5.

This table lists the rating score for the example profiles:

Profile	***Item ID***	***ABS (Desired – Actual Rating Level)***	***Rating Score***
01000	0102	0	100
02000	0102	1	80
03000	0102	1	80

The highest rating score is 100 and this is assigned only if the item has the same rating in both the source and the target. If the actual rating in the target is lower or higher than the desired rating, the rating score is less than 100. In the example, you can see that profile 02000 and 03000 have the same rating score even though the ratings are different. This is because the difference between the desired and actual rating is the same for these profiles.

The system applies weightings to items with the rating model property in the same way that it applies weightings to items without the rating model property.

To illustrate how this works, the next example shows how the system calculates scores for items with the rating model property. In this example, the job search criteria includes three competency items and desired rating, with importance values as listed in this table:

Item ID	***Rating***	***Rating Level***	***Importance***
0102 (Conceptual thinking)	C (Good)	3	2-Below Average
0110 (Time management)	A (Excellent)	5	4-Above Average
0203 (Confidence & maturity)	B (Very Good)	4	3-Average

The target profiles for the search and compare are person profiles. This table summarizes the competency ratings for Nicola Richardson:

Item ID	***Rating***	***Rating Level***
0102 (Conceptual thinking)	B (Very Good)	4
0110 (Time management)	A (Excellent)	5
0203 (Confidence & maturity)	D (Fair)	2

In this search and compare, the system calculates two property scores for each item:

- Item ID.

The profiles that have the same competency item score 100. If the competency is missing, the item score is 0.

- Rating score for the Rating property.

The first step in the search and compare is to calculate the property scores for each competency item. This table lists the property scores for Nicola Richardson:

Item ID	***Rating Level***	***Item ID Score***	***Rating Score***
0102	4	100	80 = 100 – [ABS(3–4) × 20]
0110	5	100	100 = 100 – [ABS(5–5) × 20]
0203	2	100	60 = 100 – [ABS(4–2) × 20]

Next the system calculates these values:

- Total property scores.

  The total property score for each item is the sum of the property scores for item ID and rating.

- Average item score.

  This is calculated as follows:

  Total property score/Property Count

  In this example, the property count is 2 (item ID and rating).

This table lists the item scores for Nicola:

	Property Scores			
Item ID	***Item ID Score***	***Rating Score***	***Total Property Score***	***Average Item Score***
0102	100	80	180 = 100 + 80	90 = 180/2
0110	100	100	200 = 100 + 100	100 = 200/2
0203	100	60	160 = 100 + 60	80 = 160/2

Next the system applies the weighting to the average item scores. To do this, the system calculates the weighting for each item based on the Importance assigned to the item using this formula:

Importance % = (Item Importance / Total Importance) × 100

In this example, the total importance is 9 = 2 + 4 + 3.

This table lists the weightings for the competency items:

Item ID	***Importance***	***Importance %***
0102	2	22.22% = 2/9 × 100
0110	4	44.44% = 4/9 × 100
0203	3	33.33% = 3/9 × 100

The system calculates the weighted item score as follows:

Item Score (weighted) = Item score × Importance %

This table lists the weighted item scores for Nicola:

Item ID	***Average Item Score***	***Item score (weighted)***
0102	90	20 = 90 × 22.22%
0110	100	44 = 100 × 44.44%
0203	80	27 = 80 × 33.33%

Finally, the system calculates the overall profile score by summing all the weighted item scores:

Total Profile Score = 91 = 20+ 44 + 27

Calculating the Interest Level Property Score

If the search criteria include items with the interest level property (JPM_INTEREST_LEVEL), the system calculates the property score in the same way as the rating property. The interest level property score depends on how closely the interest level in the target profile matches the interest level specified in the search criteria:

Interest Level Score = 100 – ABS (Desired Interest Level – Actual Interest Level) × Rating Weight

The Rating Weight is calculated as follows:

Rating Weight = 100 / (total number of rating levels in rating model)

The delivered interest level model (which is delivered as a rating model) has 5 levels and the rating weight is therefore 20 (100/5).

Calculating Item Scores for Mandatory Items

The system automatically includes the Mandatory check box for each item in the search criteria. If you select this check box for an item, the system searches for profiles that include the item and all the properties specified for that item. Profiles must include the item and an exact match for the requested item properties for the profile to be included in the search results. Profiles that have different item properties are not included.

For this example, the search criteria includes two competency items and a degree as shown in the table:

Item ID	***Rating***	***Country***	***Mandatory***
0110 (Time management)	3		Y
0203 (Confidence & maturity)	4		N
BA (Bachelor of Arts)		CAN	N

This table lists the items in the target profile and the item scores:

Item ID	***Rating***	***Country***	***Item Score (unweighted)***
0110 (Time management)	2		0
0203 (Confidence & maturity)	4		100
BA (Bachelor of Arts)		USA	50

Note: The target profile scores 0 for item 0110 because the rating does not match the search criteria and the item is specified as mandatory. If the mandatory item receives a score of 0, then the profile will not be returned as a search result.

(Classic) Select a Profile Page

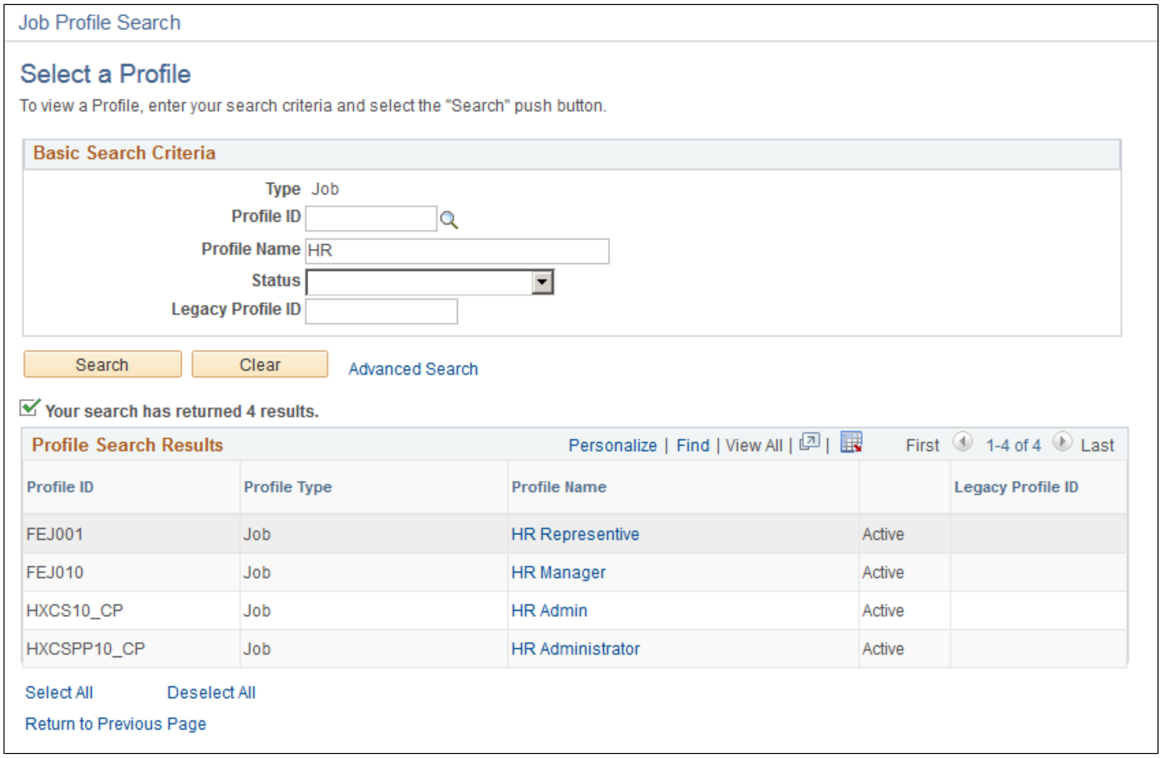
Use the Select a Profile page (JPM_COM_PROF_SRCH) to select the profile that you want to use as the source of criteria for the search using the classic user interface.

The source profile that you select provides the default search criteria. This page is displayed only if the search selected has a criteria rule of *Default, No Display* or *Default and Display* and the source profile type is a non-person profile type. If the criteria rule is *No Default, Display*, you enter the search criteria manually on the Search Criteria page.

Navigation:

Select a search link on the Search for Profiles page.

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



Basic Search Criteria

Field or Control	***Description***
Type	Displays the profile type defined as the source for the search. The source and target profile types are configured on the Define Search Configuration Page.
Profile ID	Select the profile, or enter part of the profile ID.
Profile Name	Enter the profile name, or part of the profile name, to search for profiles with matching names.
Status	Select a status to list profiles of one status only, such as *Active.*
Legacy Profile ID	Enter the legacy profile ID if you want to search for a profile that existed in earlier versions of HR. The legacy profile ID is assigned to the profile during upgrade.
Search	Click this button to list profiles that match the search criteria.

Field or Control	Description
Clear	Click this button to clear all search criteria or search results from the page.

Profile Search Results

This scroll area lists the profiles that match the search criteria you selected. Click the profile name that you want to use as the source for the search and compare. Depending on the search type, the system either displays the Search Criteria page or runs the search using the selected profile. If the criteria rule for the search is *Default, Display* the system displays the Search Criteria page and you can modify the search criteria before running the search. If the criteria rule for the search is *Default, No Display* the system runs the search and displays the results on the Search Results page.

(Classic) Search Criteria Page

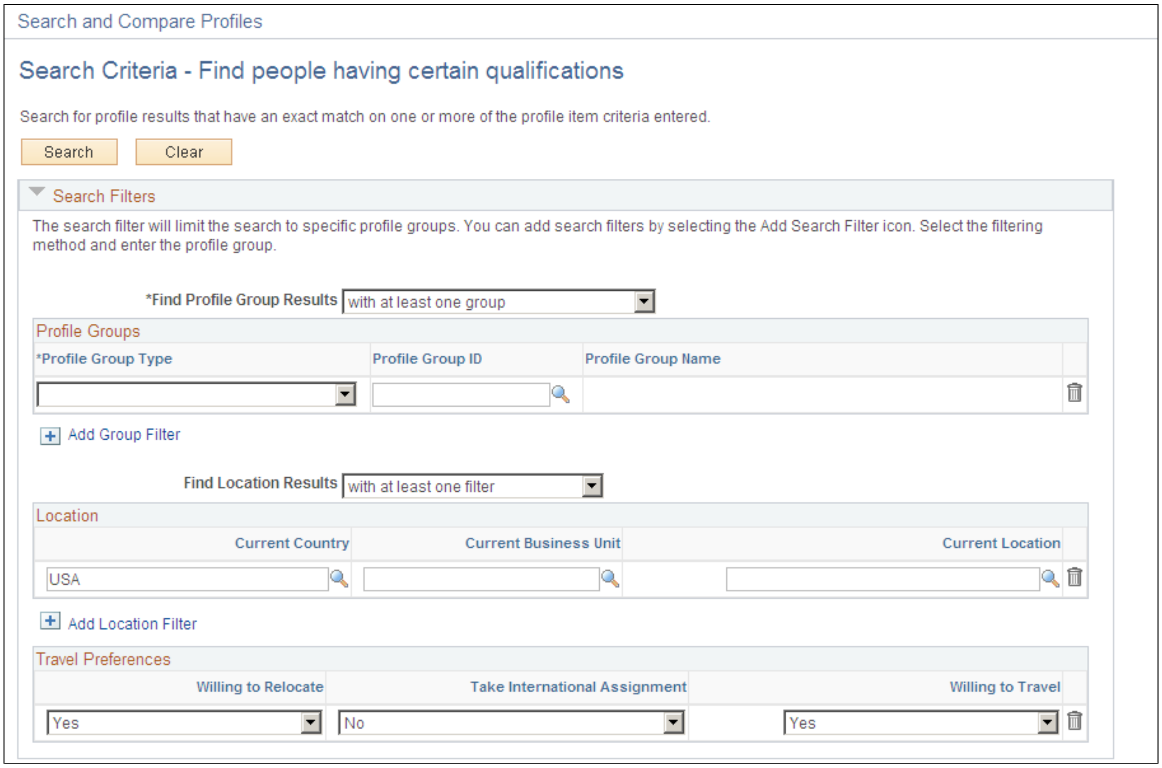
Use the Search Criteria page (JPM_SRCH_CRITERIA) to view and modify the search criteria for the search and compare using the classic user interface.

If the search selected on the Search for Profiles page has a criteria rule of Default and Display or No Default, Display (Adhoc), this page is displayed before you run the search. If the criteria rule is Default, No Display, the system runs the search without first displaying the Search Criteria page.

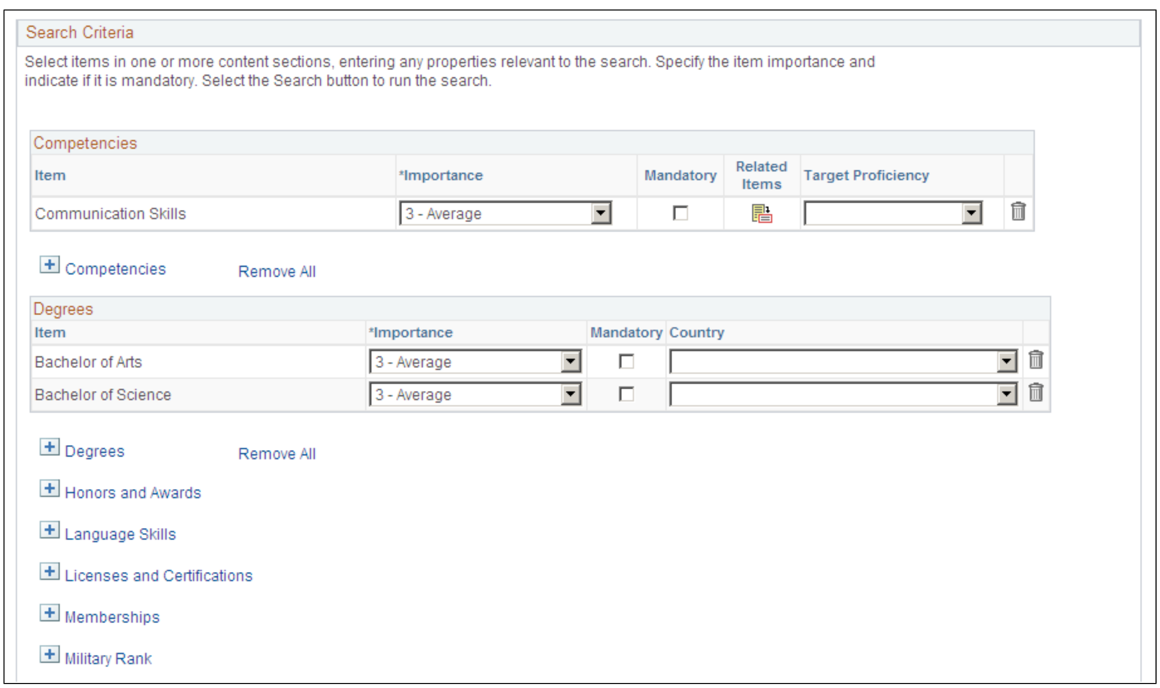
Navigation:

- Select a search link on the Search for Profiles page.
- Click the **Modify Search Criteria** link on the Search Results page.

This example illustrates the fields and controls on the Search Criteria page: Search Filters section of the page. You can find definitions for the fields and controls later on this page.



This example illustrates the fields and controls on the Search Criteria page (2 of 2): Search Criteria section of the page. You can find definitions for the fields and controls later on this page.



Use this page to define the search criteria. If the search that you selected has the criteria rule of *Default, Display,* the system automatically displays the default search criteria based on the source profile you selected on the Select a Profile page or the Person Search page. Review and modify the search criteria as required.

However, if the search you selected doesn't have the profile types defined, you must first specify the source and target profile types to use, and then define the search criteria manually.

Note: The content types listed on this page and the fields for each content type are determined by the search type selected, the profile type definitions, and the content types definitions.

See Understanding the Search and Compare Profiles Process

See Understanding Setting Up Search and Compare Profiles.

See Setting Up Profile Types.

See Setting Up Content Types and Properties.

Field or Control	***Description***
Source Profile Type and **Target Profile Type**	Select the profile types that you want to use in the search. The source profile type is used as the basis for the search criteria. The target is the profile type from which the system searches for matching profiles. These fields appear for adhoc searches that don't have the source and target profile types defined on the Search Configuration page. When you complete these fields, the system displays the content sections and search filters that you can use in the search.
Search	Click to initiate the search based on the criteria you have specified on this page. The system performs the search and displays the matching profiles on the Search Results page.
Clear	Click this button to clear the search criteria.

Search Filters

Filters may include profile groups, current location, and travel preferences, depending upon how the profile was set up. Use the **Profile Groups** group box to limit the search to selected profiles. The **Profile Groups** group box appears only if the target profile type belongs to searchable profile groups. Filter group boxes for current location and travel preferences may also appear if the target profile type includes this content section in the Profile Type configuration.

Filter data is used to filter the target profile candidates, but does not contribute to the overall search score. For example, you may want to find those person profiles that best match the requirements of the job Manager-Information Systems and are currently located in the Paris office. The Current Location fields filter out those candidates that are not in the Paris office and the score of the candidates is based on how well their profiles match the Manager-Information Systems job profile. If no candidates are found, then the **Travel Preferences** properties, such as **Willing to Relocate** and **Take International Assignment** can be used as filters to find those candidates outside the Paris office. The PERSON profile type is delivered with the Mobility content section where you can enter these preferences for a person.

See Profile Group Types Page.

Search Criteria

Fields in this section depend upon how the profile type is set up.

Field or Control	***Description***
Importance	Select a value that indicates the importance of the profile item. The default value is *3 - Average.* The system uses the Importance value to determine how well profiles match the search criteria. If you select a high importance value, those profiles that include the profile item are considered a better match than the profiles without the profile item.
Mandatory	If you want matching profiles to include certain profile items, select this check box for those items. When you run the search, the system searches for target profiles with matches on the mandatory items and the same item properties that are specified in the search criteria. For example, if the search criteria includes a mandatory competency item and you specify a proficiency rating for the competency, the search results include only those profiles with the competency item and the same proficiency rating.
Related Items	Select this icon to access the Related Items page and enter related items that should be part of the search. This icon is available when the content item has been set up with related items.

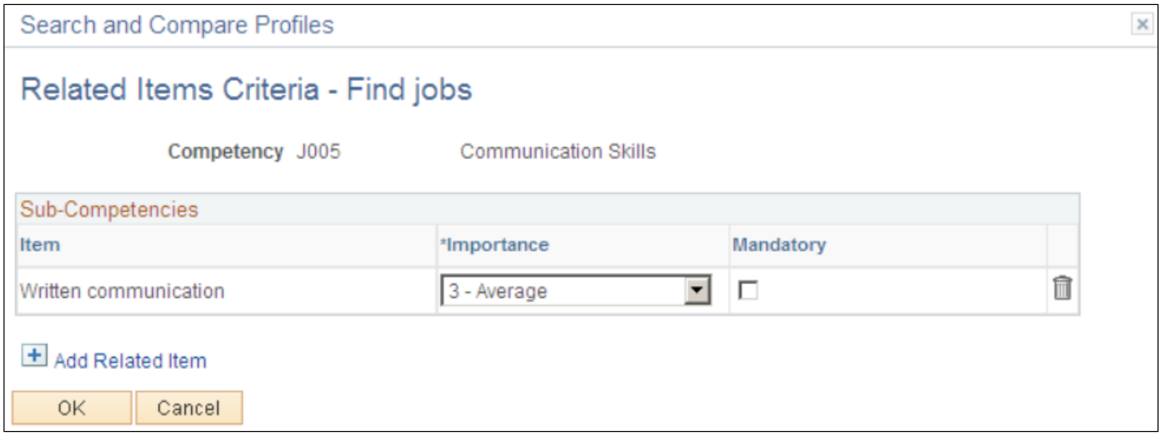
(Classic) Related Items Criteria Page

Use the Related Items Criteria page (JPM_SRCH_RELITMS) to enter the related items to be included as search criteria using the classic user interface.

Navigation:

Select the **Related Items** icon for an item on the Search Criteria page.

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



Select the **Add Related Item** link to include specific related items in you search. Indicate whether this item should be a mandatory item included in the search. When the search criteria includes a mandatory related item, the search results include only those target profiles with that related item.

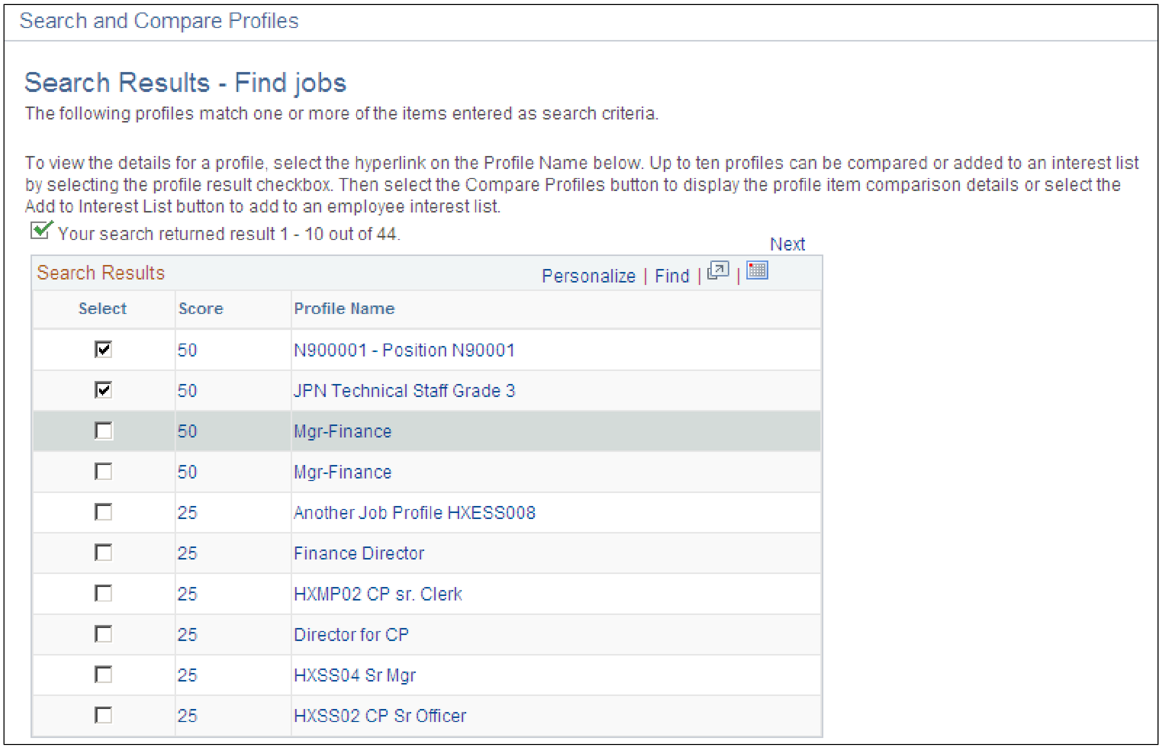
(Classic) Search Results Page

Use the Search Results page (JPM_SRCH_RESULT) to displays the results of the search using the classic user interface.

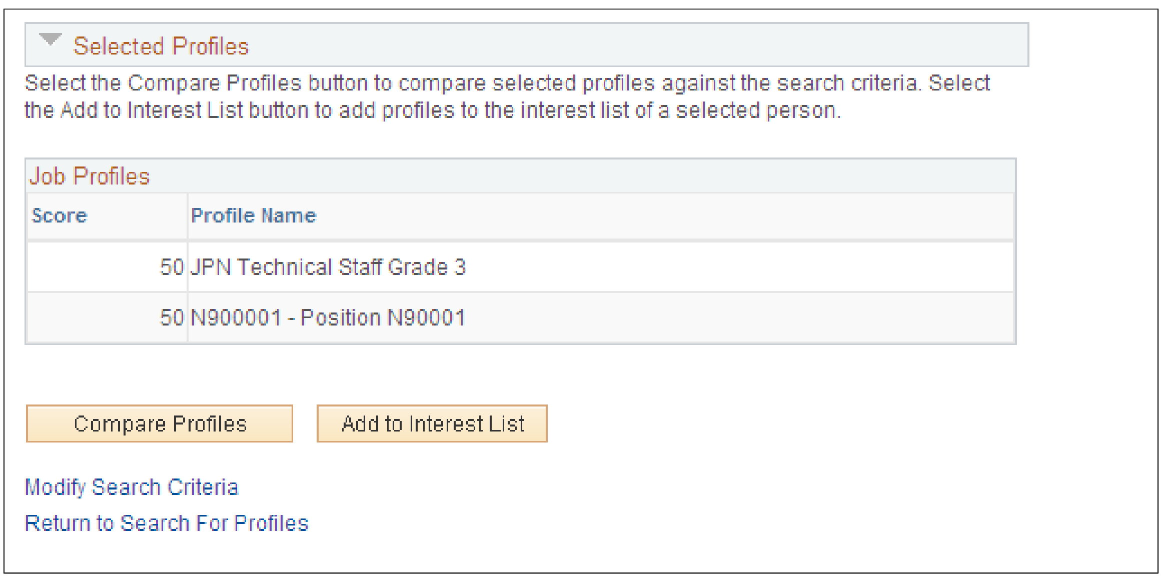
Navigation:

- Click the **Search** button on the Search Criteria page.
- Select a profile on the Select a Profile page.

This example illustrates the fields and controls on the Search Results page (1 of 2). You can find definitions for the fields and controls later on this page.



This example illustrates the fields and controls on the Search Results page (2 of 2). You can find definitions for the fields and controls later on this page.



Important! When running Search and Compare, if the Indexes cannot be located, the system will issue a message stating that the search index could not be found. This means that the process Schedule Search Indexes has not been run to create the indexes or the search framework environment is not accessible. When the index has been located, but the search criteria does not find any profile matches, the system will issue a message stating that your search did not return any results.

Search Results

Field or Control	***Description***
Select	Select this check box to select the profile. This will add the profile to the Selected Profiles section and will be used in the compare process. You can select up to ten (10) profiles to compare.
Score	Click the score link to view the Match Results page. This page lists the items in the search criteria and the corresponding item score for the profile that you selected.
Profile Name	Click the profile name link to view the profile. The system displays the Person Profile page or the Non-person Profile page depending on the profile type.

Selected Profiles

Field or Control	***Description***
Compare Profiles	Click this button to run the comparison. You can include 1 and 10 profiles for comparison. The system displays the Compare Results page, which lists the items in the search criteria and the corresponding item scores for the profiles that you selected.
Add to Interest List	Click this button to add the profiles you have selected to a person's interest list. This button is displayed when the target profile type for the search is a non-person profile type.
Modify Search Criteria	Click this link to view and modify the search criteria if you want to rerun the search with different search criteria. The system displays the Search Criteria page.
Return to Search for Profiles	Click this link to run a new search. The system returns you to the Search for Profiles page that lists all the searches available.

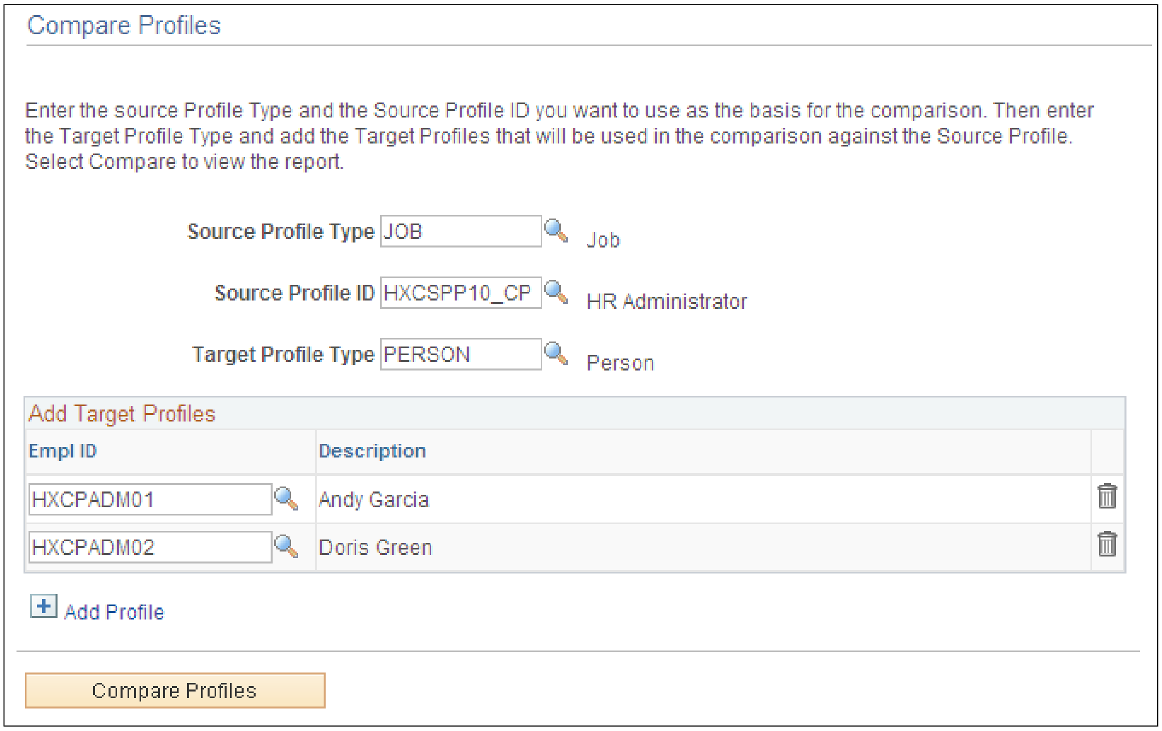
(Classic) Compare Profiles Page

Use the Compare Profiles page (JPM_COMPARE_MAIN) to select the source and the target profile types that you want to compare using the classic user interface.

Navigation:

Workforce Development > **Profile Management** > **Profiles** > **Compare Profiles**

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



Field or Control	*Description*
Source Profile Type	Select the profile type that you want to use for the source of the compare.
Source Profile ID	Select the profile that you want to compare the target profiles against.
Target Profile Type	Select the profile type from which the target profiles are selected.
Target Profile ID or **Empl ID** (employee identification)	Select the profile ID. The system compares the target profiles with the profile selected in the **Source Profile ID** field.
Add Profile	Click to add another target profile.

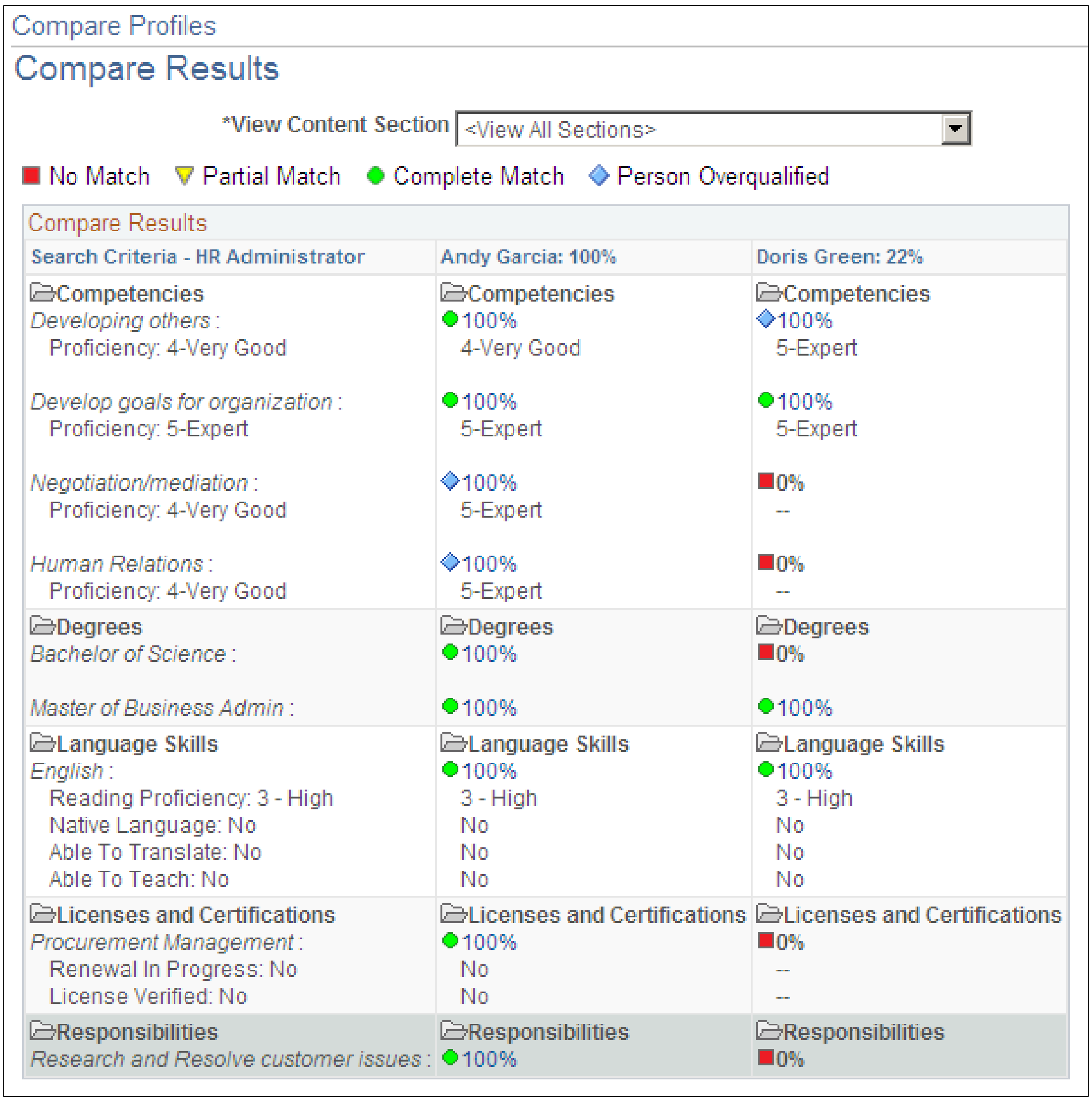
(Classic) Compare Results Page

Use the Compare Results page (JPM_COMPARE_RESULT) to view a summary of the comparison of the profiles you selected using the classic user interface.

Navigation:

- Select source and target profiles on the Compare Profiles page and click the **Compare Profiles** button.
- Select profiles on the Search Results page, select the check box next to 1 to 10 profiles and then select the **Compare Profiles** button.
- Click the score link on the Search Results page.
- Click the **Compare** button on the Interest List page.
- Select the *Compare employee profile to current job* profile action and select the **Go** icon.

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



This page displays the results of the compare. You access this page from the Search Results page, Compare Profiles page, or by clicking the **Compare** button on the Interest List page. In the left hand column the system displays the content sections and content items in the source profile or search criteria. Related items appear as an indented item beneath the item to which it is related. The remaining columns show the corresponding data in the target profiles. The system shows the item scores for each target profile. Select the score links to view more details about the profile item.

Field or Control	***Description***
View Content Section	Select <*View All Sections*> to list all the sections in the profiles or select a section to view the information for one content section. The default is <*View All Sections*>.

(Fluid) Searching and Comparing Profiles

Fluid Search and Compare provides a robust way of analyzing your profile data. It provides person and non-person pre-delivered sections but allows you the flexibility to configure criteria items as needed. Criteria groups help you find and compare people or jobs using different combinations of criteria in a single search. Search criteria uses boolean logic that creates focused and productive results.

Note: To use Fluid Search and Compare you need to be on PeopleTools 8.57 or higher.

These topics provide an overview of search and compare profiles results values and discuss how to search for and compare profiles using the fluid user interface.

For an overview of performing a profile search and compare, see Understanding the Search and Compare Profiles Process.

These videos provide an overview of the Profile Manage Search and Compare modernization feature using the Fluid User Interface:

Video: PeopleSoft Profile Search Match Compare

Video: Image Highlights, PeopleSoft HCM Update Image 36: Profile Management Search, Match Compare Modernization

Pages Used to Search and Compare Profiles Using the Fluid User Interface

Page Name	***Definition Name***	***Usage***
Search / Compare Profiles Tile	HC_JPM_SRCH_LIST_FL_GBL (this is the cref for this tile)	Access to search for profiles that match selected search criteria and compare those profiles.
(Fluid) Start a New Search Page	JPM_ADMIN_SRCH_FL (Workforce Searches)	Select from the list of available configured search queries that are defined for the user.

Page Name	***Definition Name***	***Usage***
(Fluid) Search Profiles Page	JPM_COMPRF_SRCH_FL	Select the profile that you want to use as the source of criteria for the search. The source profile that you select provides the default search criteria. This page is displayed only if the search selected has a criteria rule of *Default, No Display* or *Default and Display* and the source profile type is a non-person profile type. If the criteria rule is *No Default, Display,* you enter the search criteria manually on the Search Criteria page.
(Fluid) Adhoc Search Profiles Page	JPM_SRCH_ADHOC_FL	Select the profile type that you want to use as the source of criteria for the adhoc search. The source profile that you select provides the default search criteria rule of *No Default, Display (Adhoc)*.
Select an Employee Page	HR_PSEL_FLU	Select the profile that you want to use as the source of criteria for the search. The source profile that you select provides the default search criteria. This page is displayed only if the search selected has a criteria rule of *Default, No Display* or *Default and Display* and the source profile type is a person profile type. If the criteria rule is *No Default, Display*, you enter the search criteria manually on the Search Criteria page.
(Fluid) Search Criteria Page	JPM_SRCH_CRIT_FL	View and modify the search criteria for the search and compare. If the search selected has a criteria rule of *Default and Display* or *No Default, Display,* this page is displayed before you run the search. If the criteria rule is *Default, No Display,* the system runs the search without first displaying the Search Criteria page.
(Fluid) Add / Remove Criteria Page	JPM_SRCH_ADDCR_SCF	Specify group criteria items that you want to include in your search criteria.
<Edit Criteria Item> Page	JPM_SRCH_CHGCR_SCF	View, update, or remove search criteria from a group.
(Fluid) Add/Remove Criteria (Related Items) Page	JPM_SRCH_ADDRI_SCF	Include or remove related items as part of your search criteria.
<Edit Related Item> Page	JPM_SRCH_CHGRI_SCF	View information about the related item or remove it as part of the search criteria.

Page Name	***Definition Name***	***Usage***
(Fluid) Advanced Filters Page	JPM_SRCH_GRPFLT_FL	Specify additional filters to narrow the search to specific profile groups or job data properties.
(Fluid) Search Results Page	JPM_SRCH_RESULT_FL	Displays the results of the search.
(Fluid) Compare Results Page	JPM_CSC_COMPARE_FL	View a summary of the comparison of the profiles you selected.
(Fluid) Profile Selection Page	JPM_CSC_PRFSEL_SCF	Select other profiles to add to the compare process.
Profile Compare Tile	HC_JPM_COMP_ADM_FL_GBL (this is the cref for this tile)	Select a source and the target profile type that you want to compare.
(Fluid) Profile Compare Page	JPM_COMP_ADM_FL	Select the source and the target profile types that you want to compare.

Note: The JPM Person Profile (HC_JPM_PERSON_PROFILE) search index supports real time indexing (RTI) with PeopleTools version 8.59.10 or higher. When enabled, RTI allows real-time updates to the indexed data to provide job search using the latest information.
For more information about Real Time Indexing, refer to PeopleTools Search Technology, “Administering PeopleSoft Search Framework”, Using Real Time Indexing.

Understanding Search and Compare Profile Results Using the Fluid Pages

These topics discuss:

- Results calculation ranking.
- Calculating property and item percentages.
- Calculating the rating property percentages.
- Calculating item scores for exact match items.

Overview of the Results Calculation Ranking

This topic discusses how the system calculates results for target profiles to determine the profiles that best match for the search criteria. Search and compare profiles uses the search engine to determine which profiles most closely meet the specified criteria. The search query is constructed of search elements generated from each criteria item property in the search criteria. A search against the Person or Non-person Profile index is performed to return matching profiles with a match percentage. The profiles are displayed with the profile having the best fit listed first.

The search criteria comprises a set of profile criteria items that you want to search for in the target profile. However, items in the search criteria can have multiple properties. For example, if you add a competency to the search criteria you can also specify the desired rating for the competency, or if you add a language skill you can specify the desired writing proficiency for that language. The competency rating and the writing proficiency are properties of the competency and language skill profile criteria items. The system calculates a property percentage match value for each property that you specify in the search criteria.

Profile match percentages are also determined by the setting of the **Exact Match** field. This is discussed later in this topic.

Calculating Property and Item Percentages

The property percentages vary according to the property. For most properties, criteria with matching properties score 100 percent and those that don't score 0 percent. However, properties with a rating scale, such as the rating property and the interest level property, have scores that are in the range 0–100 percent according to how closely the source and the target match.

A search criteria item must at least match on the content item, unless Exact Match is specified. With Exact Match, the content item and all specified properties must match. When Exact Match is not specified, then the more properties that match for the criteria item the higher the score will be for that item.

If the search criteria include items with the interest level property (JPM_INTEREST_LEVEL), the system calculates the property score in the same way as the rating property.

Calculating the Rating Property Percentages

If the search criteria includes items with the rating or interest level property (JPM_RATING1, JPM_RATING2, JPM_RATING3, or JPM_INTEREST_LEVEL), the system calculates this property value differently than other properties. Instead of scoring 100 or 0 percent, the system assigns a score that depends on how closely the rating or interest level in the target profile matches the rating or interest level specified in the search criteria.

The system uses a *Closest Fit* scoring method for all search types (*person-to-person, job-to-job, person-to-job,* and *job-to-person*) to rank the target profiles to the source search criteria. This means the profiles closest to the search criteria will be ranked higher. Items with the same rating score will be identified at a 100 percent match while target profile items with a lower or higher rating will be assigned a score of less than 100 percent.

However, for searches that use *person-to-job* or *job-to-person* types, the end user has the option on the Search Results page to sort the profiles, relative to the person, by either:

- *Lowest to Highest Job Rating*: Job ratings that are at or below the person rating will be ranked higher.

  For example, you are trying to find jobs for a person who is rated at a level *4–Very Good* for an item. When a job in the search results only requires a level *3–Good* rating for the same item, this person is overqualified for the job and therefore the score for this job profile, relative to the person, will indicate a greater than 100 percent (*>100%*) match value for this item.

- *High to Low Person Rating*: Person ratings that are at or above the job rating will be ranked higher.

  For example, you are trying to find individuals for a job that requires a level *4–Very Good* rating for an item. When a person in the search results possesses a rating of *5–Excellent* for the same item, this person is overqualified for the job requirement and therefore the score for this person profile will indicate a greater than 100 percent (*>100%*) match value for this item.

The following use cases illustrate the scoring methodology that is tied to the profile usage (*PERSON* and *JOB*) of the search source and target profile types:

Person looking for a best job match using the following scoring method:

- *Closest Fit* — A target (job) profile has a matching item with:
  - A higher rating, then the job profile score is a number less than 100 percent.
  - The same rating, then the job profile score is *100%* (100 percent).
  - A lower rating, then the job profile score is a number less than 100 percent

- *Lowest to Highest Job Rating* — A target (job) profile has a matching item with:
  - A higher rating, then the job profile score is a number less than 100 percent.
  - The same rating, then the job profile score is *100%* (100 percent).
  - A lower rating, then the job profile score is *>100%* (greater than 100 percent).

Job needs to be filled with the best person match using the following scoring method:

- *Closest Fit* — A target (person) profile has a matching item with:
  - A higher rating, then the person profile score is a number less than 100 percent.
  - The same rating, then the person profile score is *100%* (100 percent).
  - A lower rating, then the person profile score is less than 100 percent.

- *High to Low Person Rating* — A target (person) profile has a matching item with:
  - A higher rating, then the person profile score is *>100%* (greater than 100 percent).
  - The same rating, then the person profile score is *100%* (100 percent).
  - A lower rating, then the person profile score is a number less than 100 percent.

The system automatically uses the *Closest Fit* method for person-to-person or job–to–job searches (such as looking for people with certain qualifications or looking for jobs with certain criteria). This is where a target profile has a matching item with:

- A higher rating, then the score is a number less than 100 percent.
- The same rating, then the score is *100%* (100 percent).
- A lower rating, then the score is a number less than 100 percent.

When a target profile does not have the criteria item, the score is *0%* (zero percent).

The system calculates the rating property score based on the number of levels in the rating model defined for that item.

Important! When running a search and compare, the rating models used for the profile items in the source and target profiles must have the same number of rating levels. If the rating models are not consistent, the scores will not be accurate.

Calculating Item Scores for Exact Match Items

The system automatically includes the **Exact Match** field for each item in the search criteria. If you select *Yes* to the **Exact Match** option for an item, the system searches for profiles that include the item and all the properties specified for that item. Profiles that have different item properties are not included in the results. However, since the Fluid pages use boolean logic, the results may return a profile that does not have an exact match, depending on your use of the AND and OR operator.

For example, your search criteria includes two competency items and a degree, as shown in the table, and each item is connected by an OR operator:

Item ID	*Rating*	*Country*	*Exact Match*
0110 (Time management)	3		Yes
0203 (Confidence & maturity)	4		No
BA (Bachelor of Arts)		CAN	No

This table lists the items in the target profile and the item scores:

Item ID	*Rating*	*Country*	*Item Score (unweighted)*
0110 (Time management)	2		0 (Although the profile has the item, it did not have an exact match to the rating property)
0203 (Confidence & maturity)	4		100
BA (Bachelor of Arts)		USA	50 (Although it matched the item, it did not match the country value, thus only matching 50% of the requirement)

The target profile scored *0* for item 0110 (Time Management) because the rating does not have an exact match with the item. However, the profile is returned in the results because the target profile contained exact or partial matches to other items. With the OR operator, the profile only needed to posses at least one of the criteria item properties.

If the items in this example had been joined with the AND boolean operator, then the profile would not have been returned because the profile needed to have a match with all the items.

Search / Compare Profiles Tile

Use the Search / Compare Profiles tile to access and search for profiles that match selected search criteria and compare those profiles.

Navigation:

The Search / Compare Profiles tile is delivered as part of the following dashboards based on your user role, but you can add the tile to any home page through personalizations.

- *Administrator*: From the Workforce Administrator home page in fluid, select the Profile Administration tile to access the Profile Administration Dashboard.
- *Employee*: From the Employee Self Service home page in fluid, select the My Profiles tile to access the “My Profiles Dashboard” (PeopleSoft eDevelopment).
- *Manager*: om the Manager Self Service home page in fluid, select the Team Profiles tile to access the “Team Profiles Dashboard” (PeopleSoft eDevelopment).

This example illustrates the Search / Compare Profiles tile.

Click the Search / Compare Profiles tile to access the Start a New Search page.

(Fluid) Start a New Search Page

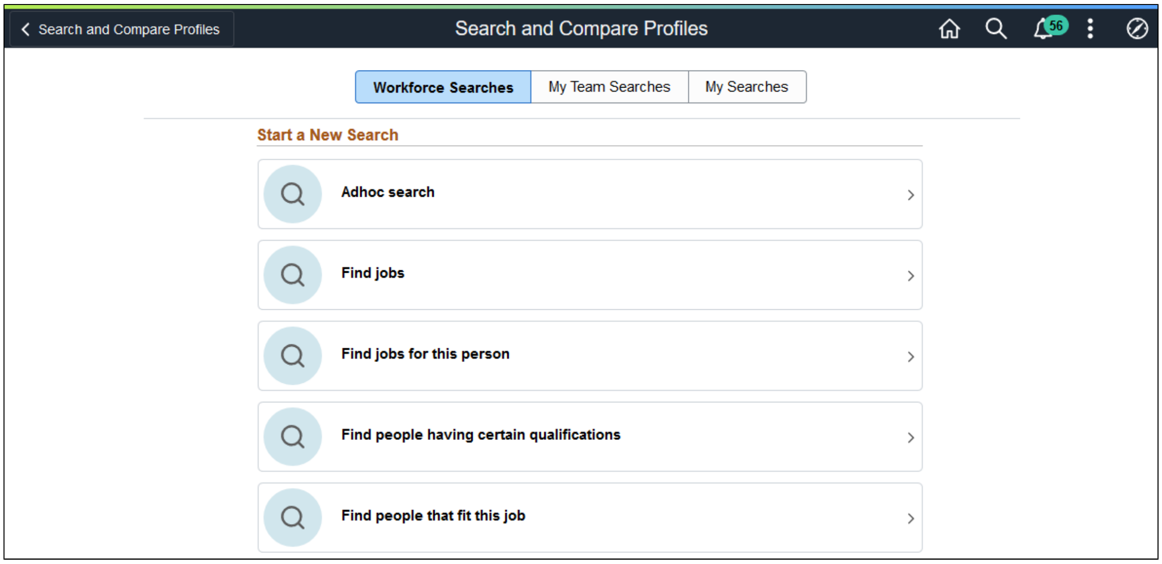
Use the Start a New Search page (JPM_ADMIN_SRCH_FL) to select from the list of available configured search queries that are defined for a user using the fluid user interface.

Navigation:

- *Administrator*: **Workforce Administrator home page** > **Profile Administration tile** > **Search / Compare Profiles tile**.
- *Employee*: **Employee Self Service home page** > **My Profiles tile** > **Search / Compare Profiles tile**.
- *Manager*: **Manager Self Service home page** > **Team Profiles tile** > **Search / Compare Profiles tile**.

- Select the Search / Compare Profiles tile from any home page to which it has been added.

This example illustrates the fields and controls on the Start a New Search page.



The options on this page vary based on the configuration.

Field or Control	***Description***
Workforce Searches, **My Team Searches**, and **My Searches**	These tabs display across the top of the page and are based on the roles you are assigned. You will see the following tabs if you have been assigned the corresponding role: • Workforce Searches page tab: *Administrator* role • My Team Searches page tab: *Manager* role • My Searches page tab: *Employee* role If you are assigned to only one role, the search queries associated with your role are displayed, and the tab is not shown on the page.

Note: Valid search queries for user roles (*Administrator*, *Employee*, and *Managers*) are defined on Define Search Configuration Page.

The configuration of the search queries determines which of the following pages the application will display next:

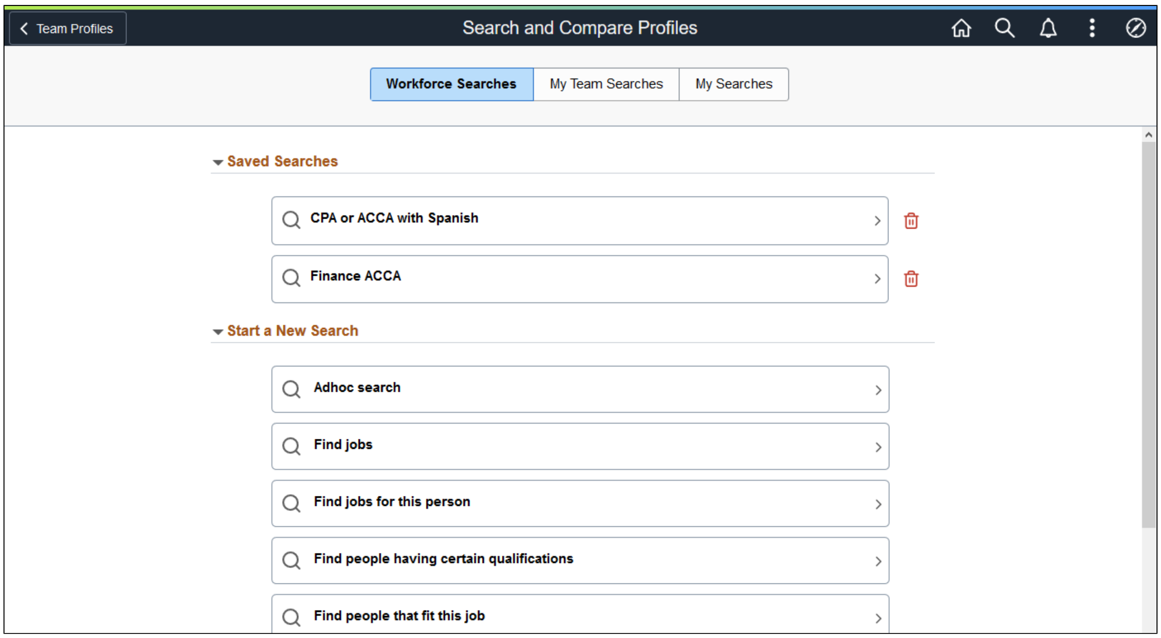
- (Fluid) Search Profiles Page
- (Fluid) Adhoc Search Profiles Page
- Select an Employee (for an Administrator), Select Team Member (for a Manager), or Select Your Job Profile (for an Employee)
- (Fluid) Search Criteria Page

Saved Searches

The page displays this section when you have saved searches (see the (Fluid) Search Criteria Page).

The Search and Compare feature enables you to save profile search criteria. When you have saved search criteria, the Start a New Search page will display your saved searches at the top of the page in a collapsible **Saved Searches** section. Saved searches are specific to the logged in user.

This example illustrates the fields and controls on the Start a New Search page when you have saved searches.



Select a saved search to be taken directly to the (Fluid) Search Results Page to see a list of profiles that meet the criteria of the search. If no profiles match your criteria, the page will indicate that there are no results.

Field or Control	***Description***
(Delete) icon	Select to remove this saved search from your list.

Related Links

Understanding the Search and Compare Profiles Process

(Fluid) Search Profiles Page

Use the Search Profiles page (JPM_COMPRF_SRCH_FL) to select the profile that you want to use as the source of criteria for the search.

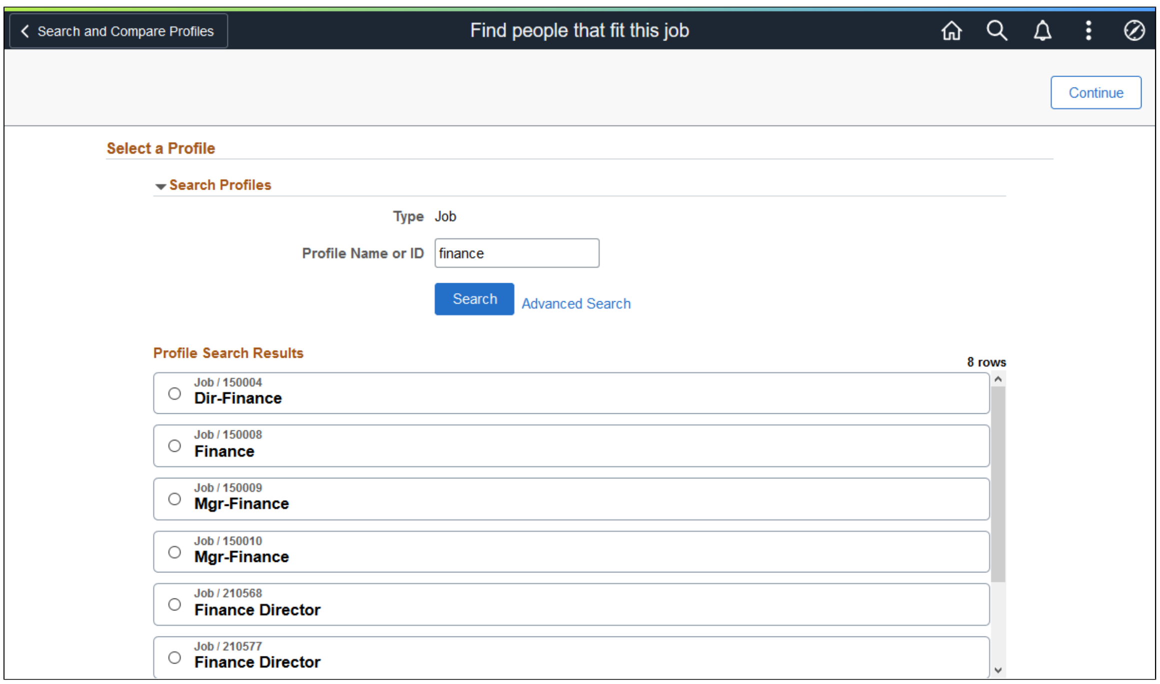
Note: The source profile that you select provides the default search criteria. This page is displayed only if the search selected has a criteria rule of *Default, No Display* or *Default and Display* and the source profile type is a non-person profile type. If the criteria rule is *No Default, Display*, you enter the search criteria manually on the (Fluid) Search Criteria Page.

Navigation:

Select a search query with a non-person source type on the (Fluid) Start a New Search Page.

Note: The name in the banner displays the name of the search you selected.

This example illustrates the fields and controls on the Search Profiles page.



These fields appear when the source profile type is a non-person profile type.

Field or Control	***Description***
Type	Displays the profile type defined as the source for the search. The source and target profile types are configured on the Define Search Configuration Page.
Profile Name or ID search field and  button	Enter a description or ID for the non-person profile that you want to use as the source of criteria. Click the profile Search below the search field to have the system retrieve profiles that meet your criteria and display them in the Profile Search Results section of the page.
Advanced Search or **Basic Search**	Click these links to toggle between the basic and advanced search field options.

Profile Search Results grid and Continue button

The Profile Search Results scroll area lists the profiles that match the search criteria you selected. Select the profile name that you want to use as the source for the search and compare.

Field or Control	***Description***
	Click the Continue button in the sub-header of this page to move to the next step in the search and compare process. Depending on the search type, the system does one of the following: • Displays the (Fluid) Search Criteria Page. When the criteria rule for the search is *Default, Display*, the system displays this page and you can modify the search criteria before running the search. • Runs the search using the selected profile and displays the (Fluid) Search Results Page. When the criteria rule for the search is *Default, No Display*, the system runs the search and displays the results.

(Fluid) Adhoc Search Profiles Page

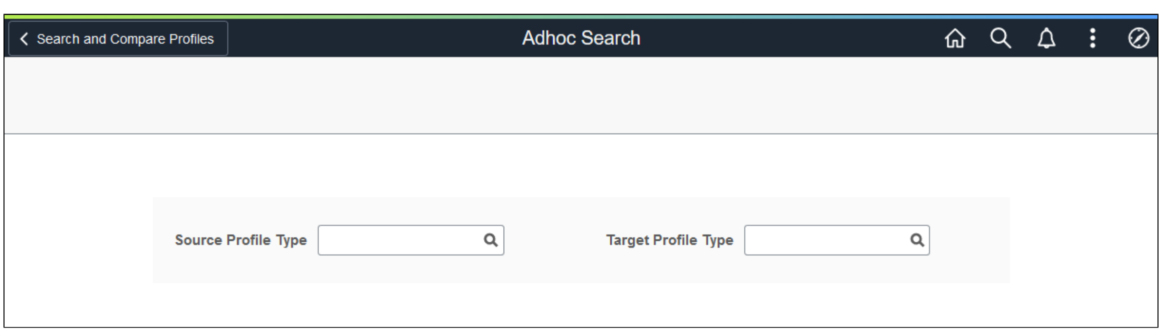
Use the Adhoc Search Profiles page (JPM_SRCH_ADHOC_FL) to select the profile type that you want to use as the source of criteria for the adhoc search.

Navigation:

Select an adhoc search query on the (Fluid) Start a New Search Page.

Note: The name in the banner will reflect the search you selected.

This example illustrates the fields and controls on the Adhoc Search Profiles page.



These fields appear for adhoc [*No Default, Display (Adhoc)*] searches where the source and target profile types are not defined on the search configuration page.

These fields appear when the source profile type is blank:

Field or Control	***Description***
Source Profile Type and **Target Profile Type**	Select the profile that you want to use as the source of criteria for the search. The source profile type is used as the basis for the search criteria. The target is the profile type from which the system searches for matching profiles. When you complete these fields, the system displays the (Fluid) Search Criteria Page.

(Fluid) Search Criteria Page

Use the Search Criteria page (JPM_SRCH_CRIT_FL) to view and modify the search criteria for the search and compare.

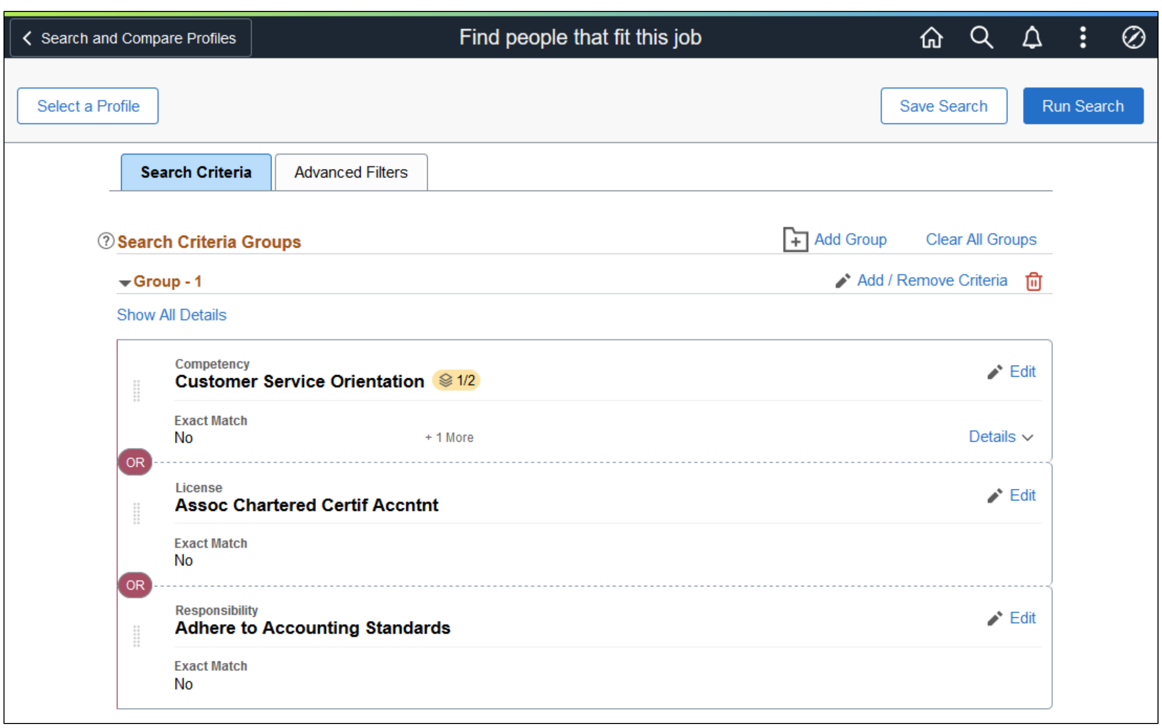
Note: If the search selected on the Search for Profiles page has a criteria rule of *Default and Display* or *No Default, Display (Adhoc),* this page is displayed before you run the search. If the criteria rule is *Default, No Display*, the system runs the search without first displaying the Search Criteria page.

Navigation:

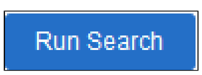
- Select a search query item from the (Fluid) Start a New Search Page.
- Click the **Continue** button in the header of the (Fluid) Search Profiles Page.

Note: The name in the banner will reflect the search you selected.

This example illustrates the fields and controls on the Search Criteria page.



Use this page to define the search criteria. If the search that you selected has the criteria rule of *Default, Display*, the system automatically displays the default search criteria based on the source profile you selected on either the (Fluid) Search Profiles Page or the select an employee search page. Review and modify the search criteria as required.

Field or Control	***Description***
Search and Compare Profiles button	Click this button in the page banner to start a new search. The system returns you to the (Fluid) Start a New Search Page that lists all the searches available for your role.
 **Select a Profile** button	Select this button to return to the previous step and enter a new source profile or select a new search query. **Note:** This button may not be available for some searches.
 **Save Search** button	Select this button to open the Save Search page and enter the name of this search. This will save the criteria you have entered under the name you enter. You can then access all your saved searches from the (Fluid) Start a New Search Page. You can also delete searches from that page. To update a saved search, access the search, which will take you to the (Fluid) Search Results Page. Select to modify the criteria, then select the **Save Search** button. The system will ask if you want to replace the current search criteria in your saved searches or create a new search under another name. **Note:** Saved searched are specific to the logged in user.
 **Run Search** button	Select this button in the sub-header to run the search and compare process.

Working with Search Criteria Groups

Use groups to help you to find and compare people or jobs using different combinations of criteria in a single search. You can add the same criteria in multiple groups and make different combinations. You can also move search criteria items from one group to another group.

The following scenario shows an example of using groups in your search criteria:

You are looking for a person who has certain qualifications but are open to several different combinations of educational experiences. Qualified individuals would need to possess one of the following educational combinations:

- Bachelor of Business Administration

  OR

- Associate of Business Administration AND Certified Public Accountant

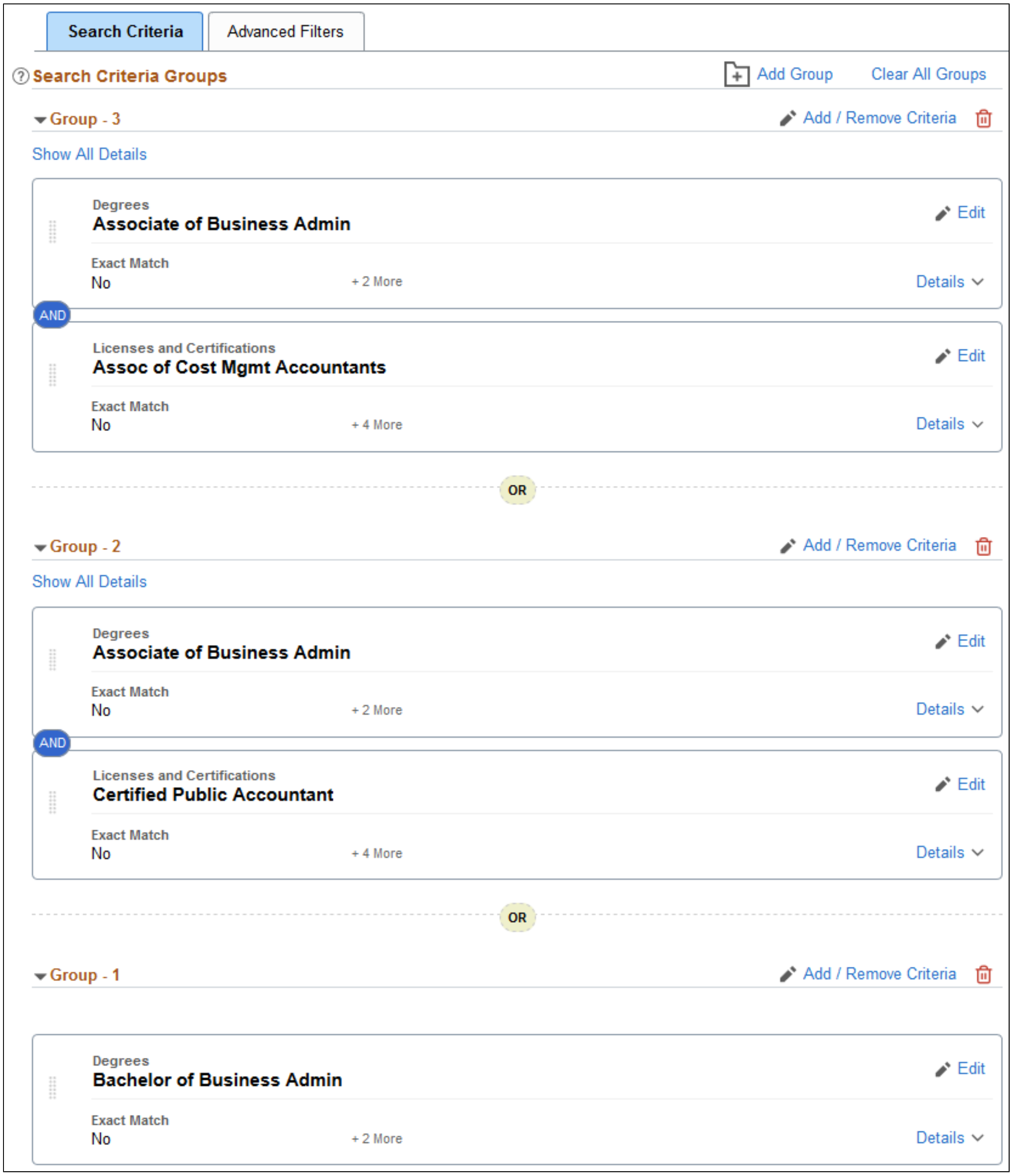
OR

- Associate of Business Administration AND Association of Cost Management Accountants certification

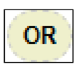
To enter this search criteria, you will need to:

1. In the Group -1 group box, select the **Add / Remove Criteria** link, select the criteria type *Degrees*, add the *Bachelor of Business Admin* criteria, and click **Done**.
2. Select the **+ Add Group** icon and link to insert the Group - 2 group box at the top of the page. Click the **Add / Remove Criteria** link in the Group - 2 header. Select a criteria type of *Degrees* and add the *Associate of Business Admin* criteria. Then select a criteria type of *Licenses and Certifications* and add the *Certified Public Accountant*, and click **Done**.
3. Select the **+ Add Group** icon and link to insert the Group - 3 group box at the top of the page. Click the **Add / Remove Criteria** link in the Group -3 header. Select a criteria type of *Degrees* and add *Associate of Business Admin*. Then select a criteria type of *Licenses and Certifications*, add the *Assoc of Cost Mgmt Accountants* criteria, and click **Done**.

This example illustrates the use of criteria groups as explained in the previous scenario.



Adding and Removing Groups

Field or Control	***Description***
 (Add Group) icon and link	Click this link to add another criteria group to your search. The system will always provide one group by default, but you can add multiple groups to create different combinations of criteria in a single search. You can add the same criteria in multiple groups to make different combinations.
Clear All Groups link	Click this link to remove the search criteria from all the groups.
 (Delete Group) icon	Click this link in the criteria group header to removed the group from this search criteria. When a group is the only criteria group on the page, click this link to remove all the criteria specified in the group. **Note:** When a group is collapsed, this icon is not available for selection.
 (OR) icon	Displays the operator OR between group sections to indicate that a profile need only meet the requirements of one of the groups. **Note:** You can only use the operator OR between groups.

Adding or Removing Criteria

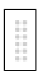
A group consists of one or several criteria cards that indicate your searching parameters. Each group must contain at least one search criterion.

Field or Control	***Description***
 (Criteria) badge icon	A criteria item displays this badge when it has related items (sub-competencies or elements). The first number in the badge identifies how many have been added as additional criteria for this search and the second number indicates how many are associated with the item. **Note:** Related items that you can add as criteria are determined by the relationships defined in the content catalog and the content section definitions in the profile type. The content section must also be configured to be included in the Search/Compare index to be included in the search. See <Edit Criteria Item> Page and (Fluid) Add/Remove Criteria (Related Items) Page.
 **Add / Remove Criteria** icon and link	Click this icon and link to open the (Fluid) Add / Remove Criteria Page to add or remove items for a group to include in your search criteria.
Show All Details and **Hide All Details** links	Toggle between these two links to show or hide additional details that may reside on the criteria card.
 (Edit) icon and link	Click this icon and link to access the <Edit Criteria Item> Page where you can view, update, or delete an item from the search criteria.
Details link	Click this link to show or hide additional details that reside on the criteria card. The link will toggle between a down and up arrow to expand or collapse the data.
Exact Match	Displays whether a criteria item must be part of the target profile to be in the search results. **Note:** Exact Match is the Mandatory property in the profile setup configuration. If the Mandatory property is included in a content section definition, the system uses the setting in the profile as the default value in the search criteria, but you can override the default.

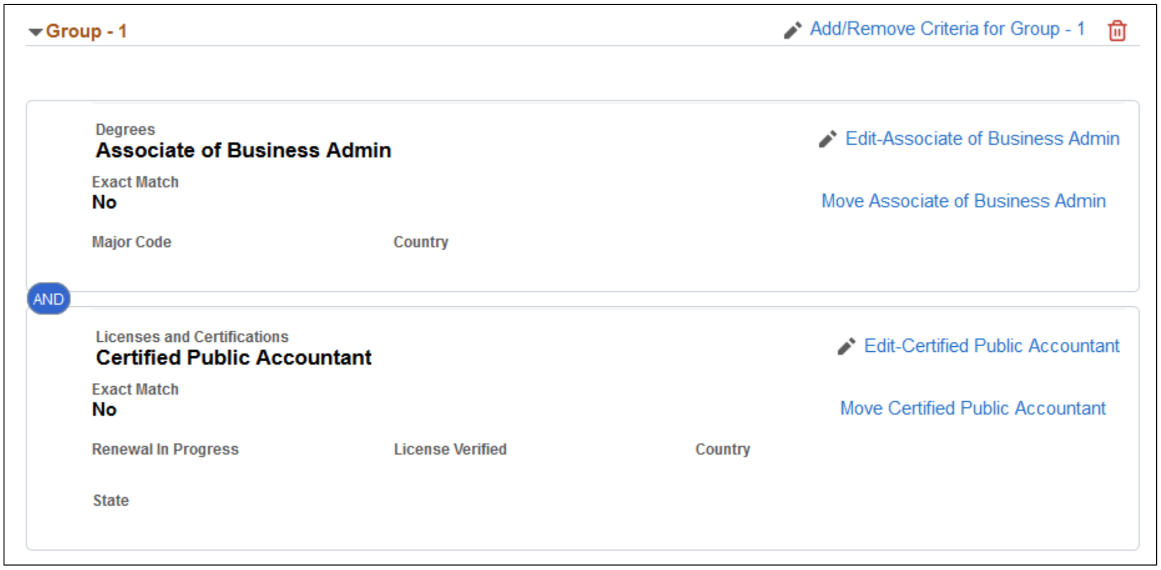
Field or Control	***Description***
 and 	Click these icons to toggle between the *OR* and *AND* operators. These operators are available between criteria cards within a group and provide you with the flexibility to require that the target profile possess all criteria items (AND) or specify that the target profile need have only one of the criteria items (OR). When you select OR, the page combines the criteria cards indicating that only one item from the cards is required. When you select AND, the criteria cards remain separate, indicating that both card items are required to return rows in the search.

Moving Criteria from One Group to Another

Moving criteria varies depending upon the device you are using or mode in which you have accessed the system.

Field or Control	***Description***
 (Drag and Drop) icon	(Desktop) Click and drag this icon to move a criteria card to another drag and drop icon location. You can also move a criteria card to another group. When you move a card, the operator that sits on top of the card moves with it. For example, if you had a criteria item card that was preceded with the AND operator and you move it below another card, the AND operator will remain between the top card and the card you just moved.

This example illustrates the moving options when using a touch device or in screen reader mode.



Field or Control	***Description***
Move <Criteria Item> link	(Touch screens or screen reader mode) Click the link to open the Move <Criteria Item> page (JPM_SRCH_MOVCR_SCF) and move a criteria item to another location. You can also move a criteria card to another group. When you have more than one group, select the group to which this item should be moved. Then use the **Placement in Group** field to specify where you want to place it within the group.

Related Links

Understanding the Search and Compare Profiles Process
Understanding Setting Up Search and Compare Profiles
Setting Up Content Types and Properties
Setting Up Profile Types

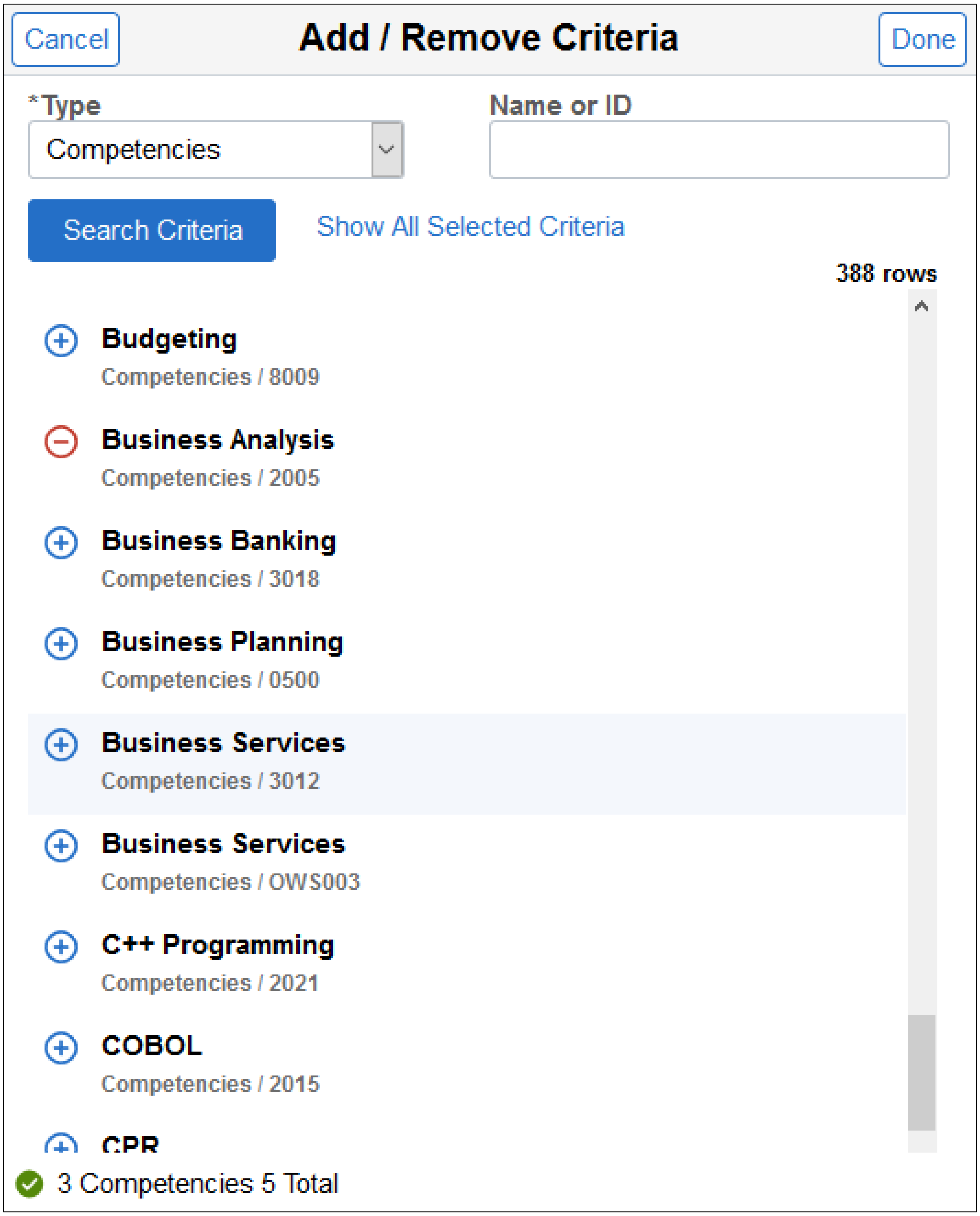
(Fluid) Add / Remove Criteria Page

Use the Add / Remove Criteria page (JPM_SRCH_ADDCR_SCF) to specify group criteria items that you want to include in your search criteria.

Navigation:

Click the **Add / Remove Criteria** link in the header of a group box.

This example illustrates the fields and controls on the Add / Remove Criteria page.



Use this page to add or remove criteria items from a criteria group box. This page allows you to display all criteria items for a content type, or display the items you have selected thus far. The bottom of the page shows how many items you have selected for a criteria type and the total of all items selected from all content types.

Note: Criteria items are known as content items when configuring the Profile Management system.

Field or Control	*Description*
Type	Select a criteria type. Valid criteria types are added as content sections to a profile type on the Profile Types - Content Page. When you select a type and click the Search Criteria, the page will list those criteria items you can add to the criteria group.
Name or ID	Enter a full or partial name or ID of a criteria item to filter the list to show only those items that match the information you entered. **Note:** You must select a criteria type first to use this field.
Search Criteria button	Click this button to search for items that are within the specifications you entered in the **Type** and **Name or ID** fields.
Show All Selected Criteria	This link becomes active after you add criteria items. Click to show a list of all items you have selected for this criteria group.
 (Add Criteria) icon	Click to add an item to the criteria group and search. When this icon appears, it is not added to your criteria group or the search.
 (Remove Criteria) icon	Click to remove an item from the criteria group and search. When this icon appears, it has already been included in the criteria group for the search. Note that if the item was already a part of this criteria group prior to selecting the **Add / Remove Criteria** link, it will still show up on the list preceded by the remove criteria icon.
Cancel button	Click this button to return to the Search Criteria page without saving any of your changes.
Done button	Click this button to save and add your changes to the criteria group.

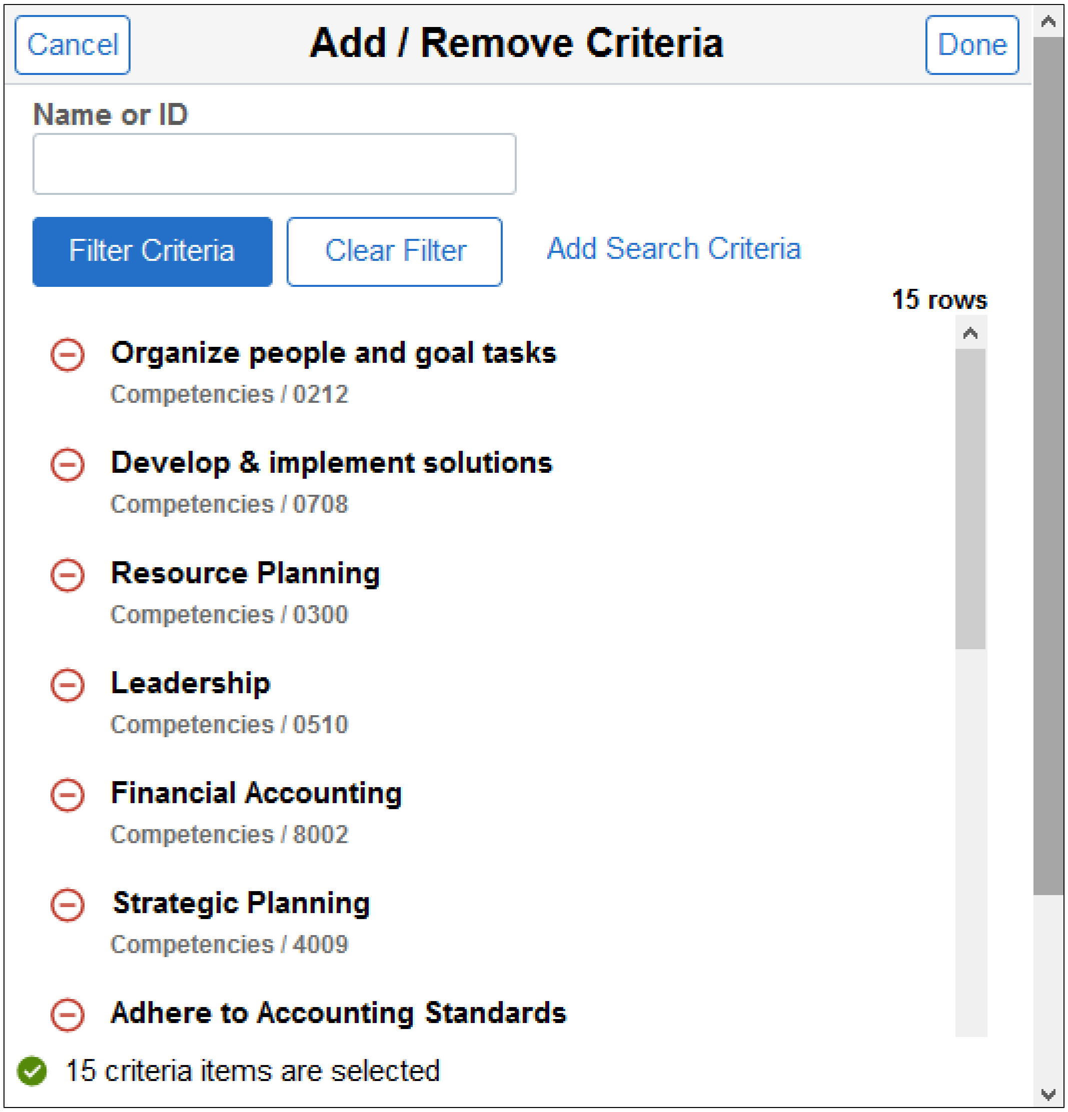
Add / Remove Criteria page when viewing selected criteria

To view only the criteria items you have selected for your search criteria, use the **Show All Selected Criteria** link.

Navigation:

Click the **Show All Selected Criteria** link on the Add / Remove Criteria page.

This example illustrates the Add / Remove Criteria page when you click the **Show All Selected Criteria** link.



When you click the **Show All Selected Criteria** link, the page shows all the items you have selected for this criteria group. It also includes the following field elements:

Field or Control	***Description***
Name or ID	Enter a full or partial name or ID of a criteria item to filter the list to show only those items that match the information you entered. It searches on all items selected for this group.
Filter Criteria button	Click this button to search for items that meet the criteria you entered in the **Name or ID** field.

Field or Control	***Description***
Clear Filter button	Click this button to clear the **Name or ID** field and reset the list to show all items you have selected for this group.
Add Search Criteria	Click this link to return to the page where you can select types and add more items.

<Edit Criteria Item> Page

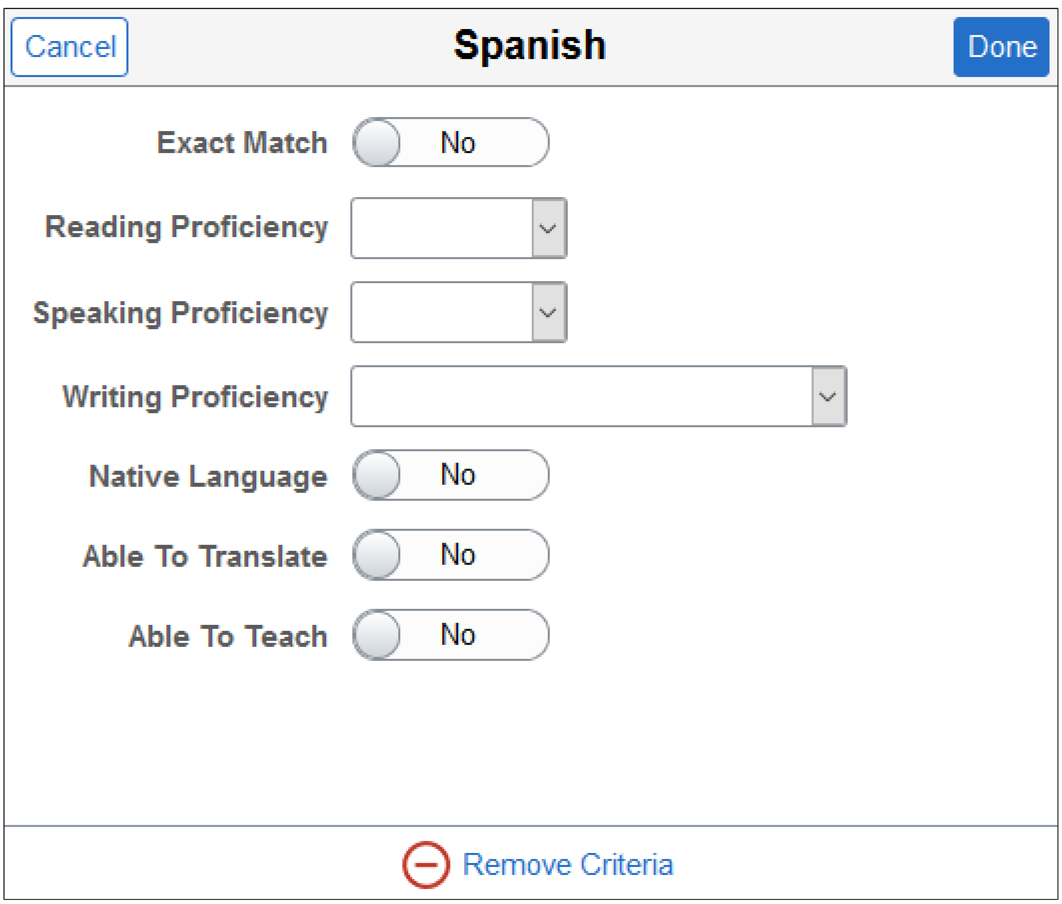
Use the <Edit Criteria Item> page (JPM_SRCH_CHGCR_SCF) to view, update, or remove search criteria from a group.

Note: The page name will display the content item you selected for edit.

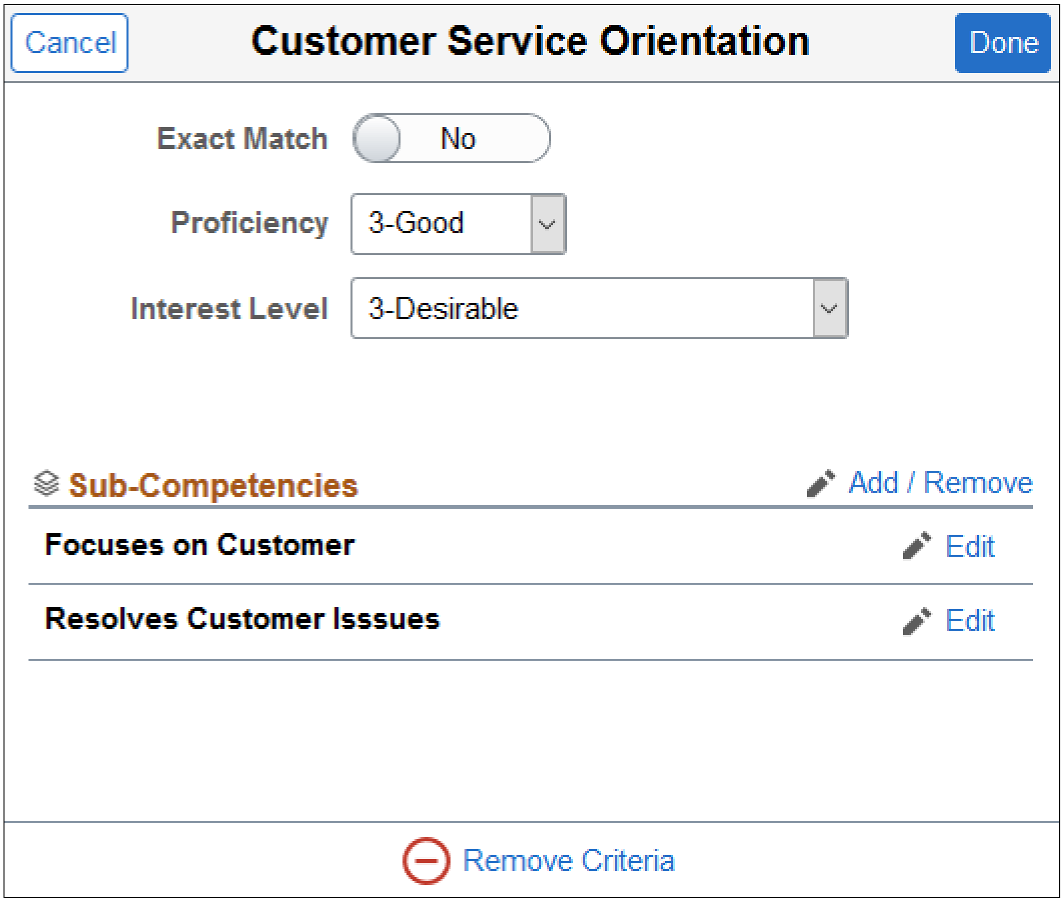
Navigation:

Click the **Edit** icon and link for a criteria card on the (Fluid) Search Criteria Page.

This example illustrates the fields and controls on the <Edit Criteria Item> page.



This example illustrates the fields and controls on the <Edit Criteria Item> page when it has Related Items content.



For search and match, the Exact Match option will always be available, while other properties (including proficiency) will vary based on the configuration.

Field or Control	***Description***
Exact Match	Identify if a criteria item must be part of the target profile for it to be returned in the search results. This option can be a used in conjunction with another property value in order to indicate what value the target source needs to match. If the Exact Match option is set to *Yes* for any criteria item, the search results include only those profiles containing that profile item and having the same property values as those in the search criteria, provided it is not combined with an OR operator in the search criteria where it may match the other item values. **Note:** Exact Match is the Mandatory property in the profile setup configuration. If the Mandatory property is included in a content section definition, the system uses the setting in the profile as the default value in the search criteria, but users can override the default. **Note:** A profile may still return if it contains a criteria item that does not have the same properties as the search criteria if the profile matches other items in the criteria.
Proficiency or **Target Proficiency**	Select the proficiency rating wanted for the criteria item. This field is available when the search criteria includes one or more of the Rating properties.
Remove Criteria icon and link	Click this icon and link to delete this criteria item from the criteria group.
Done	Click this button to save your changes.

Related Items (Sub-Competencies or Elements)

This section is available when related items have been configured for a content item and can be included as part of the Search/Compare process.

Field or Control	***Description***
Add / Remove (Competencies or Elements) icon and link	Click this icon and link to open the (Fluid) Add/Remove Criteria (Related Items) Page to include or remove related items as part of your search criteria.
Edit (Edit) icon and link	Click this icon and link to access the <Edit Related Item> Page where you can view information about the related item or remove it as part of the search criteria.

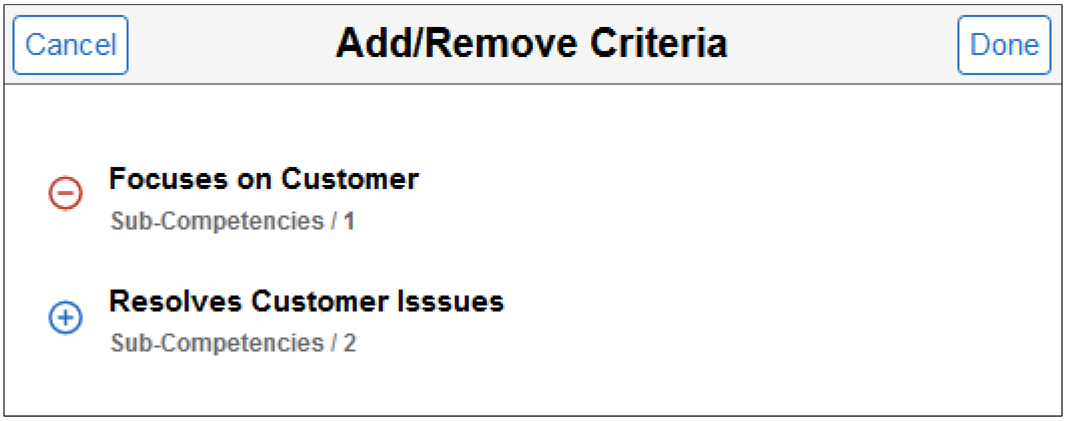
(Fluid) Add/Remove Criteria (Related Items) Page

Use the (Fluid) Add/Remove Criteria (Related Items) page (JPM_SRCH_ADDRI_SCF) to include or remove related items as part of your search criteria.

Navigation:

Click the **Add / Remove** link in the Related Items header (Sub-Competencies or Elements) group box of the <Edit Criteria Item> Page.

This example illustrates the fields and controls on the Add/Remove Criteria (Related Items) page.



Field or Control	***Description***
(Add Criteria) icon	Click to add a related item to the criteria group. When this icon appears, it is not part of your criteria group and search.
(Remove Criteria) icon	Click to remove a related item from the criteria and search. When this icon appears, it has already been selected for as part of the criteria group and search.
Cancel button	Click this button to return to the previous page without saving any of your changes.
Done button	Click this button to save and add your changes to the criteria.

<Edit Related Item> Page

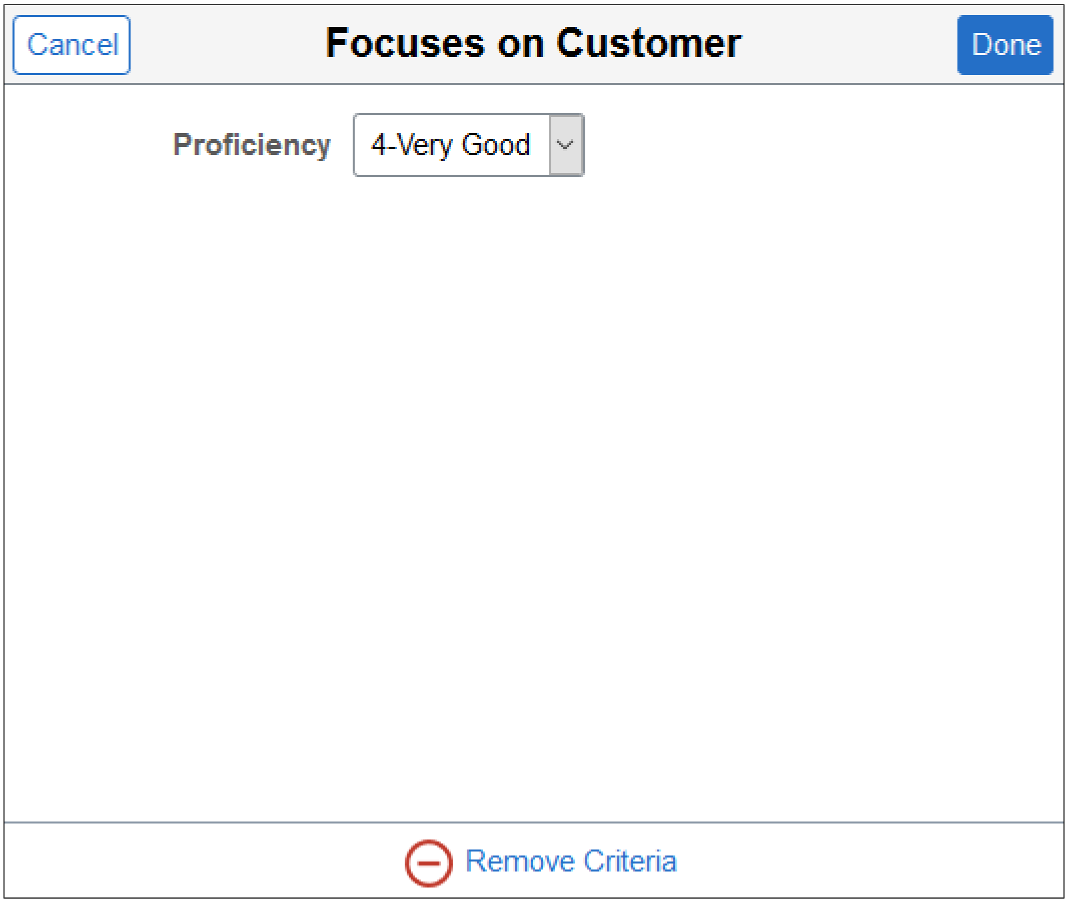
Use the <Edit Related Item> page (JPM_SRCH_CHGRI_SCF) to view information about the related item or remove it as part of the search criteria.

Note: The page name will display the related item you selected for edit.

Navigation:

Click the **Edit** icon and link for a related item on the <Edit Criteria Item> Page.

This example illustrates the fields and controls on the <Edit Related Item> page.



For related items, the exact match comes from the parent item and will never show on this page. However, other properties can be set up to appear on this page.

Field or Control	***Description***
Remove Criteria icon and link	Click this icon and link to delete this related item from the criteria and search.
Done	Click this button to save your changes.

(Fluid) Advanced Filters Page

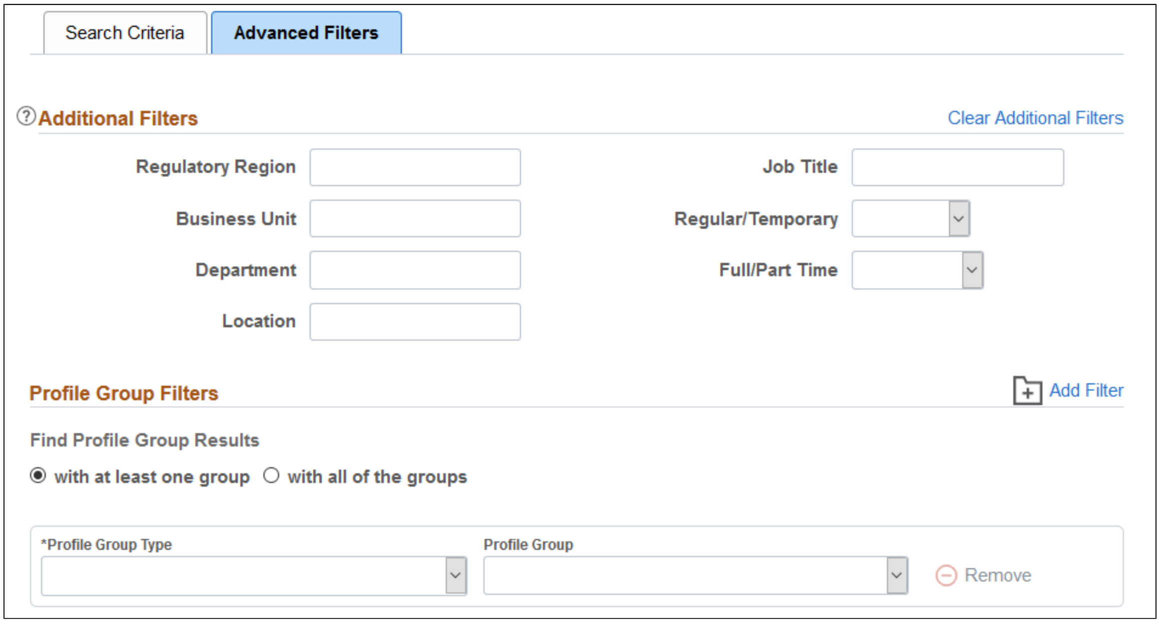
Use the Advanced Filters page (JPM_SRCH_GRPFLT_FL) to specify additional filters to narrow the search to specific profile groups or job data properties.

Note: If the search selected on the Search for Profiles page has a criteria rule of *Default and Display* or *No Default, Display (Adhoc),* this page is displayed before you run the search. If the criteria rule is *Default, No Display*, the system runs the search without first displaying this Search Criteria page.

Navigation:

- Select a search query item from the (Fluid) Start a New Search Page and select the Advanced Filters tab.
- Click the **Continue** button in the sub-header of the (Fluid) Search Profiles Page and select the Advanced Filters tab.

This example illustrates the fields and controls on the Advanced Filters page.



Use this information to limit or narrow your search to those with selected job data or that are part of a profile group. Filter data is used to filter the target profile information but does not contribute to the overall search scores or ranking. For example, you may want to find those person profiles that best match the requirements of the job *Manager-Information Systems* and are currently located in the *Paris* location. The Location field will filter out those candidates that are not in the Paris office and the ranking of the candidates is based on how well their profiles match the *Manager-Information Systems* job profile.

Additional Filters

This section is available when the target source is a person type.

Enter a partial or full description to use as a filter against your search. You can use single quotes (' ') around words that make up a phrase or an asterisk (*) to search for partial strings.

Field or Control	***Description***
Clear Additional Filters	Click this link to clear all the values you have entered in the Additional Filters section.

Profile Group Filters

The group box appears only if the target profile type belongs to searchable profile groups.

See Profile Group Types Page.

Field or Control	***Description***
Profile Group Type	Select a profile group type. Valid groups are those that share the same profile type as this search.
Profile Group	Select a profile group, which is a subset of the group type, and specify which profile IDs are members of this group.

Related Links

Creating Profile Group Types and Profile Groups
Understanding Setting Up Search and Compare Profiles

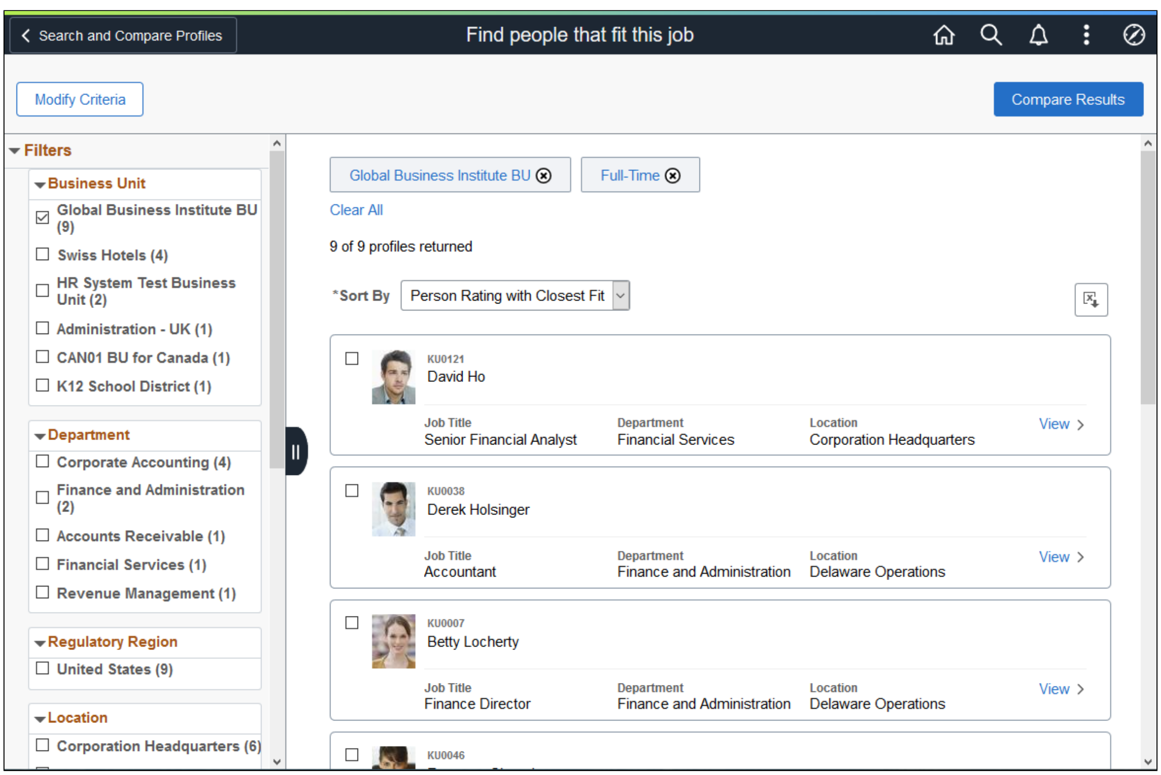
(Fluid) Search Results Page

Use the Search Results page (JPM_SRCH_RESULT_FL) to display the results of the search.

Navigation:

- Click the **Run Search** button on the Search Criteria page.
- Select a profile on the Select a Profile page.

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



Important! When running Search and Compare, if the indexes cannot be located, the system will issue a message stating that the search index could not be found. This means that the process Schedule Search Indexes has not been run to create the indexes or the search framework environment is not accessible. When the index has been located, but the search criteria does not find any profile matches, the system will issue a message stating that your search did not return any results.

Filters (Facets) Panel

This left panel displays facets that are based off of the search results. Select different facets to further filter and narrow your results.

Note: When you have multiple languages enabled, you must run the Person Profile search index for **All Languages** to enable the multi-language display of the facet values.

Breadcrumbs will appear above the Search Results grid for each selected facet. Each time you select a facet, the list of facet values is refined and a new set of values and counts are displayed.

Search Results

Field or Control	*Description*
Search and Compare Profiles button	Click this button in the page banner to start a new search. The system returns you to the (Fluid) Start a New Search Page that lists all the searches available for your role.
Modify Criteria button	Click this button to return to the (Fluid) Search Criteria Page and review, modify, and rerun the search with different search criteria.

Field or Control	***Description***
Sort By	This field is not available when the source and target profiles are of the same profile type (Non-Person-to-Non-Person or Person-to-Person) and displays results according to closest fit. Displays the sorting method of the profile search results. When the search criteria includes one or more of the Rating properties for an item, the target rating impacts the profile search ranking method. Options vary based on the target profile. The default method is provided by the value defined on the Define Search Configuration Page, but you can override this value. Options for a Person source to a Non-Person target profile include: • *Job Rating with Closest Fit*: The closer the job profile results are to the search criteria rating the higher the ranking. • *Lowest to Highest Job Rating*: Job ratings that are at or below the person rating will be ranked higher. Options for a Non-Person source to a Person target profile include: • *Person Rating with Closest Fit*: The closer the person profile results are to the search criteria rating the higher the ranking. • *High to Low Person Rating*: Person ratings that are at or above the job rating will be ranked higher. See also Understanding Search and Compare Profile Results Using the Fluid Pages.

Field or Control	*Description*
Add to Interest List button	This button appears when the target profile type for the search is a non-person profile type and the **Add to Interest List Button** option is selected on the Define Search Configuration Page. Click this button to add the profiles you have selected to a person's interest list. When you select jobs to add to an interest list, the system displays a confirmation message stating the number of jobs added and an ADDED badge will appear at the end of the row for that profile. **Note:** The ADDED badge remains until you move to another page.
Profile check boxes	Select the profiles that you want to include in the compare process. This will add the profile to the (Fluid) Compare Results Page. If you are viewing job profiles for a person and the **Add to Interest List** button is available, select those job profiles you want to add to the person's interest list.
View > profile link	Click this link to open and view the profile. The system displays the Person Profile page or the Non-person Profile page depending on the profile type.
Compare Results button	Click this button to run the comparison for the profiles you selected. The system displays the (Fluid) Compare Results Page, which lists the profiles you selected and the match percentages for each of the search criteria items.
Show More link	If more profiles are returned in the results than appear on the page, this link will appear at the bottom of the search results grid. Click this link to show additional profiles that are returned by the search. The default number of items to display is defined in the **Display Max** field on the (Fluid) Compare Results Page.

Related Links

Managing Interest Lists
"(Fluid) Maintaining Person Profiles" (PeopleSoft eDevelopment)
Maintaining Profiles as an Administrator

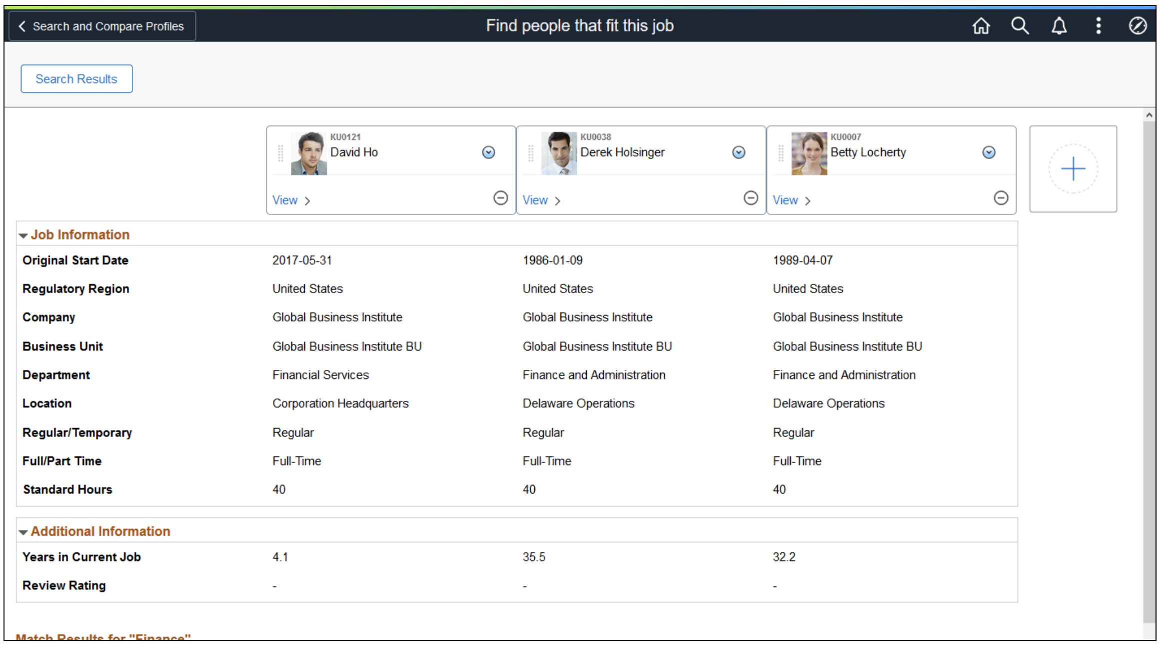
(Fluid) Compare Results Page

Use the Compare Results page (JPM_CSC_COMPARE_FL) to view a summary of the comparison of the profiles you selected.

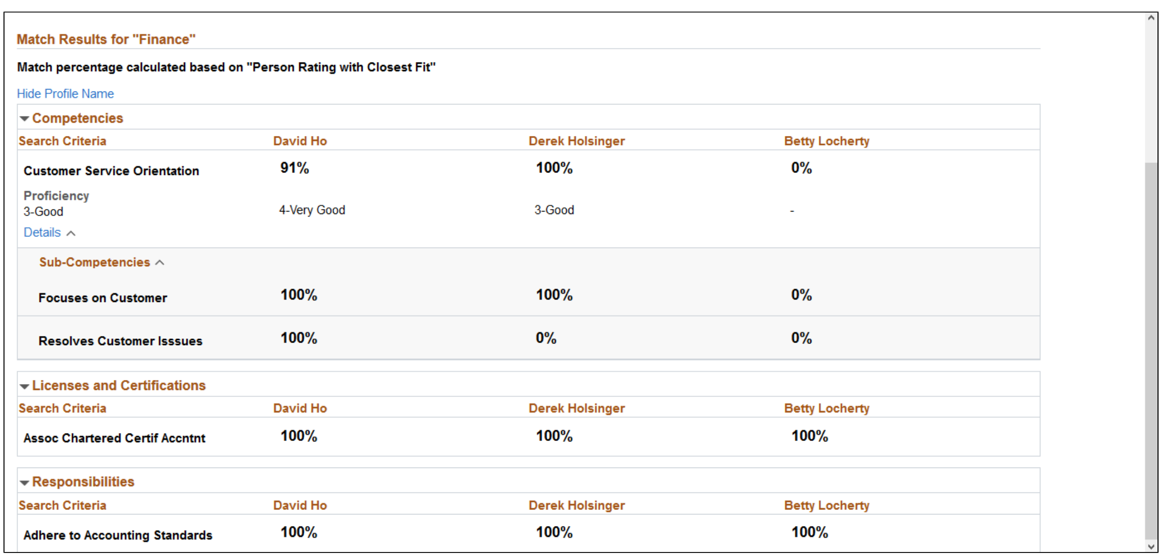
Navigation:

Click the **Compare Results** button on the (Fluid) Search Results Page or (Fluid) Profile Compare Page.

This example illustrates the fields and controls on the Compare Results page (1 of 2).



This example illustrates the fields and controls on the Compare Results page (2 of 2).

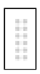
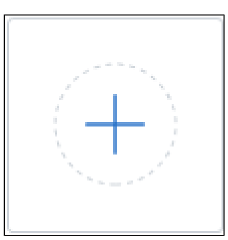


This page lists the items in the search criteria and the corresponding item score for the profiles that you selected.

Field or Control	***Description***
Search and Compare Profiles button	Click this button in the page banner to start a new search. The system returns you to the (Fluid) Start a New Search Page that lists all the searches available for your role.
Search Results button	Click this button to return to the (Fluid) Search Results Page and change filters, select other profiles for comparison, or change the sort order.

Profile Search Results Cards

The top of this page shows those profiles you selected for the compare process in a card format. Use this section to review, move, delete, or add profiles to the compare process.

Field or Control	***Description***
 (Drag and Drop) icon	Click and drag this icon to move a profile results card to another drag and drop icon location to change the sort order manually. **Note:** For touch screen or in screen reader mode, the cards will display Move to the Right [>] or Move to the Left [<] arrow buttons to change the order of the cards.
 (Related Actions) icon	Click the Related Actions icon to perform other transactions for this profile.
View link	Click this link to open and view the profile. The system displays the Person Profile page or the Non-person Profile page depending on the profile type.
 (Minimize Profile) icon	Click this icon to minimize a profile so it does not show in the compare results. This removes the profile from the grid, but displays this profile in minimized form at the bottom of the page. You can select this minimized icon to reinstate the profile in the Compare grids.
 (Add Profile) card icon	Click this card icon to open the (Fluid) Profile Selection Page and view a list of profiles that were returned as part of the search process and add it to the compare process.

Configurable Compare Group Headings

Administrators can configure this page to display additional compare groups using the search and compare configuration pages. This allows you to view additional fields in the compare results which do not impact the search ranking. In the previous screen shot, the Job Information and Additional Information collapsible sections were part of this search query's setup.

Matching Results for "<Profile Name>"

This section shows the results for the compare based on the profiles and sort order for the compare process.

Field or Control	***Description***
Match percentage calculated based on <Sort Order>	Displays this text and the sort order value that you selected on the previous page to indicate how the individuals are ranked on this page. For more information on sort order, see the **Sort By** field definition on the (Fluid) Search Results Page.
Show Profile Name and **Hide Profile Name** link	Click this link to toggle between showing the target profile names (for example, the employee or job names) in the header of each column.

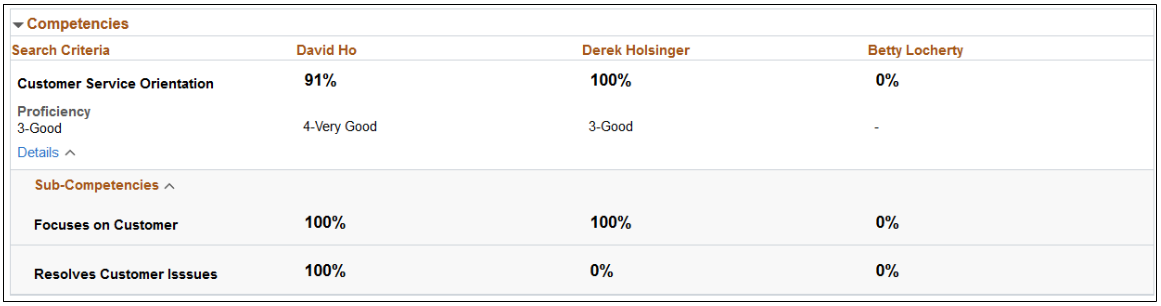
The results will display a collapsible Criteria Type group box that lists the criteria items selected for that type. The left most column in the box shows the source criteria items, and when applicable, the proficiency or requirements specified for that profile. The other columns represent the target items that correspond to the search criteria with a percentage score of how well they match to the source item based on the sort.

Field or Control	***Description***
Details	Click this link to show or hide additional details that reside on a row for a criteria item. The link will toggle between a down and up arrow to expand or collapse the data.

Related Items

When items in the search have related items, they will appear as a collapsible sub-section under the criteria item.

Example of the Compare Results page showing related items (Sub-Competencies) sub-section for a criteria item



Related Links

Setting Up Searches

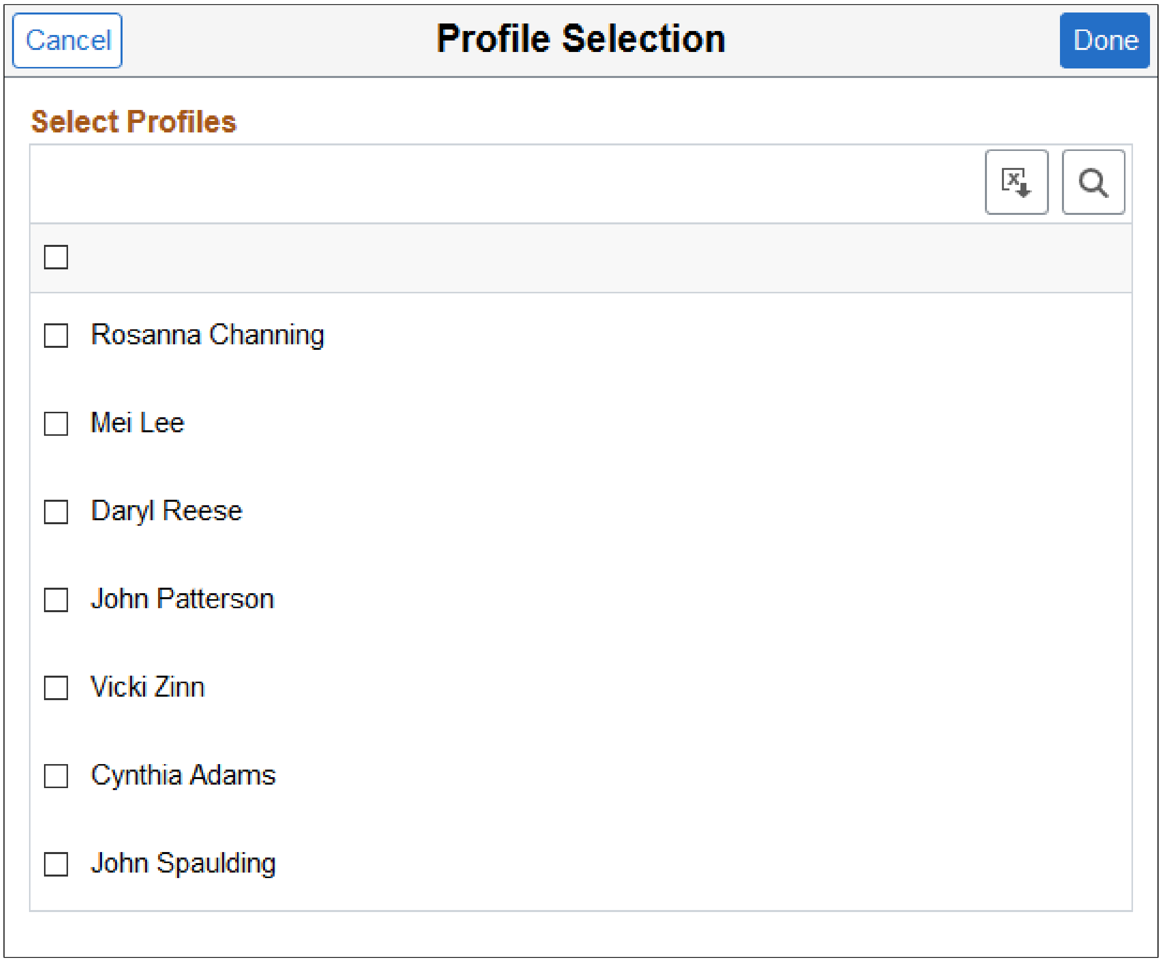
(Fluid) Profile Selection Page

Use the Profile Selection page (JPM_CSC_PRFSEL_SCF) to select other profiles to add to the compare process.

Navigation:

Click the Add Profile card icon from the (Fluid) Compare Results Page.

This example illustrates the fields and controls on the Profile Selection page.



Select the check box to add a profile to the Compare Results page. Select the check box in the header of the page to select all profiles.

Click **Done** to save your selections.

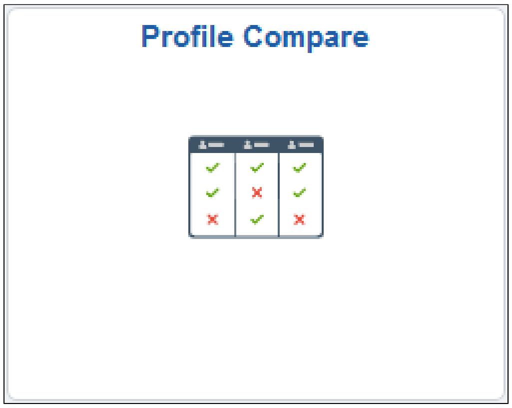
Profile Compare Tile

Use the Profile Compare tile to select a source and target profiles that you want to compare.

Navigation:

The Profile Compare tile is delivered as part of the Profile Administration Dashboard, but the location can change if you change the delivered home pages or if you personalize a home page.

This example illustrates the Profile Compare tile.



Click the Profile Compare tile to access the Profile Compare page.

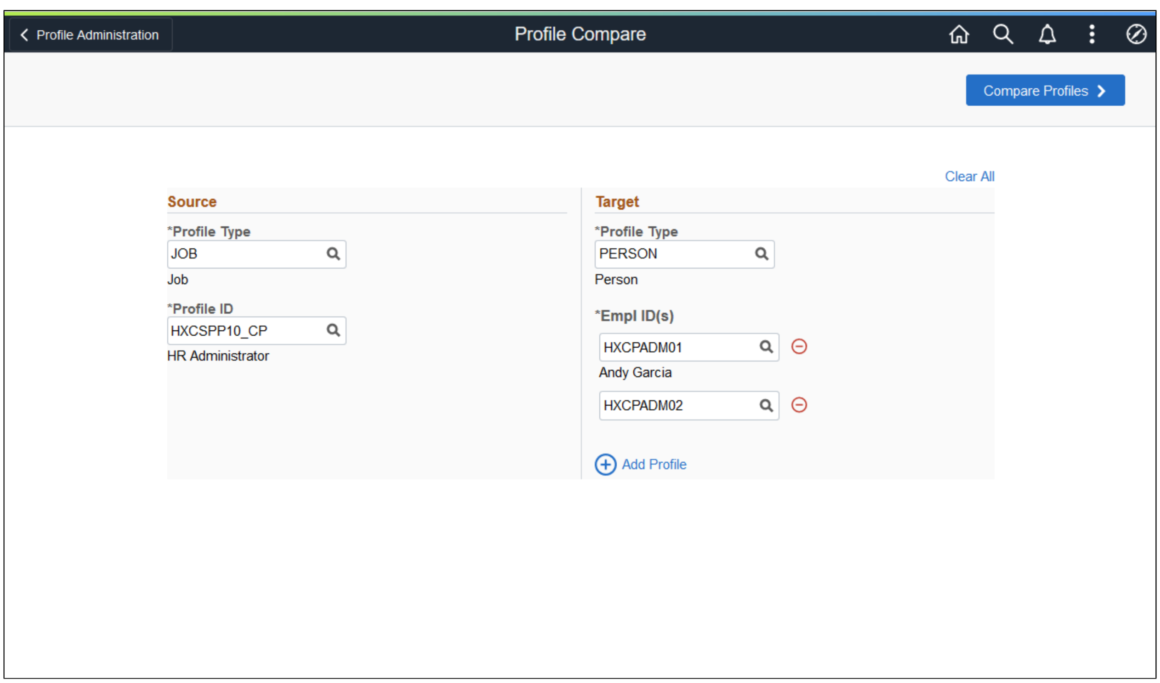
(Fluid) Profile Compare Page

Use the Profile Compare page (JPM_COMP_ADM_FL) to select the source and target profiles that you want to compare.

Navigation:

- From the Administer Workforce home page in fluid select the **Profile Administration tile** > **Profile Compare tile**.
- Select the Profile Compare tile from any home page to which it has been added.

This example illustrates the fields and controls on the **Profile Compare** page.



Field or Control	***Description***
Clear All link	Click this link to remove all source and target profile data from this page.
Compare Profiles button	Click this button to access the (Fluid) Compare Results Page and view a summary of the comparison of the profiles you selected.

Source

Use this section to enter source profile data. Tab out of a field to enable other fields on the page.

Field or Control	***Description***
Profile Type	Select the profile type that you want to use for the source of the compare.
Profile ID	Select the profile that you want to compare the target profiles against.

Target

Use this section to enter target profile data. Tab out of a field to enable other fields on the page.

Field or Control	***Description***
Profile Type	Select the profile type from which the target profiles are selected.
Profile ID(s) or **Empl ID(s)** (employee identification)	Select the profile ID. The system compares the target profiles with the profile selected in the **Source: Profile ID** field.
 (Remove) icon	Click this icon to remove a target profile ID from the compare results.
 **Add Profile** icon and link	Click to add another target profile ID.

Chapter 7

Matching Profiles

Understanding Profile Comparisons

The PeopleSoft Manage Profiles business process provides three ways to compare profiles:

- Search and compare profiles.
- Compare profiles.
- Role matching.

Search and Compare Profiles

Using the Search and Compare Profiles option you can configure searches to suit your content catalog, profile types, and users. Users select the search that they want to run and the search returns the profiles that best match the search criteria. Each profile in the search results is assigned a score that indicates how well the profile matches all the item properties specified in the search criteria. You can also compare profiles in the search results with the search criteria. Depending on the search type, users can also modify the search criteria, which makes the Search and Compare Profiles more flexible than role matching.

Use the Search and Compare Profiles option if you have a specific profile or profile item criteria and you want to search for matching profiles within a profile type.

See (Classic) Searching and Comparing Profiles and (Fluid) Searching and Comparing Profiles.

Compare Profiles

The Compare Profiles option provides an online comparison of the profile items in a source profile with one or more target profiles.

See (Classic) Compare Results Page or (Fluid) Compare Results Page.

Profile Matching

Use the profile matching options if you want to compare a specific employee profile with a specific non-person profile and you want fit-gap information on each competency based on proficiency and importance only.

The options on the **Workforce Development** > **Profile Management** > **Profiles** > **Profile Matching** menu enable you to compare the competencies and other profile content of an employee's profile against those required by a non-person profile, or a group of employee profiles against a non-person profile for a job task. The degree of fit is based on importance (field JPM_IMPORTANCE) and in the case of competencies, item proficiency (field JPM_RATING1). The comparison is not configurable and will use these fields only. The points assigned as a match score are based on the importance points of the matching items. If the non-person profile uses a profile type that does not have JPM_IMPORTANCE defined as a field on the content types, each item is given an importance of 1 and the points scored will match the number of items matched.

The matching can be done using any profile type, but the delivered PERSON and ROLE profile types are set up to work best with the scoring of points in the matching process.

Use Search and Compare Profiles if you want to:

- Search person or non-person profiles for best matches.

  With profile matching you select one person profile and one non-person profile and then match on proficiency and importance only. With Search and Compare Profiles, you have greater flexibility to set up search criteria and the searches return the profiles that best match those criteria.

  See (Classic) Searching and Comparing Profiles and (Fluid) Searching and Comparing Profiles.

- Make searches available to employees and managers.

  If you have eDevelopment installed you can set up searches for self-service users.

  See Understanding Setting Up Search and Compare Profiles and Understanding the Search and Compare Profiles Process.

Understanding Profile Matching

These topics discuss:

- Point awards and importance levels.
- Multiple evaluations.

Point Awards and Importance Levels

You run different inquiries to match:

- Employee to non-person profiles.
- Teams to job tasks.

However, all inquiries are performed the same way. The system awards points to employees or teams based on their assigned competencies using competency proficiency ratings, and importance given to the competency in the non-person–profile. Other content items are awarded points only based on the importance assigned in the non-person profile. If the **Importance** field is left blank, the system assigns an importance of *1* to all items. This happens when the profile type for the profile does not have the **Importance** field defined to the content sections.

The system assigns the following point values to importance levels:

Importance Level	***Points***
High	5

Importance Level	***Points***
Above Average	4
Average	3
Below Average	2
Low	1
None	0

This table shows the competency requirements for a human resources (HR) specialist position and the points awarded for each competency:

Competency	***Importance Level***	***Points Assigned***
Communication	High	5
Leadership	Average	3
Interpersonal Effectiveness	Above Average	4
Planning	Low	1
Decision Making	Above Average	4
Adaptability to Change	Below Average	2

The *total match* value for a position represents the maximum number of points available if the employee meets all the requirements. In the preceding example, the total match equals 19 (the sum of the points in the Points Assigned column). Points are assigned differently for content items other than competencies.

Employee Points for Content Items Other than Competencies

Other content points are calculated by the system. If the item exists in an employee's profile, the system awards points to the employee based on the importance value that you assign to the item. Some of the content types that are calculated in this manner are: degrees, school education, honors and awards, licences & certifications, language skills, memberships, and tests/examinations, and NVQs.

Employee Points for Competencies

Competencies have proficiency ratings associated with them. These ratings indicate a level of expertise. If you are using a profile type with this matching process, you should set it up in such a way that when you assign competencies to the non-person profile, you also define the rating required for each competency. Similarly, you should set up the employee profiles in such a way that you give a rating for each competency that you add to the profile.

The system assigns points to an employee only if the individual has the required proficiency level for the competency. The points assigned are calculated as the average of the points for the most current row for each of the user specified evaluation types. These user evaluation types are assigned in the Match Evaluation Types component.

Here are the match indicator icons:

Term	***Definition***
Over Qualified	If the employee's rating is more than one level higher than the rating required for the role, the system displays a blue diamond and the text indicating that the employee is over qualified.
Met	A green filled circle indicates that the employee possesses the required competency and has the required proficiency rating.
Met Some	A yellow triangle indicates that the employee has a rating that is one level lower than that required for the role.
Not Met	A red square indicates that the employee's rating in this competency is multiple levels below that required for the role.

Because proficiency ratings vary according to the rating model, the system uses the review points value associated with the rating to perform the match analysis. In some cases, the value in **Review Points** field on the Rating Model page is the same as the rating. For example, the PSCM rating model uses ratings from 0 (none) to 5 (expert), and these ratings have the associated review points of 0 to 5.

The following table shows an example of the ratings required for an HR specialist position, and it shows a hypothetical employee profile. The competencies in the profile are assigned the PSCM rating model. The Match Indicator column shown describes the icon that appears for the particular scenario.

Competency	***Required Rating***	***Employee Rating***	***Match Indicator***
Communication	5	5	Met (green circle icon)
Leadership	4	3	Met Some (yellow triangle icon)
Interpersonal Effectiveness	3	5	Over Qualified (blue diamond icon)
Planning	3	1	Not Met (red square icon)

Competency	*Required Rating*	*Employee Rating*	*Match Indicator*
Decision Making	2	3	Over Qualified (blue diamond icon)
Adaptability to Change	3	None	None

Related Links

Setting Up Profile Types
Defining Rating Models
Maintaining Profiles as an Administrator

Multiple Evaluations

If multiple people evaluate an employee or group of employees, each evaluation might include different competencies and competency ratings.

To control which evaluations are used in match and gap analyses, you define match evaluation types. For example, you might include only evaluations with the status of Approved/Official.

To understand how the system performs a match analysis with multiple evaluations, consider the following example:

Competency	*Manager Evaluation*	*Peer 1 Evaluation*	*Peer 2 Evaluation*	*Average Rating*
Communication	5	4	5	4.67
Leadership	4	3	3	3.33
Interpersonal Effectiveness	5	5	5	5
Planning	NA	NA	NA	NA
Decision Making	3	2	3	2.67
Adaptability to Change	2	1	2	1.67

If you use manager and peer evaluations for match analysis, the system calculates the average rating based on the three evaluations: manager, peer 1, and peer 2.

The following table shows the results if this employee is compared with the HR specialist position. The Employee Match column describes the icon that appears for the particular scenario.

Competency	***Importance***	***Points Assigned***	***Rating Required***	***Employee Rating***	***Employee Match***	***Employee Points***
Communication	High	5	5	4.67	Green half-filled circle	0
Leadership	Average	3	4	3.33	Green half-filled circle	0
Interpersonal Effectiveness	Above Average	4	3	5	+ Blue filled circle	4
Planning	Low	1	3	None	None	0
Decision Making	Above Average	4	2	2.67	Blue filled circle	4
Adaptability to Change	Below Average	2	3	1.67	Red circle outline	0

The total points value for the HR Specialist position is 19 (the sum of the values in the points assigned column). The employee earns the points for a competency when their rating meets or exceeds the required rating for the position being evaluated. In this case, the employee met or exceeded the required rating for two competencies. The combined point value for those two competencies is 8. Therefore, the employee's total points for evaluation against the HR Specialist position is 8.

Setting Up Match Evaluation Types

To set up match evaluation types, use the Match Evaluation Types (MATCH_TYPES) component.

This topic discusses how to define match evaluation types.

You must set up match evaluation types that correspond to the users for whom you want to run match analyses. Evaluation types determine which evaluations are included in each analysis.

Page Used to Set Up Match Evaluation Types

Page Name	***Definition Name***	***Usage***
Match Evaluation Types Page	CM_MATCH_INSTR	Define match evaluation types specifying the types of inquiries a user can run and the evaluation types a user can access. To run the match analyses, you must first set up evaluation types and user access.

Match Evaluation Types Page

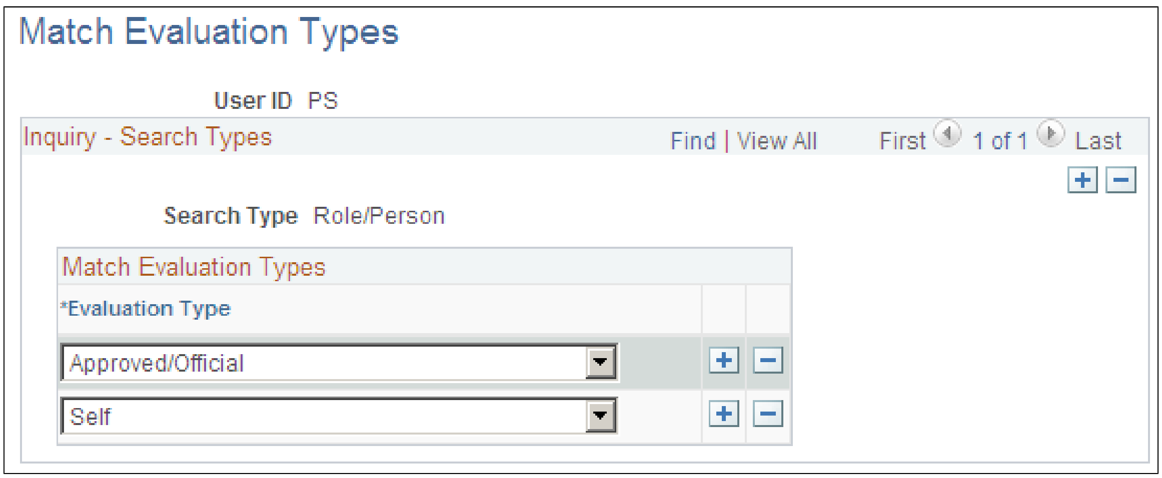
Use the Match Evaluation Types page (CM_MATCH_INSTR) to define match evaluation types specifying the types of inquiries a user can run and the evaluation types a user can access.

To run the match analyses, you must first set up evaluation types and user access.

Navigation:

Workforce Development > **Profile Management** > **Profiles** > **Profile Matching** > **Match Evaluation Types** > **Match Evaluation Types**

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



Field or Control	*Description*
Search Type	Displays *Role/Person.* This enables the selected user ID to match non-person profiles to employees, employees to non-person profiles, and teams to projects.
Evaluation Type	Select evaluation types for this user. These control which competency ratings the system includes when performing the analysis. For example, when performing a gap analysis for an individual (as opposed to a project team), you might include manager and peer evaluations and exclude customer evaluations. If *Self* is selected as the evaluation type, only self-evaluations that have been approved by the employee's manager are included in the role matching process.

Matching Employee Profiles

These topics list prerequisites and discuss how to match employee profiles.

Pages Used to Match Employees to Profiles

Page Name	***Definition Name***	***Usage***
Employee Profile Matching - Summary Page	CM_PROFILE_SUMM	Specify the employee, employee profile type and non-person profile with which you want to compare and view an analysis of the employee matches.
Employee Profile Matching - Competency Match Page	CM_PROFILE_MATCH	View competency matches that display an analysis of how the employee matches the individual competencies required for a given non-person profile.
Competency Match Detail Page	CM_PROF_MATCH_SEC	View competency match details of the employee's ratings in each competency assigned to the non-person profile.
Competency Training Page	CM_COMP_TRAIN_SEC	View training courses that address a selected competency.
Employee Profile Matching - Other Items Match Page	CM_PROFILE_MATCH2	Analyze other profile item matches for an employee. Review how well an employee matches individual content for a given non-person profile.
Employee Profile Matching - Gap-Fit Measurement Page	CM_PROFILE_MATCH3	Compare an employee's ratings in each required competency with the rating expected for the non-profile, and view the percentage difference. The sum of these percentages provides an overall indication of how well the employee matches the requirements.

Prerequisites

Before you use the employee to profile match, set up:

- A profile for the employee using a person usage profile type. This profile type should have competencies set up with *JPM_RATING1* as the **Proficiency** field. The delivered profile type *PERSON* is set up in this manner.
- A profile for the role using a non-person usage profile type. This profile type should have competencies set up with *JPM_RATING1* as the **Proficiency** field and *JPM_IMPORTANCE* set up as the **Importance** field. The delivered profile type *ROLE* is set up in this manner.
- Match evaluation types for the user ID of the person running the search to control which evaluations are considered in the role match.

Related Links

Setting Up Profile Types

[Understanding Managing Profiles](#)
[Setting Up Match Evaluation Types](#)

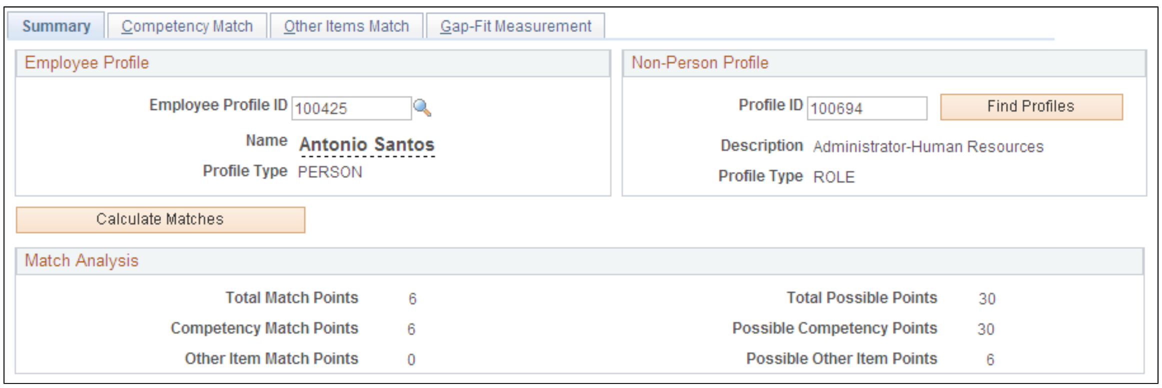
Employee Profile Matching - Summary Page

Use the Employee Profile Matching - Summary page (CM_PROFILE_SUMM) to specify the employee, employee profile type and non-person profile with which you want to compare and view an analysis of the employee matches.

Navigation:

Workforce Development > **Profile Management** > **Profiles** > **Profile Matching** > **Employee Profile Matching** > **Summary**

This example illustrates the fields and controls on the Employee Profile Matching - Summary page. You can find definitions for the fields and controls later on this page.



Field or Control	*Description*
Employee Profile ID	Select the employee profile you wish to analyze. If you do not know the profile ID of the employee, select the look up button to access a search page where you can enter additional information to locate an employee profile. The page will display the person's name and the profile type associated with the employee's profile after you have entered the employee profile ID.
Profile ID and **Find Profiles**	Enter the non-person profile ID you wish to compare to and rate the employee against. Select the **Find Profiles** button to access the search page to search for the profile by profile identity, profile group, or by description. The page will display the description and profile type after entering the ID.
Calculate Matches	Select this button, after you have selected an employee profile and non-person profile, to calculate the matches. The system compares the employee's profile content to that of the non-person profile and displays the results of the analysis.

Match Analysis

Field or Control	*Description*
Total Match Points and **Total Possible Points**	Indicates the employee's points out of the total points possible compared to the non-person profile. This calculation includes points for all content items, both competencies and the non-competency items. This total is weighted for the importance of each content item assigned to the non-person profile.
Competency Match Points and **Possible Competency Points**	Indicates how many of the points are from the employee's competencies and how many competency points are available. These numbers add to the total match and total possible point values.
Other Item Match Points and **Possible Other Item Points**	Indicates how many of the employee points are from non-competency content items and how many non-competency content item points are available. These numbers add to the total match and total possible point values.

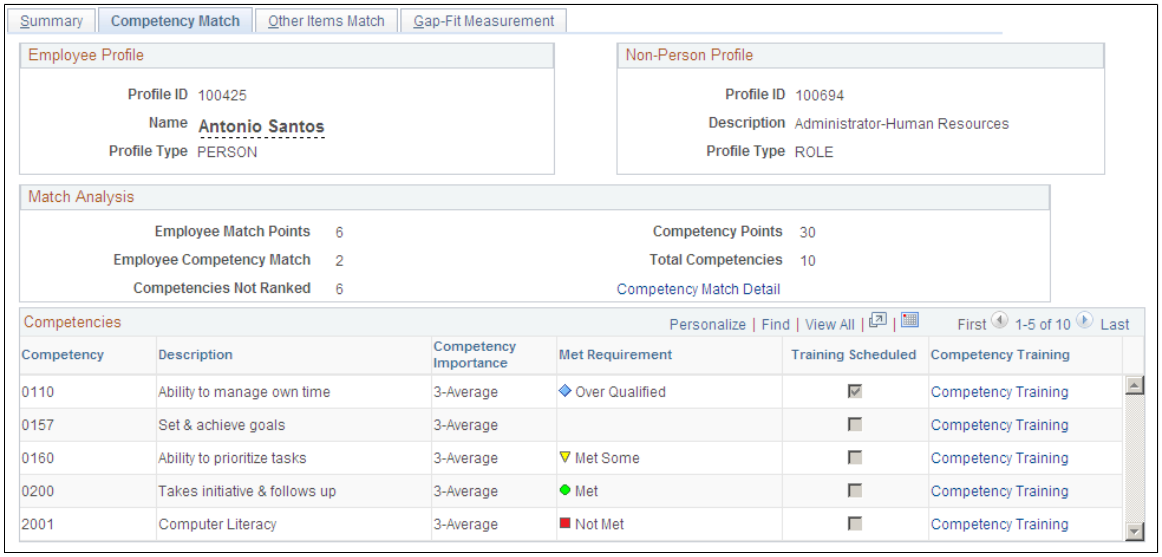
Employee Profile Matching - Competency Match Page

Use the Employee Profile Matching - Competency Match page (CM_PROFILE_MATCH) to view competency matches that display an analysis of how the employee matches the individual competencies required for a given non-person profile.

Navigation:

Workforce Development > **Profile Management** > **Profiles** > **Profile Matching** > **Employee Profile Matching** > **Competency Match**

This example illustrates the fields and controls on the Employee Profile Matching - Competency Match page. You can find definitions for the fields and controls later on this page.



Match Analysis

Field or Control	***Description***
Employee Match Points and **Competency Points**	Indicates the number of competency points that an employee has out of a total possible number of competency points required by the non-person profile.
Employee Competency Match and **Total Competencies**	Displays the number of employee competencies that match the competencies required for the non-person profile. For example, an employee may only have 7 of the 15 competencies defined for the role.
Competencies not ranked	Displays the number of competencies required by the role that are not included in the employee's evaluations.
Competency Match Detail	Click to open the Competency Match Detail page and view the breakdown of each competency and its match within the profiles.

Competencies

Field or Control	***Description***
Competency	Lists competencies assigned to the non-person profile, from highest to lowest importance.

Field or Control	*Description*
Importance	Displays the importance levels that are assigned to the competencies in the non-person profile.
Met Requirement	Displays the appropriate text and icon in the field for how the person matches the competency. Values include *Over Qualified, Met, Met Some,* and *Not Met.* When a person's profile does not have an item specified in the non-profile, no image will display for the item.
Training Scheduled	Indicates whether the employee is already scheduled for training in the competency.
Competency Training	Select this link to open the Competency Training page to see if any available training courses target the competency.

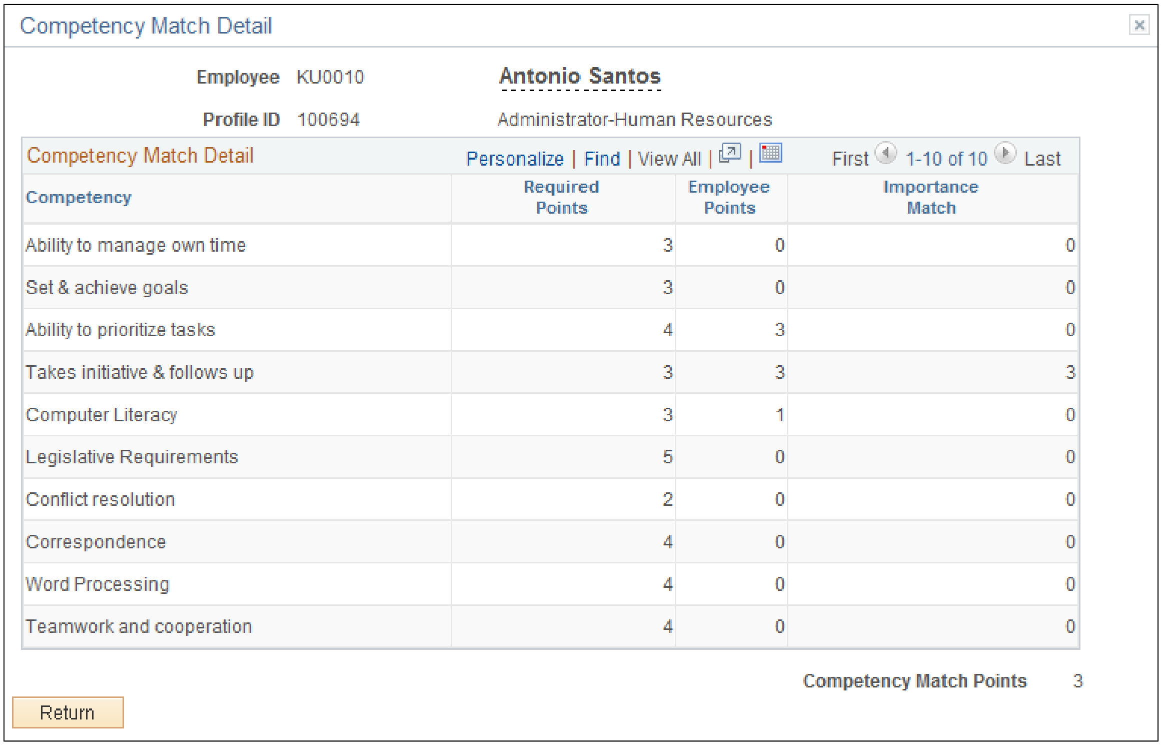
Competency Match Detail Page

Use the Competency Match Detail page (CM_PROF_MATCH_SEC) to view competency match details of the employee's ratings in each competency assigned to the non-person profile.

Navigation:

Click the **Competency Match Detail** link on the Competency Match page.

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


Competency Match Detail

Employee KU0010 Antonio Santos

Profile ID 100694 Administrator-Human Resources

Competency Match Detail Personalize | Find | View All | First 1-10 of 10 Last

Competency	Required Points	Employee Points	Importance Match
Ability to manage own time	3	0	0
Set & achieve goals	3	0	0
Ability to prioritize tasks	4	3	0
Takes initiative & follows up	3	3	3
Computer Literacy	3	1	0
Legislative Requirements	5	0	0
Conflict resolution	2	0	0
Correspondence	4	0	0
Word Processing	4	0	0
Teamwork and cooperation	4	0	0

Competency Match Points 3

Return

Field or Control	*Description*
Required Points	Each rating in a rating model has points associated with it. Required points are derived from the rating (or rather a point translation of the rating) this is assigned to the competency for the specified role. You specify the number of points for each rating by using the **Review Points** field on the Rating Model page.
Employee Points	Displays the employee's point rating for the competency. Employee review points are the point translation of the rating that the employee receives for the competency, and these points are specified for each rating using the **Review Points** field on the Rating Model page.
Importance Match	If the employee possesses the required competency and has the required rating, the employee is awarded points based on the importance of the competency.

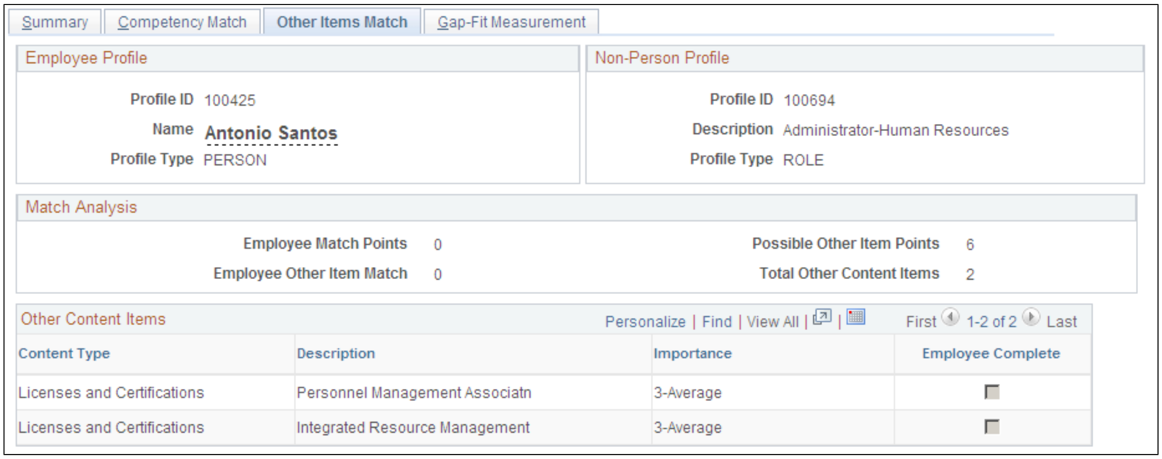
Employee Profile Matching - Other Items Match Page

Use the Employee Profile Matching - Other Items Match page (CM_PROFILE_MATCH2) to analyze other profile item matches for an employee. Review how well an employee matches individual content for a given non-person profile.

Navigation:

Workforce Development > Profile Management > Profiles > Profile Matching > Employee Profile Matching > Other Items Match

This example illustrates the fields and controls on the Employee Profile Matching - Other Items Match page. You can find definitions for the fields and controls later on this page.



Match Analysis

Field or Control	***Description***
Employee Match Points	Indicates the number of employee importance points for those profile item matches between the employee and the non-person profile.
Possible Other Item Points	Indicates the total number of profile item importance points available.
Employee Other Item Match	Displays the number of employee profile items other than competencies that match the profile items required for the non-person profile.
Total Other Content Items	Displays the number of total profile items that are required for the non-person profile.

Other Items

Field or Control	***Description***
Content Type	Lists each content type for the content item assigned to the non-person profile, from highest to lowest importance.

Field or Control	*Description*
Description	Lists descriptions of each profile item in the non-person profile from, highest to lowest importance.
Importance	Displays importance levels assigned to the profile item in the non-person profile.
Employee Complete	Indicates whether the employee has accomplished the content item.

Employee Profile Matching - Gap-Fit Measurement Page

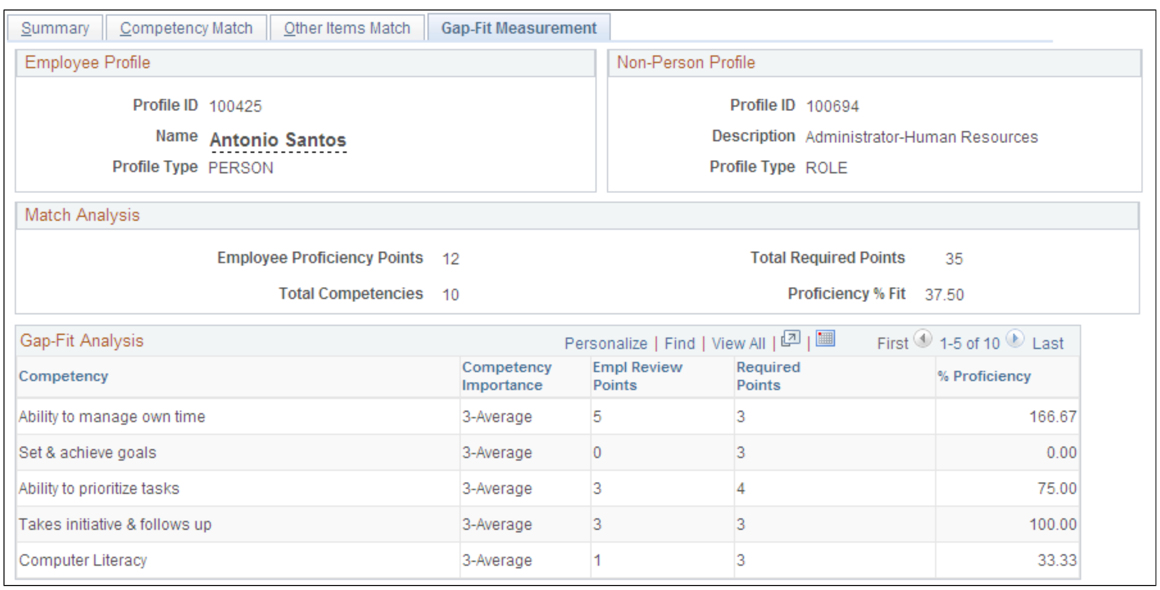
Use the Employee Profile Matching - Gap-Fit Measurement page (CM_PROFILE_MATCH3) to compare an employee's ratings in each required competency with the rating expected for the role, and view the percentage difference.

The sum of these percentages provides an overall indication of how well the employee matches the requirements.

Navigation:

Workforce Development > **Profile Management** > **Profiles** > **Profile Matching** > **Employee Profile Matching** > **Gap-Fit Measurement**

This example illustrates the fields and controls on the Employee Profile Matching - Gap-Fit Measurement page. You can find definitions for the fields and controls later on this page.



Match Analysis

Field or Control	***Description***
Employee Proficiency Points	Indicates how many importance points the employee has been awarded for competencies.
Total Required Points	Indicates how many competency importance points are possible for the non-person profile.
Total Competencies	Displays the number of competencies that are assigned to the non-person profile.
Proficiency % Fit (proficiency percentage fit)	Displays the employee's points as a percentage of the total possible. The system only includes points associated with competencies in this calculation. For example, if the employee has 5 points and the total possible for the non-person profile is 20 points, then the percentage fit is 25%.

Gap-Fit Analysis

Field or Control	***Description***
Empl Review Points (employee review points)	Displays the employee's proficiency point rating for the competency. For example, if you use the PSCM rating model, a rating of 5 has an associated review point value of 5.
Required Points	Each rating in a rating model has points associated with it. Points are derived from the rating (or rather a point translation of the rating) that is assigned to the competency for the specified role. You specify the number of points for each rating by using the **Review Points** field on the Rating Model page.

Field or Control	*Description*
% Proficiency (percentage proficiency)	Displays the employee's rating percentage compared to the rating required for the role. The system divides the employee review points by the required points and converts the result into a percentage. For example, if the value of the employee review points is 3 but the role requires a point value of 4, then the percentage proficiency is 75%. If an employee's rating exactly matches the required rating, then the percentage proficiency deficiency is 100%. A percentage less than 100% indicates that the employee has not met the required rating, and a percentage greater than 100% indicates that the employee's rating exceeds the rating required for the role.

Matching Teams to Projects

These topics list prerequisites and discuss how to match teams to projects.

Pages Used to Match Teams to Projects

Page Name	*Definition Name*	*Usage*
Create Teams Page	EE_TEAMS	Set up employee teams.
Compare Team to Job Task - Competency Match Page	CM_TEAM_ROLE	Analyze team competency matches. Compare the competencies assigned to a job task with the competency profiles of team members.
Competency Match Detail Page	CM_TEAM_ROLE_SEC	View the team members with the competency at the required proficiency.
Compare Team to Job Task - Other Items Match Page	CM_TEAM_ROLE2	Compare the content items other than competencies required by a job task with the team members' profile items.
Team Details Page	CM_TEAM_ROLE2_SEC	View a list of the team members with the required profile item.

Prerequisites

Before you can use the Compare Team to Job Task option, set up:

- A profile for the job task using a non-person usage profile type. This profile type should have competencies set up with *JPM_RATING1* as the **Proficiency** field and *JPM_IMPORTANCE* set up as the **Importance** field. The delivered profile type *ROLE* is set up in this manner.
- Profiles for the employees in the team using a person usage profile type. This profile type should have competencies set up with *JPM_RATING1* as the **Proficiency** field. The delivered profile type *PERSON* is set up in this manner.
- Match evaluation types for the user ID of the person running the search to control which evaluations are considered in the comparison.

Related Links

Understanding Managing Profiles
Setting Up Match Evaluation Types

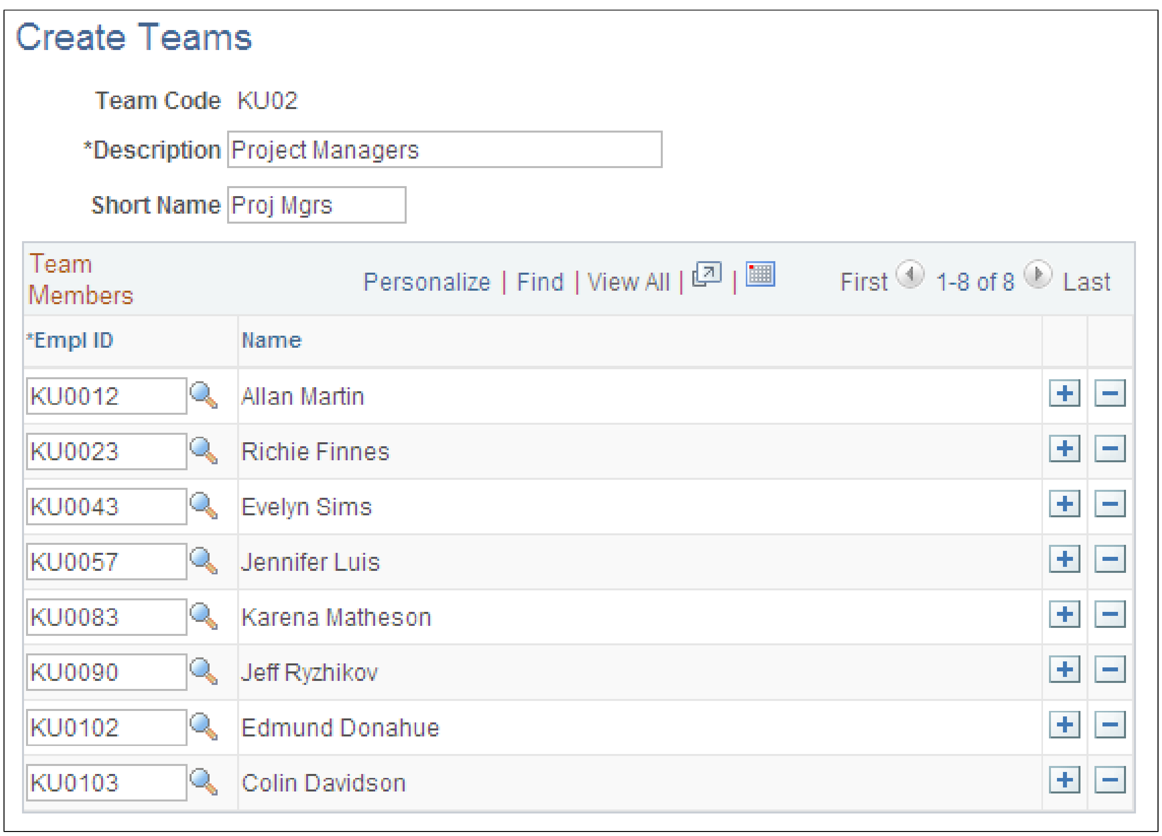
Create Teams Page

Use the Create Teams page (EE_TEAMS) to set up employee teams.

Navigation:

Workforce Development > **Profile Management** > **Profiles** > **Profile Matching** > **Create Teams** > **Create Teams**

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



Field or Control	Description
Team Members	Add members by selecting from the list of employee IDs. Insert new rows to add more employees.

Compare Team to Job Task - Competency Match Page

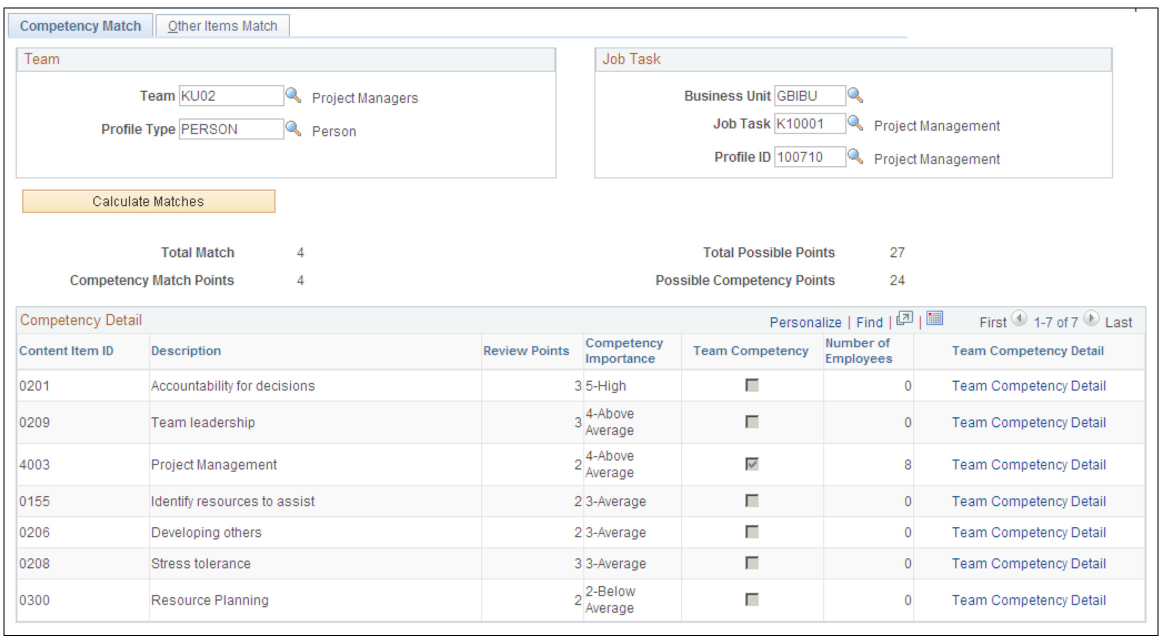
Use the Compare Team to Job Task - Competency Match page (CM_TEAM_ROLE) to analyze team competency matches.

Compare the competencies assigned to a job task with the competencies in the profiles of team members.

Navigation:

Workforce Development > **Profile Management** > **Profiles** > **Profile Matching** > **Compare Team to Job Task** > **Competency Match**

This example illustrates the fields and controls on the Compare Team to Job Task - Competency Match page. You can find definitions for the fields and controls later on this page.



Field or Control	Description
Total Match	Indicates how many competency and accomplishment points the team has been awarded for the job task
Total Possible Points	Indicates how many total competency and accomplishment points are possible for the task.
Competency Match Points	Indicates how many of the team points are from competencies.

Field or Control	Description
Possible Competency Points	Indicates how many of the task points are from competencies.

Competency Detail

Field or Control	Description
Team Competency	Indicates whether any member of the team has the competency at the required proficiency.
Number of Employees	Displays how many team members have the competency at the required proficiency level.
Team Competency Detail	Click to access the Competency Match Detail page and view which team members have the required competency.

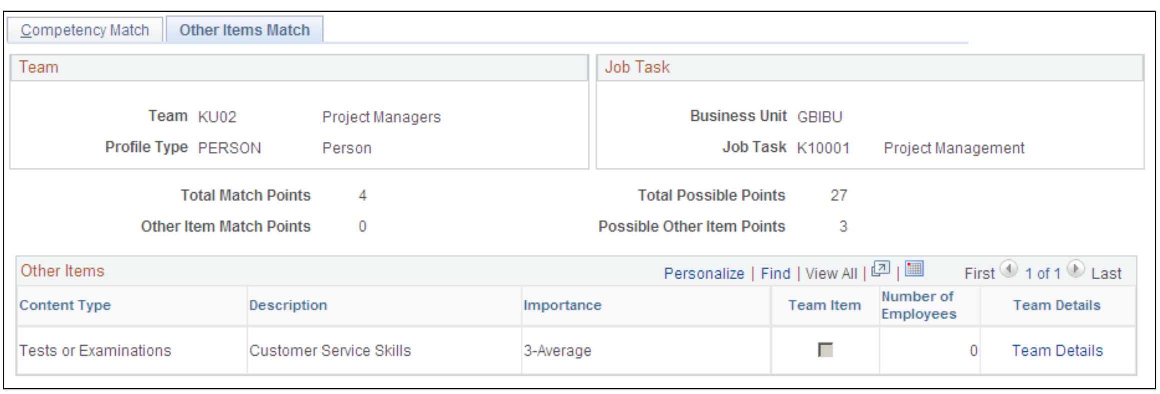
Compare Team to Job Task - Other Items Match Page

Use the Compare Team to Job Task - Other Items Match page (CM_TEAM_ROLE2) to compare the accomplishments required by a job task with the team members' accomplishments.

Navigation:

Workforce Development > **Profile Management** > **Profiles** > **Profile Matching** > **Compare Team to Job Task** > **Other Items Match**

This example illustrates the fields and controls on the Compare Team to Job Task - Other Items Match page. You can find definitions for the fields and controls later on this page.



Field or Control	Description
Total Match Points	Indicates how many content item points the team has been awarded for the job task

Field or Control	***Description***
Total Possible Points	Indicates how many total content item points are possible for the task.
Other Item Match Points	Indicates how many of the team points are from content items other than competencies.
Possible Other Item Points	Indicates how many of the task points are from content items other than competencies.

Other Items

Field or Control	***Description***
Team Item	Indicates whether any team member has the required item.
Number of Employees	Displays how many team members have the item.
Team Details	Click to access the Team Details page and view which team members have the required item.

Chapter 8

Running Content Catalog and Profile Reports

Reporting Content Catalog Items

This topic discusses how to reporting content catalog items.

Page Used to Run the Content Catalog Report

Page Name	*Definition Name*	*Usage*
Content Catalog Listing Page	JPM_CATLIST_RPT	Run the Content Catalog Listing report (JPM_CATI_RPT) that lists the content items that have been set up for a selected content type or for all content types. Access the report in Report Manager.
Competency Summary Page	CM_COMPETENCY_SUMM	Review the category that is assigned to competencies. You can view competencies in a selected competency category or a competency type.

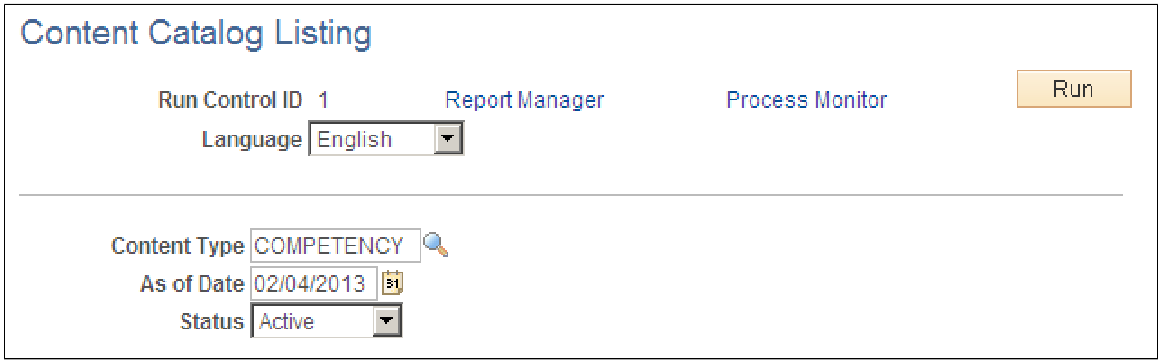
Content Catalog Listing Page

Use the Content Catalog Listing page (JPM_CATLIST_RPT) to run the Content Catalog Listing report (JPM_CATI_RPT) that lists the content items that have been set up for a selected content type or for all content types. Access the report in Report Manager.

Navigation:

Set Up HCM > **Product Related** > **Profile Management** > **Content Catalog** > **Content Catalog Listing** > **Content Catalog Listing**

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



Field or Control	***Description***
Content Type	Select the content type you want the report to include. Leave this field blank to generate a report of content items for all content types.
As of Date	Select a date to generate a list of content items effective as of the date specified. Leave this field blank to generate a report of content items for all dates.
Status	Select *Active* to include only items with an *Active* status in the report, *Inactive* to include only inactive items, or leave the field blank to include both active and inactive items.

Related Links

Setting Up to Use BI Publisher Reports and Profiles

Competency Summary Page

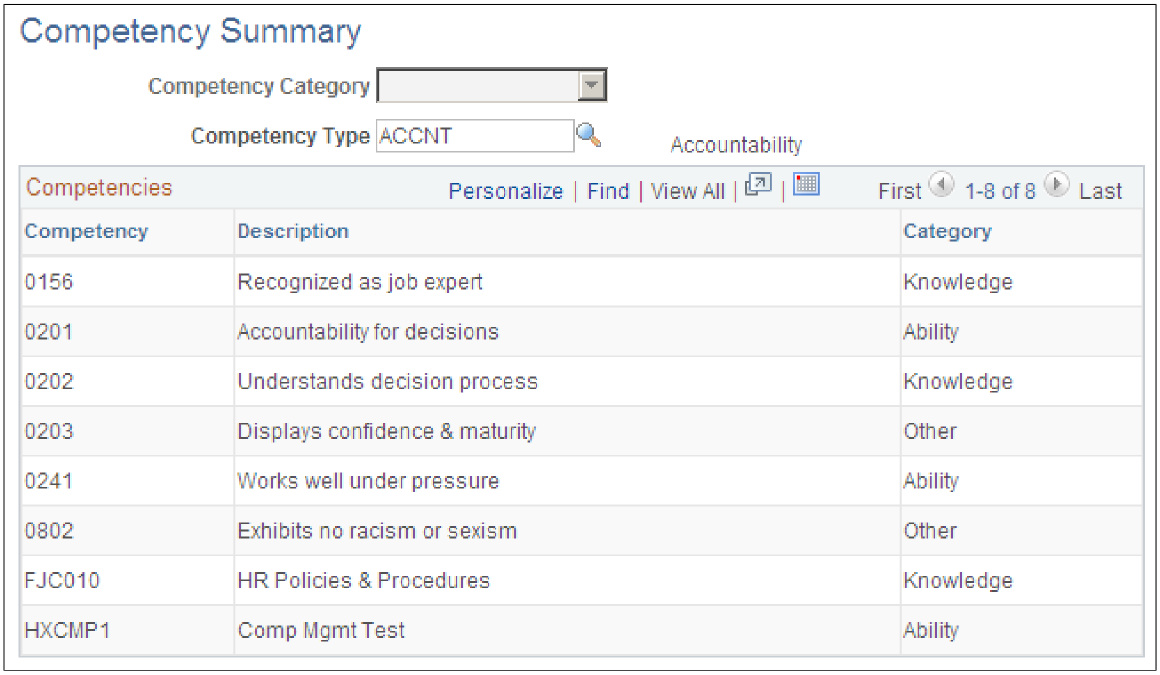
Use the Competency Summary page (CM_COMPETENCY_SUMM) to review the category that is assigned to competencies.

You can view competencies in a selected competency category or a competency type.

Navigation:

Set Up HCM > **Product Related** > **Profile Management** > **Content Catalog** > **Competency Summary** > **Competency Summary**

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



Select a competency category or type to list the competencies in that category or type. The competencies are listed in order of competency code.

Running Profile Reports

These topics discuss running profile reports.

Pages Used to Run Profile Reports

Page Name	***Definition Name***	***Usage***
Person Profile Report Page	JPM_PPROF_RPT	Run the Person Profile report (JPM_JPPP_RPT) to generate a PDF file for each person listed in the run parameters. Each report shows all items in the person's profile that are effective as of the date specified in run parameters. The Report Manager lists each report file separately with the employee ID in brackets in the report description.

Page Name	Definition Name	Usage
Non-Person Profile Report Page	JPM_NPPROF_RPT	Run the Non-Person Profile report (JPM_JPNP_RPT) to generate a PDF file for each profile listed in the run parameters. Each report shows all items in the profile that are effective as of the date specified in run parameters. The Report Manager lists each report file separately with the profile ID in brackets in the report description.
Competency Inventory Page	RUNCTL_PER011	Run the Competency Inventory report (PER011) that lists employees in a department and their competencies. Run the Refresh Employees Table Application Engine process (PER099) before running this report to include any new employees and their associated competencies. To run this process navigate to **Set Up HCM** > **System Administration** > **Database Processes** > **Refresh EMPLOYEES Table.** Use the same run control ID for both the Refresh Employee Table process and the Competency Inventory report.
License/Certificate Report Page	RUNCTL_CMM007	Run the License/Certificate report (CMM007) that lists employees who need to renew a license or certificate.
Internal Resume Page	RUNCTL_PER034	Run the Internal Resume report (PER034) that creates a resume-like document from the data contained in PeopleSoft tables, including the employee's PERSON profile. Sections of the report include: employee name and address, prior work history, education, salary history, job performance, training, special projects, competencies, languages, citizenship, visa/work permits, licenses and certificates, professional memberships, and honors and awards.

Person Profile Report Page

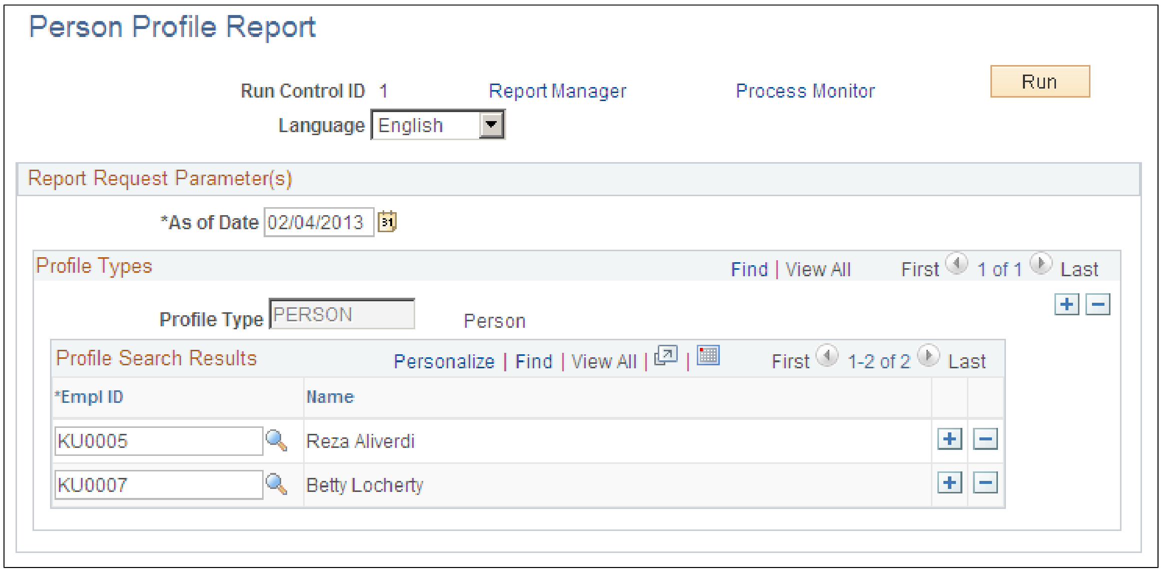
Use the Person Profile Report page (JPM_PPROF_RPT) to run the Person Profile report (JPM_JPPP_RPT) to generate a PDF file for each person listed in the run parameters.

Each report shows all items in the person's profile that are effective as of the date specified in run parameters. The Report Manager lists each report file separately with the employee ID in brackets in the report description.

Navigation:

Workforce Development > **Profile Management** > **Reports** > **Person Profile Report** > **Person Profile Report**

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



Field or Control	***Description***
As of Date	The report lists the person's profile items that are effective as of the date you select. If you enter the current date, the report is identical to the current printable profile generated from the Person Profile page.
Profile Type	Select the profile types associated with profiles you want to print, adding a row for each profile type. The system displays person profile types only. **Note:** After you select a profile type, you cannot change it.
EmplID	For each profile type, select the person IDs for the profiles that you want to print. You must select at least one person.

Related Links

Setting Up to Use BI Publisher Reports and Profiles

Non-Person Profile Report Page

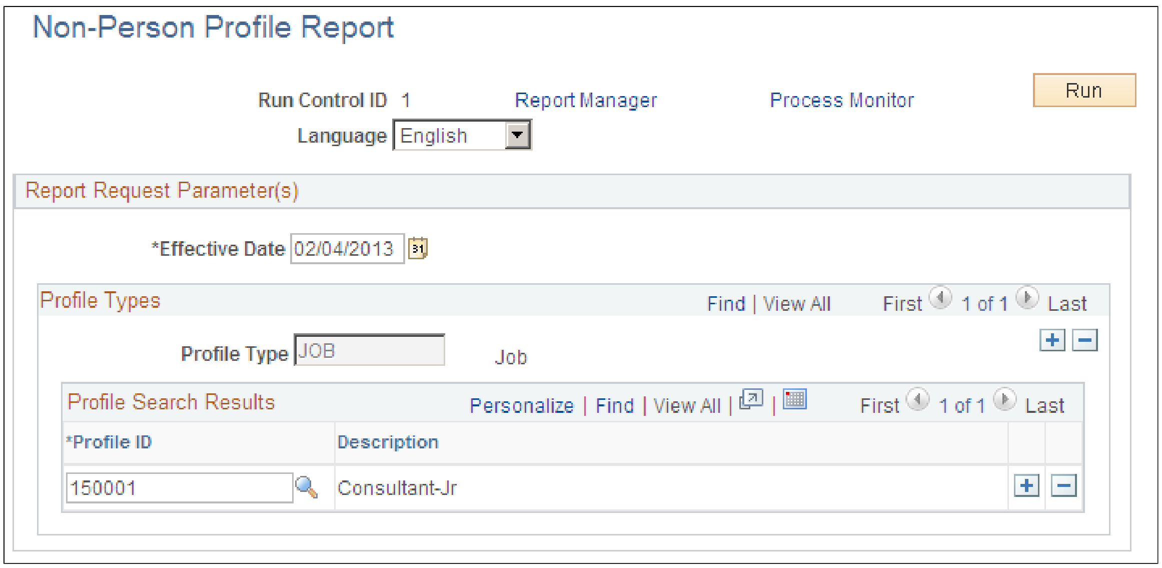
Use the Non-Person Profile Report page (JPM_NPPROF_RPT) to run the Non-Person Profile report (JPM_JPNP_RPT) to generate a PDF file for each profile listed in the run parameters.

Each report shows all items in the profile that are effective as of the date specified in run parameters. The Report Manager lists each report file separately with the profile ID in brackets in the report description.

Navigation:

Workforce Development > **Profile Management** > **Reports** > **Non-Person Profile Report** > **Non-Person Profile Report**

This example illustrates the fields and controls on the Non-Person Profile Report page. You can find definitions for the fields and controls later on this page.



Field or Control	***Description***
Effective Date	The report lists the profile items that are effective as of the date you select. If you enter the current date, the report is identical to the current printable profile generated from the Non-person Profile page.
Profile Type	Select the profile types associated with the profiles that you want to print, adding a row for each profile type. The system displays non-person profile types only.
Profile ID	For each profile type, select the profiles that you want to print.

Related Links

Setting Up to Use BI Publisher Reports and Profiles

Chapter 9

(GBR) Managing National Vocational Qualifications

Understanding NVQs

National Vocational Qualifications (NVQs) reflect the skills, knowledge, and understanding that employees possess, much like competencies. As with other accomplishments, NVQs enable transfer and progression, both within areas of competence and between them.

The national Qualifications and Curriculum Authority (QCA) coordinates the development and specification of NVQ standards. Refer to the QCA website http://www.qca.org.uk for further information. NVQ competence areas derive from a functional analysis of business roles and provide structure for competence-based qualifications. The qualifications are unit-based; the number and size of units varies between areas of competence. A unit is achieved when an enrolled employee is assessed as having competent skills and knowledge.

The following areas of work are currently covered by the NVQ system:

- Tending animals, plants, and land.
- Extracting and providing natural resources.
- Constructing.
- Engineering.
- Transporting.
- Providing health, social, and protective services.
- Providing goods and services.
- Manufacturing.
- Providing business services.
- Developing and extending knowledge and skill.
- Communicating.

NVQ competence levels include the following:

Level	***Definition***
Level 1	Competence that involves the application of knowledge and skills in the performance of a range of varied work activities, most of which may be routine or predictable.
Level 2	Competence that involves the application of knowledge and skills in a significant range of varied work activities and performed in a variety of contexts. Some of the activities are complex or non-routine, and there is some individual responsibility and autonomy. Collaboration with others, perhaps through membership of a work group or team, may often be a requirement.
Level 3	Competence that involves the application of knowledge and skills in a broad range of varied work activities performed in a variety of contexts, most of which are complex and non-routine. There is considerable responsibility and autonomy, and control or guidance of others is often required.
Level 4	Competence that involves the application of knowledge and skills in a broad range of complex, technical or professional work activities, performed in a wide range of contexts and with a substantial degree of personal responsibility and autonomy. Responsibility for the work of others and the allocation of resources is often present.
Level 5	Competence that involves the application of skills and a significant range of fundamental principles across a wide and often unpredictable variety of contexts. Substantial personal autonomy and significant responsibility for the work of others and for the allocation of substantial resources is important, as personal accountability for analysis and diagnosis, design, planning, execution, and evaluation.

Several organizations develop, deliver, award, and preserve the quality of NVQs:

- *Sector bodies* identify, define, and update employment-based standards of competence for groups of occupations.
- *Awarding bodies* also develop NVQ standards. Additionally, they monitor the assessment process and award NVQs and unit certificates. They verify that employees are assessed fairly and consistently across all assessment centers.

The National Database of Vocational Qualifications contains comprehensive information on NVQs, including the units that make up each qualification, key skills, and units specifically developed for assessors and verifiers.

Setting Up NVQ Information

These topics provide an overview of NVQ setup and discuss how to specify awarding bodies for NVQs.

Pages Used to Set Up NVQ Awarding Bodies

Page Name	***Definition Name***	***Usage***
NVQ Award Body Table Page	NVQ_AWARD_TBL	Define name and location information for NVQ awarding bodies.
NVQ Award Bodies Page	NVQ_DETAILS	Specifying awarding bodies for NVQs that you have defined in the content catalog. You must set up NVQs and the NVQ Award Body Table values in before you can use this page.

Understanding NVQ Setup

To track NVQs, you need to define the following:

- NVQ content items.
- NVQ unit content items.
- NVQ Element content items.

  NVQ units are divided into elements and you track an employee's progress for each element separately.
- Awarding bodies.

NVQs, NVQ units, and NVQ elements are stored in the content catalog. Use the following delivered content types for NVQs:

Content Type	***Description***
NVQ ELEMENT	Use to define the elements associated with NVQ units.
NVQ UNIT	Use to define the NVQ units that are required by NVQs.
NVQ	Use to define the NVQ codes.

The content types are related as follows:

- NVQ ELEMENT is a child of NVQ UNIT. This enables an element content item to be defined for different NVQ Unit content items. Satisfying the element only satisfies it within a specific NVQ Unit.
- NVQ UNIT supports NVQ.

  This enables one NVQ unit to be linked to more than one NVQ. Satisfying one NVQ Unit qualifies as completion within all NVQs that are supported by the NVQ Unit.

When you set up NVQs, NVQ units, and NVQ elements, use the Relationship page in the Content Item component to link these items.

Set up NVQ data as follows:

1. Set up the NVQs, NVQ units, and NVQ elements in the content catalog.
2. Set up awarding body name and location using the NVQ Award Body Table component (NVQ_AWARD_BODY).
3. Assign awarding bodies to NVQs using the NVQ Award Bodies component (NVQ_DETAILS).

Related Links

Understanding the Content Catalog

NVQ Award Bodies Page

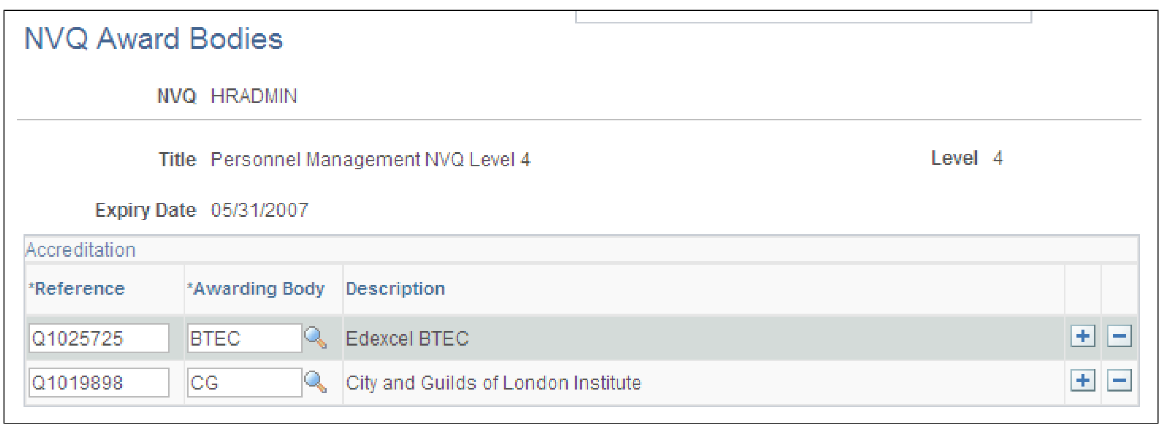
Use the NVQ Award Bodies page (NVQ_DETAILS) to specifying awarding bodies for NVQs that you have defined in the content catalog.

You must set up NVQs and the NVQ Award Body Table values in before you can use this page.

Navigation:

Set Up HCM > **Product Related** > **Profile Management** > **Content Catalog** > **NVQ Award Bodies** > **NVQ Award Bodies**

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



Field or Control	***Description***
Level	Displays the NVQ level that is defined for the NVQ in the content catalog.
Expiry Date	Displays the date on which current NVQ details will be reviewed by the awarding bodies.

Field or Control	*Description*
Reference and **Awarding Body**	Select one or more awarding bodies. Enter the reference numbers for each awarding as provided by the NVQ.

Processing Employees' NVQs

These topics discuss processing employees' NVQs.

Pages Used to Process Employees' NVQs

Page Name	*Definition Name*	*Usage*
Enroll NVQ Page	NVQ_EMPLNVQS	Register employees for NVQ programs.
NVQ Review Page	NVQ_REVIEW	Enter an NVQ review.
NVQ Unit Plan Page	NVQ_UNIT_PLAN	Populate and track unit status for an NVQ review.
Unit Detail Page	NVQ_UNIT_PLAN_SEC	Enter details for an NVQ unit being reviewed.
Element Detail Page	NVQ_EMPLELEM_SEC	Enter details for an element of an NVQ unit being reviewed.
View NVQs or View NVQs Units Page	JPM_PROF_DTL_SEC	View NVQ and NVQ Units details for a given person's profile.

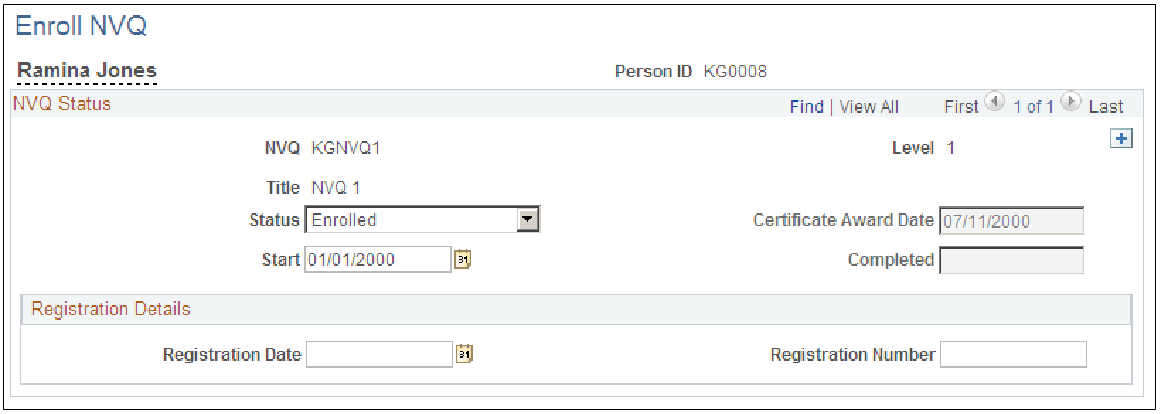
Enroll NVQ Page

Use the Enroll NVQ page (NVQ_EMPLNVQS) to register employees for NVQ programs.

Navigation:

Workforce Development > **Profile Management** > **Manage NVQ GBR** > **Enroll NVQ** > **Enroll NVQ**

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



Field or Control	***Description***
Status	Enter the status of the NVQ for which you are registering the employee. Valid values are: • *Achieved:* Select to indicate that the employee achieved the NVQ. You can select this value only if all of the associated NVQ units have a status of Completed. • *Cancelled:* Select to cancel the employee's registration for the NVQ program. • *Enrolled:* Select to enroll the employee in the NVQ program. • *Previous Achievement:* Select to indicate that the employee already achieved this NVQ prior to enrollment in this program.
Start	Enter the date on which you set the NVQ status.
Certificate Award Date	Enter the date of the NVQ certificate award. This field is available only if you select *Achieved* or *Previous Achievement* in the **Status** field.
Completed	Enter the date on which the NVQ was completed. This field is available only if you select *Achieved* or *Previous Achievement* in the **Status** field.
Registration Date and **Registration Number**	Enter the date the employee registered for the NVQ program along with any registration number assigned to the employee.

When you save this page, the system updates the Manage Profiles profile tables with the enrollment information using the SetPersonProfileItems service. You can then view the enrollment information when you access the Person Profile page for the employee, but it cannot be updated from this page.

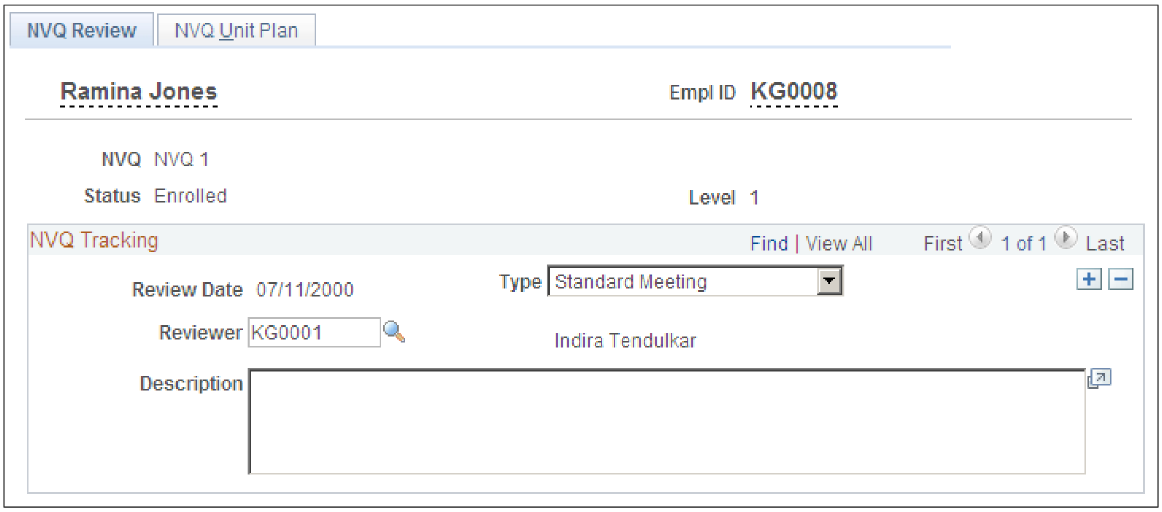
NVQ Review Page

Use the NVQ Review page (NVQ_REVIEW) to enter an NVQ review.

Navigation:

Workforce Development > **Profile Management** > **Manage NVQ GBR** > **Track NVQ** > **NVQ Review**

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



Field or Control	***Description***
Review Date	Enter or view the date of the review.
Type	Select the type of review you are entering. Valid values are: • *Brief Meet* • *Meeting* • *Requested* • *Review*
Reviewer	Enter the ID of the reviewer.
Description	Enter any pertinent notes you want to record for the review.

Note: You must also enter information in the required fields on the NVQ Unit Plan page before you can save the information on the NVQ Review page.

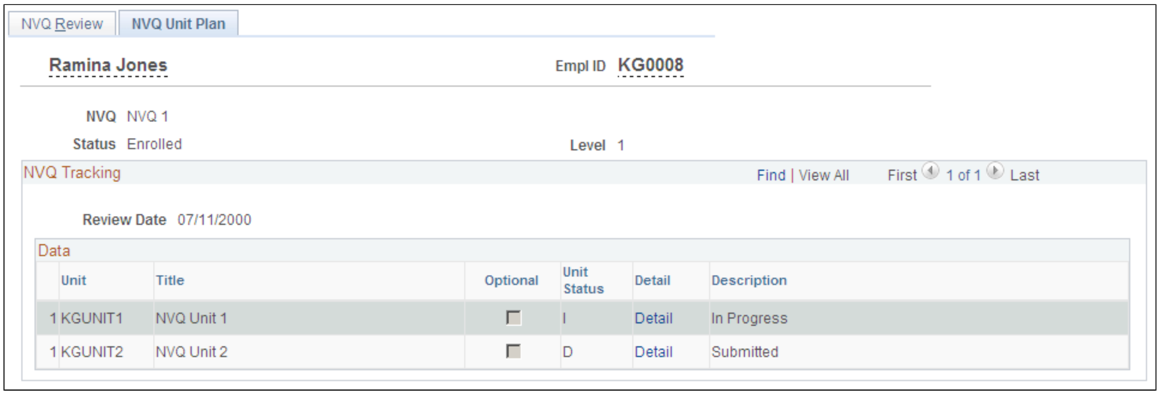
NVQ Unit Plan Page

Use the NVQ Unit Plan page (NVQ_UNIT_PLAN) to populate and track unit status for an NVQ review.

Navigation:

Workforce Development > **Profile Management** > **Manage NVQ GBR** > **Track NVQ** > **NVQ Unit Plan**

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



This page enables you to track the status of the NVQ units associated with an NVQ program in which an employee is enrolled. Each time you create a new review on the NVQ Review page, you must populate the NVQ units on this page and enter a value in the **Unit Status** column for each unit.

Field or Control	***Description***
Populate NVQ Units	Click to populate the NVQ Tracking, Data grid with the units defined with a *Supports* relationship with the content item associated with the NVQ. Once you have populated the grid, this button is no longer visible.
Unit Status	Select the status for each NVQ unit in the NVQ Tracking, Data grid. Valid values are: • *C (Completed)* • *D (Submitted)* • *I (In Progress)* • *N (Not Started)* • *P (Planned)* **Note:** The system changes the status to *Completed* automatically for a unit when you enter a date in the **Completed** field on the Unit Detail page. All NVQ units associated with an NVQ must have a status of *Completed* before you can set the NVQ status to *Achieved* on the Enroll NVQ page.

Field or Control	Description
Detail	Click to access the Unit Detail page.

When you create and save a new review using the Track NVQ component, the system updates the Manage Profiles profile tables using the SetPersonProfileItems service (or the DeletePersonProfileItems service if you deleted a review). You can then view the tracking information for both the NVQ and NVQ Units content sections on the Person Profile page.

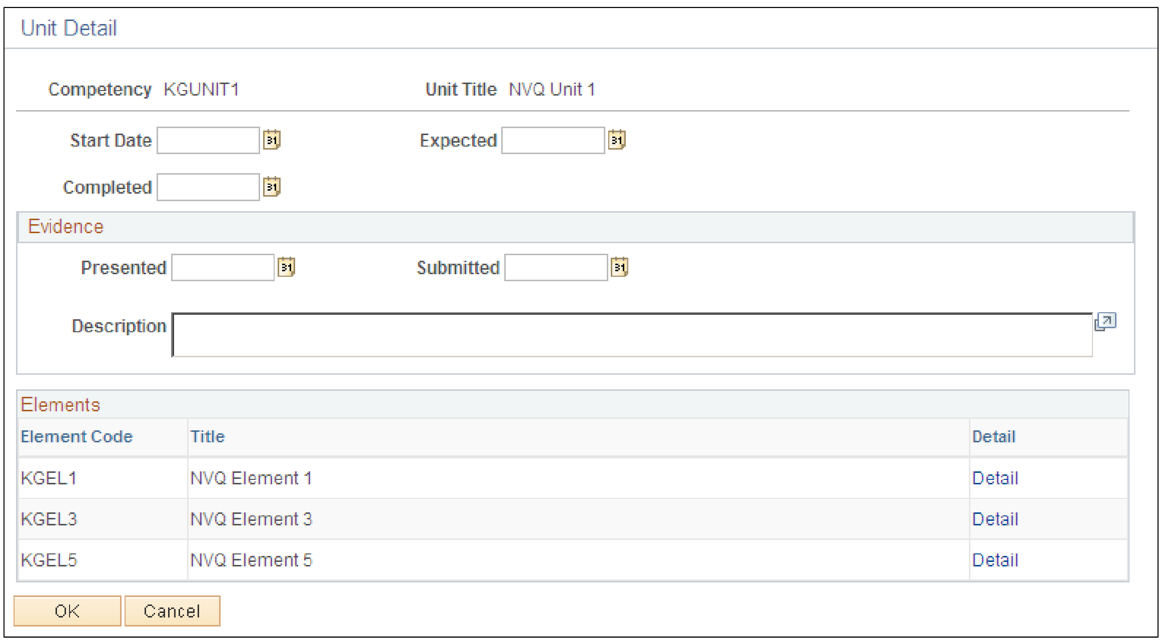
Unit Detail Page

Use the Unit Detail page (NVQ_UNIT_PLAN_SEC) to enter details for an NVQ unit being reviewed.

Navigation:

Click the **Detail** link for an NVQ unit on the NVQ Unit Plan page.

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



Field or Control	Description
Start Date	Enter the date on which the employee began the NVQ unit.
Expected	Enter the date on which the employee is expected to complete the NVQ unit.

Field or Control	***Description***
Completed	Enter the actual date on which the employee completed the NVQ unit. When you enter a date in this field and click the **OK** button, the system automatically sets the status of the NVQ unit to *Completed.*
Presented	Enter the date on which the evidence was presented.
Submitted	Enter the date on which the evidence was submitted.
Description	Enter information regarding evidence submitted by the employee toward the completion of the NVQ unit.
Detail	Click to access the Element Detail page.

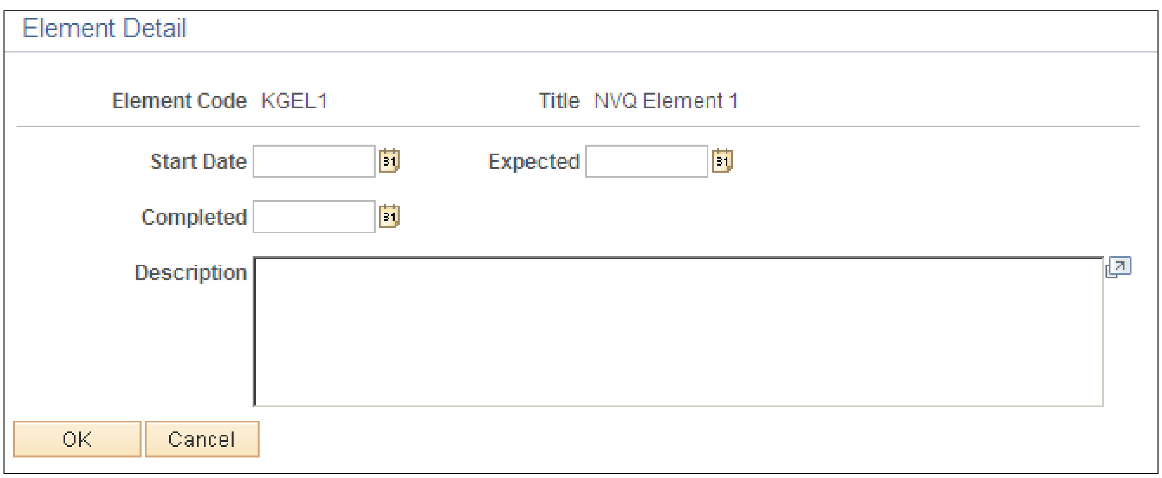
Element Detail Page

Use the Element Detail page (NVQ_EMPLELEM_SEC) to enter details for an element of an NVQ unit being reviewed.

Navigation:

Click the **Detail** link for an element on the Unit Detail page.

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



Field or Control	***Description***
Start Date	Enter the date on which the employee began the element.
Expected	Enter the date on which the employee is expected to complete the element.

Field or Control	***Description***
Completed	Enter the actual date on which the employee completed the element.
Description	Enter any information pertinent to the completion of the element.

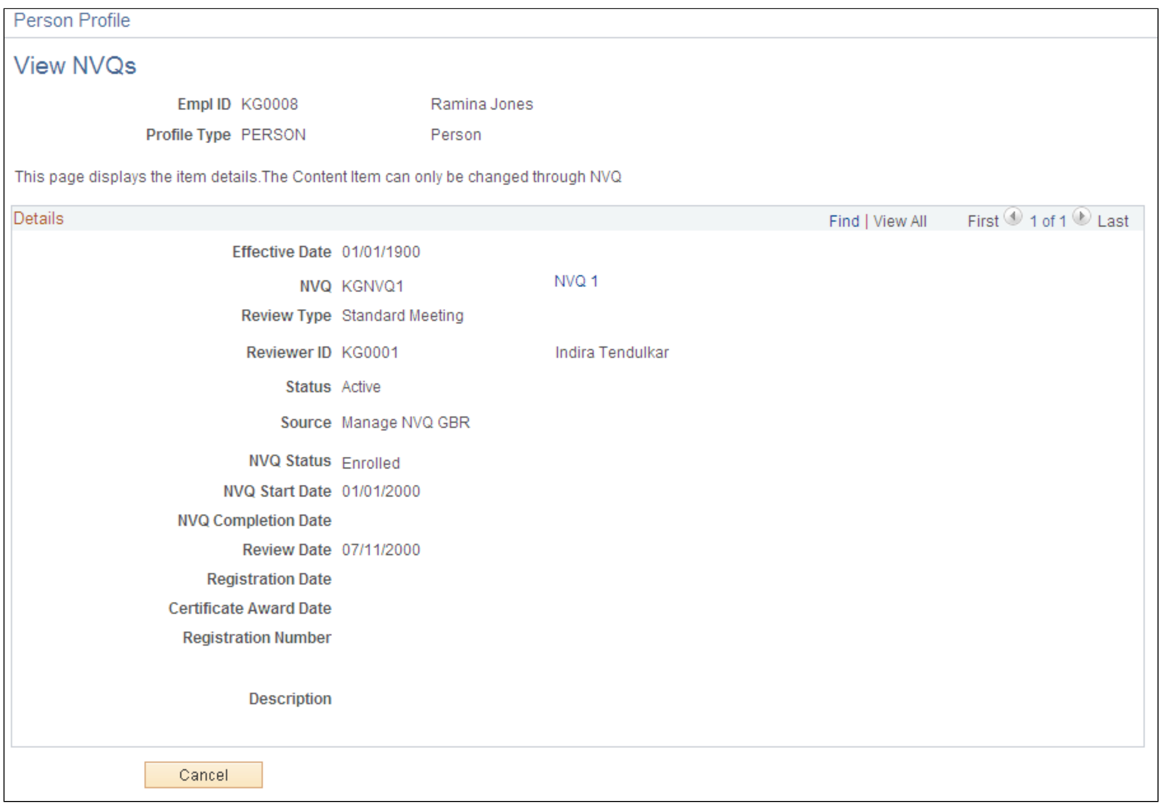
View NVQs or View NVQs Units Page

Use the View NVQs page (JPM_PROF_DTL_SEC) to view NVQ and NVQ Units details for a given person's profile.

Navigation:

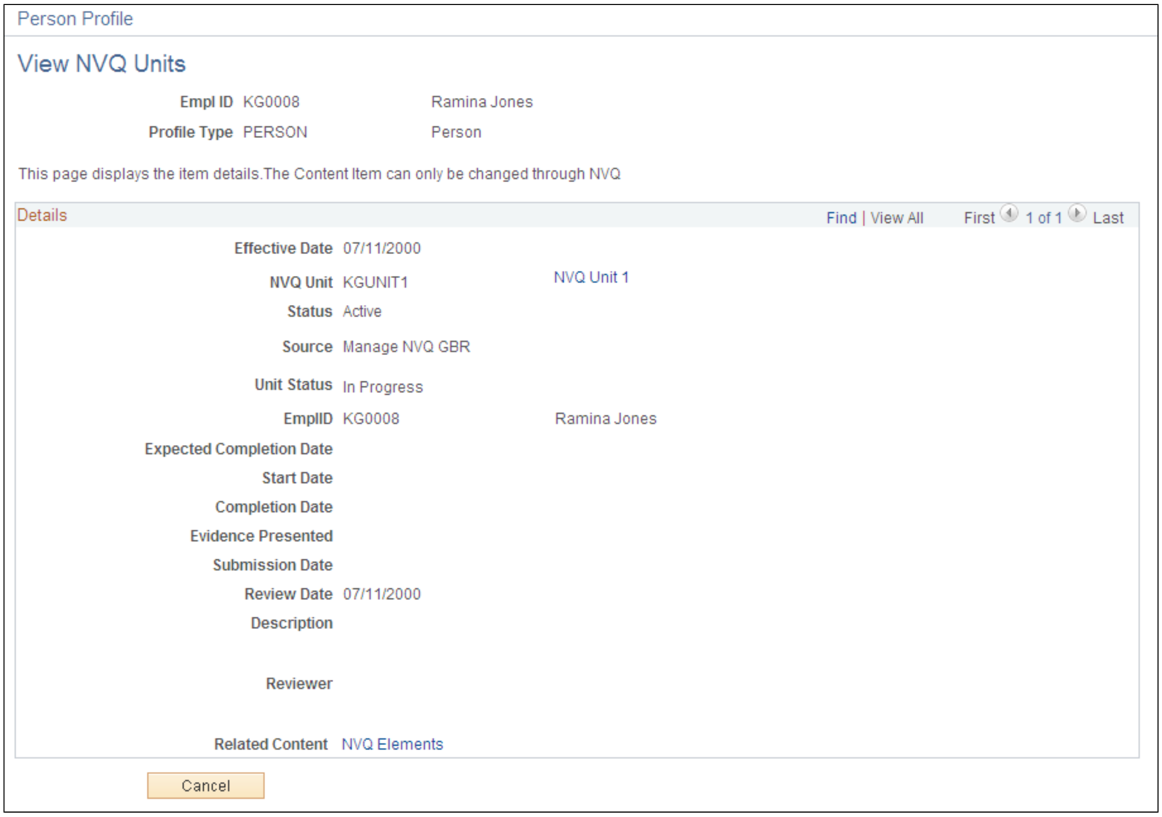
Click the **NVQ** or **NVQ Unit** link within the Person Profile page: NVQ tab.

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



The Details section on this page displays the original NVQ enrollment values that you entered on the Enroll NVQ page. Each review that you enter for this NVQ using the Track NVQ component appears on this page as an additional effective-dated row with updated values.

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



Each effective-dated row on the View NVQ Units page displays information for an NVQ review. You can view details for elements associated with an NVQ unit by clicking the **NVQ Elements** link.

Related Links

Person Profile Page

Reviewing NVQ Summaries

These topics discuss reviewing NVQ summaries.

Pages Used to Review NVQ Information

Page Name	***Definition Name***	***Usage***
NVQs by Employee Page	NVQ_SUMMARY1	Review all NVQs associated with an employee.
NVQs by Qualification Page	NVQ_SUMMARY2	View the employees associated with an NVQ.

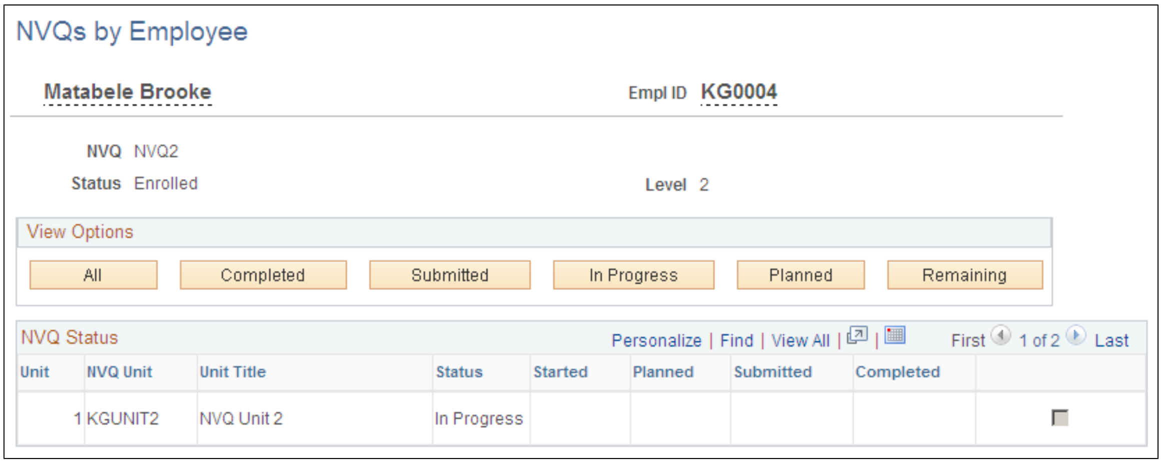
NVQs by Employee Page

Use the NVQs by Employee page (NVQ_SUMMARY1) to review all NVQs associated with an employee.

Navigation:

Workforce Development > **Profile Management** > **NVQ Reports GBR** > **NVQs by Employee** > **NVQs by Employee**

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



The system lists the NVQ units sorted by status and date. Click a button in the **View Options** group box to see only those units of a given status.

Note: Only those NVQ units listed in the employee's PERSON profile are included. The system does not check employees' profiles of any other type.

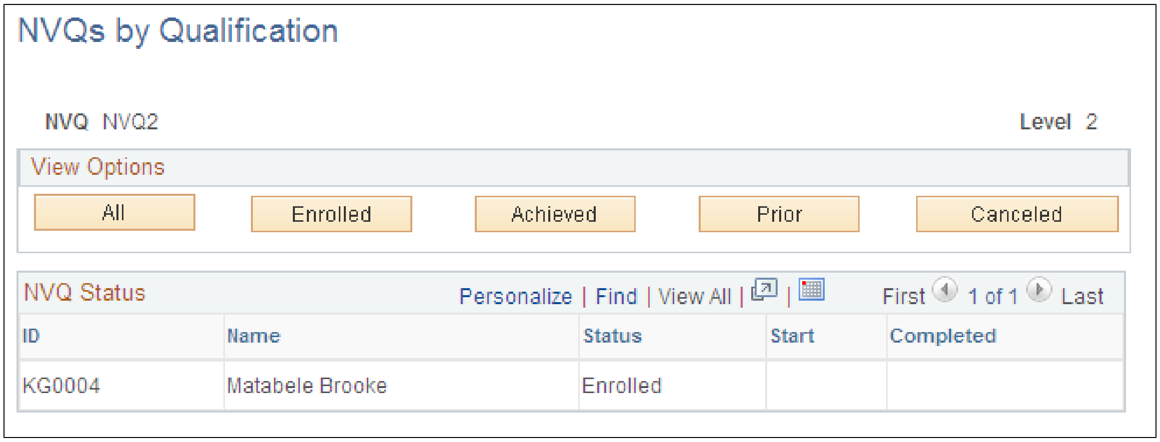
NVQs by Qualification Page

Use the NVQs by Qualification page (NVQ_SUMMARY2) to view the employees associated with an NVQ.

Navigation:

Workforce Development > **Profile Management** > **NVQ Reports GBR** > **NVQs by Qualification** > **NVQs by Qualification**

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



The system lists all the employees associated with the selected NVQ, sorted by status and date. Click a button in the **View Options** group box to see only those employees of a given status.

Running NVQ Reports

These topics list the pages used to run NVQ reports and discuss how to run the Initialize Plan process.

Note: You must run the Initialize Plan process before running the Employee Plan (NVQ006) report.

Pages Used to Run NVQ Reports

Page Name	***Definition Name***	***Usage***
Employee Status - NVQ001 Page	PRCSRUNCNTL	Run the NVQ - Employee Status report (NVQ001). This report lists employees assigned to an NVQ and their status.
Unit Listing - NVQ002 Page	PRCSRUNCNTL	Run the NVQ - Unit Listing report (NVQ002) that lists all defined NVQ units.
NVQ Listing - NVQ003 Page	PRCSRUNCNTL	Run the NVQ - NVQ Listing report (NVQ003) that lists all defined NVQs.
Unit/Element - NVQ004 Page	PRCSRUNCNTL	Run the NVQ – Unit/Element Listing report (NVQ004) that lists the elements associated with NVQ units.

Page Name	***Definition Name***	***Usage***
Initialize Plan Page (NVQ005)	RUNCTL_NVQ005	Run the Initialize Plan process (NVQ005) for a selected employee. This SQR process compiles the data required for the Employee Unit Plan report (NVQ006).
Employee Plan - NVQ006 Page	PRCSRUNCNTL	Run the Employee Unit Plan report (NVQ006). This report summarizes an employee's NVQ Unit plan. You must run the Initialize Plan process (NVQ005) before you can generate the report.

Initialize Plan Page (NVQ005)

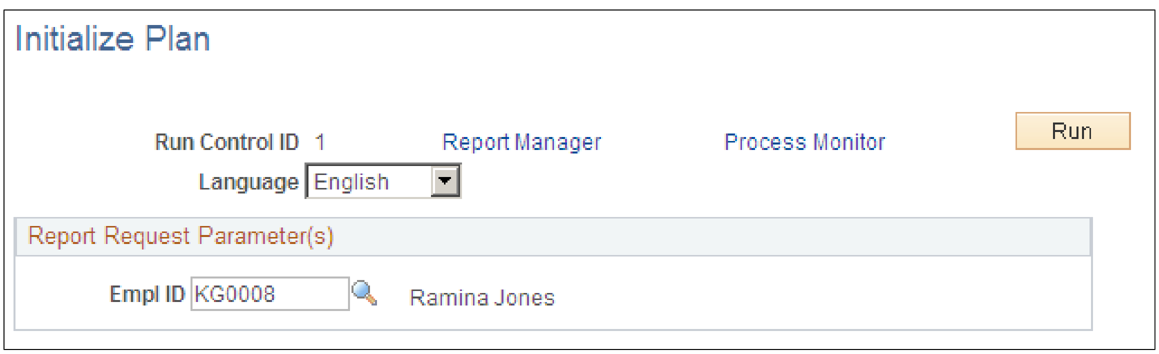
Use the Initialize Plan page (RUNCTL_NVQ005) to run the Initialize Plan process (NVQ005) for a selected employee.

This SQR process compiles the data required for the Employee Unit Plan report (NVQ006).

Navigation:

Workforce Development > **Profile Management** > **NVQ Reports GBR** > **Initialize Plan** > **Initialize Plan**

This example illustrates the fields and controls on the Initialize Plan page (NVQ005 process). You can find definitions for the fields and controls later on this page.



Use this page to run the Initialize Plan process (NVQ005) that compiles the data required to generate the Employee Unit Plan report (NVQ006).

Field or Control	***Description***
Language	Automatically populated based on the run control ID that you selected. Override the default language if necessary.

Chapter 10

Content Type and Profile Type Properties

Understanding Properties

When you set up a content type, you select the properties, or field names, that are shared by items of that type. The system displays the properties that you define for a content type as fields on the Item Details page when you set up content items. These properties will be used to describe the content items when you define them.

After you add content types to the profile type to create content sections, you will then add the properties that will be available for viewing or updating a profile item. When users add profile items to the profile, the system displays the properties you define for the content section.

Note: The properties defined for a content type do not have any impact on the profile type content section properties.

The order in which properties are displayed on the Item Details page or in profiles is determined by the page field ordering and cannot be altered.

Note: The order in which properties are added to the profile type content section or to the Content Type has no impact on the display order.

The tables in this topic list the properties in the order that they are displayed.

Related Links

Setting Up Content Types and Properties
Content Section Page

Content Type Properties

This table lists the properties (field names) that you can add to a content type in the Content Types component, the order in which the properties are displayed on the Item Details page, the default label text, and the type of information you can track using this property.

Property	***Default Label Text***	***Description***
JPM_CAT_ITEM_ID	Content Item ID	The system populates this field with the item ID. **Note:** This is a required property and the system adds it to all new content types.

Property	***Default Label Text***	***Description***
EFFDT	Effective Date	The item's effective date. **Note:** This is a required property and the system adds it to all new content types.
EFF_STATUS	Status as of Effective Date	The item status as of the effective date. **Note:** This is a required property and the system adds it to all new content types.
JPM_DESCR90	Description	The item description. It is used as a related display field for the item ID in the profile. **Note:** This is a required property and the system adds it to all new content types.
DESCRLONG	Long Description	A long description of the content item.
DESCRSHORT	Short Description	A short description of the content item.
CM_CATEGORY	Category	The category to which an item belongs. An item can belong to one category only. This property is useful for competency-related content types. However you can also use content groups to group items.
JPM_CAT_ITEM_SRC	Content Item Source	Specifies the origin of a content item. Valid values are: *Customer Defined, DDI, Lominger,* or *PDI.*
RATING_MODEL	Rating Model	The rating model. Use this field if the content type is associated with rating models.
COUNTRY	Country	The country in which this item applies. This property is useful for content types that have country-specific items.
EP_SUB_LEVEL	Level	The level of the item. When this row is entered in a content type, the List field appears. Select a list that contains the values you want to use. Lists and valid values are defined on the Custom Prompt page. This property is used with sub-competencies.

Property	***Default Label Text***	***Description***
EDUCATION_LVL	Education Level	The education level desired or required for this content item.
TYPE_OF_STUDY_GER	Type Of Study	(DEU) A German property that indicates the type of study. Valid values are: *Chemistry, Commerce, Constr/Mining, Electronic*, *Food, Forestry, Glass, Hotels, Mechanic, Other,* Printing, *Public Sector,* and *Textiles*. This property is used with degrees.
FIELD_OF_STUD_GER	Field Of Study	(DEU) A German property that indicates the field of study *(Commercial, Industrial,* or *Technical).* This property is used with degrees.
FP_DEGREE_LVL	Level	(FRA) The degree level. This field is used for French Public Sector only.
HP_STATS_DEG_LVL	Stats-Can Degree Level	(CAN) The Canadian degree level.
SATISFACTION_MTHD	Satisfaction Method	Use to specify how an element is achieved. Valid values are: *Attend Training Course, Dispensation Given, Off Job Training, On Job Training, Possess License/Certificate, Recognition of Prior Learning, Supervisor Assessment.* This property is used with the ELEMENT content type.
NVQ_LEVEL	Level	(GBR) The level of an NVQ *(1, 2, 3, 4* or *5)*
JPM_DURATION_1	Duration (1)	A generic duration field to enter the number of days, months, years, or hours. Use the field in conjunction with the Duration Type (1) field, which defines the duration unit.
JPM_DURATION_TYPE1	Duration Type (1)	Specifies the units for the Duration (1) field. Select from *Days, Months, Years,* or *Hours*.
JPM_DURATION_2	Duration (2)	A generic duration field to enter the number of days, months, years, or hours. Use the field in conjunction with the Duration Type (2) field, which defines the duration unit.

Property	*Default Label Text*	*Description*
JPM_DURATION_TYPE2	Duration Type (2)	Specifies the units for the Duration (2) field. Select from *Days, Months, Years,* or *Hours.*
JPM_YN_1	User Yes/No (1)	A generic Yes/No check box. If the check box is selected, it indicates Yes, and if it is not selected this indicates No.
JPM_YN_2	User Yes/No (2)	A generic Yes/No check box.
JPM_YN_3	User Yes/No (3)	A generic Yes/No check box.
JPM_YN_4	User Yes/No (4)	A generic Yes/No check box.
JPM_YN_5	User Yes/No (5)	A generic Yes/No check box.
JPM_DATE_1	User Date (1)	A generic date field.
JPM_DATE_2	User Date (2)	A generic date field.
JPM_TEXT254_1	User Text - 254 Char	A comment field of up to 254 characters.
JPM_TEXT254_2	User Text - 254 Char	A comment field of up to 254 characters.
JPM_TEXT254_3	User Text - 254 Char	A comment field of up to 254 characters.
JPM_TEXT254_4	User Text - 254 Char	A comment field of up to 254 characters.
JPM_TEXT1325_1	User Text - 1325 Char	A comment field of up to 1325 characters.
JPM_TEXT1325_2	User Text - 1325 Char	A comment field of up to 1325 characters.

Profile Type Properties

This table lists the properties (field names) that you can add to a content section in the Profile Types component, the order in which the properties are displayed on the profile page, the property attributes, and any special Profile Management processing tied to the property.

Content Property	***Data Type***	***Max. Length***	***Prompt Value Source***	***Country Section***	***Special Processing***
EFFDT	Date				Automatically included in the content section. If effective dated content is not desired, then it can be removed.
JPM_CAT_ITEM_ID	Character	12			Automatically included in the content section if the content type has not been defined as free form.
JPM_ADHOC_DESCR	Character	80			Automatically included for free-form content types.
JPM_CAT_ITEM_QUAL	Character	12			User configurable key tied to a qualifier set. Instance Qualifier Set 1 must be specified if this property is included.
JPM_CAT_ITEM_QUAL2	Character	12			User configurable key tied to a qualifier set. Instance Qualifier Set 2 must be specified if this property is included.
EFF_STATUS	Character	1	Translate values A, I		
JPM_JP_ITEM_SRC	Character	4			Automatically set by interfacing products. If this field has a value, then the profile item cannot be updated in Profile Management.
BUSINESS_UNIT	Character	5	Business Unit Table		PERSON profile validations.
LOCATION	Character	10	Location Table		PERSON profile validations.
SETID_DEPT	Character	5	SetID Table		
DEPTID	Character	10	Department Table		

Content Property	*Data Type*	*Max. Length*	*Prompt Value Source*	*Country Section*	*Special Processing*
COUNTRY	Character	3	Country Table		PERSON profile validations.
STATE	Character	6	State Table		PERSON profile validations. The validations also automatically set the STATE label based on the country value that is selected.
RATING_MODEL	Character	4	Rating Model table		When adding a profile item, the value automatically defaults from content item definition, then from profile type content section if none exists.
JPM_RATING1	Character	1	Rating Model table		RATING_MODEL property must also be included to enable the prompt values.
JPM_RATING2	Character	1	Rating Model table		RATING_MODEL property must also be included to enable the prompt values.
JPM_RATING3	Character	1	Rating Model table		RATING_MODEL property must also be included to enable the prompt values.
JPM_VERIFY_METHOD	Character	1	Translate values		
JPM_INTEREST_LEVEL	Character	1	Rating Model INT		
NVQ_STATUS	Character	1	NVQ Status translate values		
JPM_IMPORTANCE	Character	1	Importance rating level translate values		
JPM_PERSON_ID_1	Character	11	PERSON_NAME		
SCHOOL_TYPE	Character	3	School Type Table		
SCHOOL_CODE	Character	10	School Table		PERSON profile initialization and validations.

Content Property	Data Type	Max. Length	Prompt Value Source	Country Section	Special Processing
SCHOOL_DESCR	Character	100			Used together with the SCHOOL_CODE property if permitting entry for schools that are not in SCHOOL_TBL. PERSON profile validations automatically default the school description when a value for SCHOOL_CODE has been entered.
MAJOR_CODE	Character	10	Major Table		PERSON profile initialization and validations.
MAJOR_DESCR	Character	100			MAJOR_DESCR is used together with the MAJOR_CODE property if permitting entry for majors that are not in MAJOR_ TBL. PERSON profile validations automatically default the major description when a value for MAJOR_CODE has been entered.
JPM_MINOR_CD	Character	10	Major Table		PERSON profile initialization automatically defaults the value of MINOR_DESCR when a value for JPM_MINOR_ CODE has been entered.
MINOR_DESCR	Character	100			Used together with the JPM _MINOR_CD property if permitting entry for minors that are not in MAJOR_ TBL. PERSON profile initialization and validations automatically default the minor description when a value for JPM_MINOR_ CD has been entered.
AVERAGE_GRADE	Character	5			

Content Property	***Data Type***	***Max. Length***	***Prompt Value Source***	***Country Section***	***Special Processing***
JPM_OBSTACLE_1	Character	2	Translate values		
JPM_LOC_BUNIT_1	Character	5	Business Unit Table		
JPM_LOCATION_1	Character	10	Location Table		
JPM_LOC_BUNIT_2	Character	5	Business Unit Table		
JPM_LOCATION_2	Character	10	Location Table		
JPM_AREA_PREF_1	Character	2	Integration Installations Table		
JPM_AREA_PREF_2	Character	2	Integration Installations Table		
JPM_AREA_PREF_3	Character	2	Integration Installations Table		
JPM_CNTRY_PREF_1	Character	3	Country Table		
JPM_CNTRY_PREF_2	Character	3	Country Table		
JPM_CNTRY_PREF_3	Character	3	Country Table		
JPM_PROMPT_1	Character	12	User configurable		
JPM_PROMPT_2	Character	12	User configurable		
JPM_INTEGER_1	Number	8			PERSON profile validations.
JPM_PROMPT_3	Character	12	User configurable		
JPM_DECIMAL_1	Number	7.2			
JPM_PROMPT_4	Character	12	User configurable		
JPM_PCT_1	Number	3			
JPM_PROMPT_5	Character	12	User configurable		

Content Property	***Data Type***	***Max. Length***	***Prompt Value Source***	***Country Section***	***Special Processing***
JPM_MANDATORY	Character	1	Translate values Y/N		
JPM_YN_1	Character	1	Translate values Y/N		PERSON profile validations.
JPM_PROMPT_6	Character	12	User configurable		
JPM_DATE_1					
JPM_PROMPT_7	Character	12	User configurable		
JPM_DATE_2	Date				PERSON profile validations.
JPM_PROMPT_8	Character	12	User configurable		
JPM_INTEGER_2	Number	8			PERSON profile validations.
JPM_PROMPT_9	Character	12	User configurable		
JPM_DECIMAL_2	Number	7.2			
JPM_PROMPT_10	Character	12	User configurable		
JPM_PCT_2	Number	3			
JPM_PROMPT_11	Character	12	User configurable		
JPM_YN_2	Character	1	Translate values Y/N		
JPM_PROMPT_12	Character	12	User configurable		
JPM_YN_3	Character	1	Translate values Y/N		
JPM_PROMPT_13	Character	12	User configurable		
JPM_DATE_3	Date				PERSON profile validations.
JPM_PROMPT_14	Character	12	User configurable		

Content Property	***Data Type***	***Max. Length***	***Prompt Value Source***	***Country Section***	***Special Processing***
JPM_DATE_4	Date				
JPM_PROMPT_15	Character	12	User configurable		
JPM_YN_4	Character	1	Translate values Y/N		
JPM_PROMPT_16	Character	12	User configurable		
JPM_YN_5	Character	1	Translate values Y/N		
JPM_PROMPT_17	Character	12	User configurable		
JPM_DATE_5	Date				
JPM_PROMPT_18	Character	12	User configurable		
JPM_DATE_6	Date				
JPM_PROMPT_19	Character	12	User configurable		
JPM_PROMPT_20	Character	12	User configurable		
JPM_TEXT254_1	Character	254			
JPM_TEXT254_2	Character	254			
JPM_TEXT254_3	Character	254			
JPM_TEXT254_4	Character	254			
JPM_TEXT254_5	Character	254			
JPM_TEXT1325_1	Character	1325			PERSON profile validations.
JPM_TEXT1325_2	Character	1325			
PRACTIC_GRADE_GER	Character	4		DEU	
THEORY_GRADE_GER	Character	4		DEU	

Content Property	***Data Type***	***Max. Length***	***Prompt Value Source***	***Country Section***	***Special Processing***
IPE_SW	Character	1	Translate values Y/N	DEU	
EDUC_LVL_AUS	Character	1	Highest education achievement translate values	AUS	
APS_HEDUC_CD_AUS	Character	2	Higher education level translate values	AUS	
FACULTY_CODE	Character	10	JPN Faculty Table	JPN	PERSON profile initialization and validation.
FACULTY_DESCR	Character	100		JPN	FACULTY_DESCR is used together with the FACULTY_CODE property if permitting entry for faculties that are not in FACULTY_TBL_JPN. PERSON profile initialization automatically default the faculty description when a value for FACULTY_CODE has been entered.
SUBFACULTY_CODE	Character	10	JPN Sub-Faculty Table	JPN	PERSON profile initialization and validation.
SUBFACULTY_DESCR	Character	100		JPN	SUBFACULTY_DESCR is used together with the SUBFACULTY_CODE property if permitting entry for faculties that are not in SBFCLTY_TBL_JPN. PERSON profile initialization automatically default the faculty description when a value for SUBFACULTY_CODE has been entered.
MAJOR_CATEGORY	Character	1	Education category translate values	JPN	
GVT_CREDIT_HOURS	Character	3		USF	PERSON profile validations.

Content Property	***Data Type***	***Max. Length***	***Prompt Value Source***	***Country Section***	***Special Processing***
GVT_CRED_HRS_TYPE	Character	1	Education credit unit translate values	USF	PERSON profile validations.
FP_SUBJECT_CD	Character	3	FPS Degree Subject Table	FPS	
FP_SKIL_HIR	Character	1	Translate values Y/N	FPS	
FP_SKIL_PRM	Character	1	Translate values Y/N	FPS	
FP_SKIL_TEN	Character	1	Translate values Y/N	FPS	
FP_DEGR_REQUIRED	Character	1	Translate values Y/N	FPS	
BONUS_AMOUNT_FRA	Number	5.2		FRA	
BONUS_DT_FRA	Date			FRA	
JPM_SOURCE_ID2	Character	12			Contains the syndication source profile ID. This property is always display-only.
JPM_WF_STATUS	Character	1	Translate values Approved, Denied, Pending, Saved, New		System updates workflow status of a profile item. This property is always display-only.
LASTUPDDTTM	DateTime				Set by system when profile item is added or updated.
LASTUPDOPRID	Character	30			Set by system when profile item is added or updated.

Property Initializations and Validations

The following initialization/validations are delivered to work with the PERSON Profile Type definition. An entry for the profile type exists in the table JPM_PKG_TYPES to specify that the validations in the application class ControllerPerson are active. If these validations are not desired, then the entry for the PERSON profile type can be removed from JPM_PKG_TYPES. When creating a new profile type, these validations will be included if the profile type is cloned from the delivered PERSON profile type and the **Copy Validations** check box is selected.

Property	***Profile***	***Content Type***	***Validation/Initialization***
JPM_TEXT1325_1	PERSON	Competency	Populated with content item description.
JPM_INTEGER_1 JPM_INTEGER_2	PERSON	Competency	Year Acquired must be earlier than or equal to Year Last Used.
EFFDT JPM_DATE_3	PERSON	Membership Honors & Awards	Date issued cannot be greater than end date.
EFFDT JPM_DATE_3	PERSON	Licenses	Issue Date cannot be greater than Expiration Date.
JPM_DATE_3 JPM_DATE_2	PERSON	Membership	Mandate End Date cannot be greater than Mandate Begin Date.
JPM_YN_1 JPM_INTEGER_2	PERSON	Degrees	Graduate Indicator will automatically be selected when Year Acquired is in the past.
GVT_CRED_HRS_TYPE GVT_CREDIT_HOURS	PERSON	Degrees	Credit Hours Type is required if Credit Hours are entered
COUNTRY STATE SCHOOL_CODE	PERSON	Degrees Education Level	Ensures that country, state, and school code values work together.
COUNTRY STATE	PERSON	Licenses	Ensures that country, state values work together.
BUSINESS_UNIT LOCATION COUNTRY	PERSON	Current Location	Initializes values from primary job.
JPM_YN_1 JPM_DATE_3	PERSON	Licenses	Set the Renewal Required field from the content catalog. If renewal is required, then set expiration date to date issued plus renewal length.

Property	***Profile***	***Content Type***	***Validation/Initialization***
FACULTY_DESCR	PERSON	Degrees	Populate Faculty description from JPN Faculty Table if code specified.
SUBFACULTY_DESCR	PERSON	Degrees	Populate Sub Faculty description from JPN Faculty Table if code specified.
MAJOR_DESCR	PERSON	Degrees	Populate Major description from Major Table if code specified.
MINOR_DESCR	PERSON	Degrees	Populate Minor description from the Major Table if code specified.
SCHOOL_DESCR	PERSON	Degrees Education Level	Populate SCHOOL_DESCR from School Table if code specified.