
PeopleSoft HCM 9.2: PeopleSoft eProfile Manager Desktop

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PeopleSoft HCM 9.2: PeopleSoft eProfile Manager Desktop
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Preface

Understanding the PeopleSoft Online Help and PeopleBooks

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

Hosted PeopleSoft Online Help

You can access the hosted PeopleSoft Online Help on the [Oracle Help Center](#). The hosted PeopleSoft Online Help is updated on a regular schedule, ensuring that you have access to the most current documentation. This reduces the need to view separate documentation posts for application maintenance on My Oracle Support. The hosted PeopleSoft Online Help is available in English only.

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

Locally Installed 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.

<i>Typographical Convention</i>	<i>Description</i>
Key+Key	Indicates a key combination action. For example, a plus sign (+) between keys means that you must hold down the first key while you press the second key. For Alt+W , hold down the Alt key while you press the W key.
... (ellipses)	Indicate that the preceding item or series can be repeated any number of times in PeopleCode syntax.
{ } (curly braces)	Indicate a choice between two options in PeopleCode syntax. Options are separated by a pipe ().
[] (square brackets)	Indicate optional items in PeopleCode syntax.
& (ampersand)	When placed before a parameter in PeopleCode syntax, an ampersand indicates that the parameter is an already instantiated object. Ampersands also precede all PeopleCode variables.

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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Send your suggestions to pssoft-infodev_us@oracle.com.

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

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	<u>Follow @PeopleSoft_Info on X.</u>
	<u>Read PeopleSoft Blogs</u>
	<u>Connect with PeopleSoft on LinkedIn</u>

Chapter 1

Getting Started with eProfile Manager Desktop

eProfile Manager Desktop Overview

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

eProfile Manager Desktop Business Processes

eProfile Manager Desktop supports the following business processes:

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

(USF) With this application, you can also:

- Reassign employees.
- Separate employees.

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

- Review employee talent summary information.

- Review managerial tasks on the Manager Dashboard.

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

eProfile Manager Desktop Implementation

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

Other Sources of Information

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

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

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

Related Links

Application Fundamentals

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

Understanding Guided Self-Service Transactions

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

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

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

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

Oracle delivers these guided self-service transactions for managers:

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

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

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

Related Links

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

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

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Configuring Guided Self-Service Transactions for Manager Self-Service

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

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

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

Related Links

[Understanding Guided Self-Service Transactions](#)

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

Pages Used to Configure Guided Self-Service Transactions

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

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

Understanding Delivered Transactions and Fields for Guided Self-Service

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

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

Delivered Transactions

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

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

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

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

- HR_RETIREMENT (Retire Employee)
- HR_TERMINATE (Terminate Employee)
- HR_SALARY_CHANGE (Request Ad Hoc Salary Change)
- HR_TRANSFER_PAY (Transfer Employee)

Types of Delivered Fields

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

These are the supported pages:

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

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

Delivered Fields for Job Data

These fields are available on the Job Details subpage HR_MSS_CT_JOB_SBF:

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

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

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

Delivered Fields for Compensation Details

These fields are available on the Compensation Details subpage HR_MSS_CT_COMP_SBF:

- *Annual Rate*
- *Previous Salary*

Delivered Fields for Clone Position

These fields are available on the Clone Position subpage HR_MSS_CLPOSN1_SBF:

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

- *Long Description*
- *Company*
- *Position Pool ID*
- *Pre-Encumbrance Indicator*
- *Encumber Salary Option*
- *Encumber Salary Amount*
- *Classified Indicator*
- *FTE*
- *Adds to FTE Actual Count*

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

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

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

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

Understanding Updates to Position Data

This overview discusses considerations for employees in positions.

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

Updating Data for an Employee's Position

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

- Change Full/Part Time or Hours
- Request Location Change
- Request Reporting Change

- Update Job Details for Group

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

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

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

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

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

Conditions that Prevent Automatic Position Data Updates

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

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

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

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

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

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

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

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

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

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

Changes to Which Position is Associated With an Employee

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

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

Related Links

“Maintaining Position Data” (PeopleSoft Human Resources Manage Positions)

Understanding URL Definitions for Guided Self-Service Attachments

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

File Storage

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

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

File Type Restrictions

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

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

Transaction Configuration - Configuration Page

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

Navigation:

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

This example illustrates the Transaction Configuration - Configuration page (1 of 2).

Configuration

Questionnaire

Transaction ID HR_PROMOTE_PAY

Regulatory Region

Transaction Details ?
1 of 1

*Effective Date ? Clone Transaction + -

*Status ?

*Title ?

Comments ?

Guided Self Service ?

Allow Multiple Transactions for Employee

Approvals ?

*Transaction Name ? Promote Employee

Approval Process ID GSSPromoteEmployee Promotion Transaction Approval

This example illustrates the Transaction Configuration - Configuration page (2 of 2).

Activity Guide ?

Activity Guide ID ? Guided Self Service

Attachments ?

Allow Attachments

Help & Support ?

Help Text ID ? ✎

Decision Support ?

Sequence	Message Set	Number	Content		
<input type="text" value="10"/>	<input type="text" value="18031"/> ?	<input type="text" value="1000"/> ?	Manager Resource Guide	+	-
<input type="text" value="20"/>	<input type="text" value="18031"/> ?	<input type="text" value="1003"/> ?	Compensation Guidelines	+	-
<input type="text" value="30"/>	<input type="text" value="18031"/> ?	<input type="text" value="1002"/> ?	Career Level Guidelines	+	-
<input type="text" value="40"/>	<input type="text" value="18031"/> ?	<input type="text" value="1001"/> ?	Promotion Approval Matrix	+	-
<input type="text" value="50"/>	<input type="text" value="18031"/> ?	<input type="text" value="1004"/> ?	FAQ	+	-

Field or Control	Description
Transaction ID	<p>Configuration settings are keyed by effective date and regulatory region as well as by transaction ID, but the transaction ID is the field that identifies the transaction.</p> <p>For example, all settings with the transaction ID HR_PROMOTE_PAY are for the Promote Employee transaction. At runtime, when a manager initiates a Promote Employee transaction, the system looks at the effective date and regulatory region values to select the correct row for the HR_PROMOTE_PAY transaction.</p>
Regulatory Region	<p>Displays the regulatory region that you are configuring. For every Transaction ID, there must be a configuration record with no regulatory region defined. This is the default configuration that system uses for employees in regulatory regions that do not have region-specific settings.</p>

Transaction Details

Field or Control	Description
Clone Transaction	<p>Click to copy the current transaction to create a new configuration row for the transaction.</p> <p>The newly created row retains the current Transaction ID, but you can enter a new effective date and / or regulatory region to create a modified configuration to support requirements that have changed or that are different for different regulatory regions.</p>
Status	<p>Keep the default value of <i>Active</i> for configurations that are currently in use. Select <i>Inactive</i> to remove a configuration from use. You cannot inactivate all effective-dated rows for a transaction's default configuration (the configuration with no regulatory region).</p>
Title	<p>Enter a short description for this transaction. At runtime, the system will display this title at the top of the guided self-service pages.</p>
Comments	<p>Enter any additional descriptive information about the transaction.</p>

Guided Self Service

Use this section to override the default setting that prevents a manager from submitting more than one transaction request for an employee at a time.

For more detailed information on enabling multiple transaction for an employee, see the "**Allowing Multiple Guided Self Service Transactions for an Employee**" subtopic under the [Understanding Guided Self-Service Transactions](#) discussion.

Field or Control	Description
Allow Multiple Transactions for Employee	<p>Select this option for individual transactions to override the delivered Guided Self Service setting that prevents managers from entering multiple job transactions for an employee.</p> <p>Enabling this option at the transaction configuration level allows a manager to initiate a request for this specific transaction even though another transaction may be in progress for the employee. The system sees the transaction as an exception and allows it. You will need to enable this option for each transaction that should be an exception.</p> <hr/> <p>Important! Organizations can enable this functionality at a global level by selecting the Allow Multiple Transactions for Employee option in the Guided Self Service section of the Installation Table - "HCM Options Page" (Application Fundamentals).</p> <p>When this option is selected on the Installation Table, the system will allow multiple job requests for <i>all</i> transactions and effective dates. The system does not look at the individual transaction configuration settings. Note that you cannot disable a transaction when this functionality is enabled on the Installation Table.</p> <p>Oracle recommends that you do <i>NOT</i> enable multiple transactions at the global (Installation Table) level.</p> <hr/> <p>When deselected here <i>and</i> on the Installation Table, the manager cannot initiate a request if an employee already has a job transaction in progress.</p>

Approvals

Field or Control	Description
Transaction Name and Approval Process ID	<p>Enter the workflow transaction name to be used. The system displays the approval process ID that is related to the specified workflow transaction.</p> <p>The delivered transactions all include delivered approval processes. For a list of the delivered approval processes, see Understanding Delivered Approval Process IDs for Guided Self-Service Transactions.</p>

Activity Guide


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

Field or Control	Description
Activity Guide ID	<p>Select the activity guide that renders the transaction steps to end users. Guided self-service transactions that Oracle delivers already include an activity guide ID.</p> <p>Activity Guides have their own security setup. In the delivered activity guides, the eProfile Manager Fluid role has access to guided self-service transactions. If you set up your own activity guides, or if you use other roles for guided self-service users, use the activity guide security settings to ensure all users have proper access.</p> <p>The delivered activity guides are <i>GSS_POSNIL</i> for the Clone Position transaction and <i>GSS_SUOW01</i> for all other delivered transactions. Do not modify these activity guides except to update security. If you need to change other areas of the activity guide configuration, clone the delivered activity guide, make your changes, and then update the transaction to reference the modified activity guide.</p>

Attachments

Field or Control	Description
Allow Attachments	<p>Select this check box to enable requestors to attach supporting documents for this transaction.</p> <p>When this check box is selected, the Review and Submit page for the transaction includes an attachments section where the requestor can upload attachments related to the request.</p> <p>Approvers using classic approval pages or Fluid Approvals can review these attachments during the approval process. (Attachments are not supported by the Mobile Approvals Platform (MAP). If you still use MAP, consider switching to Fluid Approvals so that approvers can see attachments.)</p> <p>For information on configuring attachment storage and allowable file types, see Understanding URL Definitions for Guided Self-Service Attachments.</p>

Help & Support

<i>Field or Control</i>	<i>Description</i>
Help Text ID	Enter the message catalog text ID for the introductory text that appears before the questions on the Questionnaire Page of the guided transaction. This text gives the user instructions or guidance for answering the questionnaire.
 Edit Help Text icon	If a Help Text ID has been entered, you can click the Edit Help Text pencil icon to open a dialog box that displays the specified text catalog entry on the “Maintain Text Catalog Page” (Application Fundamentals). Use the dialog box to view or modify the text catalog entry.

Decision Support

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

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

Clone Transaction Secondary Page

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

Navigation:

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

This example illustrates the Clone Transaction secondary page.

<i>Field or Control</i>	<i>Description</i>
Regulatory Region	Enter the regulatory region for the new row to be created. When a transaction has different configurations for different regulatory regions, the system uses the configuration for the employee who is being processed. If there is not a row for the employee’s regulatory region, the system uses the default configuration (the one that does not have any regulatory region specified).
Title	The title for the new row appears as the transaction title at runtime.

Transaction Configuration - Questionnaire Page

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

Navigation:

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

This example illustrates the Transaction Configuration - Questionnaire page.

Configuration | Questionnaire

Transaction ID HR_PROMOTE_PAY

Regulatory Region

Transaction Details Find | View All First 1 of 1 Last

Effective Date 01/01/1900

Status Active

Title Promote Employee

Questionnaire Personalize | Find | First 1-4 of 4 Last

Questions | Actions | Pages | Form Factor

Sequence	Question Text ID	View/Edit Text	Default Response	Hide Question
10	JOBCODE	View/Edit Text	Yes	<input checked="" type="checkbox"/>
20	LOCATION	View/Edit Text	No	<input type="checkbox"/>
30	SUPERVISOR	View/Edit Text	No	<input type="checkbox"/>
40	SALARY	View/Edit Text	Yes	<input type="checkbox"/>

Position Data Options

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

Questions Tab

Field or Control	Description
Sequence	<p>Enter a sequence number to determine order in which the questions are presented to the end-user on the Questionnaire page.</p> <p>For the Hide Action/Reason setting on the Actions tab, the sequence also determines which setting is used if different rows have different settings. Specifically, the system uses the settings from the first question that has a <i>Yes</i> answer.</p>
Question Text ID	<p>Enter the text catalog ID for the text of the question. Valid text catalog IDs are those that have the object owner ID of <i>HELM</i> (eProfile Manager Desktop) and the sub ID of <i>CT</i>.</p> <p>On the Form Factor tab, you can enter a different text catalog ID for small form factor devices such as phones.</p>

Field or Control	Description
View/Edit Text	If a Question Text ID has been entered, you can click this link to open a dialog box that displays the text catalog entry on the Maintain Text Catalog page. Use the dialog box to view or modify the text catalog entry.
Default Response	Select a default response of <i>Yes</i> or <i>No</i> to this question. The field defaults to <i>No</i> .
Hide Question	<p>Select this check box to hide this question from the end user on the Questionnaire page. This check box is enabled only when the Default Response value is <i>Yes</i>.</p> <p>If all the questions defined for a transaction are hidden, the Questionnaire page is not displayed as part of the guided self-service transaction.</p> <hr/> <p>Note: Any fields that are essential to a transaction should be associated with a hidden question. Because this question always has a <i>Yes</i> answer, the fields are always included in the transaction, even if the user answers <i>No</i> to all other questions.</p>

Actions Tab

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

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

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

Field or Control	Description
Action	<p>Select the personnel action code to associate with this question. You can select any active action that is defined on the “Actions Page” (PeopleSoft Human Resources Administer Workforce), with the exception of these actions:</p> <ul style="list-style-type: none"> • <i>Hire</i> • <i>Rehire</i> • <i>Add Contingent Worker or Renewal</i> (actions for contingent workers). <p>The system uses this action code in the new Job record row that is created when the transaction is approved. If the same action code is specified for all of the transaction’s questions, then the system writes one row to the Job record. If different questions have different action codes, then the system creates multiple rows in the Job record, but the same data, except for the action and action reason, is written to each row.</p> <hr/> <p>Note: The manager will not see the Action field on the guided self-service transaction page.</p>
Action Reasons	<p>Click to access the Action Reasons Page, where you can choose valid action reasons for the job data row that the transaction creates and you can choose a default action reason.</p> <hr/> <p>Note: Rows that have the same action must also have the same action reason settings. If you change the action reason settings for a row, your changes are automatically applied to any other rows with the same action.</p>
Hide Action Reason	<p>Select this check box to hide the Reason field on the guided self-service transaction pages. This configuration prevents the manager from overriding the default reason.</p> <p>If you select this check box for some questions but not for others, at runtime the system uses the setting from the first question that has a <i>Yes</i> answer. Typically this is the first question in the transaction, which is normally configured as a hidden question with a <i>Yes</i> answer.</p> <p>When you select the Hide Action Reason check box, the Action Reasons link on this configuration page becomes read-only. Therefore, if you want a default action reason that cannot be changed, click the Action Reasons link and choose a default action reason before you select the Hide Action Reason check box.</p>

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

Pages Tab

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

Questionnaire ?		Personalize Find	First	1-4 of 4	Last
Questions	Actions	Pages	Form Factor		
Sequence	Page Name	Page Fields			
10	HR_MSS_CT_JOB_SBF	Page Fields			
20	HR_MSS_CT_JOB_SBF	Page Fields			
30	HR_MSS_CT_JOB_SBF	Page Fields			
40	HR_MSS_CT_COMP_SBF	Page Fields			

Field or Control	Description
Page Name	<p>Select the page that contains the record and field definitions that are associated with this question. You can associate the same page with more than one question. After choosing a page, click the Page Fields link to access a secondary page where you choose which fields on the page to show to the end user when this question is answered <i>Yes</i>.</p> <p>These are the supported pages:</p> <ul style="list-style-type: none"> • HR_MSS_CT_JOB_SBF (Job Details subpage) for job data fields. • HR_MSS_CT_COMP_SBF (Compensation Details subpage) for compensation data fields. • HR_MSS_CLPOSN1_SBF (Clone Position subpage) for position data fields. <p>Oracle also delivers an additional job data subpage, HR_MSS_CT_JOBC_SBF that your organization can modify if you need to add additional fields for guided self-service. As delivered, this page does not include any fields.</p> <p>For a detailed list of the fields on each page, see Understanding Delivered Transactions and Fields for Guided Self-Service.</p>
Page Fields	<p>Click to access the Page Fields Page where you choose which fields to show to the end user when this question is answered <i>Yes</i>.</p>

Form Factor Tab

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

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

Field or Control	Description
Small Form Factor Text ID	<p>Use this field to define alternate question text for small form factors such as phones. This option enables you to shorten questions for the smaller screen. To choose the alternate text, enter the ID of the Text Catalog entry with the appropriate text.</p> <p>When this field is blank, the regular question text appears on all devices.</p>
View/Edit Text	<p>If a small form factor text ID has been entered, you can click this link to open a dialog box that displays the text catalog entry on the Maintain Text Catalog page. Use the dialog box to view or modify the text catalog entry.</p>

Position Data Options

Field or Control	Description
Position Data Options	<p>If you use position management, click this link to access the Transaction Configuration - Position Data Options Page, where you configure options related to updating the employee's position data.</p> <hr/> <p>Note: Position Data settings are valid only for the delivered transactions <i>Change Full/Part Time or Hours</i>, <i>Request Location Change</i>, <i>Request Reporting Change</i>, and <i>Update Job Details for Group</i>. Do not set up position options for any other transactions.</p> <hr/> <p>This link is not visible for the <i>Clone Position</i> transaction, which creates a new position but does not affect existing positions.</p>

Action Reasons Page

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

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

Navigation:

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

This example illustrates the Action Reasons page.

Action Reasons
✕

Transaction ID HR_PROMOTE_PAY

Effective Date 01/01/1900

Regulatory Region

Action Promotion

Action Reasons ?

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

OK
Cancel

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

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

Action Reasons Grid

<i>Field or Control</i>	<i>Description</i>
Reason Code and Description	These fields identify the action reasons that are associated with the action you are configuring. The grid lists all available reasons for the specified action.

Field or Control	Description
Display	<p>Select this check box to make an action reason available for the job data row that gets created for this action. You must select this check box for the default action reason. Also select this check box for all values that you want managers to be able choose manually.</p> <p>If you configure the transaction to hide the Action Reason field from end users, then the end user cannot override the default and there is no reason to select any rows other than the default.</p>
Default	<p>Select this check box for one row only. The selected reason becomes the default reason for the job row that is created with the specified action. The end user will be able to override the default reason unless you select the Hide Action Reason check box for this action.</p> <p>If multiple questions have the same action code but different reasons, the system uses the default reason for the first question that has a <i>Yes</i> answer. Typically this is the first question in the transaction, which is normally configured as a hidden question with a <i>Yes</i> answer.</p>

Page Fields Page

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

Navigation:

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

This example illustrates the Page Fields page.

Page Fields
✕

Sequence 10

Question Text ID JOBCODE

Page Name HR_MSS_CT_JOB_SBF

Page Fields ?	Visible	Display Only
Business Unit	<input type="checkbox"/>	<input type="checkbox"/>
Position Number	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Department ID	<input type="checkbox"/>	<input type="checkbox"/>
Location Code	<input type="checkbox"/>	<input type="checkbox"/>
Job Title	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Supervisor ID	<input type="checkbox"/>	<input type="checkbox"/>
Reports To	<input type="checkbox"/>	<input type="checkbox"/>
Full/Part Time	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Standard Hours	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Last Date Worked	<input type="checkbox"/>	<input type="checkbox"/>
Expected Return Date	<input type="checkbox"/>	<input type="checkbox"/>

OK
Cancel

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

Page Fields Grid

<i>Field or Control</i>	<i>Description</i>
Page Field Name	<p>Displays a list of fields that are associated with the Page Name shown at the top of the page.</p> <p>For a list of the fields that are available for selection, see Understanding Delivered Transactions and Fields for Guided Self-Service at the beginning of this topic.</p> <p>When you configure job data fields, use the same settings for the Reports To and Supervisor ID fields. The guided self-service transaction and approval pages include logic to display the correct field depending on the employee data.</p> <p>For employees in positions, the Reports To field displays the position to which the employee reports rather than the person to whom the employee reports, so if this field is shown, the transaction and approval pages also display a read-only Manager Name field.</p>

Field or Control	Description
Visible	<p>Select this check box to make a specific field visible to the end user on the guided self-service pages.</p> <hr/> <p>Note: The <i>Clone Position</i> transaction clones data from all of the available fields, including those that are not visible to end users.</p> <hr/> <p>Different fields are appropriate for different transactions. For example, the Last Date Worked field is used so that a manager can enter an employee’s actual last work day, so this field is appropriate for the Terminate and Retire transactions.</p> <p>The field is visible if it is marked visible for at least one question with a <i>Yes</i> answer, regardless of whether it is marked visible for other questions.</p> <p>Even if a field is marked as visible for multiple questions, it appears only once on the guided self-service pages.</p> <p>Visible fields are enterable unless you also select the Display Only check box.</p> <hr/> <p>Note: If you make the Business Unit field enterable in a guided self-service transaction, you should also make the Location Code, Department ID, and Job Code fields enterable. This is necessary because if the end user changes the business unit, the system will clear the values for Department, Location and Job Code, and the end user will need to enter new values in those fields.</p> <hr/>
Display Only	<p>Select this check box if you want a visible field to be read-only on the guided self-service pages. Only fields that are already marked as visible can be made read-only.</p> <p>If a particular field is marked as read-only for at least one question with a <i>Yes</i> answer, the field will be read-only regardless of whether the field is configured as read-only for other questions.</p>

Transaction Configuration - Position Data Options Page

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

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

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

Navigation:

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

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

Field or Control	Description
Update Position Data	Select this check box to allow the system to make automatic updates to position data. The position data change occurs only if both of these conditions are met: <ul style="list-style-type: none"> • There is a one-to-one relationship between the employee and the position. • The employee’s position data has not been overridden. See Understanding Updates to Position Data .
Reason	Select the reason for the position data change. This reason is entered into the new effective-dated row that the system creates in the position data record.

Field or Control	Description
<p>Position Data Fields</p>	<p>This read-only list shows which fields from the guided self-service transaction are included in position data updates:</p> <ul style="list-style-type: none"> • For the Request Location Change transaction, the only field in the list is <i>Location Code</i>. • For the Change Full/Part Time or Hours transaction, the only field in the list is <i>Full/Part Time</i>. • For the Request Reporting Change transaction, the only field in the list is <i>Report To</i>. • For the Update Job Details for Group transaction, the fields in the list are <i>Department ID</i>, <i>Location Code</i>, and <i>Reports To</i>. <p>If you inadvertently access this page for other transactions, additional fields can appear in the list. However, because those other transactions do not support position data updates, you can ignore the field list.</p>

Clone Transaction Page

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

Navigation:

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

This example illustrates the Clone Transaction page.

Clone Transaction

Transaction ID HR_PROMOTE_PAY

Effective Date 01/01/1900

Regulatory Region

Title Promote Employee

Enter information for the new transaction.

Transaction ID

Effective Date

Regulatory Region

Title

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

Chapter 3

Setting Up eProfile Manager Pagelets for the Dashboards

Dashboards and the Portal Registry

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

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

Dashboards are created and maintained in the Portal Registry.

Structure and Content

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

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

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

Managing Dashboards

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

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

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

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

Understanding Accessing Direct Line Report Information on the Dashboard Pagelets

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

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

There are seven different access types available:

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

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

See “Configuring Direct Reports Functionality” (Application Fundamentals).

See “Setting Up Access to Direct Reports Data” (Application Fundamentals).

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

Understanding Related Actions and Self Service Transactions

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

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

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

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

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

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

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

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

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

- **View in Talent Summary**
- **View in Company Directory**

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

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

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

Configuring the Manager Dashboard Pagelets

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

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

Pages Used to Configure the Manager Dashboard Pagelets

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

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

Understanding the Manager Dashboard Pagelets and Setup

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

The following pagelets are delivered with the Manager Dashboard:

- Alerts
- Objective Alignment (narrow version of the Business Objective information)

- Business Objective Alignment (wide version of the Business Objective information)
- Pending Approvals
- Direct Line Reports
- Learning
- Company Directory
- My Job Openings
- Quick Links
- My Reports

Understanding Alerts

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

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

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

Alert Message Generation

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

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

Understanding Approvals

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

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

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

Steps to Setting Up the Approvals Pagelet

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

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

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

Related Links

“Understanding Approvals” (Application Fundamentals)

Understanding the Direct Line Reports Pagelet Features

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

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

This topic discusses the delivered Direct Line Reports pagelet format.

The Delivered Direct Line Reports Pagelet Format

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

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

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

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

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

Alerts Pagelet Setup Page

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

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

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

Navigation:

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

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

Alerts Pagelet Setup

User Changes Allowed

Allow Changes to Alert Type

Alert Levels

Number of Alerts to Display

Alerts Level to Display

Critical (🔴)

Warning (🟡)

Informational

*Number of Alerts

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

User Changes Allowed

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


Field or Control	Description
Allow Changes to Alert Type	<p>Select to enable the manager to specify specific alert types he or she wants to see on the Alerts pagelet. By selecting this check box, the system will display the Alert Types to Include group box on the Personalize Alerts page for the manager. For a list of alert types, see Understanding Alerts.</p> <p>Deselect this check box to have all alert types display on the Alerts pagelet and to remove the ability for the manager to select alert types on his or her personalization page.</p>


Field or Control	Description
Alert Levels	<p>Select to have the Alerts Level to Display group box available on the Personalize Alerts page for the user. This enables managers to specify which levels of alerts they want or don't want to see on the Alerts pagelet. Alert types include:</p> <ul style="list-style-type: none"> • Critical • Warning • Informational <p>Deselect this check box to hide the Alerts Level to Display group box on the Personalize Alert page for the user, preventing the manager from choosing which alert level he or she wants to display. With this check box deselected, only those alert levels you select in the Alerts Level to Display group box on this page will display on the Alerts pagelet.</p>
Number of Alerts to Display	<p>Select to have the Number of Alerts to Display group box available on the Personalize Alerts page for the user. This enables the user the ability to change the number of alerts that will show on the Alerts pagelet.</p> <p>Deselect this check box to hide the Number of Alerts to Display group box on the Personalize Alert page for the user and prevent managers from identifying the maximum number of alerts that show display on the Alerts pagelet. Instead, the Alerts pagelet will display up to the number of alerts defined in the Number of Alerts field on this page.</p>

See [Personalize Alerts Page](#).

Alerts Level to Display

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

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

Field or Control	Description
Warning ()	Select to have warning level alerts with the corresponding icon appear on the Alerts pagelet next to the alert type. When you deselect this check box, the Warning alerts option will be unavailable to the user on the Personalize Alerts page and these alerts will not display on the pagelet.
Informational	Select to have all informational level alerts with the corresponding icon appear on the Alerts pagelet next to the alert type. When you deselect this check box, the Informational alerts option will be unavailable to the user on the Personalize Alerts page and these alerts will not display on the pagelet.
Number of Alerts	Enter the maximum number of alerts that should appear in the Alerts pagelet when user first opens the pagelet. The user can override this number when the Number of Alerts to Display check box is selected on this page. If the number of alerts for the manager exceeds this number, the user can click the View All link on the pagelet to view the additional alerts.

Alert Definitions

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

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

Field or Control	Description
Sequence	Enter the priority number for the alert type. The alerts on the pagelet are sorted first by alert level, and then by this sequence number.
Include	Select to include this type of alert on the Alerts (Manager Dashboard) and Licenses and Certifications (Talent Summary) pagelets. When an alert type and the Alert Types check box in User Changes Allowed group box of this page is selected, users can choose to include or exclude this alert type on the Manager Dashboard - Alerts pagelet using the Personalize Alerts page.

Field or Control	Description
Alert Type	Displays the name of the alert type. You can define different options for each of the seven alert types.
Days for Critical Alerts	Enter the number of days prior to an event's due date or expiration date to identify when the system should display the alert type as critical.
Days for Warning Alerts	Enter the number of days prior to an event's due date or expirations date to identify when the system should display the alert type as a warning.
Days for Informational Alerts	Enter the number of days prior to a due date of an event for which the system should define the alert as informational for this alert type.
Maximum Days to View in Past	Enter the number of day after the due date of an event that the system should show this alert type. Overdue alerts will appear as critical. Past due alerts that have exceeded the number of days specified here will not display on the Alerts pagelet.
Allow to Delete	Select this check box to enable the user to delete this type of alert from the Alerts pagelet. Deselect this option to hide the delete icon for this type of alert from the Alerts pagelet.

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

Approvals Pagelet Setup Page

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

Navigation:

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

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

Approvals Pagelet Setup

Maximum Number of Approvals

*Maximum Number of Approvals

Warnings

Display Warnings Based On Transaction Effective Date

Display Overdue Warnings (⊘) Display Overdue Warnings days before Transaction Effective Date

Display Standard Warnings (⚠) Display Standard Warnings days before Transaction Effective Date

Approval Workflow Engine (AWE) Transactions Personalize | Find | | First 1-8 of 8 Last

	*Sequence	*Transaction Description	Include	
1	10	Compensation Proposal	<input checked="" type="checkbox"/>	+ -
2	20	Military Rank Change	<input checked="" type="checkbox"/>	+ -
3	30	Nonperson Profile	<input checked="" type="checkbox"/>	+ -
4	40	Performance Document	<input checked="" type="checkbox"/>	+ -
5	50	Person Profile	<input checked="" type="checkbox"/>	+ -
6	60	Promotion	<input checked="" type="checkbox"/>	+ -
7	70	Reporting Change	<input checked="" type="checkbox"/>	+ -
8	80	Transfer	<input checked="" type="checkbox"/>	+ -

Maximum Number of Approvals

Field or Control	Description
Maximum Number of Approvals	Enter the maximum number of approvals that should appear in the Approvals pagelet on the Manager Dashboard.

Warnings


Field or Control	Description
Display Warnings Based On	<p>Chose the method the system should use to notify managers of an upcoming approval that requires their approval. The system uses this information to determine the date to calculate and display the overdue and standard warning icons in the pagelet grid. Valid values are:</p> <ul style="list-style-type: none"> <i>Approval Receipt Date</i> - reflects the date the manager received the approval in his or her queue. <i>Transaction Effective Date</i> - reflects the date on which a transaction becomes effective or occurs. For example, the date on which a promotion will take place. <p>The value you select here will determine the label text for the overdue and standard warning days fields.</p>

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).

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

Field or Control	Description
Display Overdue Warnings - __ days after Approval Receipt Date	<p>This field is available when you select <i>Approval Receipt Date</i> in the Display Warnings Based On field and select the Display Overdue Warnings check box.</p> <p>Enter the number of days after a manager has received an approval request that the system should mark a pending approval as overdue. For example, you enter 7 in this field. An employee submits an approval request on October 20. On October 27, and forward, the system will mark this pending approval with the Response overdue icon.</p> <hr/> <p>Note: This number should be larger than the number in the Display Standard Warnings __ days after Approval Receipt Date field, if both warnings are selected to display.</p>

Field or Control	Description
<p>Display Overdue Warnings - __ days before Transaction Effective Date</p>	<p>This field is available when you select <i>Transaction Effective Date</i> in the Display Warnings Based On field and select the Display Overdue Warnings check box.</p> <p>Enter the number of days before a transaction is to take place to mark a pending approval as overdue and requiring a response. For example, you enter 5 in this field. An employee is eligible for a promotion on October 20. On October 15, and forward, the system will mark this pending approval with the Response overdue icon.</p> <hr/> <p>Note: This number should be smaller than the number in the Display Standard Warnings __ days before Transaction Effective Date field, if both warnings are selected to display.</p>

Field or Control	Description
<p>Display Standard Warnings </p>	<p>Select this check box to have the Response due icon display in the Warning column on the Pending Approvals pagelet. This works in conjunction with the standard warning days field on this page. These approvals will appear after approvals with overdue warnings for each approval type.</p>

Field or Control	Description
<p>Display Standard Warnings __ days after Approval Receipt Date</p>	<p>This field is available when you select <i>Approval Receipt Date</i> in the Display Warnings Based On field and select the Display Overdue Warnings check box.</p> <p>Enter the number of days after a manager has received an approval request that the system should mark a pending approval with a standard warning requiring a response. For example, you enter 3 in this field. An employee submits an approval request on October 20. On October 23 the system will mark this pending approval with the Response due icon and it will remain until the warning days number on this page is reached.</p> <hr/> <p>Note: This number should be smaller than the number in the Display Overdue Warnings __ days after Approval Receipt Date field, if both warnings are selected to display.</p>

Field or Control	Description
Display Standard Warnings __ days before Transaction Effective Date	<p>This field is available when you select <i>Transaction Effective Date</i> in the Display Warnings Based On field and select the Display Standard Warnings check box.</p> <p>Enter the number of days before a transaction is to take place to mark a pending approval with a standard warning requiring a response. For example, you enter <i>10</i> in this field. An employee is eligible for a promotion on October 20. On October 10 the system will mark this pending approval with the Response due icon and remain until the warning days number is reached.</p> <hr/> <p>Note: This number should be larger than the number in the Display Overdue Warnings __ days before Transaction Effective Date field, if both warnings are selected to display.</p> <hr/>

Approval Workflow Engine (AWE) Transactions

Field or Control	Description
Sequence	Enter a priority number for an approval transaction to determine the order in which the approvals should appear in the Pending Approvals pagelet. The lower the number, the earlier the approvals of that type are displayed in the pagelet grid.
Transaction Description	<p>Select the approval transactions you support in your organization. The descriptions come from the Workflow Transactions registry (Set Up HCM > Common Definitions > Approvals > Workflow Transactions).</p> <p>This is also the description that will appear in the pagelet. AWE transactions are listed in the Understanding Approvals topic of the documentation.</p> <p>See Understanding Approvals.</p>
Include	Select to have the Pending Approvals pagelet display an approval transaction type. An approval transaction will not display on the pagelet if this check box is deselected.

Related Links

“Understanding Approvals” (Application Fundamentals)

Direct Reports Pagelet Setup Page

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

Navigation:

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

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

Direct Reports Pagelet Setup

Tab Labels

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

Columns

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

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

Field Settings

Show Domain Name In Emails

Allow Empty Position

Document Type

Absence Management

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

Tab Labels

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

Columns

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

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

The following fields have special considerations:

Field or Control	Description
Actions	<p>Select this check box to make the Action menu drop-down list available in the grid. This enables the user to quickly access the manager self service pages to complete transactions for his or her employees. The Action menu values are configured through PeopleSoft Related Content Services. This framework enables developers and subject matter experts to link application pages with contextually relevant collaborative content.</p> <p>See Delivered Manager Self Service Transactions Available from the Manager Dashboard.</p> <p>See Understanding Related Actions and Self Service Transactions.</p> <p>For more information, see the product documentation <i>PeopleTools: Portal Technology</i>, “Developing and Configuring Related Content Services”.</p>

Field or Control	Description
Instant Message	<p>Select this check box to have the grid display IM availability for an employee.</p> <p>The instant message presence icon must be enabled in the Org Chart Viewer for the <i>Direct-Line Reports</i> org view type for the Manager Dashboard to display an IM icon. To activate this functionality for direct line reports, navigate to Set Up HCM > Common Definitions > Org Chart Viewer > Chart and Profile Settings. Access the component for the org view type <i>Direct-Line Reports</i>. The Manager Dashboard first checks the Org Chart Content page to see if the Instant Message Presence Icon field is selected and the IM protocol and IM Domain fields are entered. If these options are not defined, then the system checks the Profile Content page for this same information. If none of these IM options are defined in the Org Chart Viewer for <i>Direct-Line Reports</i>, the IM column will not be available on the Direct Line Reports pagelet.</p> <p>When using the XMPP protocol for instant messaging, you will also need to navigate to My System Profile at the root menu and on the General Profile Information page add the XMPP protocol domain, user ID, and password for the user.</p>

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

Field Settings

Field or Control	Description
Show Domain Name In Emails	<p>Select this check box to have the domain name appear in the person's email. The domain name is the text that appears after the @ sign in an e-mail address.</p> <p>Deselect this check box to have the system hide the domain name. This will save space on the page and avoid redundancy, such as when all employees have the same domain name in their business e-mail address.</p>

Field or Control	Description
Document Type	<p>Enter the document type the system should use to retrieve employee performance ratings. The system will retrieve ratings from the last closed document of the document type specified in this field.</p> <p>If the document type is not specified, or the employee does not have a completed performance rating from the specified document, the performance rating information will not display.</p>
Allow Empty Position	<p>Select to display empty positions on the Direct Line Reports pagelet when using Position Management. Deselect this check box to hide unfilled positions from the manager.</p>

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

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

Field or Control	Description
Balance Type 1, 2, and 3	<p>Select to enable any one of three user configurable Absence Management Leave Balance fields.</p> <p>The Balance Type 1 and Balance Type 2 options are selected by default and represent vacation and sick leave. To adjust for this, the Time and Labor Vacation Balance and Sick Balance options are deselected in the Columns group box. The default options for the Balance Type 3 are cleared.</p>

Field or Control	Description
Balance Type 1, 2, and 3 Label	<p>Enter the column label that will appear in the column header for each of the three Absence Manager columns in the Direct Line Reports grid.</p> <p>The system delivers the Balance Type 1 Label field text as <i>Vacation</i> by default and the Balance Type 2 Label field text as <i>Sick</i> by default.</p>

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

Related Links

“Understanding Applications and List Sets” (PeopleSoft Global Payroll)

“Setting Up Applications” (PeopleSoft Global Payroll)

“Setting Up List Sets” (PeopleSoft Global Payroll)

Configuring the Talent Summary Pagelets

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

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

Pages Used to Configure the Talent Summary Pagelets

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

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

Understanding the Talent Summary Dashboard Pagelets and Setup

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

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

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

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

The screenshot shows the Talent Summary page for Rosanna Channing. The page is divided into several sections:

- Employee Information:**
 - Name: Rosanna Channing
 - Job Title: Senior Manager-Accounting
 - Job Code: 600135
 - Address: 4500 Corporate Lane, Pleasanton, CA 94588
 - Work Phone: 925.555.1234
 - Location: Corporation Headquarters, Building 2000
 - Email: HCMGENUser1@ap6023fems.us.oracle.com
 - Full/Part Time: Full-Time
 - Employee ID: KU0046
 - Birthday: 01/04
- HR Status and Performance:**
 - HR Status: Active
 - Org Relationship: Employee
 - Talent Category: Achiever (★★★★)
 - Last Start Date: 08/29/1986
 - Years of Service: 26.4
 - Date in Current Job: 11/04/2008
 - Years in Current Job: 4.2
 - Last Performance Period: Jan 2011 to Dec 2011
 - Potential Rating: High Potential Candidate
 - Last Performance Rating: Exceeds Expectations
- Performance and Risk of Leaving Charts:**
 - Performance Chart:** A 3x3 grid with a blue square in the top-right cell, indicating a high performance rating.
 - Risk of Leaving Chart:** A 3x3 grid with a blue square in the top-right cell, indicating a low risk of leaving.

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

Prerequisites

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

- Set up the Direct Reports API data service off Enterprise
 - See “Configuring Direct Reports Functionality” (Application Fundamentals).
 - See “Setting Up Access to Direct Reports Data” (Application Fundamentals).
- Configure Related Content Services
 - See *PeopleTools: Portal Technology*, “Developing and Configuring Related Content”.
- Set up the Org Chart Viewer, Chart and Profile Field Map component to identify fields that you can select for the Talent Summary header.
 - See “Chart and Profile Field Map Page” (PeopleSoft Human Resources Administer Workforce).
- Define alerts on the Manager Dashboard, Alerts Pagelet Setup component.
 - See [Alerts Pagelet Setup Page](#).
- Enable instant messaging
 - For the instant messaging icon to display on the Talent Summary page, you will perform additional setup tasks for your direct line report settings in the Org Chart Viewer setup pages.
 - See [Header Fields Page](#).
- Assign security access roles to the users to view Talent Summary and pagelet data.
 - To grant access to the Talent Summary Setup pages, assign the Administer *HR Dashboards* role (permission list *HCCPHR8000*) to your administrators.
 - To grant access to the Talent Summary page, assign the *Manager Dashboards* role (permission list *HCCPHR8010*) to your managers.

- To grant access and view the ELM Learning pagelet data, assign the *Manager Dashboard – ELM* role to your manager.

Header Fields Page

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

Navigation:

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

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

The screenshot shows the 'Header Fields' page with two main sections: 'Column 1 Display Fields' and 'Column 2 Display Fields'. Each section has a table with columns for '*Line Number', '*Display Field', and two small icons (+ and -). Below these sections is an 'Instant Messenger' section with a checkbox labeled 'Display IM Icon'.

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

Instant Messenger

Display IM Icon

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

<i>Field or Control</i>	<i>Description</i>
Line Number	Select the fields in the order you want them to display. If one of the rows is deleted, the line numbers will be automatically re-ordered when the page is saved.

Field or Control	Description
Display Field	<p>Select fields that should appear in the header according to the designated column.</p> <hr/> <p>Note: The Talent Summary header fields use the Set Up HCM > Common Definitions > Org Chart Viewer > Chart and Profile Field Map component to define the field mappings in the header. Valid values for the Display Fields are those field mapping IDs that have <i>General</i> designated in the Section column.</p> <hr/> <p>See “Chart and Profile Field Map Page” (PeopleSoft Human Resources Administer Workforce).</p> <p>Display field values that come from Personal and Job Data are:</p> <ul style="list-style-type: none"> • <i>Address</i> • <i>Birthday</i> • <i>Building</i> • <i>Date in Current Job</i> • <i>Email</i> • <i>Employee ID</i> • <i>Full Time/Part Time</i> • <i>HR Status</i> • <i>Job Code</i> • <i>Job Title</i> • <i>Last Start Date</i> • <i>Location</i> • <i>Organizational Relationship</i> • <i>Reports Count - Total</i> • <i>Work Phone</i> • <i>Years in Current Job</i> • <i>Years of Service</i> <p>Display field values that come from Succession Planning are:</p> <ul style="list-style-type: none"> • <i>Talent Category</i> • <i>Potential Rating</i> <p>Display field values that come from ePerformance are:</p> <ul style="list-style-type: none"> • <i>Last Performance Period</i>

Field or Control	Description
	<ul style="list-style-type: none"> • <i>Last Performance Rating</i>
<p>Display IM Icon (display instant messenger icon)</p>	<p>Select this check box to display or hide the IM presence icon in the header of the Talent Summary page.</p> <p>The instant message presence icon must be enabled in the Org Chart Viewer for Direct-Line Reports for the Talent Summary page to display a chat icon. To activate this functionality for direct line reports, navigate to Set Up HCM > Common Definitions > Org Chart Viewer > Chart and Profile Settings. Access the component for the org view type Direct-Line Reports. The Talent Summary page first checks the Org Chart Content page to see if the Instant Message Presence Icon is selected and the IM Protocol and IM Domain fields are entered. If these options are not defined, then the system checks the Profile Content page for this same information. If none of these IM options are defined in the Org Chart Viewer - Chart and Profile Settings page for Direct-Line Reports, the chat icon will not be available on the Talent Summary page header.</p> <p>See “Org Chart Content Page” (PeopleSoft Human Resources Administer Workforce).</p> <p>See “Chart and Profile Settings - Profile Content Page” (PeopleSoft Human Resources Administer Workforce).</p> <p>When using the <i>XMPP</i> protocol for instant messaging, you will also need to navigate to My System Profile at the root menu and on the General Profile Information page add the <i>XMPP</i> protocol domain, user ID, and password for the user.</p>

Header Rate Boxes Page

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

Navigation:

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

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

Header Fields
Header Rate Boxes
Other Pagelets

Performance Versus Potential Rating

Display Performance Versus Potential Ratings Box
 Performance Document Type
 Performance Rating Axis Potential Rating Axis
 Performance Axis Label Potential Axis Label

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

Rating Model Average 5 Level Rating Model

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

Potential Rating Mappings

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

Risk of Leaving Versus Impact of Loss

Display Risk of Leaving Versus Impact of Loss Box
 Risk Axis Label
 Impact Axis Label

Performance Versus Potential Rating

<i>Field or Control</i>	<i>Description</i>
Display Performance Versus Potential Ratings Box	Select this box to display the Performance versus Potential ratings box on the header of the Talent Summary page. The Performance versus Potential Ratings box displays the performance rating from the most recently completed performance document and the potential rating from career planning. When no data is available for the ratings box, the box will not appear and the page will display text that performance or potential rating data does not exist.

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

<i>Field or Control</i>	<i>Description</i>
Performance Rating Axis	Select an option in this field to configure the maximum value for the x-axis. The values in this drop-down are 1-5. This number defines the ratings box size, along with the y-axis.

<i>Field or Control</i>	<i>Description</i>
Performance Axis Label	Specify the label for the performance x-axis.


<i>Field or Control</i>	<i>Description</i>
Potential Rating Axis	Select an option in this field to configure the maximum value for the y-axis. The values in this drop down are 1-5.

<i>Field or Control</i>	<i>Description</i>
Potential Axis Label	Specify the label for the performance y-axis.

Performance Rating Model Mapping

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

<i>Field or Control</i>	<i>Description</i>
Rating Model	Identify the rating models you wish to use in the performance rating axis. Rating models are managed in the Rating Model table by navigating to Set Up HCM > Product Related > Profile Management > Content Catalog > Rating Model .

<i>Field or Control</i>	<i>Description</i>
 (View Detail icon)	Click this icon to open the Review Rating Model Table page and view details about this rating model.

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

Potential Rating Mappings

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

Risk of Leaving Versus Impact of Loss

<i>Field or Control</i>	<i>Description</i>
Display Risk of Leaving Versus Impact of Loss	Select this box to display the Risk of Leaving Versus Impact of Loss ratings box on the header pagelet of the Talent Summary page. When no data is available for the ratings box, the box will not appear and the page will instead display text that risk of leaving or impact of loss data does not exist.

<i>Field or Control</i>	<i>Description</i>
Risk Axis Label	Specify a label for the risk of leaving x-axis.

<i>Field or Control</i>	<i>Description</i>
Impact Axis Label	Specify a label for the impact of leaving y-axis.

Other Pagelets Page

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

Navigation:

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

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

Header Fields
Header Rate Boxes
Other Pagelets

Competencies

Number of past years to display rated competencies

Valid Evaluation Types

*Instance Qualifier	Sequence Number		
Supervisor/Manager	20	+	-
Approved/Official	10	+	-

Licenses and Certifications

Include Expired Licenses

[Configure Alert Icons](#)

Projects

Number of years since completion to display projects

Performance History

Document Type

Number of past completed reviews to be displayed

Succession Options

Display Succession Plans for Status

Official

Draft

Field or Control	Description
Number of past years to display rated competencies	<p>Enter the number of years the system should go back and show rated competencies. The competency related pagelets will display competencies within the years entered here.</p> <hr/> <p>Note: Regardless of the number of years you enter the pagelet displays only the most current ratings. Limiting the number of years to display data eliminates old data that may no longer be relevant.</p>

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Field or Control	Description
Valid Evaluation Types - Instance Qualifier	Identify which evaluation types should appear in the competency pagelets.
Sequence Number	Specify the priority for the evaluation type. If a competency has more than one valid evaluation type, the type with the lowest priority number is considered to have the highest priority.
Include Expired Licenses	Select to show the expired licenses and certifications on the Talent Summary - Licenses and Certifications pagelet. Expired licenses and certificates will display with the critical alert icon. Deselect this check box to hide the expired licenses and certificates from the user in the Licenses and Certifications pagelet.
Configure Alert Icons	Click this link to open the Alert Pagelet Setup page and define how alerts should display in your pagelets. The Alert Pagelet Setup page is also used by the Manager Dashboard.
Number of years since completion to display projects	Enter the number of years the system should display a completed project. This number year applies to the Special Projects and E&G Special Projects pagelets.
Document Type	Select the performance document type that should be used for the graphical or grid Performance History pagelets.
Number of past completed reviews to be displayed	Specify the number of past completed reviews to appear in the graphical or grid Performance History pagelets.
Display Succession Plans for Status	Identify key positions, anticipate organizational bottlenecks, and develop multiple career paths for individuals who are ready for promotion. Values are: <i>Official</i> and <i>Draft</i> . This information is shown in the Succession Options pagelet.

Alerts Pagelet Setup Page

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

Navigation:

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

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

Alerts Pagelet Setup

User Changes Allowed

Allow Changes to Alert Type

Alert Levels

Number of Alerts to Display

Alerts Level to Display

Critical (!)

Warning (!)

Informational

*Number of Alerts

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

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

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

Setting Up Employee Snapshot

Understanding Employee Snapshot Dashboards and Tiles

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

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

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

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

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

Adding a Dashboard to the Employee Snapshot Dashboard Action List

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

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

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

- f. Save your data.

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

2. Navigate to **PeopleTools > Portal > Structure and Content**.

- a. Click the label link for **Manager Self Service**.

Note: Do not use the link titled **Fluid Homepage**.

- b. In the **Content References** group box, click the **Edit** link for the new dashboard you just created.
- c. In the **Content Reference Link Attributes** group box, delete the *NAVTOPWIN* row by selecting the delete (-) button.
- d. Copy the **Attribute value** text that ends in *_LINK* in the **Attribute value** field (for example, *PROMOTION_READINESS_LINK*).
- e. Save the page.

3. Navigate to **PeopleTools > Portal > Portal Utilities > Navigation Collections**.

- a. Enter *Employee Snapshot* in the **Search By** field and click **Search**.
- b. Click the **Edit** link for *Employee Snapshot*.
- c. Click **Add Link** button.
- d. On the Add Link page, select *Local Portal* in the **Source Portal** field.
- e. Paste the name that ends in *_LINK* you copied from the previous step into the **Menu Item** field.
- f. Click **OK**, then **Save**.

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

Renaming a Dashboard from the Employee Snapshot Dashboard Action List

To rename an Employee Snapshot dashboard, perform these steps:

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

5. **Save.**

Removing a Dashboard from the Employee Snapshot Dashboard Action List

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

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

Displaying Tiles on an Employee Snapshot Dashboard

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

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

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

Determining the Sequence Order of Tiles on the Dashboard

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

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

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

Root > [Fluid Structure Content](#) > [Fluid Pages](#) > Employee Snapshot

Structure and Content

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

▼ **Folders** Personalize | Find | View All | | First 1 of 1 Last

Add Folder

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

▼ Content References		Personalize Find View All First 1-18 of 18 Last					
Link	Node Name	Label	Edit	Sequence number	Create Link	Number of links	
	HRMS	Banner in the Activity Guide	Edit	100	Create Link	0	[-]
	HRMS	View Employee Snapshot	Edit	150	Create Link	0	[-]
	HRMS	Summary	Edit	200	Create Link	1	[-]
	HRMS	Promotion Readiness	Edit	300	Create Link	1	[-]
	HRMS	Job Details	Edit	1000	Create Link	0	[-]
	HRMS	Job Details modal	Edit	1050	Create Link	0	[-]
	HRMS	Compensation	Edit	1100	Create Link	0	[-]
	HRMS	Compensation History modal	Edit	1150	Create Link	0	[-]
	HRMS	Job Competencies	Edit	1200	Create Link	0	[-]

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

Configuring Employee Snapshot

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

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

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

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

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

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

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

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

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

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

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

Related Links

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

Pages Used to Configure Employee Snapshot

Page Name	Definition Name	Usage
Configure Employee Snapshot Tile	HC_HCTS_ESNAP_CFG_FL_GBL (cref of the tile)	Access the configuration pages for Employee Snapshot.
Configure Employee Snapshot Layout	N/A	The Configure Employee Snapshot pages appear in a multi-panel layout. When using a large form factor like a desktop or tablet, the left panel lists the page category items and the main panel displays the content related to that item. When using a small form factor, such as a phone, the page category items will display by default when you select the Configure Employee Snapshot tile. Select a page list item to access that page.
Configure Employee Snapshot - Competencies Page	HCTS_CFG_COMP_FL	Identify the number of years to display competencies for the evaluation types you have defined on this page.
Configure Employee Snapshot - Licenses and Certifications Page	HCTS_CFG_LICRT_FL	Determine if you want to compare the competencies held by a person to their job profile and when to alert a manager of expiring items.
Configure Employee Snapshot - Projects Page	HCTS_CFG_PRJCT_FL	Enter the number of years to display special projects assigned to the employee.

Page Name	Definition Name	Usage
Configure Employee Snapshot - Document History Page	HCTS_CFG_PERF_FL	Identify performance and development document types and the number of reviews to display.
Configure Employee Snapshot - Performance versus Potential Page	HCTS_CFG_PP_BOX_FL	Set up the Performance versus Potential ratings box for the Employee Impact tile.
Rating Model Information Page	HCTS_CFG_RATE2_SCF	Map a performance rating axis value to each rating within a rating model.
Configure Employee Snapshot - Risk versus Loss Page	HCTS_CFG_RL_BOX_FL	Set up the Risk versus Loss ratings box for the Employee Impact tile.
Configure Employee Snapshot - Succession Options Page	HCTS_CFG_SUCC_FL	Select which of the employee's succession plans should display on the Succession Plans tile and page based on the plan's status.
Configure Employee Snapshot - Profile Content Page	HCTS_CFG_CAT_FL	View or add new profile-related tiles to the Employee Snapshot dashboards.
Tile Attributes Page	HCTS_TILE_TBL_SCF HCTS_TILE_TBL2_SCF	Define the attributes and publish profile-related tiles to the Employee Snapshot dashboards.
Dashboard Information Page	HCTS_DASHBOARD_SCF	View tile publish statuses.

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

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

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

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

Configure Employee Snapshot Tile

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

Navigation:

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

This example illustrates the Configure Employee Snapshot tile.



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

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

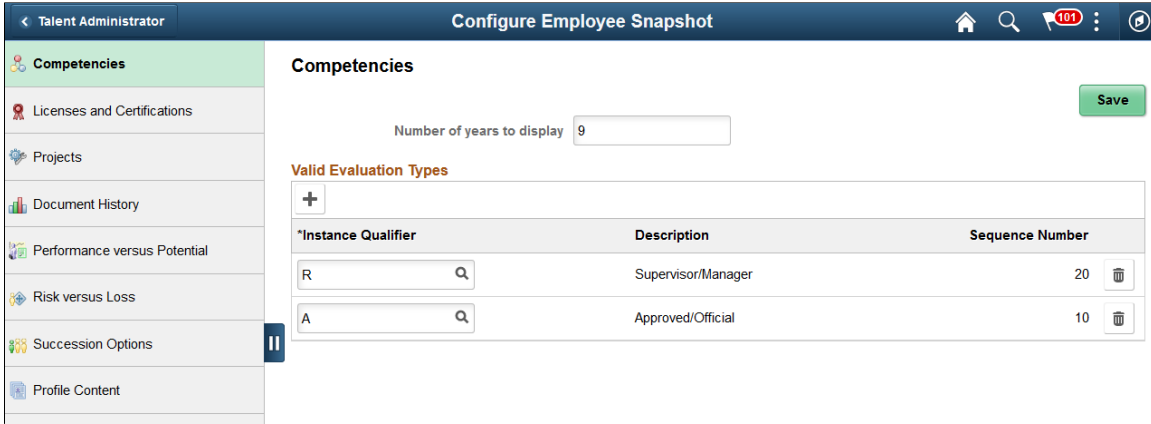
- [Configure Employee Snapshot - Competencies Page](#)
- [Configure Employee Snapshot - Licenses and Certifications Page](#)
- [Configure Employee Snapshot - Projects Page](#)
- [Configure Employee Snapshot - Document History Page](#)
- [Configure Employee Snapshot - Performance versus Potential Page](#)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

Configure Employee Snapshot Layout

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

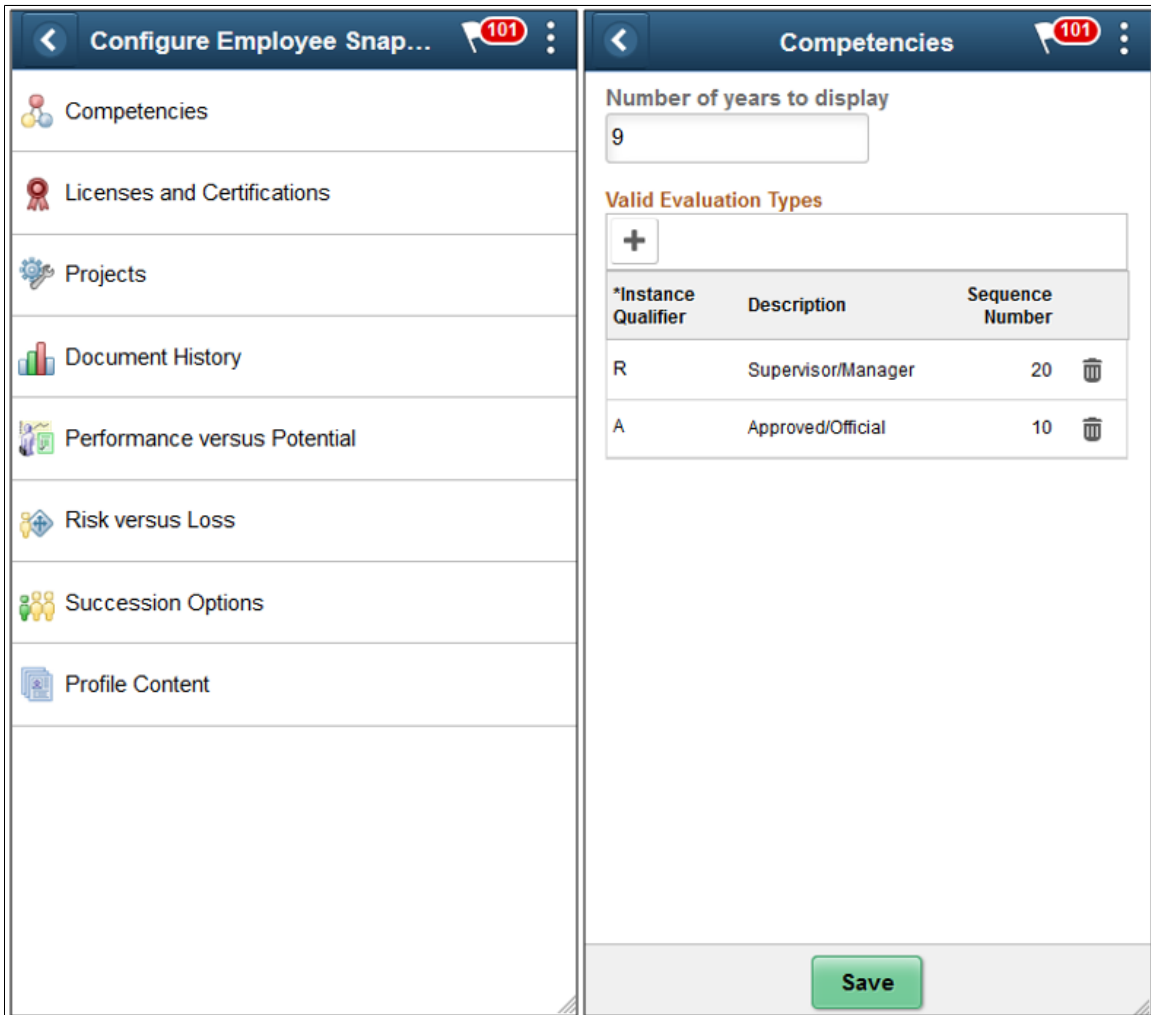
content view. Click the slider tab when using a large form factor device to hide or display the left panel list.

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



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

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



Configure Employee Snapshot - Competencies Page

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

Navigation:

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

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

Competencies

Save

Number of years to display

Valid Evaluation Types

+

*Instance Qualifier	Description	Sequence Number	
<input style="width: 80%;" type="text" value="R"/> 🔍	Supervisor/Manager	20	🗑️
<input style="width: 80%;" type="text" value="A"/> 🔍	Approved/Official	10	🗑️

<i>Field or Control</i>	<i>Description</i>
Number of years to display	<p>Enter the number of years the system should show rated competencies. The competency-related tiles and pages for the Employee Snapshot will display competencies within the years entered here.</p> <hr/> <p>Note: Regardless of the number of years you enter, the tiles and pages display only the most current competency ratings. Limiting the number of years to display data eliminates old data that may no longer be relevant.</p>

Valid Evaluation Types

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

<i>Field or Control</i>	<i>Description</i>
<div style="border: 1px solid #ccc; padding: 5px; display: inline-block; text-align: center; width: 30px; height: 30px; line-height: 30px;">+</div> Add icon button	<p>Click to include additional evaluation types that can appear on the competency tiles and pages.</p> <hr/> <p>Important! When you do not identify valid evaluation types, the Job Competency tiles and page will display a message that you need to contact the system administrator to configure this view.</p>
Instance Qualifier and Description	<p>Enter instance qualifiers to identify which evaluation types should appear on the competency-related tiles and pages.</p>

Field or Control	Description
Sequence Number	<p data-bbox="865 262 1464 426">Displays the sequence number for the evaluation type (instance qualifier). These are defined under the <i>COMPETENCY</i> content type on the Manage Profiles “Instance Qualifiers Page” (PeopleSoft Human Resources Manage Profiles).</p> <hr data-bbox="865 457 1464 462"/> <p data-bbox="865 472 1464 741">Note: When more than one evaluation type exists for an employee, the system will use the evaluation type with the lowest sequence number. For example, if an employee has both an <i>Approved/Official</i> evaluation, which has a sequence number of 10, and a <i>Supervisor/Manager</i> evaluation, which has a sequence number of 20, the system will display the <i>Approved/Official</i> evaluation on the Employee Snapshot pages, since it has the lowest sequence number of 10.</p>

Related Links

“Talent Profile Page (for Employees) or Team Talent Profile Page (for Managers)” (PeopleSoft eDevelopment)

“Person Profile Page” (PeopleSoft Human Resources Manage Profiles)

“Add New <content type>, Update <content type>, or View <content type> Page” (PeopleSoft Human Resources Manage Profiles)

“Defining Instance Qualifiers” (PeopleSoft Human Resources Manage Profiles)

Configure Employee Snapshot - Licenses and Certifications Page

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

Navigation:

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

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

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

Licenses and Certifications

Compare Person with Job Profile **No**

Days for Warning Alert

<i>Field or Control</i>	<i>Description</i>
<p>Compare Person with Job Profile</p>	<p>Set this option to <i>Yes</i> to have the Licenses and Certifications tiles and pages identify which items held by the employee are required by the job versus those that are not required by the job. When enabled, the:</p> <ul style="list-style-type: none"> • The summary <u>Licenses and Certifications (Summary) Tile</u> will include missing job required items in the total count with expiring items. • The non-summary <u>Licenses and Certifications Tile</u> will display a two box layout. The first box will show the number count of current, expired, and missing items of required items. The second box will show only the number count of additional items held by the employee. • <u>Licenses and Certifications Page</u> will display required and additional items on two different page tabs. The first tab of the page will show those items held by the employee that are required for the job, and the second tab of the page will display additional items held by the employee that are not required by the job. <p>Set this option to <i>No</i> to have all licenses and certifications held by the employee grouped together and not separated by those required by the job. The tiles will show a current and expiring count as well as a count for expired items. The page will display all licenses and certifications held by the employee on one page. Missing items will not be identified on the tiles or pages.</p>

Field or Control	Description
Days for Warning Alert	<p>Enter the number of days before a transaction is to expire to indicate that the system should display an expiration warning to the manager. For example, if you entered 60 in this field, and an employee's CPR certification expires on October 30, then from September 1 until the expiration date the system will display an Expiring Soon warning alert icon next to this employee's certification. After this date the icon will switch to an Expired alert icon instead. Expiration dates for licenses and certifications are defined on the Person Profile: Qualifications tab.</p> <hr/> <p>Note: When the Compare Person with Job Profile option is enabled on this page, the Licenses and Certifications Tile will list the number count of required-for-job items that have expired or that are expiring soon. It will not list the number count of additional items that are expired or are expiring soon. Click the <number count> Additional Items box on the tile to view expiring soon or expired items that are not required by the job. However, the Licenses and Certifications (Summary) Tile does not separate out the required versus non-required items, even when the Compare Person with Job Profile option is set to <i>Yes</i>.</p> <hr/>

Related Links

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

[Licenses and Certifications Tile](#)

[Licenses and Certifications Page](#)

“Talent Profile Page (for Employees) or Team Talent Profile Page (for Managers)” (PeopleSoft eDevelopment)

“Add New <content type>, Update <content type>, or View <content type> Page” (PeopleSoft Human Resources Manage Profiles)

Configure Employee Snapshot - Projects Page

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

Navigation:

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

Select the Projects category item from the left panel.

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



Projects

Number of years to display

Save

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

Configure Employee Snapshot - Document History Page

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

Navigation:

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

Select the Document History category item from the left panel.

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

Document History

Save

Performance History

Number of reviews to display

Performance Document Types

+

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

Development History

Number of reviews to display

Development Document Types

+


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

Performance History

<i>Field or Control</i>	<i>Description</i>
Number of reviews to display	Enter the maximum number of completed performance reviews the Employee Snapshot tiles and pages should display for an employee.

Performance Document Types

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

<i>Field or Control</i>	<i>Description</i>
 Add icon button	Click to include additional performance document types that can appear on the Performance History tiles and pages.
Document Type	Select the performance document types that should be used for the overall performance rating for the performance tiles and pages. These values are defined on the “Document Types Page” (PeopleSoft ePerformance).


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

Development History

<i>Field or Control</i>	<i>Description</i>
Number of reviews to display	Enter the maximum number of completed development reviews the Employee Snapshot tiles and pages should display for an employee.

Development Document Types

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

<i>Field or Control</i>	<i>Description</i>
 Add icon button	Click to include development document types that can appear on the Development History tiles and pages.
Document Type	Select the development document types that should be used to display on the development tiles and pages. The tiles and pages will show the completed development documents for the employee. Document types are defined on the “Document Types Page” (PeopleSoft ePerformance).

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

Related Links

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

[Performance History Tile](#)

[Performance History Page](#)

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

[Development History Tile](#)

[Development History Page](#)

Configure Employee Snapshot - Performance versus Potential Page

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

Navigation:

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

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

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

Performance versus Potential

Save

Display Ratings Box Chart **Yes**

Performance Document Type Q

Performance Rating Axis

Performance Axis Label

Potential Rating Axis

Potential Axis Label

Performance Rating Model Mapping

+

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

Potential Rating Mappings

Potential Rating	Rating Box Value
High Potential Candidate	<input style="width: 30px;" type="text" value="3"/>
Lateral Transfer	<input style="width: 30px;" type="text" value="2"/>
Officer Potential	<input style="width: 30px;" type="text" value="2"/>

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

Field or Control	Description
Display Performance Versus Potential Ratings Box	<p>Swipe to <i>Yes</i> if you want this ratings box to appear on the Employee Impact Tile.</p> <p>If you select <i>NO</i>, this ratings box will not appear on the tile and the employee’s evaluation for performance and potential will not be viewable on the Employee Impact Page as well.</p> <hr/> <p>Note: If this option and the Display Risk of Leaving Versus Impact of Loss Box option on the Configure Employee Snapshot - Risk versus Loss Page are set to <i>NO</i>, the tile will display a message to contact to administrator to configure the view. This also prevents the manager from viewing any of the employee’s ratings.</p>
Performance Document Type	Select the performance document type that should be used for the Overall Performance Rating for the Performance versus Potential ratings box. These values are defined in the “Document Types Page” (PeopleSoft ePerformance).
Performance Rating Axis	Select an option in this field to configure the maximum value for the x-axis. The values in this drop-down are 1-5. This number defines the ratings box size, along with the y-axis.
Performance Axis Label	Specify the label for the performance x-axis.
Potential Rating Axis	Select an option in this field to configure the maximum value for the y-axis. The values in this drop down are 1-5.
Potential Axis Label	Specify the label for the performance y-axis.

Performance Rating Model Mapping

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

Field or Control	Description
Rating Model	<p>Identifies the rating models you wish to use in the performance rating axis. Rating models are managed on the “Rating Model Page” (PeopleSoft Human Resources Manage Profiles).</p> <p>Click the Add (+) button or select a row to access the Rating Model Information Page and add, view, or manage rating model mappings.</p>

Potential Rating Mappings

<i>Field or Control</i>	<i>Description</i>
Potential Rating	Map a rating box value to each potential rating type. The system uses this information to determine where a person's potential rating should display in the ratings box on the Employee Impact Tile . The values run from 1 to the value defined in the Potential Rating Axis field.

Rating Model Information Page

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

Navigation:

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

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

The screenshot shows a window titled "Rating Model Information" with "Cancel" and "Done" buttons. Below the title bar, it displays "Rating Model K001 Average 5 Level Rating Model". The main content is a table with the following data:

Rating	Description	Rating Box Value
U	Unsatisfac	1
N	Needs Impr	1
M	Meets	2
E	Exceeds	3
C	Co Maker	3

At the bottom of the table, there is a "Delete" button.

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

Configure Employee Snapshot - Risk versus Loss Page

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

Navigation:

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

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

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

Risk versus Loss

Display Ratings Box Chart **Yes**

Risk Axis Label

Impact Axis Label

<i>Field or Control</i>	<i>Description</i>
Display Risk of Leaving Versus Impact of Loss Box	<p>Swipe to <i>Yes</i> if you want this ratings box to appear on the Employee Impact Tile. When no data is available for the ratings box, the box will not appear.</p> <p>If you select <i>NO</i>, this ratings box will not appear on the tile and the employee’s evaluation for risk of leaving and impact of loss will not be viewable on the Employee Impact Page as well.</p> <hr/> <p>Note: If this option and the Display Performance Versus Potential Ratings Box option on the Configure Employee Snapshot - Performance versus Potential Page are set to <i>NO</i>, the tile will display a message to contact to administrator to configure the view. This also prevents the manager from viewing any of the employee’s ratings.</p>
Risk Axis Label	Specify a label for the risk of leaving x-axis.
Impact Axis Label	Specify a label for the impact of leaving y-axis.

Configure Employee Snapshot - Succession Options Page

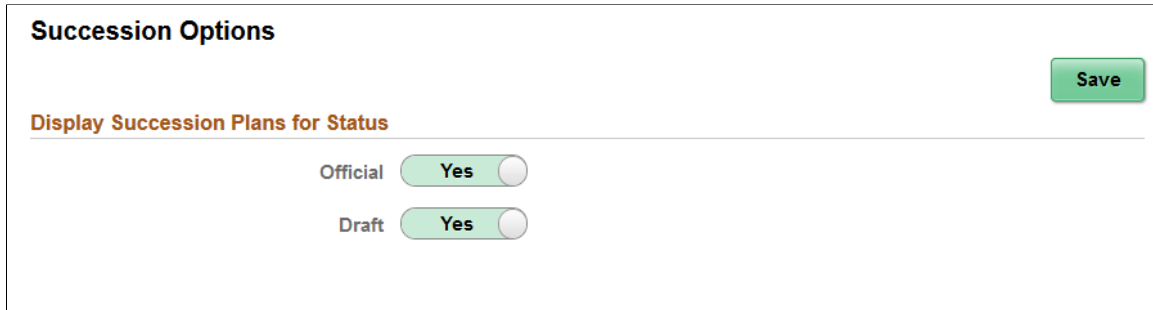
Use the Configure Employee Snapshot - Succession Options page (HCTS_CFG_SUCC_FL) to select which of the employee’s succession plans should display on the Succession Plans tile and page based on the plan’s status.

Navigation:

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

Select the Succession Options category item from the left panel.

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



Succession Options

Save

Display Succession Plans for Status

Official Yes

Draft Yes

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

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

Configure Employee Snapshot - Profile Content Page

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

Navigation:



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

Select the Profile Content category item from the left panel.

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

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

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

Field or Control	Description
 Add Content Type button or  Add icon button	Click to access the Tile Attributes Page and configure a new profile tile for any of the Employee Snapshot dashboards.
Content Type and Description	Displays the type of content that will be available on the tile and pages. This information comes from Profile Management.
Tile Title	Displays the content name of the tile and page that will display to the user within Employee Snapshot. Note: This name is represented as <Content Type> or <Content Item> throughout this documentation.

Field or Control	Description
Published	<p data-bbox="863 254 1469 310">Indicates if a tile has been published to an Employee Snapshot dashboard.</p> <hr/> <p data-bbox="863 348 1437 489">Note: Although a content type may indicate that it has been publish, it may not be published to all dashboards you have configured for this content type. The tile only need be published to one dashboard to indicate that it has been published.</p> <hr/> <p data-bbox="863 527 1429 611">To view the dashboard or dashboards to which this tile has been published, click the row to access the Tile Attributes Page.</p> <p data-bbox="863 638 1446 722">If this field is blank, the tile has not been published and therefore not accessible from any of the Employee Snapshot dashboards.</p>

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

Related Links

“Understanding the Content Catalog” (PeopleSoft Human Resources Manage Profiles)

“Profile Types - Content Page” (PeopleSoft Human Resources Manage Profiles)

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

Tile Attributes Page

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

Navigation:

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

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

Cancel
Tile Attributes
Save

Tile Information

*Content Type Memberships

*Tile Title

Display Ratings Bar No

Define Tile Attributes

Tile Security Roles

+

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

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

Publish to Dashboards

+

*Dashboard Name		Tile Size	Tile Sequence	Published	Publish Tile	
Summary		1x1 v	<input type="text" value="999"/>	Yes	<input type="button" value="Publish Tile"/>	
Promotion Readiness		2x2 v	<input type="text" value="999"/>	Yes	<input type="button" value="Publish Tile"/>	
Compensation Review		2x2 v	<input type="text" value="999"/>	Yes	<input type="button" value="Publish Tile"/>	
Performance Review		2x2 v	<input type="text" value="999"/>	Yes	<input type="button" value="Publish Tile"/>	
Career Planning		2x2 v	<input type="text" value="999"/>	Yes	<input type="button" value="Publish Tile"/>	

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

Field or Control	Description
Content Type	<p>Select a content type, which identifies the type of information that will appear on the tile and pages. Content types are defined in Profile Management on the “Content Types Page” (PeopleSoft Human Resources Manage Profiles).</p> <p>Only those content types that do not already have a tile on any of the Employee Snapshot dashboards will be available for selection.</p>
Tile Title	<p>Indicate the name that should appear on the tile and pages. You can enter up to 30 characters.</p> <hr/> <p>Note: This name is represented as <Content Type> or <Content Item> throughout this documentation.</p> <hr/>
Display Ratings Bar	<p>This field is available when the content type you have selected is associated with ratings.</p> <p><i>Yes</i> is provided by default when a content type is associated with a rating. Enabled, the tile and pages will display a ratings bar. For example, if this is a <i>Yes</i> and you are viewing language profile information, the tile will show the employee’s proficiency on a graphical bar. However, a content type like travel preferences is not associated with ratings and therefore this option would not be available for selection.</p> <p>Swipe to <i>No</i> to hide the ratings bar and show only text.</p>

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

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



Tile Security Roles

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


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

Publish to Dashboards

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

Field or Control	Description
 Add icon button	Select this button to select a new dashboard name and configure the tile.
Dashboard Name	Select the dashboard on which this tile should appear. Valid dashboard values include: <ul style="list-style-type: none"> • <i>Career Planning</i> • <i>Compensation Review</i> • <i>Performance Review</i> • <i>Promotion Readiness</i> • <i>Summary</i> You cannot publish a tile to the same dashboard more than once. After you have selected a dashboard for a content type, that dashboard option will no longer appear in the list.
 Dashboard Information icon button	Click this icon button to access the Dashboard Information Page and view all the tiles that have been published to this dashboard. This is useful to help visualize the dashboard layout and order tiles by size.

Field or Control	Description
<p>Tile Size</p>	<p>Select the size of the tile as it should appear on the selected dashboard. The system will provide a default tile size, based on the dashboard and content items available for the content type. You can change this value for non-summary type tiles.</p> <p>Valid values for the following dashboards include:</p> <ul style="list-style-type: none"> • Summary: <i>1x1</i> • Non-summary: <i>2x2</i> and <i>2x1</i> <p>Although you can save this page without having a tile size selected, you must select a tile size in order to publish the tile.</p> <p>To view the order and sizing of other tiles on the dashboard, click the Dashboard Information icon button.</p>
<p>Tile Sequence</p>	<p>Enter the priority order in which the tile should appear on the dashboard, smallest to largest. The system provides <i>999</i> by default, making it appear at the end of the tile list, but you can change this. If you have more than one tile with the same sequence number, the dashboard will display those tiles alphabetically.</p> <p>To view the current order of the tiles on the dashboard, click the Dashboard Information icon button.</p>
<p>Published</p>	<p>Displays <i>No</i> by default, indicating that the tile has not yet been published to the indicated dashboard. You must click the Publish Tile button to publish this tile. Saving the page will not publish the tile.</p> <p>After you have published the tile, the column displays a <i>Yes</i> to indicate that this tile has been published to the dashboard.</p>
<div data-bbox="246 1474 438 1549" style="border: 1px solid black; padding: 5px; width: fit-content;"> <p>Publish Tile</p> </div>	<p>Click this button to publish the tile to the indicated dashboard. Review the Published field on this page or the Configure Employee Snapshot - Profile Content Page to see if a tile is published.</p> <hr/> <p>Note: By default the <i>Talent Summary Admin Fluid</i> role is given access to all new tiles. This gives the administrator user access to add, update, and delete the tiles as needed.</p> <hr/> <p>Note: You can make changes to tile without having to republish the tile.</p> <hr/>

Field or Control	Description
 Delete button	Click this button to remove the tile from the indicated dashboard.

Other Page Controls

The page may also contains these other standard buttons.

Field or Control	Description
Cancel	Click to cancel any changes you have made to this content type.
Delete	<p>This button is available when you are updating an existing content type.</p> <p>Select to remove this content type from your configurable profile content list.</p> <hr/> <p>Note: You cannot delete a content type if there are tiles that have been published to any dashboard. You must first delete the published tiles from the dashboards before you can delete a content type.</p> <hr/>
Save	Click to save your information and have it appear in the configurable profile content list. If you have published a tile, you will need to save your information before you can view the tile on the dashboard.

Related Links

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

“Understanding the Content Catalog” (PeopleSoft Human Resources Manage Profiles)

“Setting Up Profile Types” (PeopleSoft Human Resources Manage Profiles)

Dashboard Information Page

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

Navigation:

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

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

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

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

Chapter 5

Managing Direct Reports

Understanding the Management of Direct Reports

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

Note: Transactions discussed in this topic have been replaced by guided self-service transactions. To learn about guided self-service transactions, see [Configuring Guided Self-Service Transactions for Manager Self-Service](#) and [Performing Guided Self-Service Transactions in Manager Self-Service](#).

Understanding eProfile Manager Desktop Transactions

Managers can use the following eProfile Manager Desktop transactions to:

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

Understanding the Process Flow for Transactions

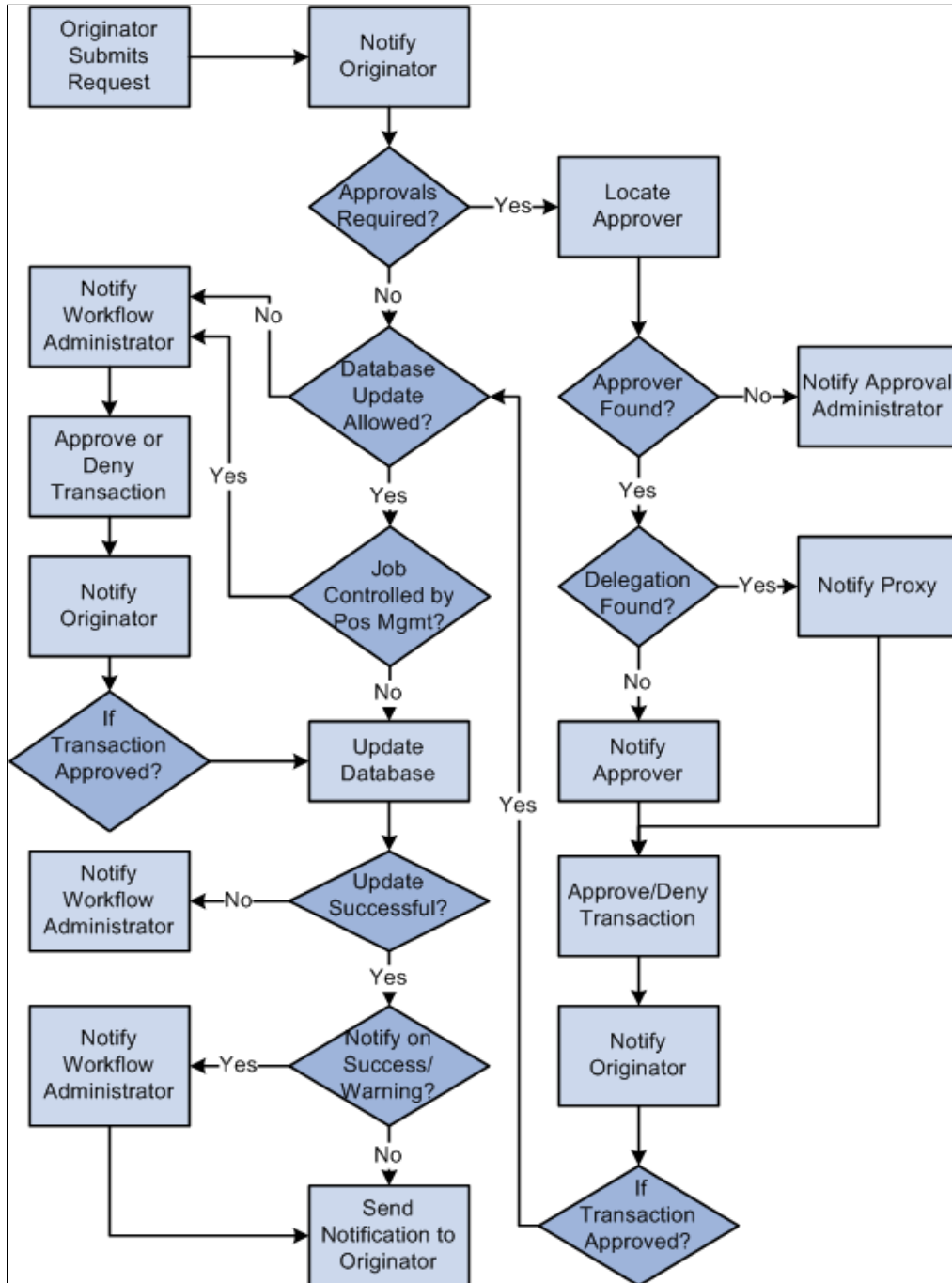
Most of the transactions in eProfile Manager Desktop can be configured to either:

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

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

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

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



There are four main sections to this process flow:

- A request is submitted.
- The request uses an approval process.
- The request allows automatic updates to the database.

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

Request is Submitted

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

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

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

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).

Approval Process Required

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

- ReportingChgEmployee
- PromoteEmployee
- TransferEmployee
- MilitaryRankChange

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

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

See “Military Rank Change Page” (PeopleSoft Human Resources Administer Workforce), “Military Processing Definition Page” (PeopleSoft Human Resources Administer Workforce).

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

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

<i>For</i>	<i>Notification Template</i>
Promote Employee Transfer Employee	HR_APPROVAL_REQUEST_SINGLE_EE
Reporting Change	HR_APPROVAL_REQUEST_MULTI_EE
Military Rank Change	MIL_RANK_CHNG_APPROVAL_REQUEST

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

<i>For</i>	<i>Notification Template</i>
Promote Employee Transfer Employee	HR_STEP_APPROVAL_SINGLE_EE
Reporting Change	HR_STEP_APPROVAL_MULTI_EE

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

<i>For</i>	<i>Notification Template</i>
Promote Employee Transfer Employee	HR_STEP_DENY_SINGLE_EE
Reporting Change	HR_STEP_DENY_REPCHG_EE

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

See “Understanding Approvals” (Application Fundamentals).

Database Update Not Allowed

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

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

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

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

<i>For</i>	<i>Notification Template</i>
Promote Employee Transfer Employee	HR_ADMIN_APV_MANUAL_PROC_SINGL
Reporting Change	HR_ADMIN_APV_MANUAL_PROC_REPCH

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

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

Database Updates Allowed

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

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

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

<i>For</i>	<i>Template</i>
Promote Employee Transfer Employee	HR_MANUAL_PROC_REQ_SINGLE_EE
Reporting Change	HR_MANUAL_PROC_REQ_REPCHG_EE

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

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

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

<i>For</i>	<i>Template</i>
Change Full/Part Status Change Location Retire Employee Terminate Employee	
Promote Employee Transfer Employee	HR_CI_UPDATE_SUCCESS HR_CI_WARNINGS_SINGLE HR_CI_FUTURE_ROWS_EXIST

<i>For</i>	<i>Template</i>
Reporting Change	HR_CI_UPDATE_SUCCESS_MULT HR_CI_WARNINGS_MULTI HR_CI_FUTURE_ROWS_EXIST_MULTI

Understanding HTML Email Approvals

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

Video: [PeopleSoft 9.2 HTML Email Approvals](#)

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

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

<i>Transaction</i>	<i>Transaction Process ID</i>	<i>Additional Information About the Transaction</i>
Job Opening Job Offer	JobOpening JobOffer	“Approving Job Offers” (PeopleSoft Talent Acquisition Manager)
Absence Request Extended Absence Request	AbsenceManagement AM_Extended_Abs	“Self Service Pages Used by Managers to Manage Absence Requests” (PeopleSoft Absence Management)
Promote Employee Transfer Employee Reporting Change	PromoteEmployee TransferEmployee ReportingChgEmployee	Understanding the Management of Direct Reports
Performance Document	PerformanceManagement	“Working with Approvals and Reviews” (PeopleSoft ePerformance)

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

For more information on configuring HTML email approvals, see “Triggering Email Collaboration” (Approval Framework).

Responding to a Request

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

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

```

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

*emcFieldComments=

*emcGuid=50723836599164026989172086120*emcField19=A

*emcQSEnd=true

```

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

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

Prerequisites for Managing Direct Reports

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

1. Activate eProfile Manager Desktop on the Installation table.

See “Products Page” (Application Fundamentals).

2. Define position management on the HCM Options page.

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

See “HCM Options Page” (Application Fundamentals).

See “Configuring Self-Service Transactions” (Application Fundamentals).

3. Set up security.

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

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

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

See “Understanding PeopleSoft Security” (Application Fundamentals).

4. Define whether a transaction uses an approval process.

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

See “Workflow Configurations Page” (Application Fundamentals).

5. Define if a transaction automatically updates the database.

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

See “Workflow Configurations Page” (Application Fundamentals).

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

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

See “Understanding Approvals” (Application Fundamentals).

7. Define rules for workflow notifications.

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

See “Admin Notification Setup Page” (Application Fundamentals).

8. Configure and manage HTML email approvals.

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

See “Triggering Email Collaboration” (Approval Framework)

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

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

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

See “Configuring Direct Reports Functionality” (Application Fundamentals).

Viewing Direct Reports' Personal Information

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

Understanding Viewing Personal Information

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

- Home, mailing, and email addresses.
- Phone numbers.
- Emergency contacts.
- Instant message IDs.
- Profile information.
- Training information.
- Compensation information and history.

Pages Used to View Personal Information

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
View Employee Personal Information Page	HR_DR_DIRECTREPORT	Select the direct employee whose information you want to review as of a reporting date.

Page Name	Definition Name	Usage
Employee Information Page	HR_EE_INF_HOME	View job information for a specific direct report. To view another employee's information, click the Return to Select Employees link at the bottom of the page. The system displays the View Employee Personal Information page, where you need to enter the as of date you wish to view the employee's information prior to selecting the employee.
Home and Mailing Addresses Page	HR_EE_ADDRESS_MGR	View the employee's home and mailing address information.
Email Addresses Page	HR_EMAIL_ADDRESSES	View the employee's home and mailing address information.
Phone Numbers Page	HR_PERSONAL_PHONE	View the employee's phone numbers.
Emergency Contacts Page	HR_EMERGENCY_CNTCT	View the employee's emergency contact information.
Instant Message IDs Page	HR_IM_CHAT_IDS	View the employee's instant message IDs.
Birthday Page	HR_EE_BIRTHDATE	View the employee's birth date information.
Total Compensation Page	HR_SS_TC_MG_REVIEW	View the employee's total compensation information.
Compensation History Page	HR_SS_MG_COMP_HIST	View the employee's salary, variable cash, and variable noncash information.
Training Summary Page	HR_TRN_SUMMARY	View the employee's internal and professional training information.
Current Person Profile Page	JPM_JP_PROFL2_EMP	View the employee's profile information, such as competencies, education, and so forth.

Changing Full-Time or Part-Time Status

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

Pages Used to Change Part- or Full-Time Status

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

Understanding Changing Full-Time or Part-Time Status

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

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

You may select more than one employee.

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

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

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

Changing Reporting Managers

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

Pages Used to Change Reporting Managers

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
Reporting Change - Employee Selection Criteria Page	HR_DR_DIRECTREPORT	Enter the employee reporting as of date and select the employee whose reporting you want to change.

Page Name	Definition Name	Usage
Request Reporting Change Page	HR_MGR_REPORT_CHNG	Enter the ID of the new manager or supervisor.
Approve Reporting Change - Select a Reporting Change Request Page	HR_MGR_REP_APPR_L	Select the transaction to approve or deny.
Reporting Change Details Page	HR_MGR_REPORT_CHNG	Approve or deny the request. View the status of reporting change requests that you have submitted.
Submit Confirmation Page	HR_REPORT_CONFIRM	Confirms the request was successfully submitted.
Reporting Change Status - Select a Reporting Change Request Page	HR_MGR_REP_VW_L	Select the transaction to view.

Understanding Changing Reporting Managers

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

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

Requesting a Reporting Change

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

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

Approving a Reporting Change

To approve a request:

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

4. Click the **Approve** or **Deny** button.

Viewing a Reporting Change Status

To view the status of a reporting change request:

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

Changing Work Locations

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

Pages Used to Change Locations

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

Understanding Changing Work Locations

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

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

You may select more than one employee.

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

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

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

Promoting Employees

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

Pages Used to Promote Employees

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

Understanding Employee Promotions

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

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

Requesting a Promotion

To request an employee's promotion, managers:

1. Access the Promote Employee page.
2. Enter the effective date and click the **Continue** button.
3. Select the employee or employees to promote and click the **Continue** button.
4. Enter the reason for the promotion and the promotion method, and click the **Submit** button.

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

Approving a Promotion

To approve a promotion, the approving manager or proxy:

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

Viewing a Promotion Status

To view the status of an employee's promotion:

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

Retiring Employees

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

Pages Used to Retire Employees

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

Understanding Retiring Employees

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

1. Access the Retire Employee page.

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

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

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

Terminating Employees

These topics provide an overview of terminating employees.

Pages Used to Terminate Employees

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

Understanding the Terminating Employees Process

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

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

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

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

Transferring Employees

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

Pages Used to Transfer Employees

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

Understanding Transferring Employees

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

- Transfer Employee
- Approve Transfer
- View Transfer Status

Transferring an Employee

To request an employee transfer:

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

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

Approving a Transfer

To approve an employee transfer:

1. Access the Approve Transfer - Select a Transaction page.
2. Select the transaction you want to approve or deny.
3. Click the **Approve** or **Deny** button.

Viewing a Transfer Status

To view an employee transfer:

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

Changing Jobs Requiring Works Council Approval

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

Pages Used to Change Jobs

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

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
Job Change Request Approval Page	WC_JCR_APPR_INQ	Mass-approve job change requests.

Understanding Job Changes

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

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

See “Understanding the Works Councils Approval Business Process” (PeopleSoft Human Resources Manage Labor Administration).

Reviewing Military Rank Change Requests

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

Page Used to Review Military Rank Change Requests

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
“Review Military Rank Change Page” (PeopleSoft Human Resources Administer Workforce)	MIL_RANK_CHNG_APPR	Review, approve, or deny a rank change request. View the status monitor of the approval chain.

Reviewing Military Rank Change Requests

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

See “Managing Military Rank Change Requests” (PeopleSoft Human Resources Administer Workforce).

Adding and Reviewing Hires

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

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

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
“Smart HR Transactions Page” (PeopleSoft Human Resources Administer Workforce)	HR_TBH_EULIST	Select a template or person to process a template-based transaction.
“Enter Transaction Details Page” (PeopleSoft Human Resources Administer Workforce)	HR_TBH_ADD	Enter transaction details to start the Smart HR transaction process for a person, such as the person's job effective date.
“Enter Transaction Information Page” (PeopleSoft Human Resources Administer Workforce)	HR_TBH_DATA	Enter worker information details for the person for whom you are performing a transaction. Only the fields that have been defined on the template you associated with this employee will display for data entry.
“Person Match Found Page” (PeopleSoft Human Resources Administer Workforce)	HR_TBH_SRMATCH	Select an existing person in the database if a match is found on the person, or continue with the transaction. Complete a transaction when a person match is found.
“Select an Action Page” (PeopleSoft Human Resources Administer Workforce)	HR_TBH_ACTION	Select an action if a matching person is found in the database.
Confirmation Page Further Processing Required Page	HR_TBH_CONFIRM	Displays the type of confirmation after saving a Smart HR transaction. When the transaction is saved successfully and automatic database updates is turned on, the Contract Data link appears, which enables users with security access to the contract pages to update contract information for a person.
“Transaction Status Page” (PeopleSoft Human Resources Administer Workforce)	HR_TBH_STATUS	View the status of a Smart HR transaction of transactions with a pending, cancelled, or processed status.

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

The Smart HR process (template-based transactions) offers a way to streamline the repetitive data entry by reducing the current data entry and enabling managers to expedite the hiring or other transaction update processes without needing to access the Personal, Job Data, or Profile pages. Transaction templates are set up by a template administrator and are intended for end-user to enters data for persons

being added to or updated in the database. The amount of data an end-user enters is dependant on the types of templates created. The template determines whether the end-user's data will automatically update the HR system, or if it requires an HR administrator to review it first. Also, the HR administrator is sent any errors that occur when the end-user saves a person's data to the database for completion.

To view a detailed description of the Smart HR Transactions or Smart HR for Managers pages, see “Using Smart HR Templates and Transactions” (PeopleSoft Human Resources Administer Workforce).

Using the Fluid User Interface for eProfile Manager Desktop

Configuring the My Team Pages

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

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

This topic discusses configuring the Fluid My Team pages.

Pages Used to Configure the My Team Pages

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

Configure My Team Pages Page

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

Navigation:

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

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

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

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

Field or Control	Description
Page Order	<p>(Tablets or desktops) Identify the order in which the My Team component should display the page buttons to the user. The component displays the page buttons in sequential order, lowest to highest. Valid values of the order are between 1 and 99.</p> <p>(Smartphone) When viewing the My Team using a small form factor device, like a smartphone, the page names will display in alphabetical order and do not adhere to the page order specified here.</p>
Page Name	<p>Displays the transactional page name.</p> <p>This page enables you to display up to nine pages on the My Team component, five of which are customizable Drop Zone pages. Drop Zones allow you to add custom content such as editable or display only fields, links, buttons, or text. For more information on Drop Zones, see the product documentation for PeopleTools: <i>Fluid User Interface Developer's Guide</i>, "Creating Pages for Fluid Applications," Creating and Configuring Drop Zones.</p> <p>This video provides an overview of Drop Zones:</p> <p>Video: PeopleSoft Drop Zones on Fluid and Classic Plus Pages</p>

<i>Field or Control</i>	<i>Description</i>
Button Label	Enter the text that should appear on the page buttons. You can add up to 30 characters.
Hide Page	Select the check box to hide the button and page information from the user on the My Team page.

Related Links

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

[My Team Tile](#)

Using the PeopleSoft Fluid User Interface to Perform Manager Tasks

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

For information about who is considered part of a manager’s team, see “Understanding Direct Reports” (Application Fundamentals).

Note: My Team uses the “Direct Reports Transaction Configuration Page” (Application Fundamentals) to set the access type and determine whether to show empty position, combine partials, and include contingent workers. No other configuration settings are used.

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

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

Video: [PeopleSoft Fluid User Interface Experience in HCM](#)

Video: [Image Highlights, PeopleSoft HCM Update Image 26: Fluid Manager Self Service -- Profile Management](#)

Video: [Image Highlights, PeopleSoft HCM Update Image 45: Configurable Fluid Header Display](#)

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

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

Page Name	Definition Name	Usage
<u>My Team Tile</u>	HC_HR_DR_TEAM_FLU_GBL (this is the cref for the tile)	Click this tile to access a group of fluid pages that are used to perform manager tasks.
<u>My Team Page Header and Page Views</u>	N/A	View which manager's team information you are accessing, change the manager and team, or select the page content.
<u>My Team Page: Actions List Menu Options</u>	N/A	Perform additional team-related actions.
<u>My Team Pages: Supplementary Panel</u>	N/A	Access a supplementary panel that provides access to related information and simplified analytics.
<u>Select Manager Page</u>	HR_MGR_SEL_FLU	Search for and select one of your reporting managers in order to view the summary information for that manager's team.
Manager Details Page	HR-MGR_SEL_SCF	(Smartphone) View additional information about the manager, such as title, department, and location when using a smartphone.
<u>My Team – Summary Page</u>	HR_DIRTEAM_FLU	View summary information about your teams that report to you directly or indirectly.
<u>My Team – Performance Page</u>	HR_DIRTEAM_EP_FLU	View performance information for a team.
<u>My Team – Compensation Page</u>	HR_DIRTEAM_EC_FLU	See how employees fit into the salary range for their jobs.
<u>My Team – Leave Balances Page</u>	HR_DIRTEAM_AB_FLU	View leave balances for team members.
<u>Leave Balances - View Details Page</u> <u>Leave Balances - View More Balances Page</u>	HR_DT_LEAVE_SCF	View detailed information about leave balances, including the balance and the as-of date for each type of leave.
<u>Performance vs. Compa-Ratio Pivot Grid</u>	PTPG_NUI_VWR	View the performance verses the compensation data for your team.

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

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

Understanding How to View Other Manager Reporting Structures

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

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

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

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

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

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

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

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

My Team Tile

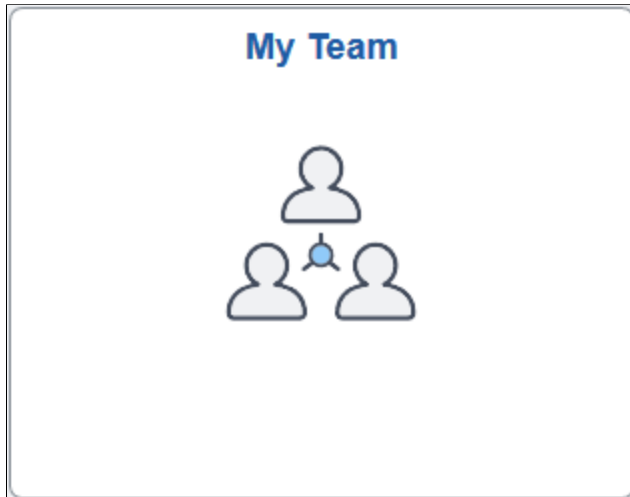
Use the My Team tile to access a group of fluid pages that are used to perform manager tasks.

Navigation:

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

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

This example illustrates the My Team tile.



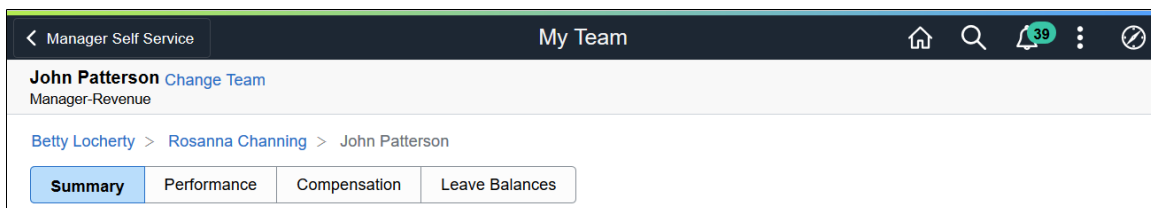
Click the tile to access the My Team page and navigate to these manager self-service transactions easily without using traditional menu navigations:

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

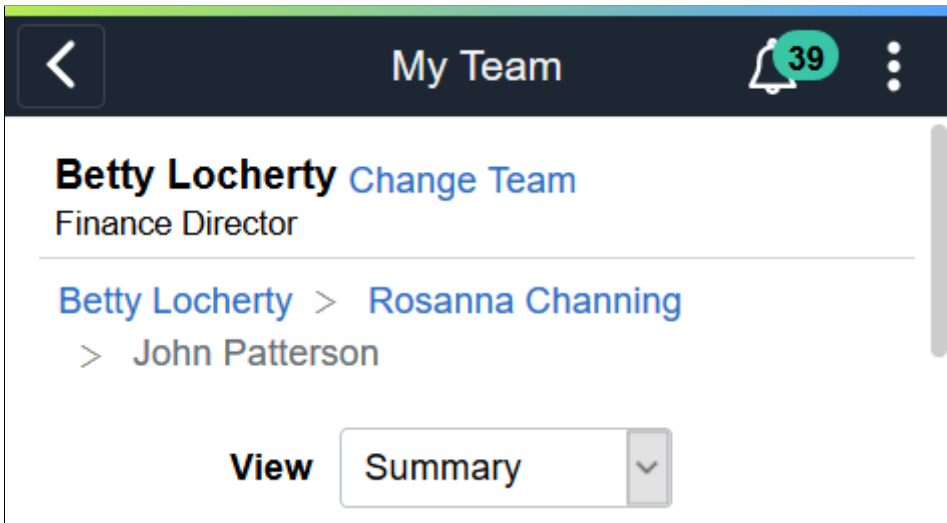
My Team Page Header and Page Views

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

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



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



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

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

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

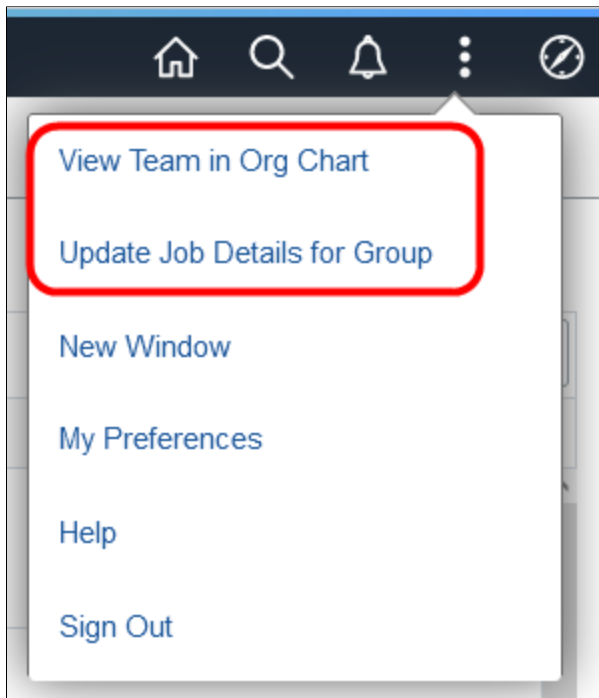
Term	Definition
Change Team	Select this link to access the Select Manager Page and select a manager to change the team view. This allows you to view the team of any of the managers that report up through you.
Summary, Performance, Compensation, and Leave Balances and other page touch points or buttons	(Tablet or Workstation) These buttons are available when the page is viewed with large form factor devices. Select a touch point button to access the page related content.
View	(Smartphones) This field is applicable when the page is viewed with small form factor devices and works the same as the large form factor touch point page buttons. Click to select and access a specific My Team page (touch point).

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

My Team Page: Actions List Menu Options

Use the Actions list menu in the banner at the top of the My Teams pages to perform additional team-related actions.

This example illustrates the Actions list menu options in the header of the My Team page.



When you access the My Team pages in fluid, the banner displays the Actions list icon button in the top right corner. The first two items in the Actions List menu are specific to the My Team pages and allow you to view the team within the context of an organizational chart or update job details for a group of people (see [Performing Guided Self-Service Transactions in Manager Self-Service](#) for information on submitting job transactions for multiple people).

My Team Pages: Supplementary Panel

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

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

These videos demonstrate simplified analytics:

Video: [Image Highlights, PeopleSoft HCM Update Image 18: Simplified Analytics](#)

Video: [PeopleSoft Simplified Analytics](#)

Navigation:

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

This example illustrates the Supplementary Panel content for the My Team pages for the tablet.

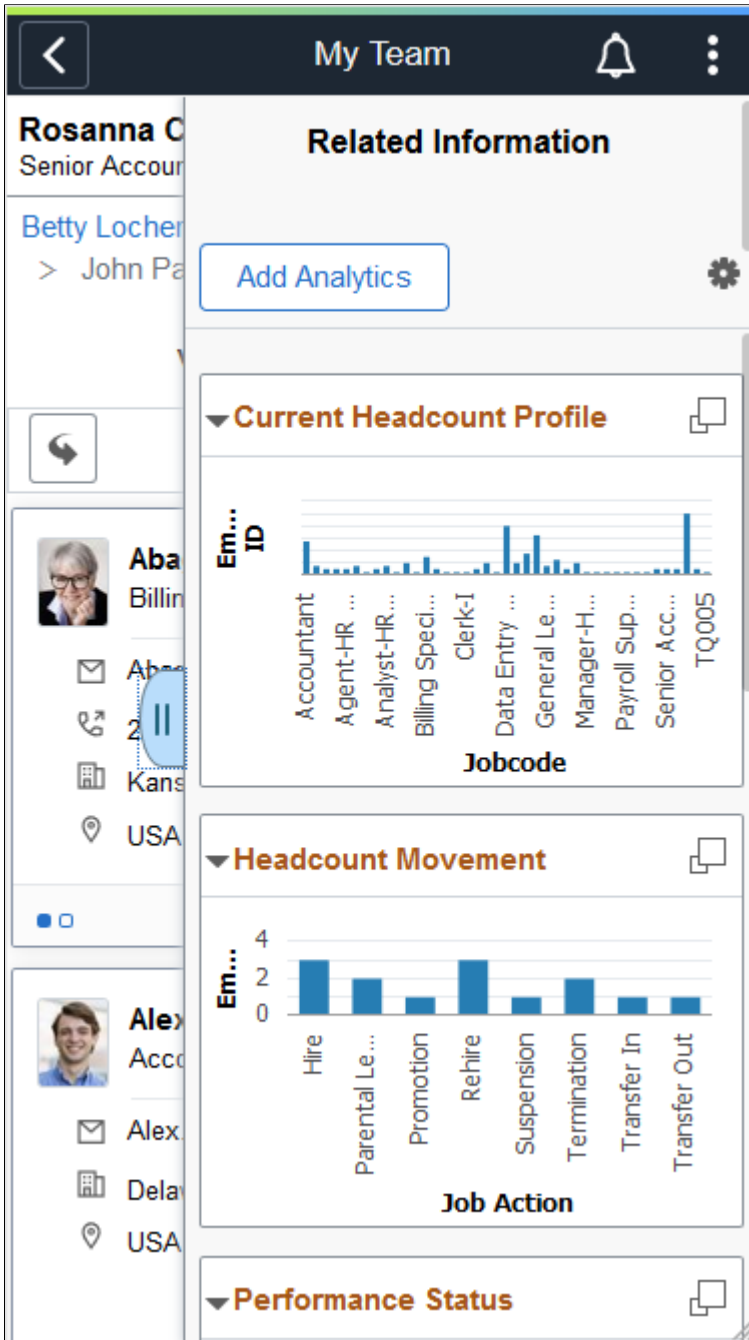
The screenshot shows the 'My Team' page for Rosanna Channing, Senior Accounting Manager. The main content area lists team members with their details:


Name / Title	Directs / Total	Department / Location	Email / Phone
Christelle Stevenson Manager-Accounting	14/14	Accounts Receivable Corporation Headquarters	Christelle.Stevenson@ora 925.694.7920
Daryl Reese Financial Analyst		Corporate Accounting Corporation Headquarters	Daryl.Reese@oraclesamp 925.555.5678
David Ho Senior Financial Analyst		Financial Services Corporation Headquarters	david.ho@oraclesample.c 944.054.3779
Edmund Donahue Manager-Accounting	13/13	Accounts Payable Corporation Headquarters	HCMGENUser1@ap6023f 925.694.7902
John Patterson Manager-Revenue	20/20	Revenue Management Kansas Operations	John.Patterson@oraclesa 973.701.9200
Mei Lee Accountant	11/11	Corporate Accounting Corporation Headquarters	Mei.Lee@oraclesample.c 925.555.5555



The supplementary panel on the right contains the following sections:

- Related Information:** Includes an 'Add Analytics' button.
- Current Headcount Profile:** A bar chart showing counts for various jobcodes: Accountant, Analyst-Bu..., Billing Spec..., Clerk-Acco..., Data Entry..., Finance Sp..., General Le..., Senior Fina...
- Headcount Movement:** A bar chart showing counts for various job actions: Hire, Parental L..., Promotion, Retire, Suspension, Termination, Transfer In, Transfer Out.
- Performance Status:** A section for performance metrics.

This example illustrates the Supplementary Panel content for the My Team pages for the smartphone.



<i>Term</i>	<i>Definition</i>
 <p>(Supplementary Panel tab)</p>	<p>Click this tab to open the Related Information panel and view related information.</p>

Term	Definition
<p>Add Analytics</p>	<p>Click to create their own helpful charts and graphs, available with PeopleTools 8.55 and later. Click this button to create a new chart. When you select to add a new analytic report, the system opens the Create Analytics page where you will use the Analytics Wizard to guide you through the process of creating a new report. The system uses templates based on the manager transaction page from which you are creating the new report. Select different My Team touch point pages to select from various template options. The templates determine the fields and prompts in the next step of the wizard.</p> <p>The delivered role <i>PivotGridSuperUser</i> gives users the ability to create and publish reports.</p>
<p> [Personalize RC (Related Content) icon]</p>	<p>This icon appears at the top of the Related Information panel. Click to open the Personalize page. This page lists the available related content so you can choose whether the Related Information panel shows or hides each item.</p>
<p> (Display <Related Content Item> in Modal Window icon)</p>	<p>This icon appears at the top of each individual related content item in the Related Information panel. Click to expand the item to open a modal dialog with a larger interactive version of the content.</p>
<p>Related Information</p>	<p>The Related Information panel displays touch friendly and responsive charts and information related to the content on the page. It displays simplified version of existing charts. These include:</p> <ul style="list-style-type: none"> • Current Headcount Profile (see “Current Headcount Pivot Grid” (PeopleSoft Human Resources Administer Workforce)) • Headcount Movement (see “Headcount Movement Pivot Grid” (PeopleSoft Human Resources Administer Workforce)) • Performance Status (see “Team Performance Status Page” (PeopleSoft ePerformance)) • Performance vs. Compa-Ratio (see Performance vs. Compa-Ratio Pivot Grid) • Current Salary Analysis (see “Salary Analysis Page” (PeopleSoft eCompensation Manager Desktop)) • Leave Balances by Type (see “Absence Cost Analysis Pagelet” (PeopleSoft Absence Management)) <p>Video: Image Highlights, PeopleSoft HCM Update Image 18: Simplified Analytics</p> <p>For information on how to use the Related Information tab content and the Simplified Analytics Wizard, see <i>PeopleTools: Pivot Grid, Viewing Pivot Grid Models, Viewing Pivot Grid Models in Fluid Mode</i>.</p>

For information on how to use the Related Information panel (also known as the Unified Related Content Analytics pane), see *PeopleTools: Pivot Grid*, “Working with Simplified Analytics,” Accessing Simplified Analytics.

Select Manager Page

Use the Select Manager page (HR_MGR_SEL_FLU) to search for and select one of your reporting managers in order to view the summary information for that manager’s team.

Navigation:





Click the **Change Team** link in the header of any of the My Team pages.

This example illustrates the Select Manager page for the tablet.

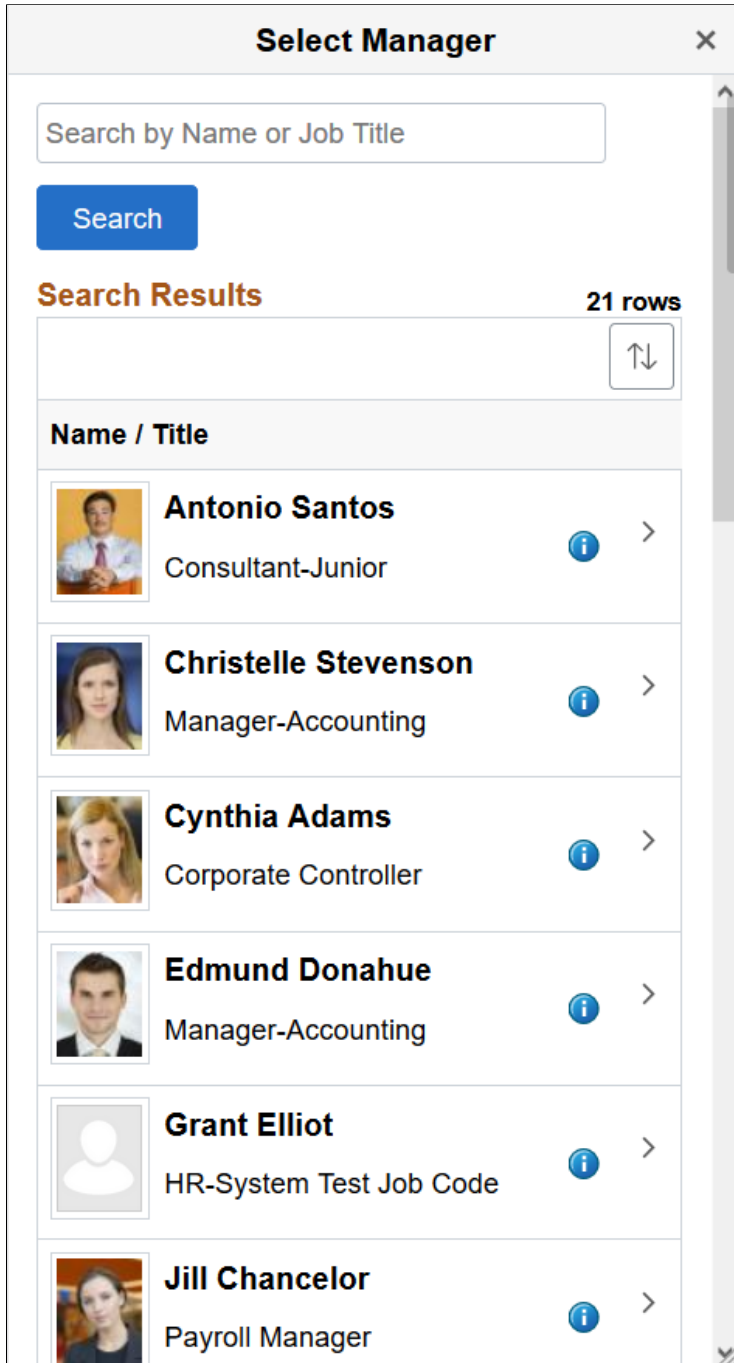
Select Manager ×

Search Results 4 rows


↑↓

Name / Title	Reports To	Department / Location	>
 <p>Christelle Stevenson Manager-Accounting</p>	Rosanna Channing	Accounts Receivable Corporation Headquarters	>
 <p>Edmund Donahue Manager-Accounting</p>	Rosanna Channing	Accounts Payable Corporation Headquarters	>
 <p>John Patterson Manager-Revenue</p>	Rosanna Channing	Revenue Management Kansas Operations	>
 <p>Mei Lee Accountant</p>	Rosanna Channing	Corporate Accounting Corporation Headquarters	>

This example illustrates the Select Manager page for the smartphone.



This page displays a list of all the managers that report up to you. Click a row to change the view to that manager’s team.

(Smartphone) When using a small form factor device, click the  (More...) icon to access the Manager Details page to view additional information about the manager, such as title, department, and location when using a smartphone.

My Team – Summary Page

Use the My Team – Summary page (HR_DIRTEAM_FLU) to view summary information about your teams that report to you directly or indirectly.

The My Team – Summary page has two viewing modes: a grid view and a card view. The card view displays information in a business card format, with different information on the front and back of the card.

Navigation:

Click the My Team tile on the Manager Self Service home page, or click the Summary touch point on the My Team page.

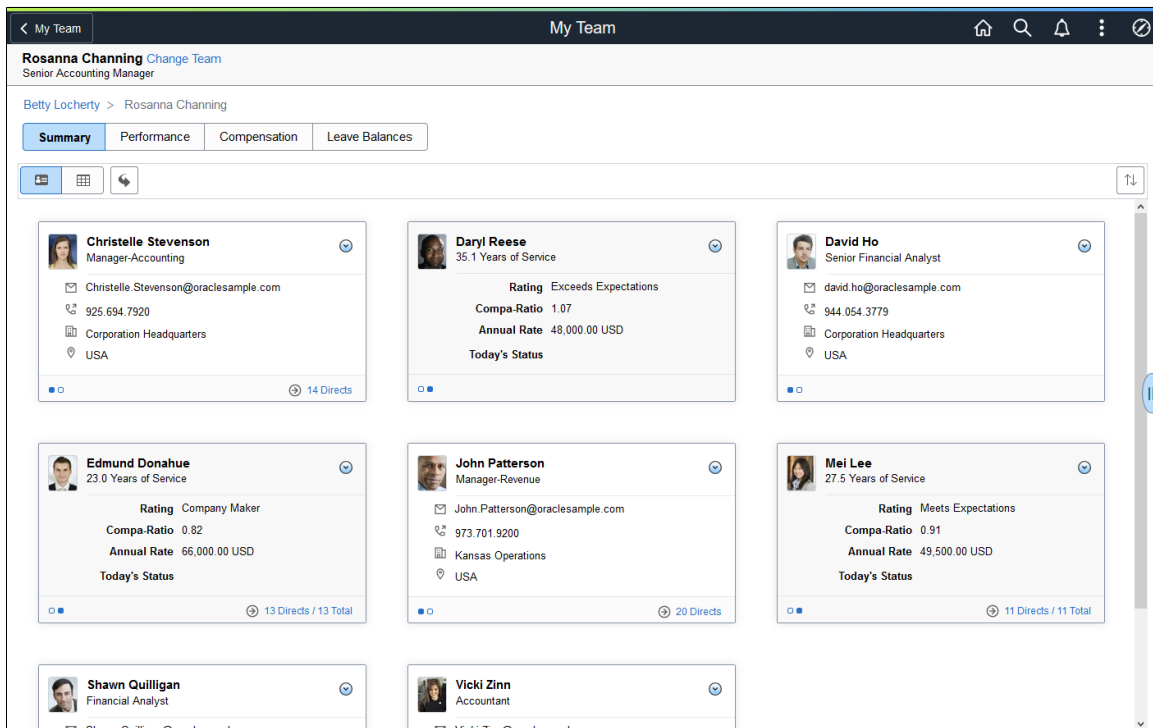
Note: This page may not be available based on the settings on the [Configure My Team Pages Page](#).

This example illustrates the grid view on the My Team - Summary page for the tablet.

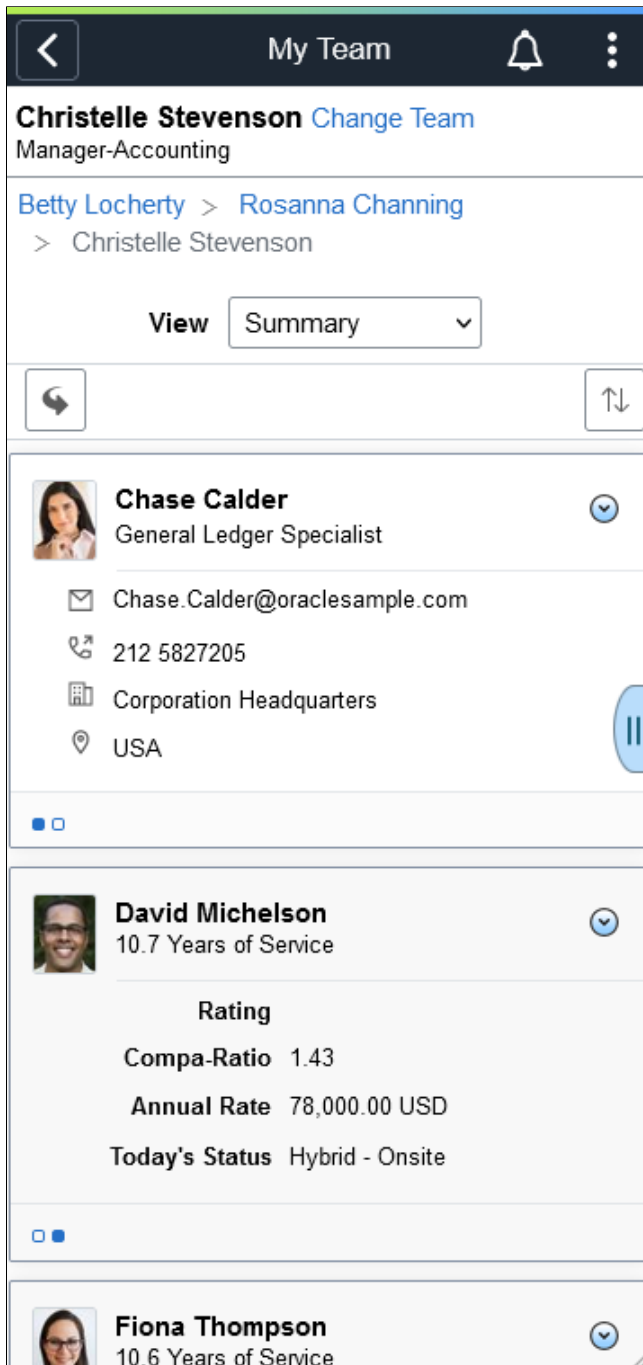
Note: The grid view is not supported on smartphones.

Name / Title	Directs / Total	Department / Location	Email / Phone	Today's Status
Jeff Backus Finance Specialist	10/10	Accounts Receivable Illinois Operations	Jeff.Backus@oraclesample.com 312 8670110	Hybrid 50%
Jennifer Michaels File Clerk		Accounts Receivable New Jersey Operations	Jennifer.Michaels@oraclesample.com 908/996-3300	Hybrid - Onsite
Jessica Livingstone General Ledger Specialist		Accounts Receivable Corporation Headquarters	Jessica.Livingstone@oraclesample.com 212 2213800	Hybrid
Joanna Strunsky Finance Specialist		Accounts Receivable Corporation Headquarters	Joanna.Strunsky@oraclesample.com	Hybrid - Onsite
Melissa Caldwell Clerk		Accounts Receivable Corporation Headquarters	Melissa.Caldwell@oraclesample.com 315/666-5413	
Melissa Caldwell File Clerk		Accounts Receivable Corporation Headquarters	Melissa.Caldwell@oraclesample.com 315/666-5413	
Michael Knight Accounting Clerk		Accounts Receivable New Jersey Operations	Michael.Knight@oraclesample.com 201/652-2120	Fully Remote
Monica Baker		Accounts Receivable	Monica.Baker@oraclesample.com	

This example illustrates the card view on the My Team - Summary page for the tablet. The cards display the employee photo on both sides of the card. This example displays the front of the card (contact information) for some of the employees and the back of the card (performance and compensation information) for a few other employees.



This example illustrates the card view on the My Team - Summary page for the smartphone.



Note: Information on this page is similar to the information on the [Direct Line Reports Pagelet](#) on the Summary, Contact, and Performance tabs.






Data Sources



PeopleSoft HR Administer Workforce provides most of the information on the My Team - Summary page, including name, contact information, job information, and reporting relationship.

PeopleSoft ePerformance provides the performance-related information that appears on the back of the card view.


Information for the Today's Status column comes from PeopleSoft Absence Management, Time and Labor, HR Administer Training, Human Resources, and Enterprise Learning Management.

Summary Page Display Modes and Controls

Field or Control	Description
 (Card View) icon	<p>(Large form factor devices) Click the Card View icon to display team member information in a business card format. The front of the card displays a photo of the team member (if available) along with general information such as name, job title, email address, and phone number, and location. The back of the card displays performance and compensation information and the team member's work status for the day:</p> <p>(Smartphone) The Card View is the default and only mode on small form factor devices.</p>
 (Grid View) icon	<p>(Large form factor devices) Click the Grid View icon to display team member information in a grid format. The grid shows the same information as the front of the card. It also shows the team member's department and an icon that represents the team member's work status for the day.</p> <p>The Grid View is the default mode on large form factor devices (tablets, desktops, and laptops).</p>
 (More Information All Cards – show back) icon button	<p>When the card view is active, click this icon to show the back of all cards. This icon is not visible from the grid view.</p>
 (Main Information All Cards – show front) icon button	<p>When the card view is active, click this icon to show the front of all cards. This icon is not visible from the grid view.</p>
 (Sort) icon button	<p>Click this icon to change the sort order of team members. You can sort by any field shown except by direct reports.</p>

Field or Control	Description
 (More Information This Card) and  (Main Information This Card) icon button	<p>When the Card view is active, this icon appears at the bottom left corner of individual cards.</p> <p>Click this icon to toggle between the main content on the front of the card and the back of the card to view more information. The front of the card (first block highlighted) displays the person's contact information and the back of the card (second block highlighted) displays the person's performance and compensation information.</p>

Name/Title

Field or Control	Description
 (Related Actions) icon button	<p>Select the related actions menu icon next to the person's name to display a drop-down menu of self-service transactions. These links provide the manager quick access to self service transactional pages.</p> <p>For more information about related actions, see “Related Actions for Manager Self Service Pages” (Application Fundamentals).</p> <p>The Update Position related action menu item will appear for empty positions when this page has been enabled to show empty positions and Position Management allows manager updates.</p>

Working with Empty Positions

When using Position Management and you have enabled the system to show empty positions on the “Direct Reports Transaction Configuration Page” (Application Fundamentals) for the My Team component, the **Name/Title** column will display the text *Empty Position* and the position number.

Video: [Image Highlights, PeopleSoft HCM Update Image 19: Displaying Empty Position within My Teams](#)

You can also configure the system to allow managers to update empty positions. When the My Team page is configured to display empty positions, use the “Position Data Installation Page” (PeopleSoft Human Resources Manage Positions) to select the **Enable Update Position for Managers** option and define attachment, approval, and activity guide settings. With these configurations in place, when a manager selects the Related Actions icon for an empty position, the menu will display the **Update Position** item. Managers can select this item to access the Manage Position activity guide for managers (“Manage Position - Position Data Page” (PeopleSoft Human Resources Manage Positions)) to propose updates to the position and send for approval.

This example illustrates the My Team page, Related Action menu item of Update Position for an empty position when a manager is allowed to update a vacant position.

My Team

Betty Locherty [Change Team](#)
Finance Director

Summary Performance Compensation Leave Balances

Name / Title	Directs / Total	Department / Location	Email / Phone
Susan Hoinck ⋮ Senior Financial Analyst		Corporate Finance Corporation Headquarters	susan.hoinck@xyzcompany.com 925.555.3654
Tina Palisco ⋮ Manager-Accounting		Accounting Consolidations Headquarters	tina.palisco@xyzcompany.com 925/694-7971
Empty Position 19000036 System's Analyst		Delaware Operations	



Actions ×

- Performance Management >
- Update Position**

If a position update request is in progress for the empty position, when you select the **Update Position** menu item, the link will display the Position Approval Chain modal page (POS_MGR_APPR_FL) for you to view the approval request status. You cannot initiate another update position request until the current request is resolved.






Approvers will use the Update Position type on the “Pending Approvals - Create (or Manage or Update) Position Page” (PeopleSoft Human Resources Manage Positions) to approve this request.


Directs / Total

Field or Control	Description
 (View My Team) icon and link for the Grid view or  (View My Organization) icon and link for the More Information All Card view	<p>These icons appear for team members who have direct reports. The number of direct reports appears next to the icon. The grid view and the back of the card view additionally display the total number of reports and indirect reports within the person's reporting hierarchy.</p> <p>Click the icon (or the number of reports link) to drill down the reporting hierarchy. As you drill down:</p> <ul style="list-style-type: none"> • The page displays the direct reports for the selected person. • Breadcrumbs at the top of the page show the reporting hierarchy between the user and the currently displayed team. <p>The user names in the breadcrumbs can be clicked to return to a list of that user's direct reports.</p>

Today's Status

The **Today's Status** field on the grid view (and on the back of the card) indicate where an employee is today. The column displays only one icon to indicate the employee schedule for the day, even if more than one schedule applies. There are several icons. The system determines which icon to display using this priority sequence:

Field or Control	Description
 <p>(remote work type) icon and link</p>	<p>Indicates that the employee works remote. Types of remote work statuses include:</p> <ul style="list-style-type: none"> • <i>Fully Remote</i> • <i>Hybrid</i> <p>Displays as a link and may contain additional text. Select the link to access the “Request Details Page” (PeopleSoft Human Resources Administer Workforce) to view additional information from the remote worker request setup, such as the person's remote schedule and location.</p> <p>The following link text will display:</p> <ul style="list-style-type: none"> • <i>Hybrid - Remote</i> or <i>Hybrid - Onsite</i> displays when a person's schedule indicates specific days of the week. <i>Remote</i> indicates that a person is scheduled to work remote that day. <i>Onsite</i> indicates that a person is scheduled to work in the office that day. • <i>Hybrid - %</i> (hybrid - percentage): displays when a person's schedule indicates a percentage of time for the week or month. • <i>Hybrid</i> (with no additional text): displays when days or percentage of time have not been specified. For example, if an employee only selects the number of days per week or month without a percentage amount, the hyperlink will display <i>Hybrid</i> by itself. <hr/> <p>Note: Although the card view will display the remote status and location, the link to access the details page is available only from the grid view.</p> <hr/>
 <p>(planned absence)</p>	<p>Indicates that the employee has a planned absence for today.</p>
 <p>(holiday)</p>	<p>Indicates that the employee is on a holiday break today.</p>
 <p>(off)</p>	<p>Indicates that the employee is not scheduled to work today based on the employee’s holiday schedule in Job Data.</p>
 <p>(training)</p>	<p>Indicates that the employee is in training today. Information is obtained from ELM or HR Training.</p>

Field or Control	Description
 (no show)	Indicates that the employee did not show up to work today when he or she is scheduled to work.

My Team – Performance Page

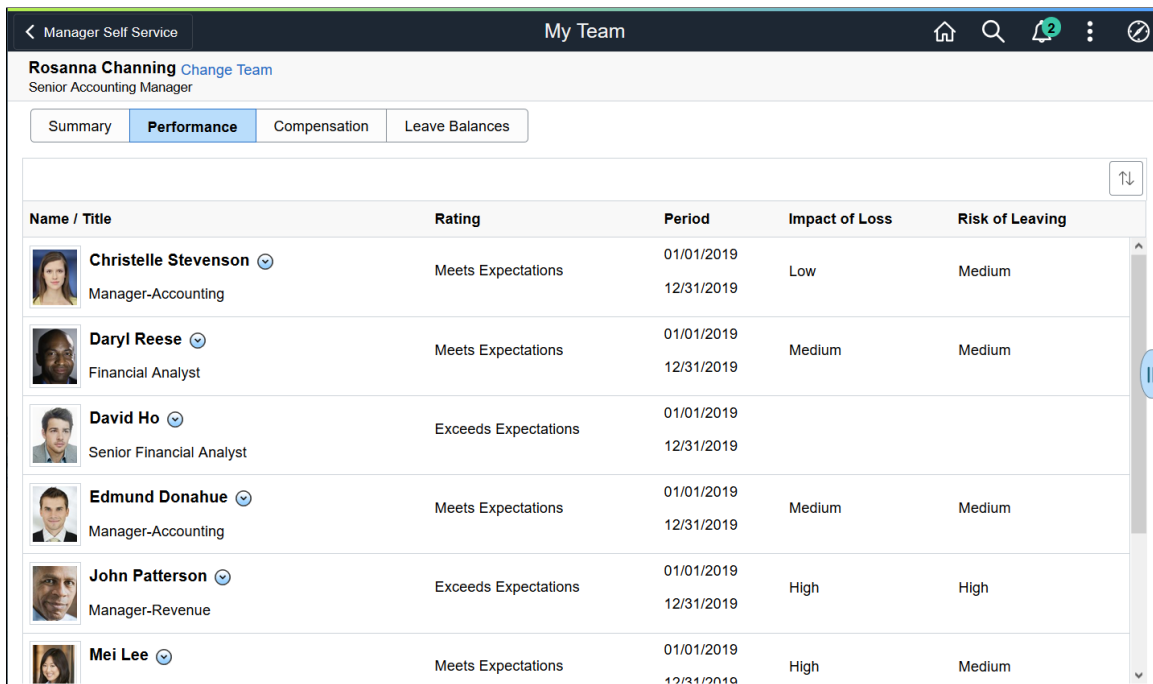
Use the My Team – Performance page (HR_DIRTEAM_EP_FLU) to view performance information for a team. The data comes from PeopleSoft ePerformance and HR Careers and Successions.







Navigation:

Click the Performance touch point on the My Team page.

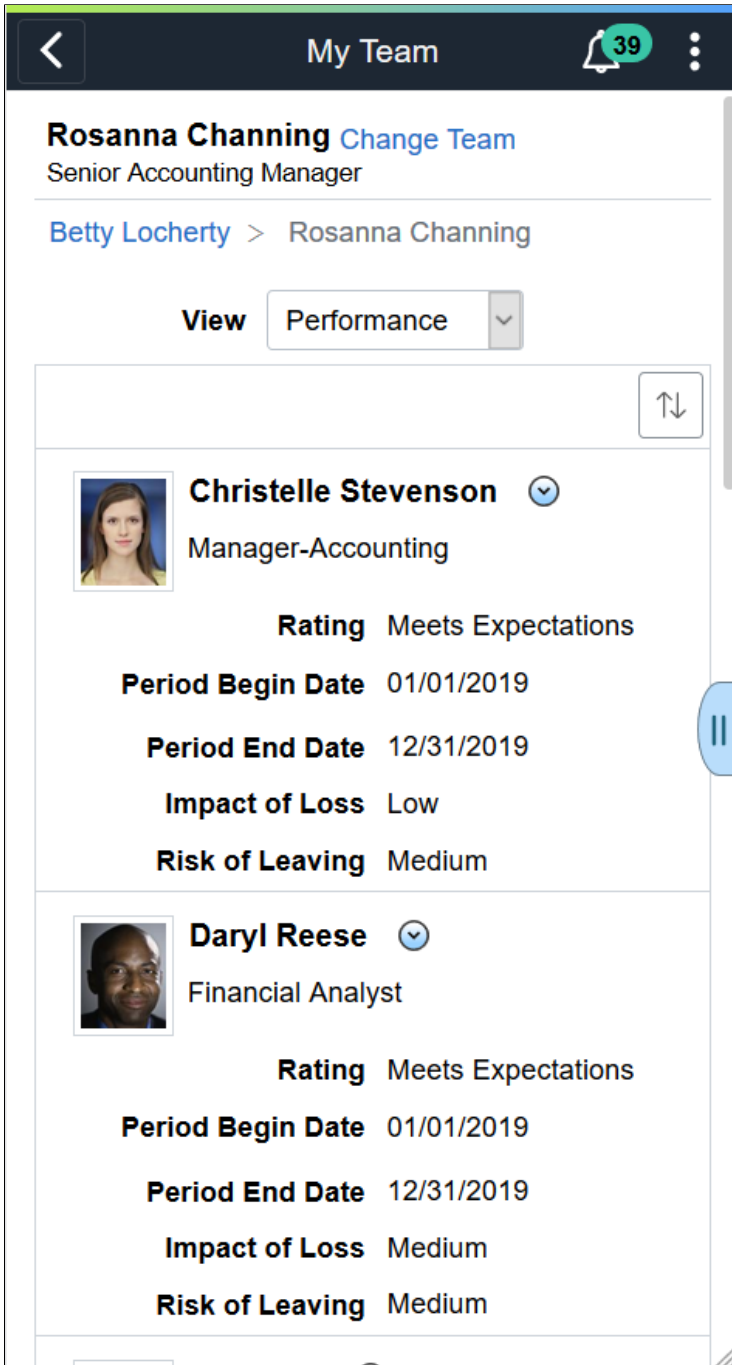
Note: This page may not be available based on the settings on the [Configure My Team Pages Page](#).

This example illustrates the My Team – Performance page for the tablet.




Name / Title		Rating	Period	Impact of Loss	Risk of Leaving
	Christelle Stevenson Manager-Accounting	Meets Expectations	01/01/2019 12/31/2019	Low	Medium
	Daryl Reese Financial Analyst	Meets Expectations	01/01/2019 12/31/2019	Medium	Medium
	David Ho Senior Financial Analyst	Exceeds Expectations	01/01/2019 12/31/2019		
	Edmund Donahue Manager-Accounting	Meets Expectations	01/01/2019 12/31/2019	Medium	Medium
	John Patterson Manager-Revenue	Exceeds Expectations	01/01/2019 12/31/2019	High	High
	Mei Lee	Meets Expectations	01/01/2019 12/31/2019	High	Medium

This example illustrates the My Team – Performance page for the smartphone.



Note: Information on this page is similar to the information on the Performance tab of the [Direct Line Reports Pagelet](#).

Performance Grid

<i>Field or Control</i>	<i>Description</i>
Impact of Loss and Risk of Leaving	These columns are visible only if relevant data exists.
	Click this icon to change the sort order of team members. You can sort by any field shown

Data Source

Performance data comes from PeopleSoft ePerformance. Specifically, the data is based on the most recent completed document of the type specified on the “Assign Document Defaults Page” (PeopleSoft ePerformance). This is also the data shown on the back side of the card on the My Team - Summary page. If a default document type has not been specified, the My Team page does not provide a touch point for accessing the performance data.

Employee ratings are taken from the overall rating section of the performance document. If an employee does not have a completed performance rating from the specified document type, no performance rating information will be displayed in that individual’s row.

Use the Performance Document History Page, addressed in the “(Classic) Viewing Historical Documents” (PeopleSoft ePerformance) topic, to view the performance document that contains the employee’s last rating.

My Team – Compensation Page













Use the My Team – Compensation page (HR_DIRTEAM_EC_FLU) to see how employees fit into the salary range for their jobs.

Navigation:

Click the Compensation touch point on the My Team page.

Note: This page may not be available based on the settings on the [Configure My Team Pages Page](#).

This example illustrates the My Team – Compensation page for the tablet.

Name / Title	Compa Ratio	Current Salary	Midpoint	Minimum / Maximum	Position in Salary Range	Quartile
 Christelle Stevenson Manager-Accounting	0.90	72,000.00 USD	80,000.00	60,000.00 100,000.00		2
 Daryl Reese Financial Analyst	1.07	48,000.00 USD	44,999.50	41,000.00 48,999.00		4
 David Ho Senior Financial Analyst	1.12	90,000.00 USD	80,000.00	60,000.00 100,000.00		3
 Edmund Donahue Manager-Accounting	0.82	66,000.00 USD	80,000.00	60,000.00 100,000.00		1
 John Patterson Manager-Revenue	0.87	70,000.00 USD	80,000.00	60,000.00 100,000.00		1
 Mei Lee	0.91	49,500.00 USD	54,499.50	49,000.00 59,999.00		1

This example illustrates the My Team – Compensation page for the smartphone.

My Team 40

Rosanna Channing [Change Team](#)
Senior Accounting Manager

[Betty Locherty](#) > Rosanna Channing

*View Compensation

↕

Christelle Stevenson ⌵
Manager-Accounting



Compa-Ratio 0.90
Annual Salary 72,000.00 USD
Midpoint 80,000.00
Minimum 60,000.00
Maximum 100,000.00
Quartile 2

Daryl Reese ⌵
Financial Analyst

Compa-Ratio 1.07
Annual Salary 48,000.00 USD
Midpoint 44,999.50
Minimum 41,000.00
Maximum 48,999.00

Note: Information on this page is similar to the information on the Compensation tab of the [Direct Line Reports Pagelet](#).

Compensation Grid

Field or Control	Description
 (Currency)	<p>Click this icon to open a dialog box where you can choose whether to display salary information in each employee's paid currency or in your own preferred currency (as identified in your user profile).</p> <p>This icon is visible only if at least one employee is compensated in a currency other than your own preferred currency.</p>
	<p>Click this icon to change the sort order of team members. You can sort by any field shown (except by the graphical column that shows the employee's position within the salary range).</p>
Position In Salary Range	<p>Displays a graphical representation of the data appearing in the grid. This column does not appear on the small form factor (phone) or in accessible mode.</p>

Data Sources

Compensation data comes from PeopleSoft HR Administer Workforce. Data for individuals comes from the job data tables, and midpoint data comes from salary plan data table.

My Team – Leave Balances Page

Use the My Team – Leave Balances page (HR_DIRTEAM_AB_FLU) to view leave balances for team members.

Navigation:

Click the Leave Balances touch point on the My Team page.

Note: This page may not be available based on the settings on the [Configure My Team Pages Page](#).

This example illustrates the My Team – Leave Balances page for the tablet.

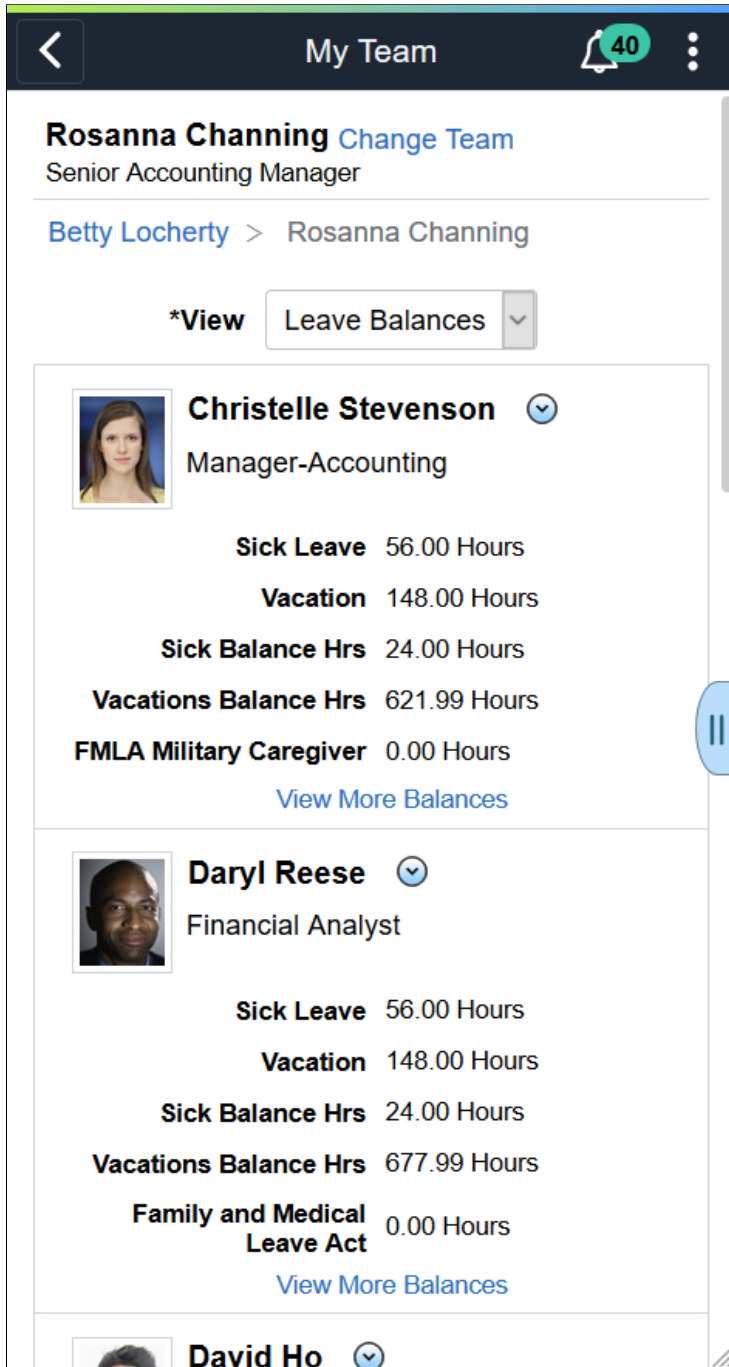
Manager Self Service | **My Team** | Home | Search | Notifications (2) | Settings

Rosanna Channing [Change Team](#)
Senior Accounting Manager

Summary | Performance | Compensation | **Leave Balances**

Name / Title	Balances	
Christelle Stevenson ▼ Manager-Accounting	Sick Leave 56.00 Hours Sick Balance Hrs 24.00 Hours FMLA Military Caregiver 0.00 Hours	Vacation 148.00 Hours Vacations Balance Hrs 621.99 Hours View More Balances
Daryl Reese ▼ Financial Analyst	Sick Leave 56.00 Hours Sick Balance Hrs 24.00 Hours Family and Medical Leave Act 0.00 Hours	Vacation 148.00 Hours Vacations Balance Hrs 677.99 Hours View More Balances
David Ho ▼ Senior Financial Analyst	No leave balances exist	
Edmund Donahue ▼ Manager-Accounting	Sick Leave 56.00 Hours Sick Balance Hrs 24.00 Hours Family and Medical Leave Act 0.00 Hours	Vacation 148.00 Hours Vacations Balance Hrs 617.66 Hours View More Balances
John Patterson ▼ Manager-Revenue	Sick Balance Hrs 22.15 Hours Family and Medical Leave Act 0.00 Hours	Vacations Balance Hrs 650.76 Hours FMLA Military Caregiver 0.00 Hours FMLA Military Exigency 0.00 Hours View Details
Mei Lee ▼	Sick Leave 56.00 Hours Sick Balance Hrs 24.00 Hours	Vacation 148.00 Hours Vacations Balance Hrs 935.99 Hours

This example illustrates the My Team – Leave Balances page for the smartphone.



Note: Information on this page is similar to the information on the Time tab of the [Direct Line Reports Pagelet](#).

The Leave Balances page always sorts employees by name.

<i>Field or Control</i>	<i>Description</i>
Balances	Displays up to five leave balances for each team member.

Field or Control	Description
View More Balances or View Details	<p>The View More Balances link appears after the fifth leave balance if an employee has more than five leave types. The View Details link appears if the employee has five or fewer leave types.</p> <p>Click either link to access the Leave Balances - View Details page, which displays all of the employee's leave balances along with the as-of date for each balance.</p>

Data Sources

Leave balances come from PeopleSoft Absence Management.

Data for compensatory time comes from PeopleSoft Time and Labor. An employee must be enrolled in Time and Labor to accrue compensatory time.

Leave Balances - View Details Page

Use the Leave Balances - View Details or View More Balances page (HR_DT_LEAVE_SCF) to view detailed information about leave balances, including the balance and the as-of date for each type of leave.

Navigation:

Click the View Details or View More Balances link on the My Team - Compensation page.

This example illustrates the Leave Balances - View Details page for the tablet and smartphone.

View More Balances ✕

Christelle Stevenson
Manager-Accounting

Leave Balances

Type	Balance	Unit	As Of
Sick Leave	56.00	Hours	02/29/2020
Vacation	148.00	Hours	02/29/2020
Sick Balance Hrs	24.00	Hours	09/30/2019
Vacations Balance Hrs	621.99	Hours	09/30/2019
FMLA Military Caregiver	0.00	Hours	09/30/2019

<i>Field or Control</i>	<i>Description</i>
As Of	Displays the end date of the last period of time for which the leave balance was calculated.

Performance vs. Compa-Ratio Pivot Grid

Use the Performance vs. Compa-Ratio page (PTPG_NUI_VWR) to view the Performance v. Compa-Ratio chart and assess the performance and compensation data for your team.

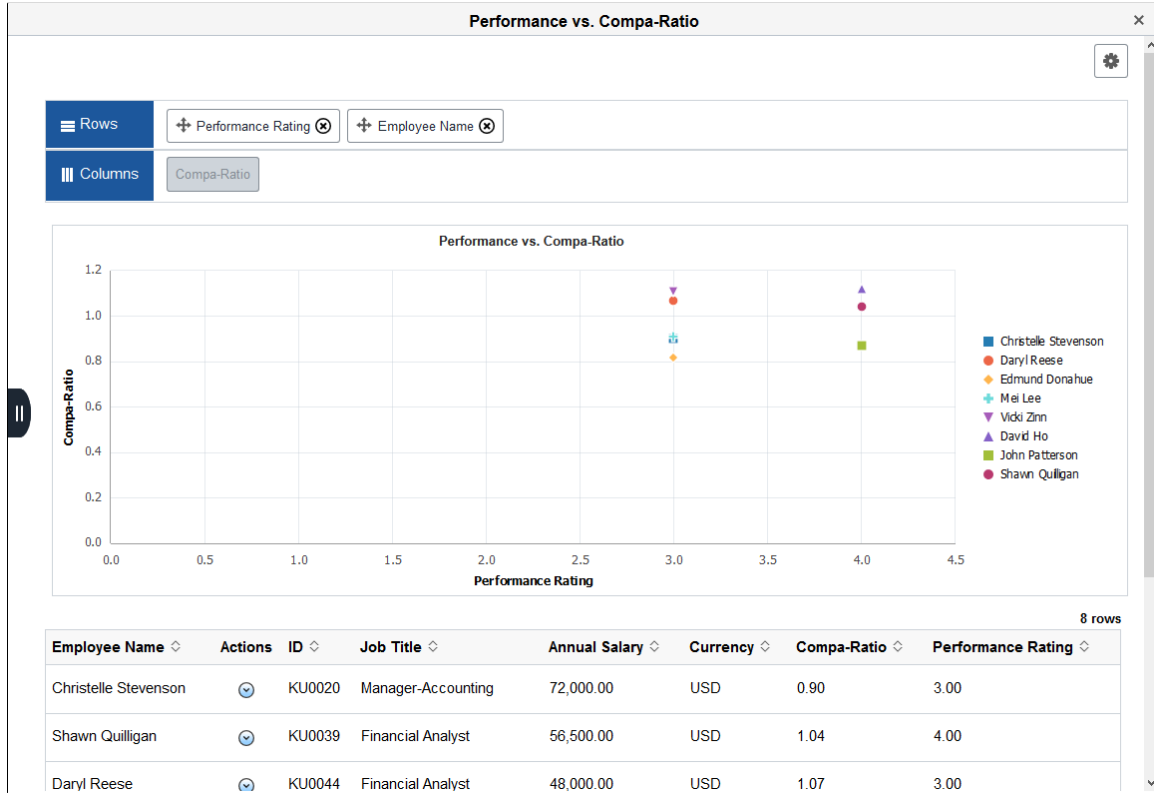
This chart and grid provides managers a quick way to perform the following tasks for their teams:

- Identify outliers within their team (i.e. individuals who are paid too little or too much relative to their performance).
- Perform a manager self-service action on an individual.
- Assess the performance and compensation data.

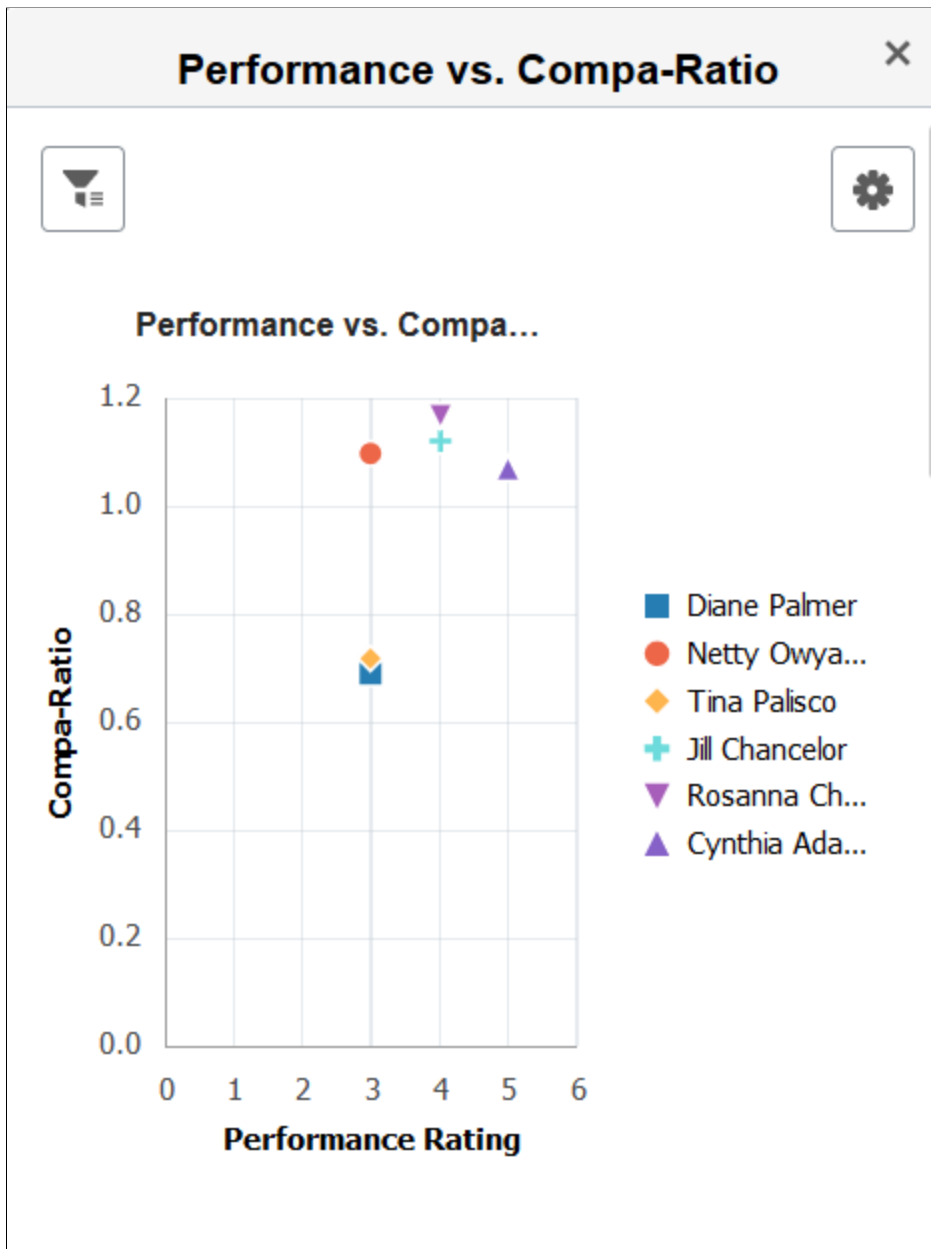
Navigation:

Click the Supplementary Panel tab button on the My Team - Leave Balances page. To open a larger version of the grid in it's own modal, click the **Display Performance vs. Compa-Ratio in Modal Window** icon.

This example illustrates the fields and controls on the Performance vs. Compa-Ratio pivot grid for the tablet.



This example illustrates the fields and controls on the Performance vs. Compa-Ratio pivot grid for the smartphone.



The PeopleSoft Fluid User Interface provides a scatterplot chart that enables managers to view compensation vs. performance data for their team members. This page populates the scatterplot chart with the current compa-ratio and the current overall performance evaluation rating of your direct reports. Direct reports that do not have a performance evaluations will not appear on this chart.

Note: Employees must have a performance rating that uses the default document type in order to appear on the chart. The system uses the document type linked to the My Team transaction, as specified on the “Assign Document Defaults Page” (PeopleSoft ePerformance), when retrieving the most recent performance rating. If the administrator has not associated a document type with the My Team transaction on the Assign Document Defaults page, the My Team page will not display the Analytics tab, since the system will have no way of knowing which document type to look for when retrieving performance documents.

Note: To provide pivot charts with the most up-to-date information, you should periodically access the “Direct Reports Tables Build Page” (Application Fundamentals) to run the direct reports process. This process populates direct report flat tables corresponding to each access type. The pivot chart selects data from flat tables through PSQuery.



This page displays those employees that are part of the reporting structure you selected on the [My Team – Summary Page](#). When a manager has multiple jobs, the system will show direct reports of the selected job record.

Hover over a data point to view the performance rating, name, and compa-ratio associated with the data point.

The grid below the chart displays the following information:

- The employee name and ID.
- The related actions icon, from which you can access and perform manager self-service transactions.
- The employee’s current job data, including the department, job code, salary, currency, and compa-ratio.
- The last performance review scores.

Click a data point in the chart to display only that person’s data in the detailed grid at the bottom of the page. Click elsewhere on the pivot grid to once again show all employees for that team.

Field or Control	Description
<div style="display: flex; flex-direction: column; align-items: flex-start;"> <div style="display: flex; align-items: center; margin-bottom: 10px;">  <div style="margin-left: 5px;"> <p>(Tablet) Show Filters or Hide Filters tab button or</p> </div> </div> <div style="display: flex; align-items: center;">  <div style="margin-left: 5px;"> <p>(smartphone) Filters button</p> </div> </div> </div>	<p>(Tablet) Select the Show Filters tab button to display the filters options on the left side of the page and specify which criteria facets should be included in the graph. Select the Hide Filters tab to close the panel that shows filter options.</p> <p>(Smartphone) Select the Filters button to open the Filters page and specify which criteria facets should be included in the graph. Select the Done button to close the Filters pages and apply the filters.</p>

This example illustrates the fields and controls on the Performance vs. Compa-Ratio page showing the filter options for the tablet.

Performance vs. Compa-Ratio
✕

Employee Name +

- Christelle Stevenson (1)
- Daryl Reese (1)
- David Ho (1)
- Edmund Donahue (1)
- John Patterson (1)
- Mei Lee (1)
- Shawn Quilligan (1)
- Vicki Zinn (1)

Performance Rating +

- 3.00 (5)
- 4.00 (3)

Job Title +

- Accountant (2)
- Financial Analyst (2)
- Manager-Accounting (2)
- Manager-Revenue (1)
- Senior Financial Analyst (1)

Department +

- Corporate Accounting (4)
- Accounts Payable (1)
- Accounts Receivable (1)

Rows + Performance Rating ⊗ + Employee Name ⊗

Columns Compa-Ratio

Performance vs. Compa-Ratio

The scatter plot displays Compa-Ratio on the y-axis (0.0 to 1.2) and Performance Rating on the x-axis (0.0 to 4.5). Data points are color-coded by employee: Christelle Stevenson (blue square), Daryl Reese (orange circle), Edmund Donahue (yellow diamond), Mei Lee (cyan plus), Vicki Zinn (purple inverted triangle), David Ho (green triangle), John Patterson (light green square), and Shawn Quilligan (pink circle). Points for Daryl Reese and Edmund Donahue are at (3.0, 0.8). Points for Vicki Zinn and David Ho are at (3.0, 1.0). Points for John Patterson and Shawn Quilligan are at (4.0, 0.8). Points for Christelle Stevenson and Mei Lee are at (4.0, 1.0).

8 rows

Employee Name	Actions	ID	Job Title	Annual Salary	Currency	Compa-Ratio	Performance Rating
Christelle Stevenson	⌵	KU0020	Manager-Accounting	72,000.00	USD	0.90	3.00
Shawn Quilligan	⌵	KU0039	Financial Analyst	56,500.00	USD	1.04	4.00

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This example illustrates the fields and controls on the Performance vs. Compa-Ratio: Filters page for the smartphone.

Filters Done

▼ **Employee Name**

- Cynthia Adams (1)
- Diane Palmer (1)
- Jill Chancelor (1)
- Netty Owyang (1)
- Rosanna Channing (1)
- Tina Palisco (1)

▼ **Performance Rating**

- 3.00 (3)
- 4.00 (2)
- 5.00 (1)

▼ **Job Title**

- Manager-Accounting (2)
- Administrative Assistant (1)
- Corporate Controller (1)
- Payroll Manager (1)
- Senior Accounting Manager (1)

▼ **Department**

- Corporate Accounting (2)

The filter panel displays the various categories reflected in the chart: **Employee Name** and **Performance Rating**, as well as **Job Code**, **Location**, and **Department**. When you select the check boxes within the filter categories using a tablet or large form factor, the filter panel, chart, and grid dynamically update to reflect data from the criteria you have selected. When you select the check boxes within the filter categories using a smartphone or small form factor, and select **Done**, the chart and grid dynamically update to reflect data from the criteria you have selected. The group of direct reports appearing on the chart are restricted to those that match the filter criteria and the filter options are limited to match the criteria of those displayed on the chart. For example, if you select to display just the managers in a team and none of them have a performance rating of 5.00, then the chart will show only those employees that

are managers and the number 5.00 performance rating will not appear within the Performance Rating category filter. If you do not select any check boxes within a filter category, the chart will display all criteria that applies within the category.

Using Fluid Approvals to Approve Self Service Transaction Requests

This topic provides an overview of approvals and discusses how to approve self service transaction requests using Fluid Approvals.

For using the common Pending Approvals and Approvals History pages, see “Using PeopleSoft Fluid User Interface Self-Service Approval Transactions” (Application Fundamentals).

The following videos provide an overview and demonstration of the Fluid Attachment framework:

Video: [PeopleSoft Fluid HCM Attachments](#)

Video: [Image Highlights, PeopleSoft HCM Update Image 26: Fluid Attachments -- HR Core](#)

Video: [Image Highlights, PeopleSoft HCM Update Image 27: Fluid HCM Attachments Uptake for Address Transaction](#)

Pages Used to Approve Self Service Transaction Requests Using Fluid Approvals

Page Name	Definition Name	Usage
Pending Approvals - <Transaction Name> Page	EOAWMA_TXNHDTL_FL	Review and take action on an eProfile Manager transaction request using Fluid Approvals.
Name Change Details Page	HR_EE_NAME_VW_FL	View the details of a name change request.
Attachments Page	HR_EE_NAME_ATT_SCF HR_EE_ADDR_ATT_SCF	View attachments linked to a name or address change request.

Understanding Approvals for eProfile Manager Desktop

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

Employee Self Service:

- Address Change
- Marital Status Change

- Name Change

Manager Self Service:

- Full/Part Time Status
- Location Change
- Promote Employee
- Reporting Change
- Retire Employee
- Terminate Employee
- Transfer Employee

For a list of delivered AWE transactions for HCM, see “Understanding the Approval Transaction Registry” (Application Fundamentals).

Approvals Process

The approval processes, which determines who approves the transaction, is defined using the common Approval Framework. For more information, see “Understanding Approvals” (Application Fundamentals).

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

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

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).

Pending Approvals - <Transaction Name> Page

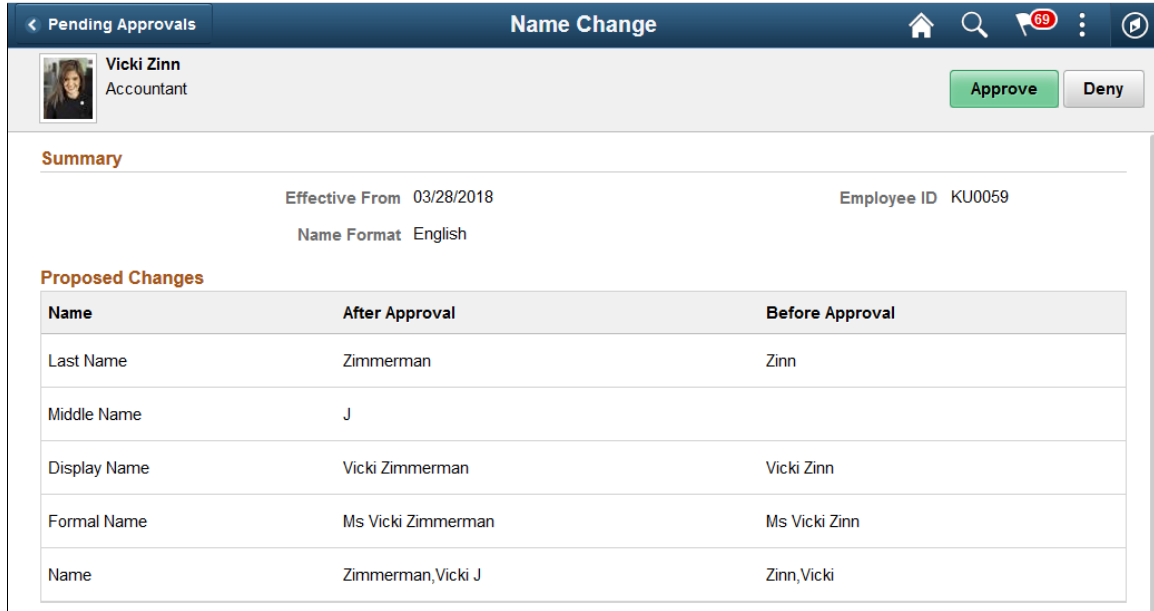
Use the Pending Approvals - <Transaction Name> page (EOAWMA_TXNHDTL_FL) to review and take action on an eProfile Manager transaction request using Fluid Approvals. The page title varies and reflects the transaction type.

Note: The transaction name for the page will change based on the transaction type you selected on the Pending Approvals page.

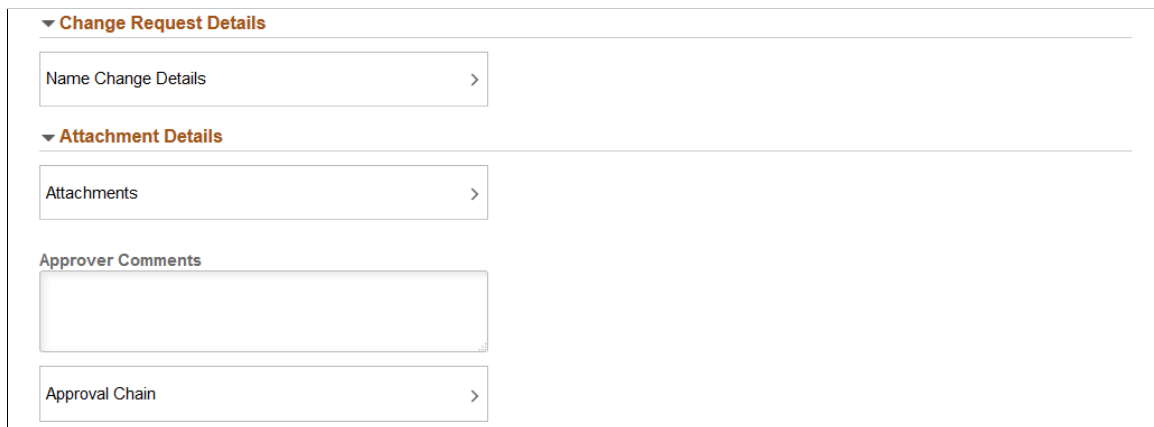
Navigation:

Click the Approvals tile on the Manager Self-Service home page or the Notifications button in the Oracle banner to access the Pending Approvals page. Then click an eProfile Manager Desktop transaction entry on the Pending Approvals page.

This example illustrates the fields and controls on the Pending Approvals - <Transaction Name> page (1 of 2). This example shows a Name Change transaction.



This example illustrates the fields and controls on the Pending Approvals - <Transaction Name> page (2 of 2). This example shows a Name Change transaction.



Approval Options

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

<i>Field or Control</i>	<i>Description</i>
Approve and Deny	Use these buttons to take action on the requested approval.

Summary and Details Sections

These sections show a quick summary of who is being impacted by the transaction request and when. The section and field names on the page will vary based upon the transaction type. Some sections and fields may not apply to certain transactions. The preceding screen shot displays an example of a transaction that shows a Summary section.

Field or Control	Description
Date-related fields	Displays the effective date for the transaction (not the date that the transaction was submitted). The field name description will vary based upon the transaction type.
Employee ID	Displays the ID of the employee being affected by this transaction request.
Name Format	For a <i>Name Change</i> request, the page will display the name format used for the employee's name. For example, <i>English</i> or <i>Japanese</i> .
Requester	Displays the name of the manager who submitted the transaction for approval.
Reason	If the transaction specified a reason to use in the new job data row, that reason appears here.

Proposed Changes Section

This section is not shown for the delivered *Reporting Change*, *Retire Employee*, and *Terminate Employee* transactions.

These sections show the proposed changes to the employee's record. The grid lists the specific data changes that are being requested. The fields in this section vary depending on the transaction.

Field or Control	Description
Job Information, Type, Name, or Description	Displays the name of the field to be updated. The Type column applies to the address type that is being updated, such as <i>Home</i> or <i>Mailing</i> . The Name column lists the different types of names for an employee, such as Last Name, First Name, or Display Name.
After Approval	Displays the proposed new value for the specified field.

Field or Control	Description
Before Approval	Displays the current value of the specified field so that you can compare the old data to the proposed change.

Proposed Supervisor and New Direct Reports Sections

These sections appear for the *Reporting Change* transaction and list the newly proposed supervisor and direct reports.

Change Request Details Section

This section appears for the *Name Change* transaction.

Field or Control	Description
Name Change Details	Click this item to open the Name Change Details Page , where you can review the proposed changes for this transaction.

Attachment Details Section

This section appears for the *Name Change* and *Address Change* transactions when an attachment is included with the request.

Field or Control	Description
Attachments	Click this item to open the Attachments Page , where you can review the attachment associated with this transaction.

Additional Information Section

This section appears for the *Full/Part Time Status* transaction and lists the standard hours per week, hourly salary, and annual rate for the employee.

Unchanged Job Information Section

This section appears for the *Promote Employee* and *Transfer Employee* transactions. This section lists additional data that is relevant to the transaction but that is not changing.

Requester Comments Section

This section displays any comments that the requester added before submitting the transaction. For some transactions this section is hidden.

Approver Comments and Approval Chain Sections

<i>Field or Control</i>	<i>Description</i>
Approver Comments	Enter any comments related to the approval action you take.
Approval Chain	Click this item to open the Approval Chain page, where you can review information about all approvers for the transaction.

Name Change Details Page

Use the Name Change Details page (HR_EE_NAME_VW_FL) to review the details of a name change request.

Navigation:

Click the **Name Change Details** item row on the Pending Approvals - Name Change page.

This example illustrates the fields and controls on the Name Change Details page.

Name Change Details
×

Effective Date 11/04/2016

Name Format English

Name Prefix Ms

First Name Vicki

Middle Name J.

Last Name Zimmerman

Name Suffix

Display Name Vicki Zimmerman

Formal Name Ms Vicki Zimmerman

Name Zimmerman,Vicki J.

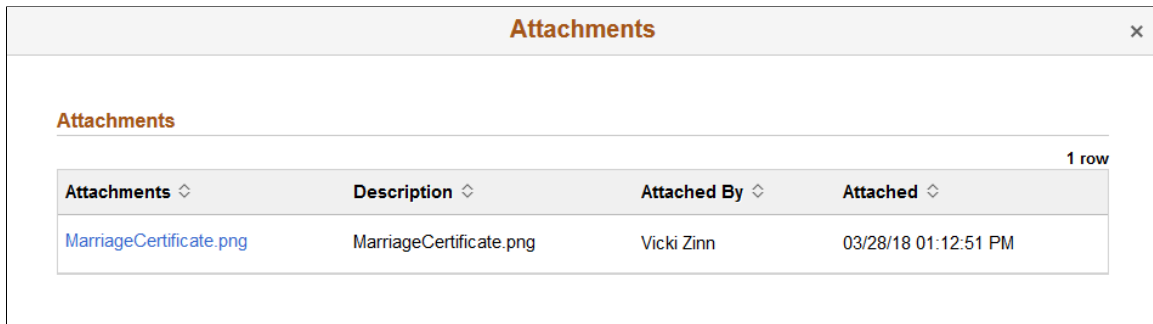
Attachments Page

Use the Attachments page (HR_EE_NAME_ATT_SCF or HR_EE_ADDR_ATT_SCF) to view attachments linked to a name or address change request.

Navigation:

Click the **Attachments** item row on the Pending Approvals - Name Change or Pending Approvals - Address Change page.

This example illustrates the Attachments page.



Attachments			
Attachments			
Attachments	Description	Attached By	Attached
MarriageCertificate.png	MarriageCertificate.png	Vicki Zinn	03/28/18 01:12:51 PM

Click the Attachments link to download and view an attachment using fluid. Note that attachments are not accessible from the classic pages.

Attachments are saved on the PS_HR_ESS_ADDR_ATT table.

The following videos provide an overview and demonstration of the Fluid Attachment framework:

Video: [PeopleSoft Fluid HCM Attachments](#)

Video: [Image Highlights, PeopleSoft HCM Update Image 26: Fluid Attachments -- HR Core](#)

Video: [Image Highlights, PeopleSoft HCM Update Image 27: Fluid HCM Attachments Uptake for Address Transaction](#)

Using Fluid Approvals to Approve Gender Identity Changes

This topic provides an overview of approvals and discusses how to approve gender (current sex) change requests using Fluid Approvals.

Fluid Approvals supports the *Gender Identity Changes* transaction types for information added on the “Gender Details Page” (PeopleSoft eProfile) of Employee Self Service, Personal Details.

For using the common Pending Approvals and Approvals History pages, see “Using PeopleSoft Fluid User Interface Self-Service Approval Transactions” (Application Fundamentals).

These videos provide an overview of the gender identity functionality:

Video: [Image Highlights, PeopleSoft HCM Update Image 41: Gender Identity and Expression](#)

Video: [PeopleSoft Gender Identity and Expression](#)

Pages Used to Approve Gender Identity Changes

Page Name	Definition Name	Usage
Pending Approvals - Gender Identity Change Page	EOAWMA_TXNHDTL_FL	Review and take action on gender (current sex) change requests.
Gender Identity Change - Attachments Page	HR_EE_GEND_ATT_SCF	View attachments linked to a request.

Pending Approvals - Gender Identity Change Page

Use the Pending Approvals - Gender Identity Change page (EOAWMA_TXNHDTL_FL) to review and take action on gender (current sex) change requests.

Navigation:

- Click the Approvals tile on the Manager Self Service home page to access the Pending Approvals page. Then click a *Gender Identity Change* transaction row on the Pending Approvals page.

Note: This transaction is listed under the *Gender Identity Change* view by type.

- Click the Notifications button in the banner, or from the Notifications panel, select the appropriate approval notification.

This example illustrates the fields and controls on the Pending Approvals - Gender Identity Change page.

The screenshot displays the 'Pending Approvals' interface for a 'Gender Identity Change' request. At the top, the user 'Mei Lee' (Accountant) is identified, with 'Approve' and 'Deny' buttons. The 'Summary' section shows the request is effective from 03/17/2022 for Employee ID KU0076. The 'Proposed Changes' table is as follows:

Description	Proposed	Current
Current Sex	Female	Male
Birth Sex	Male	
Pronoun	Ze/Hir/Hirs	

Below the table are sections for 'Attachment Details', 'Approver Comments' (with a text input field), and 'Approval Chain'.

Note: Gender identity changes are triggered when an employee updates the **Gender (Current Sex)** field because approval may be needed since current sex is used in various benefits and compensation related processes. All other gender identity updates made in the Personal Details pages (Birth Sex, Pronoun, Sexual Orientation, and Gender Identity) automatically update the HR system without needing approval.

Approval Options

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

<i>Field or Control</i>	<i>Description</i>
Approve and Deny	Use these buttons to take action on the requested approval. When you approve a gender identity change, the system inserts a row in the Biographical History section of the “Biographical Details Page” (PeopleSoft Human Resources Administer Workforce) for the person.

Proposed Changes Section

The fields on this page provide information about the transaction you are being asked to approve. These fields correspond to the information that was entered on the “Gender Details Page” (PeopleSoft eProfile) by the employee.

This section shows the proposed changes to the employee’s Personal Data record. The grid lists the specific data changes that are being requested.

Attachment Details Section

<i>Field or Control</i>	<i>Description</i>
Attachments	When available, click this item to open the Gender Identity Change - Attachments Page where you can review the attachments associated with this request. If attachments were not added to the gender details, this option will not appear on the page.
Approver Comments	Enter any comments related to the approval action.
Approval Chain	Click this item to open the Approval Chain page, where you can review information about all approvers for the transaction.

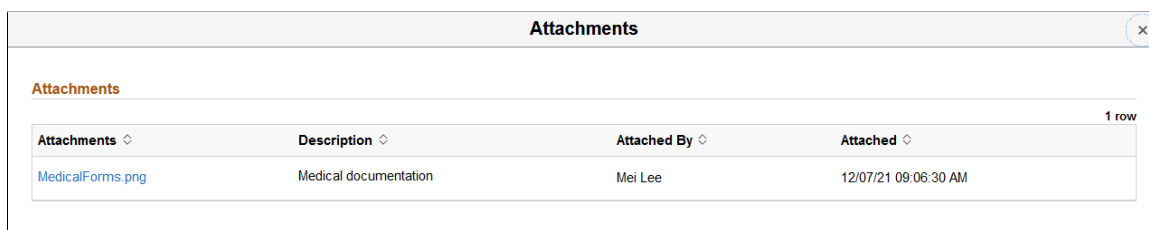
Gender Identity Change - Attachments Page

Use the Gender Identity Change - Attachments page (HR_EE_GEND_ATT_SCF) to view attachments linked to a request.

Navigation:

Click the **Documents** row on the Pending Approvals - Gender Identity Change page.

This example illustrates the Gender Identity Change - Attachments page.



Attachments			
Attachments	Description	Attached By	Attached
MedicalForms.png	Medical documentation	Mei Lee	12/07/21 09:06:30 AM

Click the **Attachments** link to download and view an attachment using fluid.

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

Video: [PeopleSoft Fluid HCM Attachments](#)

Managing Remote Worker Requests as a Manager Using Fluid

With an increased number of employees working outside the traditional office setting, you can record and track your employees that work remotely using PeopleSoft HCM. As a manager, you can submit remote worker requests for your employees using the Remote Worker tile and pages from the Manager Self Service home page. You can also use the Approval framework to approve your employee's requests.

These videos provide an overview of the Fluid Remote Worker feature:

Video: [Image Highlight, PeopleSoft HCM Update Image 40: Remote Worker](#)

Video: [PeopleSoft Remote Worker](#)

Video: [Image Highlight, PeopleSoft HCM Update Image 48: Remote Worker Request Update Enhancement](#)

This topic lists the pages managers use to enter and approve remote worker requests for their employees.

Note: Employees manage their remote work requests by accessing the Employee Self Service home page, “Remote Worker Tile (for Employees)” (PeopleSoft eProfile).

Related Links

“(Fluid) Managing Remote Worker Information” (PeopleSoft Human Resources Administer Workforce)

“Viewing Remote Worker Insights” (PeopleSoft Human Resources Administer Workforce)

Pages Used to Manager Remote Worker Requests as a Manager Using Fluid

Page Name	Definition Name	Usage
<u>Remote Worker Tile (for Managers)</u>	HC_HR_RW_MGR_FL (This is the cref for this tile)	Enter and review remote worker requests for your direct reports using fluid pages.
“Remote Worker Request Page” (PeopleSoft Human Resources Administer Workforce)	HR_RW_LANDING_FL	Initiate a remote worker request.
“Add Remote Work Request (or Edit Request) Page” (PeopleSoft Human Resources Administer Workforce)	HR_RW_ADD_RQST_FL	Initiate a remote worker request.
“Remote Worker Request - Guidelines Page” (PeopleSoft Human Resources Administer Workforce)	AGC_INFO_FL	Review any institution policies or guidelines to work remote.
“Remote Worker Request - Request Details Page” (PeopleSoft Human Resources Administer Workforce)	HR_RW_RQST_DTL_FL	Enter the specifics of the remote work request.
“Remote Worker Request - Attachments Page” (PeopleSoft Human Resources Administer Workforce)	HR_RW_SS_ATTACH_FL	Add or view attachments and notes for a request.
“Remote Worker Request - Review and Submit Page” (PeopleSoft Human Resources Administer Workforce)	HR_RW_REVIEW_FL	Review a summary of the request and submit it for approvals.
“Remote Worker Confirmation Page” (PeopleSoft Human Resources Administer Workforce)	HR_RW_SUB_CNF_FL	Confirm that your request has been submitted successfully.
“Request Details Page” (PeopleSoft Human Resources Administer Workforce) (or Remote Worker Request Page)	HR_RW_REVIEW_FL	View a complete summary of the remote work details for that start date.
“Pending Approvals - Remote Worker Page” (PeopleSoft Human Resources Administer Workforce)	EOAWMA_TXNHDTL_FL	Review and take action on remote worker requests.
“Attachments Page” (PeopleSoft Human Resources Administer Workforce)	HR_RW_ATTACH_SCF	View attachments and notes linked to a request.

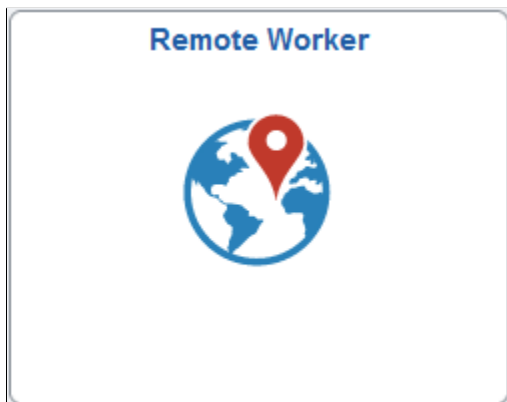
Remote Worker Tile (for Managers)

Managers use the Remote Worker tile from the Manager Self Service home page to enter and review remote worker requests for their direct reports using fluid pages.

Navigation:

The Remote Worker tile will display as part of the fluid “Manager Self Service Homepage” (Application Fundamentals) when you have been granted the *Fluid Remote Worker Manager* role.

This example illustrates the fields and controls on the Remote Worker page.



Select this tile to access the Remote Worker Request component and pages in Fluid. The system will first display the Find Team Member search page where you will identify one of your direct reports and initiate a remote worker request on his or her behalf.

See the “(Fluid) Managing Remote Worker Information” (PeopleSoft Human Resources Administer Workforce) topic for information on the common Remote Worker Request component and pages.

Chapter 7

Using Guided Self-Service Transactions

Performing Guided Self-Service Transactions in Manager Self-Service

This topic provides overviews of guided self-service pages, of how managers access guided self-service transactions, and of administrator approvals for guided self-service transactions. It then discusses the self-service transaction pages.

These videos provide overviews and demonstrations of guided self-service:

Video: [PeopleSoft Fluid HCM Guided Self Service](#)

Video: [PeopleSoft HCM 9.2 Image 17 Highlights: Guided Self-Service \(support for regulatory regions, activity guides, and action reason configuration\)](#)

Video: [PeopleSoft HCM 9.2 Image 20 Highlights: Guided Self-Service \(demotion transaction and attachments support\)](#)

Video: [PeopleSoft HCM 9.2 Image 22 Highlights: Creating a New Position Using Fluid Guided Self-Service](#)

Video: [PeopleSoft HCM 9.2 Image 22 Highlights: Changing Work Schedule Hours Using Fluid Guided Self-Service](#)

Video: [PeopleSoft HCM 9.2 Image 24 Highlights: Guided Self-Service Navigation Collection and Multi-Select Transaction](#)

Related Links

[Understanding Guided Self-Service Transactions](#)

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

[Approving Guided Self-Service Transactions](#)

Pages Used to Perform Guided Self-Service Transactions in Manager Self-Service

Note: Guided self-service transaction steps are rendered using the PeopleTools Activity Guide framework as long as you have PeopleTools 8.55 or later. As you can see in the following table, sometimes different page definitions are used if you are on an earlier version of PeopleTools, but the pages function the same.

Page Name	Definition Name	Usage
<u>Update Team Information Tile</u>	HC_NAVCOLL_7 (this is the cref for the tile)	Access the Update Team Information page, a navigation collection for initiating guided self-service transactions.
<u>Update Team Information Page</u>	Update Team Information (this is the name of the navigation collection)	Initiate guided self-service transactions.
<u><Transaction Name> - Find Team Member Page for Selecting Employees</u>	HR_PSEL_FLU	Select one or more employees for a guided self-service transaction.
<u>Questionnaire Page</u>	HR_MSS_CT_QUES_FL	Answer questions that determine which pages and fields users will see during the guided self-service transaction.
<u>Decision Support Page</u>	HR_MSS_CT_DSUP_FL	View decision support topics that are defined in the transaction configuration. This page appears in PeopleTools 8.55 or later. With earlier versions of PeopleTools, decision support appears in a panel on the Questionnaire page.
<u>Common Header for Guided Self-Service Pages</u>	not applicable	The common header provides navigation buttons and contextual information for the steps in a transaction.
<u>Work and Job Information Page</u>	HR_MSS_CT_PG1_AGFL (PeopleTools 8.55 or later) HR_MSS_CT_PG1_FL (PeopleTools versions before 8.55)	Enter work and job changes for an employee.
<u>Compensation Details Page</u>	HR_MSS_CT_PG2_AGFL (PeopleTools 8.55 or later) HR_MSS_CT_PG2_FL (PeopleTools versions before 8.55)	Enter compensation changes for an employee.
<u>Clone Position Page</u>	HR_MSS_POSN_AGFL	Enter or update position data to create a new position based on an existing one. This page requires PeopleTools 8.55 or later. The Clone Position transaction is not available with earlier versions of PeopleTools.

Page Name	Definition Name	Usage
<u>Review and Submit Page</u>	HR_MSS_CT_SBM_AGFL (for employee transactions using PeopleTools 8.55 or later) HR_MSS_CT_SUBMT_FL (for employee transactions using PeopleTools versions before 8.55) HR_MSS_CT_PSNSB_FL (for the Clone Position transaction)	Review transaction information, add comments, and submit the request.
Transaction Confirmation Page	HR_MSS_CT_CONF_FL	Confirms that the transaction was submitted. If approvals are used, this page also displays the approval chain. This page appears immediately after a transaction is submitted.
<u><Transaction Name> Page for Reviewing Submitted Transactions</u>	HR_MSS_CT_EE	Submitters use this page to review read-only information about a guided self-service transaction that has been submitted for approval.

Understanding Guided Self-Service Transactions

This overview describes how guided self-service transactions work.

Guided Self-Service Pages

The framework for guided self-service transactions displays the pages and fields that are relevant for a specific purpose. All guided self-service transactions use the same pages, but each transaction's configuration determines which pages appear and which fields appears on those pages. To complete a transaction, users step through the pages sequentially.

These are the pages that can appear in a guided self-service transaction that updates employee data:

1. Questionnaire Page: this appears only if the transaction is configured with questions that are not hidden.
2. Work and Job Information Page: this appears if the transaction is configured to show job data.
3. Compensation Details Page: this appears if the transaction is configured to show compensation data.
4. Review and Submit Page: this page summarizes the transaction and is always the last step in transactions.

Oracle delivers one transaction, *Clone Position*, that does not update employee data. This transaction is configured using the same framework, but the nature of the transaction means that it does not use the standard employee-related pages. Instead, it uses these pages:

- Clone Position page: this displays position data fields with default values from the position being cloned.

- Review and Submit page: this page summarizes the transaction and is always the last step in transactions.

Special Processing for Employees in Positions

Guided self-service includes the following special processing for employees in positions:

- The fields shown for the *Promote Employee*, *Demote Employee*, and *Transfer Employee* transactions enable a manager to change which position an employee is assigned to.

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

- The *Change Full/Part Time or Hours*, *Request Location Change*, *Request Reporting Change*, and *Update Job Details for Group* transactions can be optionally configured to make changes to position data as long as the position has just one incumbent and the incumbent's position data has not been overridden.

The *Update Job Details for Group* transaction enables you to process multiple employees. If you assign a new supervisor to a group that includes a mix of position employees and non-position employees, it is possible to choose a new supervisor who is not in a position. In this scenario, a message indicates that the supervisor cannot be automatically assigned as the manager for the position employees. All position employees in the group are sent to an administrator for processing.

See [Understanding Updates to Position Data](#) for a more detailed description of the position update configuration option, including information about what happens when positions have multiple incumbents and when employee position data has been overridden.

Allowing Multiple Guided Self Service Transactions for an Employee

As delivered, PeopleSoft HCM allows a manager to initiate one job data transaction request at a time per employee. When a transaction is in progress, such as a job promotion that is pending approval, the manager cannot submit another request for that employee until the promotion request is resolved.

However, you can grant managers who are using the guided self-service pages the ability to submit multiple job data transactions for an employee. This functionality can be enabled for all or specific transactions.

- All guided self-service transactions.

Select the **Allow Multiple Transactions for Employee** option on the Installation Table - "HCM Options Page" (Application Fundamentals).

This enables the functionality across all guided self-service transactions. For example, a manager can submit multiple job transaction requests for an employee, such as a promotion and a reporting change.

Important! When this global option is enabled, you cannot turn off the functionality at the individual transaction level. Multiple transactions will be allowed for all transactions and effective dates. Therefore, it is recommended that you do *NOT* enable multiple transactions at the global (Installation Table) level.

- Individual guided self-service transactions.

Select the **Allow Multiple Transactions for Employee** option on the [Transaction Configuration - Configuration Page](#) for the transactions in which a manager can submit a request even though another transaction is in progress.

This allows you to enable the functionality for specific transactions while restricting others. For example, if this feature is enabled for the *Request Ad Hoc Salary Change* transaction, a manager can request a salary change for an employee, even when another transaction is in progress. However, if this is not enabled for a transaction, such as *Promote Employee*, the manager cannot submit a promotion request until the current in progress transaction request is resolved.

Note: By selecting this option at the individual transaction configuration level, you override the OFF setting on Installation Table. The system treats the transaction as an exception. Note, however, that it does not work in reverse. If the functionality is enabled globally at the Installation Table level, you cannot turn the functionality off at the individual transaction level.

Transaction Summary


The following table lists the delivered guided self-service transactions, identifies the pages that appear during the transaction, and notes which transactions support position-specific processing. The Review and Submit page is part of every transaction and is not listed.


Transaction	Questionnaire Page	Work and Job Information Page	Compensation Details Page	Notes for employees in positions
Demote Employee	Yes	Yes	Depends on questionnaire answer.	Employee is assigned to a new position.
Change Full / Part Time or Hours	No	Yes	No	Can be configured to automatically update position data.
Clone Position This uses the Clone Position page, which is unique to this transaction and does not appear in this table.	No	No	No	Does not impact existing employee position data.
Request Location Change	No	Yes	No	Can be configured to automatically update position data.
Request Leave of Absence	No	Yes	No	No special processing.

Transaction	Questionnaire Page	Work and Job Information Page	Compensation Details Page	Notes for employees in positions
Request Paid Leave of Absence	No	Yes	No	No special processing.
Request Reporting Change	No	Yes	No	Can be configured to automatically update position data.
Promote Employee	Yes	Yes	Depends on questionnaire answer.	Employee is assigned to a new position.
Retire Employee	No	Yes	No	No special processing.
Request Ad Hoc Salary Change	No	No	Yes	No special processing.
Terminate Employee	No	Yes	No	No special processing.
Transfer Employee	Yes	Depends on questionnaire answer.	Depends on questionnaire answer.	Employee is assigned to a new position.
Update Job Details for Group	Yes	Yes	No	Can be configured to automatically update position data. Managers can select a non-position supervisor if the group includes both position and non-position employees, but the system will not assign this supervisor to the position employees. An administrator must manually update supervisor information for those employees.

Understanding How Managers Access Guided Self-Service Transactions

The following table describes the various navigation options for accessing guided self-service transactions.

Navigation Method	Description	Transaction-Specific Details
Update Team Information tile	<p>Click the Update Team Information Tile on the Manager Self Service home page.</p> <p>On the Update Team Information page:</p> <ul style="list-style-type: none"> • Use the left frame to select a transaction. • Use the right frame to choose the employee(s) whose data will be updated. 	All transactions are listed in the left frame of the Update Team Information page.
Menu Navigation	<p>Use standard menu navigation to select a specific transaction under the Manager Self-Service menu.</p> <p>The <Transaction Name> - Find Team Member Page for Selecting Employees appears. Use this page to select the employee(s) whose data will be updated.</p>	<p>The menu path for most transactions is Manager Self-Service > Job and Personal Information > <Transaction Name>.</p> <p>These are the exceptions:</p> <ul style="list-style-type: none"> • The <i>Clone Position</i> transaction is not available using standard menu navigation. • For the <i>Request Ad Hoc Salary Change</i> transaction, the menu path is Manager Self-Service > Compensation and Stock > Request Ad Hoc Salary Change
 Related Actions Menu	<p>Select a specific transaction from the related actions menu that appears next to team member names on various pages including, but not limited to, the My Team – Summary Page.</p> <p>This navigation method identifies both the transaction and the employee up front, so the manager goes directly into the guided self-service transaction.</p> <p>For more information about related actions, see “Related Actions for Manager Self Service Pages” (Application Fundamentals).</p>	<p>The related actions menu path for most transactions is Job and Personal Information > <Transaction Name>.</p> <p>These are the exceptions:</p> <ul style="list-style-type: none"> • The <i>Update Job Details for Group</i> transaction is not available in the related actions menu because related actions always have the context of a single employee. • The <i>Clone Position</i> transaction is available only if the selected employee is in a position. • The <i>Request Ad Hoc Salary Change</i> transaction appears under the menu path Compensation > Request Ad Hoc Salary Change.

Navigation Method	Description	Transaction-Specific Details
 Actions List on the My Team page	On the My Team page, click the Actions list icon in the page header, then select <i>Update Job Details for Group</i> . See also My Team Page: Actions List Menu Options .	The <i>Update Job Details for Group</i> transaction is the only guided self-service option under the Actions List menu. On the My Team page, all other guided self-service transactions are available from the employee-specific related actions menus, but the <i>Update Job Details for Group</i> transaction is not because it gives users the option to select multiple employees. Therefore, access to this transaction is through the Actions list menu instead.

Note: The PeopleSoft Classic versions of the Request Location Change and Request Reporting Change transactions allow managers to select multiple employees. However, when you implement guided self-service, conditional navigation redirects users to the guided self-service version of these transactions instead. These support a single employee only. To update information for multiple employees at once, use the *Update Job Details for Group* transaction. This transaction lets you request changes to any combination of department, location, and supervisor.

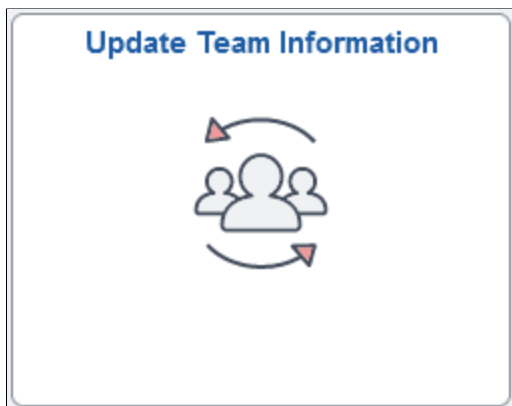
Update Team Information Tile

Use the Update Team Information tile (HC_NAVCOLL_7) to access the Update Team Information page, a navigation collection for initiating guided self-service transactions.

Navigation:

The Update Team Information tile is on the delivered Manager Self Service home page.

This example illustrates the Update Team Information tile



Update Team Information Page

The Update Team Information page is a navigation collection where you can initiate a guided self-service transaction.

Navigation:

Click the [Update Team Information Tile](#).

This example illustrates the Update Team Information page.

On this page:

- The left frame lists the delivered guided self-service transactions.
- The right frame displays the [<Transaction Name> - Find Team Member Page for Selecting Employees](#), where you choose employees for the selected transaction.

Note: Throughout the remainder of these topics, the page illustrations will often show the transaction page of the Update Team Information process without the context of the left guided self-service navigation collection. Even though the left frame is not illustrated, remember that pages appear within that layout.

<Transaction Name> - Find Team Member Page for Selecting Employees

Use the [<Transaction Name> - Find Team Member page \(HR_PSEL_FLU\)](#) to select one or more employees for a guided self-service transaction. The page name matches the transaction name.

Navigation:

This page appears when users access a guided self-service transaction using the Update Team Information tile or using menu navigation.

When you use a related action for an employee to initiate the transaction, the system bypasses this page.

This example illustrates the <Transaction Name> - Find Team Member page when the **Allow Multiple Transactions for Employee** has not been enabled on the Installation Table - “HCM Options Page” (Application Fundamentals).

Change Full/Part Time or Hours

Find Team Member

Team Member

You cannot select an employee for a new job transaction when they have another job transaction in progress

Team Members 13 rows

	Job Title	Status	Position	Type
	KU0101 - 0 Cynthia Adams	Active	19000074	Employee
Pending Transaction Transfer Employee 2 Directs				
	KOMTX005 - 0 Diane Palmer	Active		Employee
Pending Transaction Request Reporting Change				
	HXGSS100 - 0 Franklin Ron	Active		Employee
Pending Transaction None				

Note: As delivered, a manager can initiate only one job data transaction request at a time for an employee. This screenshot shows the page when multiple transactions for an employee is prohibited. For more information on allowing multiple transactions, see the "**Allowing Multiple Guided Self Service Transactions for an Employee**" subtopic under the [Understanding Guided Self-Service Transactions](#) discussion in this topic.

The reporting hierarchy is the same hierarchy that managers see on the [My Team – Summary Page](#).

Page Elements

For descriptions of common fields and controls on this page, see “(Fluid) <Transaction Name> - Find Team Member Page” (Application Fundamentals).

When Multiple Transactions for Employee is Not Allowed

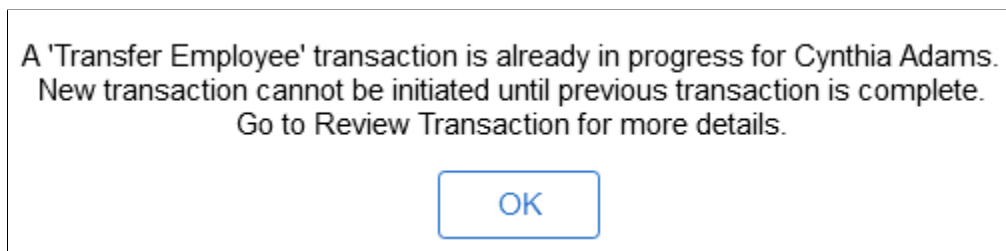
When multiple transactions for an employee is not enabled globally at the Installation Table level, the page displays text below the **Find Team Member** search section indicating that you cannot select an employee or group for a new job transaction when an employee has another job transaction in progress.

Field or Control	Description
Pending Transaction	<p>This field appears on the page when multiple transactions for an employee is not enabled at the Installation Table.</p> <p>Shows whether the employee has a job request in progress by displaying one of the following:</p> <ul style="list-style-type: none"> • <i>None</i> - indicating that you can initiate a new job transaction for this employe • The name of the In Progress transaction for the employee - indicating that you cannot initiate a new job transaction for this employee.

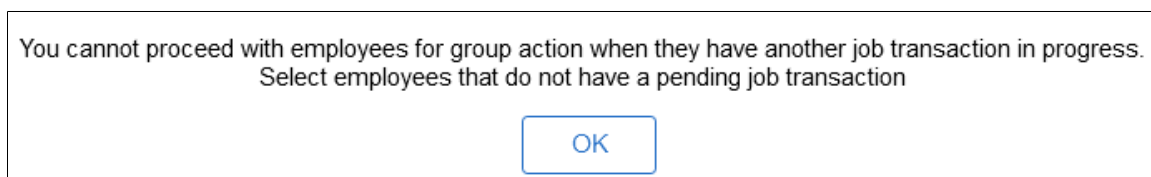
Note: Although you may have allowed multiple transactions for individual transactions, the message and field still appear for all transaction types with the exception of the leave transactions or when cloning a position.

When you select a person, or a group that has a person with a transaction in progress, the system will issue a warning, such as shown in the following screenshots:

Example of the warning message when an employee has a job transaction in progress



Example of the warning message when a group of people you have selected has an employee that has a job transaction in progress



When Multiple Transactions for Employee is Enabled Globally

These screenshots show the page when multiple transactions for an employee are enabled on the Installation Table - "HCM Options Page" (Application Fundamentals), overriding the delivered setting.

This example illustrates the <Transaction Name> - Find Team Member page for transactions where you can select only one employee.

Promote Employee





▼ Find Team Member

Team Member

Q

Team Members 13 rows

↑↓

	KU0101 - 0 Cynthia Adams			>
	Job Title Corporate Controller	Status Active	Position 19000074	Type Employee
2 Directs				
	KOMTX005 - 0 Diane Palmer			>
	Job Title Administrative Assistant	Status Active	Position	Type Employee
	HXGSS100 - 0 Franklin Ron			>
	Job Title QA Analyst	Status Active	Position	Type Employee
	KU0055 - 0 Netty Owyang			>
	Job Title Manager-Accounting	Status Active	Position	Type Employee
4 Directs				

This example illustrates the <Transaction Name> - Find Team Member page for the *Update Job Details for Group* transaction, which allows you to select multiple employees.

In this example, The user (Betty Locherty) has drilled down in her reporting structure, so the reporting structure for the current list of employees appears above the team members list.

Update Job Details for Group

Continue



▼ **Find Team Member**

Team Member

Q

Betty Locherty > Cynthia Adams

Team Members 2 rows

<input type="checkbox"/>		KU0038 - 0 Derek Holsinger		
	Job Title	Status	Position	Type
	Accountant	Active	19000034	Employee
<input type="checkbox"/>		KUC001 - 0 Mark Johnson		
	Job Title	Status	Position	Type
	Accountant	Active	19000034	Employee

For more detailed information on enabling multiple transaction for an employee, see the "**Allowing Multiple Guided Self Service Transactions for an Employee**" subtopic under the [Understanding Guided Self-Service Transactions](#) discussion.

Questionnaire Page

Use the Questionnaire page (HR_MSS_CT_QUEST_FL) to answer questions that determine which pages and fields appear in the guided self-service transaction.

Note: This page appears only for guided self-service transactions that are configured with at least one non-hidden question. The only delivered transactions that include the Questionnaire page are *Promote Employee*, *Demote Employee*, *Transfer Employee*, and *Update Job Details for Group*.

Navigation:

Access a guided self-service transaction that includes a questionnaire.

This example illustrates the Questionnaire page for the Promote Employee transaction. All transactions except *Update Job Details for Group* are for a single employee, whose information appears at the top of the page.

This example illustrates the Questionnaire page for the *Update Job Details for Group* transaction. Because this transaction allows multiple employees, the page displays a Selected Employees list rather than displaying a single employee’s information at the top of the page.

Name / Title	Business Unit	Department / Location	Supervisor
Derek Holsinger Accountant	Global Business Institute BU	Finance and Administration Delaware Operations	Cynthia Adams
Mark Johnson Accountant	Global Business Institute BU	Finance and Administration Delaware Operations	Cynthia Adams

Employee Information

For transactions other than *Update Job Details for Group*, the Questionnaire page includes a header with identifying information about the employee whose data is being updated.


Questionnaire

The on-page instructions, the questions that follow the instructions, and the default answers to the questions are all configured on the Transaction Configuration - Questionnaire Page. When you configure questions, you can choose alternate text to use on small form factors.

Field or Control	Description
Yes or No	Swipe a Yes/No slider to answer a question. The selected answers determine the pages and fields that appear in the transaction.
Next	Select this button to move to the next step in the guided self-service transaction. An error appears if the <i>Update Job Details for Group</i> transaction includes employees from multiple business units and your questionnaire answers indicate that you want to change department or work location data.

Selected Employees

This section appears only for the *Update Job Details for Group* transaction. It lists the employees whose data is being updated. The list appears even if the user selects just one employee.

Field or Control	Description
 Delete	<p>Click this icon to remove an employee from the <i>Update Job Details for Group</i> transaction without going back to the page for selecting employees. If there is only one employee in the list, you cannot delete that employee.</p> <p>You cannot add employees on this page. To add employees, restart the transaction.</p>


Related Content and Decision Support

Guided self-service transactions include an infrastructure that enables you to provide managers with decision making support and other related content. When you configure the transaction, you list message catalog entries for specific topics that you want managers to be able to access.

If you use PeopleTools 8.55 or later, you can also give managers access to PeopleTools simplified analytics. The delivered role *PivotGridSuperUser* gives users the ability to create and publish reports. Because guided self-service analytics can contain sensitive employee data, users should not publish such reports to the tile repository.

For more information about simplified analytics, see *PeopleTools: Pivot Grid*.

Use these page controls to access related information:

Field or Control	Description
 (Supplementary Panel tab button)	<p>This tab appears only in PeopleTools 8.55 or later.</p> <p>Click this tab to open the Related Content panel. The Related Information pane lists topics that have been configured for the transaction.</p> <hr/> <p>Note: This tab appears on the guided self-service pages as well as on the Questionnaire page.</p>

This example illustrates the related content panel on the Questionnaire page in PeopleTools 8.55 and later.

Questionnaire

What else do you want to change besides Job Title?

Are you changing Work Location details?

Are you changing the employee's Supervisor?

Are you changing Salary Information?

Related Information

[Add Analytics](#)
⚙️

Decision Support 📄

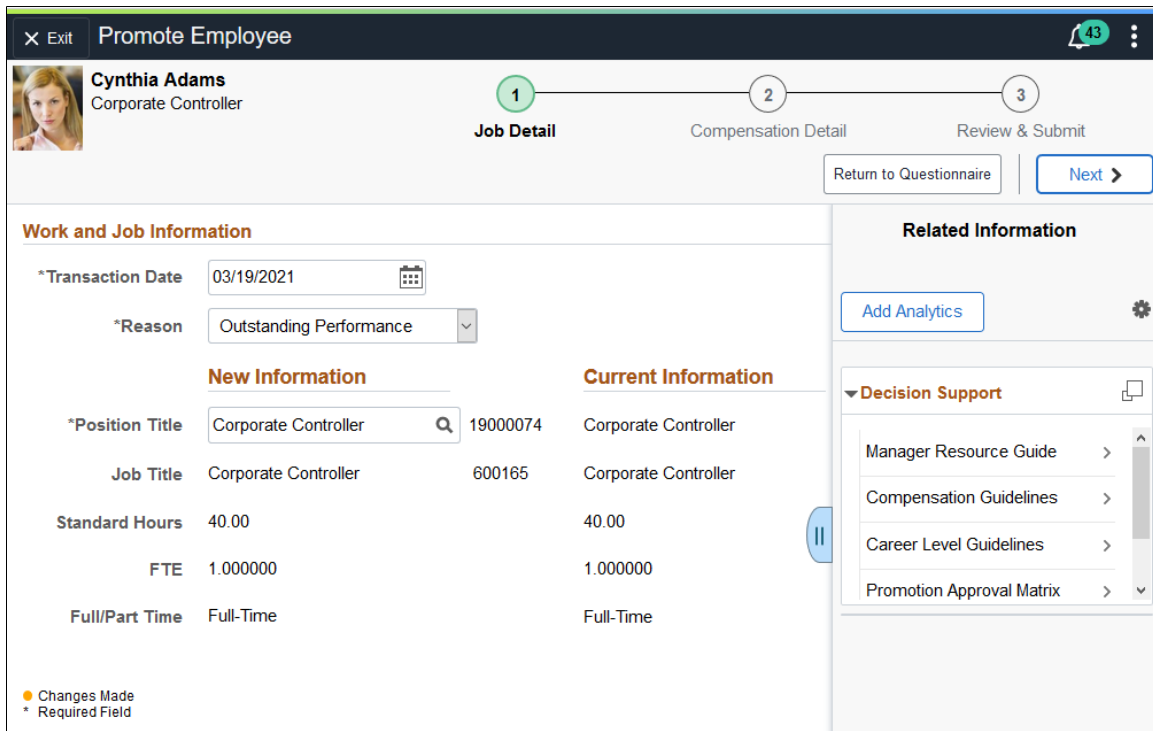
Manager Resource Guide >


Compensation Guidelines >

Career Level Guidelines >

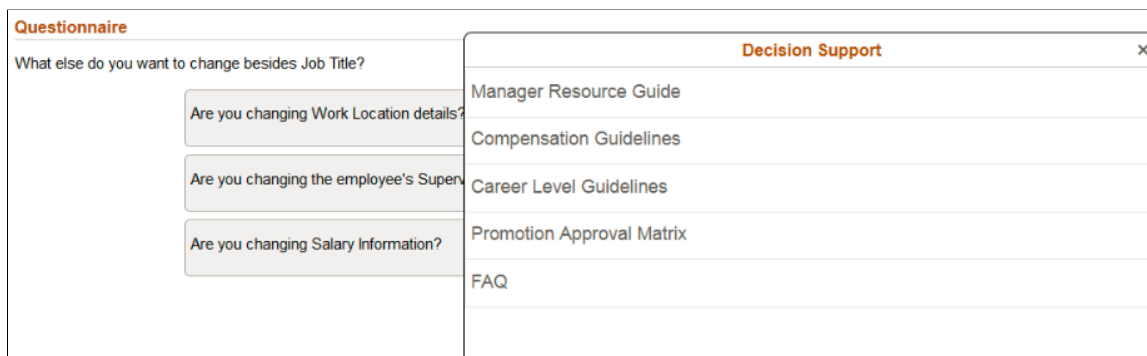
Promotion Approval Matrix >

This example illustrates the related content panel for non-Questionnaire pages in PeopleTools 8.55 and later.



Field or Control	Description
<p>Add Analytics</p>	<p>Click to access the simplified analytics capabilities provided by PeopleTools 8.55 and later and create a new chart. When you select to add a new analytic report, the system opens the Create Analytics page where you will use the Analytics Wizard to guide you through the process of creating a new report. The system uses templates based on transaction page from which you are creating the new report. The templates determine the fields and prompts in the next step of the wizard.</p> <p>The delivered role PivotGridSuperUser gives users the ability to create and publish reports.</p> <p>For information on how to create simplified analytics, see PeopleTools: Pivot Grid, “Working with Simplified Analytics,” Creating Simplified Analytics.</p>
<p> (Display Decision Support in Modal icon)</p>	<p>Click this icon to expand and open the <u>Decision Support Page</u> in a modal window, where you can view the complete list, text and details of the decision support topics.</p>

This example illustrates the Decision Support panel in PeopleTools versions older than 8.55



Click the Decision Support button then click an area of interest to view specific content. Use the back arrow buttons or use the Exit icon (X) to return to previous pages.

Decision Support Page

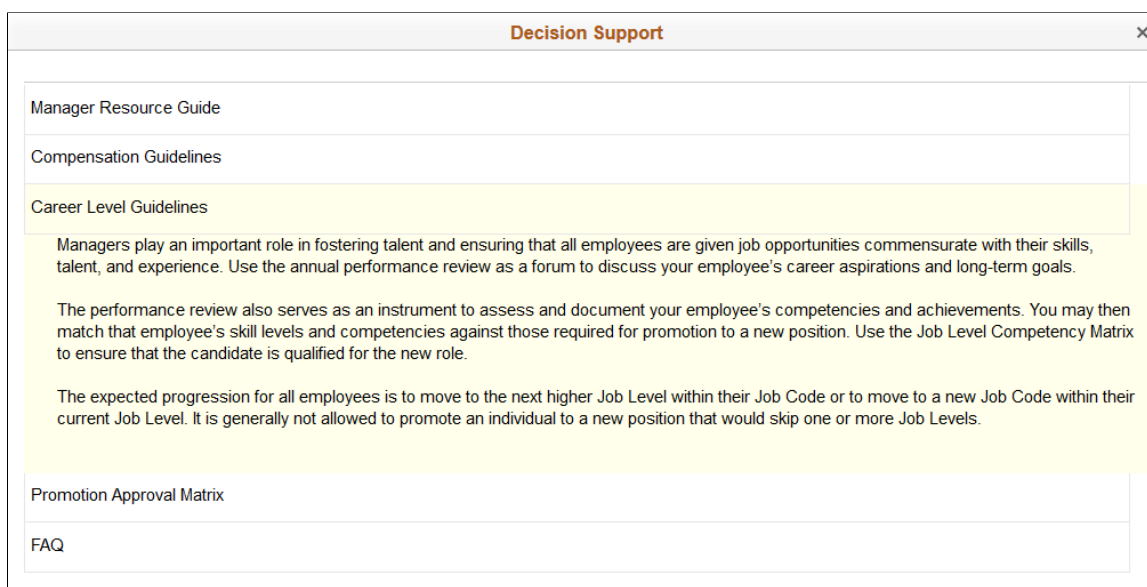
Use the Decision Support page (HR_MSS_CT_DSUP_FL) to view decision support topics that are defined in the transaction configuration.

Note: This page appears in PeopleTools 8.55 or later. With earlier versions of PeopleTools, decision support appears in a panel on the Questionnaire page.

Navigation:

Open the Related Information panel on the Questionnaire page. On the Decision Support tab, click the Display Decision Support in Modal Window icon (this icon is next to the Decision Support title).

This example illustrates the Decision Support page.



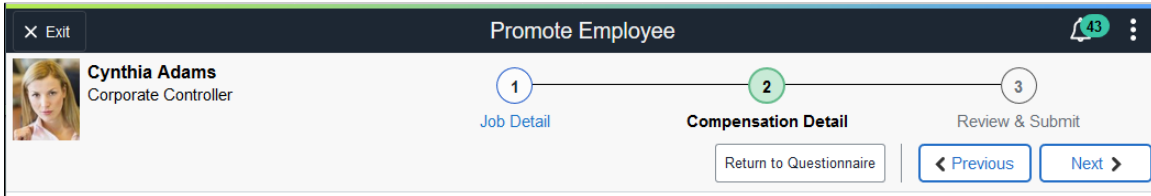
This page lists the decision support topics that are defined in the transaction configuration. Click a topic title to expand it and view the full text for the topic, then click again to hide the text and return to the list of topics.

Common Header for Guided Self-Service Pages

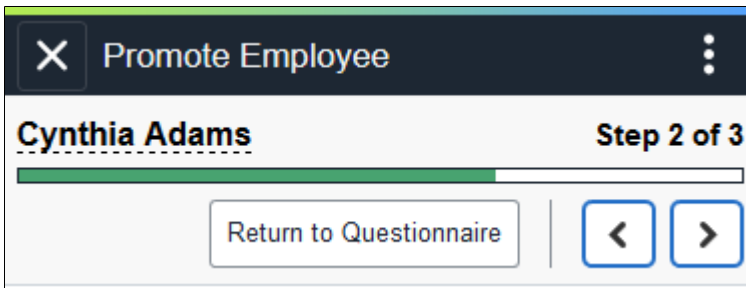
A common header appears on the pages for each post-questionnaire step in a guided self-service transaction. Use this header for navigation and to provide context.

The header on small form factor devices (phones) differs from the standard header.


This example illustrates the guided self-service header on larger devices.

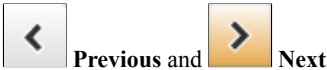



This example illustrates the guided self-service header on small form factors.



The common header in PeopleTools 8.55 and higher is rendered by the Activity Guide framework and is slightly different from the header that appears with earlier versions of PeopleTools. These differences are pointed out in the following documentation.

Field or Control	Description
 or Exit	<p>Click to exit the transaction entirely and return to the page where the transaction was invoked.</p> <p>In pre-Activity Guide systems, users see the standard fluid return button, labeled with the name of the page that will appear when the user exits.</p>
< Standard Banner Icons >	<p>When the common header is rendered by the Activity Guide framework, most of the standard banner icons are hidden, including icons such as Home and Navigator which would lead the user away from the activity. This keeps users focused on completing the steps in this transaction.</p> <p>The Notifications icon is still available in guided self-service transactions. On larger devices it appears as a banner icon, but on small form factor devices, it appears as an option in the Actions List menu.</p>

Field or Control	Description
 <p>Previous and Next</p>	<p>Click to navigate to the previous or next step in the transaction.</p> <p>In pre-Activity Guide systems, these buttons appear below the header area rather than in the header area.</p>
 <p>Actions List button</p>	<p>The icon for the Action List button depends on your version of PeopleTools. Click the icon to access a menu with these options:</p> <ul style="list-style-type: none"> Return to Questionnaire: this appears only if the transaction includes an end-user questionnaire. When the user returns to the questionnaire, transaction data is not saved, and the user must start the process over. Home: returns the user to the Fluid Home page. <p>In pre-Activity Guide systems, the Return to Questionnaire action is not in the actions menu. Instead, a Questionnaire button appears next to the Previous and Next buttons.</p>
<p><employee information></p>	<p>For the <i>Update Job Details for Group</i> transaction, the page displays a Group Update label and icon along with text stating how many employees are included.</p> <p>For all other transactions, the page displays the name, job title, and photo for the individual employee whose data will be updated.</p> <p>On small form factor devices, only the name or the <i>Group Update</i> label appears at the top of the page, but users can tap the text to display the additional information.</p> <p>In pre-Activity Guide systems, a related actions button appears next to an individual employee's name. When the common header is rendered by the Activity Guide framework, this button is hidden to keep users focused on completing the steps in this transaction.</p>
<p><graphical representation of steps></p>	<p>On larger devices, the header area includes a graphical representation of the steps in the transaction. This list includes step names and numbers. Users can click a step to go directly there as long as steps are completed sequentially.</p> <p>On small form factor devices, the header shows an overall progress indicator. The progress indicator does not show step names, but is shows the text <i>Step n of n</i> along with a progress bar that gets filled in to indicate the percentage completion. You cannot click this header to navigate to different steps.</p>

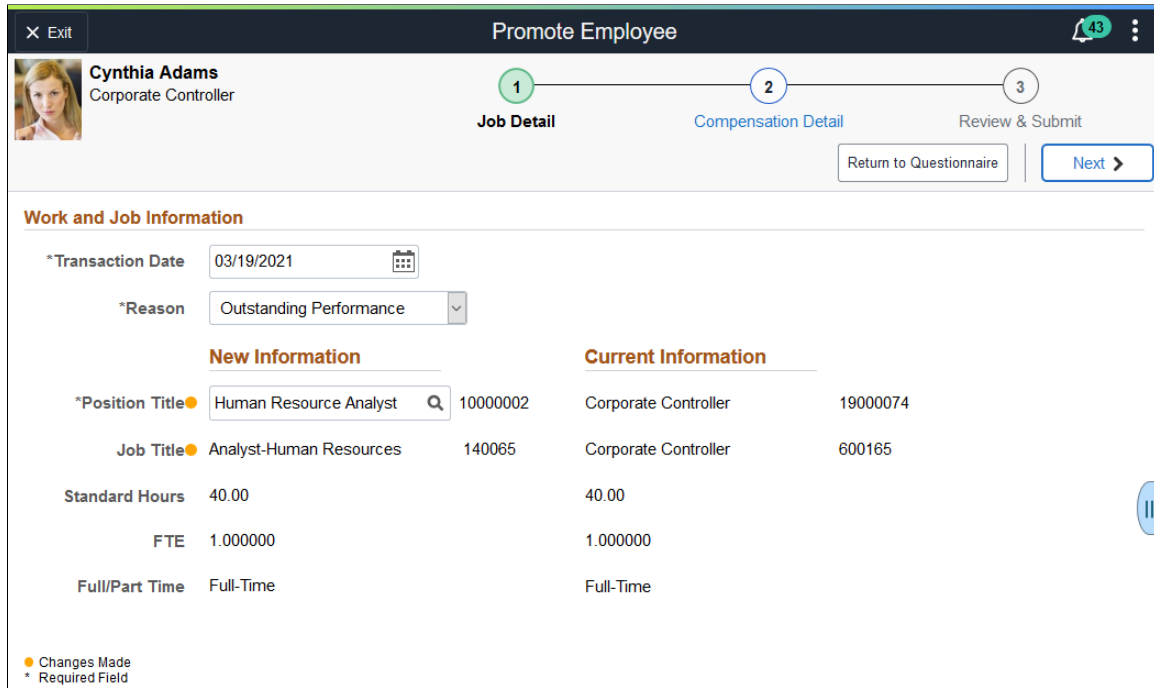
Work and Job Information Page

Use the Work and Job Information page (HR_MSS_CT_PG1_AGFL or HR_MSS_CT_PG1_FL) to enter work and job changes for an employee.

Navigation:

- For transactions that include the Work and Job Information page but do not include a questionnaire, this page appears immediately when the user navigates to the transaction.
- For transactions that include a questionnaire, select the **Next** button from the Questionnaire page. (Answers to the questions might control whether the Work and Job Information page appears at all.)
- Select the Work and Job Information step in the graphical map of the steps in the transaction.

This example illustrates the Work and Job Information page, which appears under the Job Detail step in the guided process.



Guided self-service transactions include this page when the transaction includes an update to the job or work location data. The fields on this page vary based on setup and on the answers to the questions on the [Questionnaire Page](#).

Note: Guided Self Service will not update Job Data with blank field values.

Field or Control	Description
Transaction Date	<p>The default transaction date is the current date. This date is used as the effective date of the data changes.</p> <p>If a transaction has been configured to include the Last Date Worked field, the last date worked must be equal to or earlier than the transaction date. The default last date worked is the day before the transaction date. The Last Date Worked field is normally relevant only to the Terminate Employee and Retire Employee transactions.</p>

Field or Control	Description
Reason	<p>Select an action reason to use for the job data row that will be created when this transaction is submitted and approved. The transaction configuration controls whether this field appears, whether it is required, the list of available values, and the default value.</p>
Position Data Message	<p>If you use the Promote Employee, Demote Employee, or Transfer Employee transaction to change which position an employee holds, a message appears if the position data is overridden in the employee's job data. The message states that job data must be updated manually.</p> <p>If the employee is in a position and the position data is <i>not</i> overridden in the employee's job data, a message appears when you make changes to data that is derived from the position:</p> <ul style="list-style-type: none"> • If the system is able to automatically update the position data, the message states that position data will be updated. This is possible only for transactions that have been explicitly configured to update position data. • If the system is not able to update the position data automatically, the message indicates that the Human Resources department will be notified that the transaction needs to be processed. <p>See Understanding Updates to Position Data.</p>

Field or Control	Description
New Information	<p>Enter the new data for the employee in this column. The fields that appear on this page depend on the transaction configuration.</p> <p>If the Standard Hours field appears, a read-only FTE (full-time equivalent) field also appears, and the system updates the FTE value when the user changes the standard hours.</p> <p>The employee’s business unit controls the valid values for fields such as Department and Location that are controlled by setID. The <i>Update Job Details for Group</i> transaction requires that all selected employees have the same business unit.</p> <p>Some page elements can vary depending on whether the employee is in a position:</p> <ul style="list-style-type: none"> When performing a <i>Promotion, Demotion, or Transfer</i> transaction for an employee in a position, the page prompts the user to enter a new position number. If the employee is not assigned to a position, then the page prompts the user to enter a new job code. <p>To move an employee from a job code to a position, or vice versa, the request should be handled by an HR administrator rather than through guided self-service.</p> <ul style="list-style-type: none"> The Reports To field appears only for employees in positions, while the Supervisor ID appears for employees who are not in positions, or whose Reports To position data has been overridden with a Supervisor ID. <p>The Reports To field displays the position to which the employee reports rather than the person to whom the employee reports, so if this field is shown, the page also displays a read-only Manager Name field.</p> <ul style="list-style-type: none"> For the <i>Update Job Details for Group</i> transaction, the Reports To field appears if all employees are in positions. The Supervisor ID appears if at least one employees is not in a position. (An employee who reports to a supervisor as the result of a position override is not considered to be in a position.) <p>If the group includes a mix of employees in positions and employees not in positions, the Supervisor ID field has the following logic:</p> <ul style="list-style-type: none"> If the selected supervisor is not in a position, a message indicates that the supervisor cannot be automatically assigned as the manager for employees who are in positions. All position employees in the group are sent to an administrator for processing If the selected supervisor is in a position, a Reports To field displays the supervisor’s position. If the selected supervisor is in multiple positions, the Reports To field becomes a drop-down list of those

Field or Control	Description
	positions, and the user must select the position to which the employees in positions will report.
Current Information	<p>This column displays the employee's current data.</p> <p>With the <i>Update Job Details for Group</i> transaction, it is possible for the selected employees to have different current information. When this occurs, the field indicates that there are multiple values. For example, if the selected employees are currently in different locations, the current information for the Location field is <i>Multiple Locations</i>.</p>
Selected Employees	<p>For the <i>Update Job Details for Group</i> transaction, this section lists the employees whose data is being updated.</p> <p>If the list includes position employees whose data cannot be automatically updated, a lock icon appears in the last column of the grid. Additionally, the page includes informational text to explain that an administrator will complete the processing for the position data.</p> <p>Position data cannot be automatically updated when an employee has a position data override, when a position has multiple incumbents, or when position data is not activated for the <i>Update Job Details for Group</i> transaction.</p>

Compensation Details Page

Use the Compensation Details page (HR_MSS_CT_PG2_AGFL or HR_MSS_CT_PG2_FL) to enter compensation changes for an employee.

Navigation:

- Select the **Next** button from the previous page in the guided self-service transaction.
- Select the Compensation Details step in the graphical map of the steps in the transaction.
- For transactions that include the Compensation Details page but do not include a questionnaire or the Work and Job Information page, this page appears immediately when a user navigates to the transaction.

This example illustrates the Compensation Details page.

Compensation Details

Pay Component	Change Percent	Change Amount	New Amount	Current Amount	Currency Code	Type	Frequency
Default NA Annual	<input type="text" value="2.000"/>	<input type="text" value="80.01"/>	<input type="text" value="4,080.54"/>	4,000.53	USD	Flat Amount	Monthly

48,966.49 Compa-Ratio:1.09

41,000.00 Minimum 44,999.50 Midpoint 48,999.00 Maximum

	New Information	Current Information
Monthly Salary	4,080.54 USD	4,000.53 USD
Annual Rate	48,966.49 USD	48,006.36 USD

● Changes Made
* Required Field

The guided self-service transaction includes this page when the transaction requires an update to the compensation data. The fields on this page vary based on setup and on the answers to the questions on the Questionnaire Page.

Note: Guided Self Service will not update Job Data with blank field values.

The navigation buttons (Questionnaire, Previous, and Next) are the same on this page as on the Work and Job Information page.

Field or Control	Description
Pay Component	For each pay component listed, enter the salary change details. When you enter a number in either the Change Percent , Change Amount , or New Amount fields and move from the field, the system automatically calculates and updates the other fields based on your entry. Note: To decrease the employee’s salary enter a negative adjustment in the Change Percent or Change Amount field. The Demote Employee transaction displays a warning if you enter an adjustment that is not negative.
Salary Range Graphic	The graphical representation of the annual pay range for the employee’s job or position provides a helpful visualization of where the new salary amount falls in that range. If this transaction includes a new job or position, the visualization is based on the new pay range.

Field or Control	Description
New Information	Displays the new salary information.
Current Information	Displays the employee’s current salary information.

Clone Position Page

Use the Clone Position page (HR_MSS_POSN_AGFL) to enter or update position data to create a new position based on an existing one.

Note: This page is available only with PeopleTools 8.55 or later.

Navigation:

Start a Clone Position guided self-service transaction.

This is the first of two examples illustrating the Clone Position page.

The screenshot displays the 'Clone Position' guided self-service transaction page. At the top, the user's name 'Cynthia Adams' and title 'Corporate Controller' are shown. A progress indicator shows two steps: '1 Position Details' (the current step) and '2 Review and Submit'. A 'Next >' button is visible in the top right. The main content area is divided into two sections: 'Clone Position' and 'Job Information'. The 'Clone Position' section contains a '*Transaction Date' field with the value '03/19/2021'. The 'Job Information' section contains several fields: '*Business Unit' (GBIBU), '*Job Code' (600165), '*Title' (Corporate Controller), '*Reg/Temp' (Regular), '*Regular Shift' (Not Applicable), '*Full/Part Time' (Full-Time), 'Short Title' (Controller), 'Long Description' (Corporate Controller), 'Max Head Count' (1), and 'Union Code'.

This is the second of two examples illustrating the Clone Position page.

The screenshot displays the Clone Position page with the following fields:

Work Location

- *Department: 13110 Corporate Accounting
- *Regulatory Region: USA United States
- *Location: KUNY00 Corporation Headquarters
- Supervisor Level: [Empty]
- Reports To: 19000230 Finance Director

Work Information

- *Standard Hours: 40.00
- Work Period: W Weekly
- Day-of-the-week fields for daily hours:

Mon	Tue	Wed	Thu	Fri	Sat	Sun
8.00	8.00	8.00	8.00	8.00		

Legend: ● Changes Made, * Required Field

Use the **Next** button to continue to the Review and Submit page after looking at the position data fields and making any necessary changes.

The position data fields on this page vary based on setup. They correspond to the fields on the “Position Data - Description Page” (PeopleSoft Human Resources Manage Positions) and the “Position Data - Specific Information Page” (PeopleSoft Human Resources Manage Positions).

The default values in all of the fields come from the position of the employee whose position is being cloned. Unlike other guided self-service transaction, there is no requirement for the user to change any data. However, there is also no requirement to retain any of the data. Managers are free to keep all, some, or none of the default values in the fields that appear on this page.

Here is additional important information about certain fields on this page:

- The **Mon** through **Sun** day-of-the-week fields for daily hours are visible only if the work period is *W* (weekly).

When these fields are visible, and the user updates the standard hours, the system automatically updates the **Mon** through **Sun** fields by distributing the an equal number of hours across Monday through Friday.

- As delivered, the transaction does not display the Company field. Even when the Company field is hidden, its value can change if the manager selects a Department that is in a different company.
- As delivered, the transaction does not display the encumbrance related fields.

The encumbrance-related fields are Position Pool ID, Encumbrance Indicator, Encumber Salary Option, Classified/Unclassified Ind, FTE, and Adds to FTE Actual Count.

- The clone process copies data from all fields that can be configured to appear, even those that are hidden due to the transaction configuration.
- The clone process also copies the original position’s salary plan, grade, and step unless the Business Unit is changed or cleared, in which case the system clears this data for the new position.

The salary-related fields are not part of the transaction configuration, so they are never visible on this page. An administrator is responsible for verifying that the newly created position has the correct salary information. If administrator approvals are required, this review can be done on the

administrator approval page, where the administrator can update the fields before approving the transaction.

- If the Business Unit is changed or cleared, the system also clears the Department, Job Code, and Location fields, and the user sees a warning.
- The **Update Incumbents** check box is always selected in new positions that are created by the delivered *Clone Position* transaction.

Review and Submit Page

Use this Review and Submit page (HR_MSS_CT_SBM_AGFL or HR_MSS_CT_SUBMT_FL) to review transaction information, to add comments, and to submit a request.

Navigation:

Select the **Next** button from the previous page, or select this step in the graphical representation of the transaction steps.

This example illustrates the fields and controls on the Review and Submit page for an employee transaction.

Promote Employee

Cynthia Adams
Corporate Controller

1 Job Detail 2 Compensation Detail 3 Review & Submit

Return to Questionnaire < Previous Submit

Review and Submit

Transaction Date 03/19/2021
Reason Outstanding Performance

New Information		Current Information	
Position Title	Human Resource Analyst	10000002	Corporate Controller
Job Title	Analyst-Human Resources	140065	Corporate Controller
Standard Hours	40.00	40.00	
FTE	1.000000	1.000000	
Full/Part Time	Full-Time	Full-Time	
Monthly Salary	4,080.54 USD	4,000.53 USD	
Annual Rate	48,966.49 USD	48,006.36 USD	

Comments

[Text Area]

This example partially illustrates the Review and Submit page for the *Clone Position* transaction. The **Comments** and **Attachments** sections are not shown, but they are the same for the Clone Position transaction as for employee transactions.

Note: Guided Self Service will not update Job Data with blank field values.

Field or Control	Description
Submit	<p>Select this button to finalize the transaction and, if approvals are required, to begin the approval process.</p> <p>If no errors are encountered, the system displays a confirmation page that shows the approval chain. If errors are encountered, the HR administrator is notified.</p> <p>If approvals are not required, the confirmation page appears after the system makes the related database updates. For the <i>Update Job Details for Group</i> transaction, processing time increases with the number of employee records that are being updated.</p>

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).

Transaction Details for Employee Transactions

Transactions other than the *Clone Position* include a **Review and Submit** area that displays transaction information. The transaction date appears at the top of the page.

Field or Control	Description
Reason	<p>Employee data changes are associated with an action and an action reason. This field displays the action reason for that transaction.</p> <p>The action is never visible, but the transaction configuration determines whether the Reason field is visible.</p>
New Information	<p>This column displays the data that will take effect when the transaction is approved. A yellow dot between the field name and the field value indicates data that is changing.</p> <p>To change a value, return to the appropriate page in the transaction to make the changes.</p>
Current Information	<p>This column displays the employee’s current data so that you can easily see the changes that are being requested.</p>
Selected Employees	<p>For the <i>Update Job Details for Group</i> transaction, this section lists the employees whose data is being updated.</p>

Transaction Details for Clone Position

The same sections and fields that appeared on the Clone Transaction page appear on the Review and Submit page for the transaction. The transaction date appears at the top of the page.

Comments

<i>Field or Control</i>	<i>Description</i>
Comments	Enter additional comments for the transaction’s approvers and reviewers. Comments entered here are visible throughout the approval process.

Attachments

Use the Attachments section of this page to attach supporting documents for a transaction. This section is visible only if the transaction is configured to allow attachments.

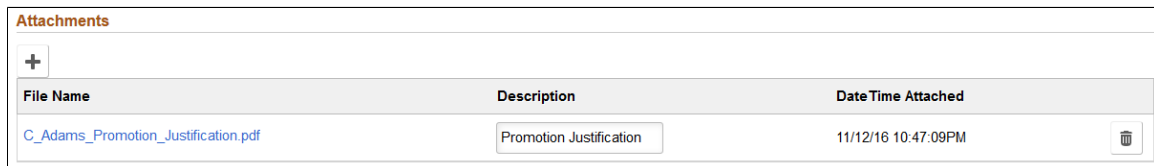
The attachments that you add here will appear in all transaction detail pages, including pages for approvers, administrators, and reviewers. The file itself is never duplicated, there are just multiple pointers to the file.


The list of transactions on the fluid Pending Approvals page includes a count of attachments for transactions that have attachments.


Approval-related notifications do not include information about attachments.

After you add an attachment to the transaction, a grid appears in the Attachments area of the page.

This example illustrates the Attachments grid on the Review and Submit page.



<i>Field or Control</i>	<i>Description</i>
	<p>Click to open a dialog box where you can select and upload a file. Your device and browser determine the appearance and behavior of this dialog box.</p> <p>Allowable file types depend on your configuration and can be further restricted by the type of device you use. For example, iOS phones allow you to attach photos or videos, but they do not provide access to a full file system where you can select other types of attachments.</p> <p>This button has a text label when no attachments have been added yet. If attachments exist, an icon button appears instead.</p>
File Name	Displays the original file name of the attachment. Click the link to open the attachment.

Field or Control	Description
Description	The default description is the file name, but you can modify this to provide more descriptive text.
Date Time Attached	Displays the date and time that the file was uploaded.
 Delete	Click to remove the attachment.

<Transaction Name> Page for Reviewing Submitted Transactions

Requestors and reviewers use the <Transaction Name> page (HR_MSS_CT_EE) to review read-only information about a guided self-service transaction that has been submitted for approval.


The page name varies depending on the transaction type.

Navigation:

This page is accessible only using an email link. The system sends requestors and reviewers an email with this link after the requestor submits a guided self-service transaction.

This example illustrates the read-only page that submitters and reviewers use to view a guided self-service transaction that updates employee data.

Request Reporting Change



Rosanna Channing
Senior Accounting Manager

Transaction Details

Transaction Date	03/23/2015		
Workflow Status	Administrator is Processing		
Effective Sequence	2		
Requestor	Betty Locherty		
	After Approval		Before Approval
Job Title	Senior Accounting Manager	600135	Senior Accounting Manager 600135
Supervisor	● Jean Parsons KU0003		Betty Locherty KU0007

Reporting Chg Approval Chain

⌵ **:Approved**
[View/Hide Comments](#)

Reporting Chg Approval Chain

Approved

Jean Parsons
✓ GSS RepChg Appr Selection
 03/23/15 - 9:57 AM

Comments


Jean Parsons-HCQAN-HCRUSA at 03/23/15 - 9:57 AM
Approved.

Betty Locherty-PS at 03/23/15 - 9:48 AM
Please approve this request.

● Changes Made

This example illustrates the read-only page that submitters and reviewers use to view a *Clone Position* transaction.

Clone Position



Cynthia Adams
Corporate Controller

Transaction Details

Transaction Date	03/16/2017
Workflow Status	
Effective Sequence	3
Requestor	Betty Locherty

New Position Details

Title	Corporate Controller	Short Title	Controller																
Business Unit	GBIBU Global Business Institute BU	Long Description	Corporate Controller																
Job Code	600165 Corporate Controller	Max Head Count	1																
Reg/Temp	Regular	Union Code																	
Regular Shift	Not Applicable	Regulatory Region	USA United States																
Full/Part Time	Full-Time	Supervisor Level																	
Department	13110 Corporate Accounting	Standard Hours	40.00																
Location Code	KJNY00 Corporation Headquarters																		
Reports To	19000230 Finance Director																		
Salary Plan	KJ01																		
Salary Grade	004																		
Step																			
Work Period	W Weekly																		
	<table style="width: 100%; border-collapse: collapse; font-size: small;"> <tr> <td style="width: 12.5%;"></td> <td style="width: 12.5%;">Mon</td> <td style="width: 12.5%;">Tue</td> <td style="width: 12.5%;">Wed</td> <td style="width: 12.5%;">Thu</td> <td style="width: 12.5%;">Fri</td> <td style="width: 12.5%;">Sat</td> <td style="width: 12.5%;">Sun</td> </tr> <tr> <td></td> <td>8.00</td> <td>8.00</td> <td>8.00</td> <td>8.00</td> <td>8.00</td> <td></td> <td></td> </tr> </table>		Mon	Tue	Wed	Thu	Fri	Sat	Sun		8.00	8.00	8.00	8.00	8.00				
	Mon	Tue	Wed	Thu	Fri	Sat	Sun												
	8.00	8.00	8.00	8.00	8.00														
Position Pool ID																			
Pre-Encumbrance Indicator	Encumber Immediately	Classified Indicator	Classified																
Encumber Salary Option	Salary Step	FTE	0.000000																
Encumber Salary Amount	0.000	<input type="checkbox"/>	Adds to FTE Actual Count																

Note: Guided Self Service will not update Job Data with blank field values.

Approving Guided Self-Service Transactions

This topic provides an overview of approvals for guided self-service transactions and discusses how to approve those transactions.

This topic describes both the fluid approval pages and the classic approval pages for guided self-service. For general information about Fluid Approvals, see “Using PeopleSoft Fluid User Interface Self-Service Approval Transactions” (Application Fundamentals).

Pages Used to Approve Guided Self-Service Transactions

Page Name	Definition Name	Usage
<u>Fluid <Transaction Name> Page for Guided Self-Service Approvals</u>	EOAWMA_TXNHDTL_FL	Review and approve a guided self-service request using Fluid Approvals.
<u>Salary Change Details Page</u>	HR_MSS_CT_MACMP_FL	Review detailed information about proposed changes to an employee's salary.
<u>Salary Grade Information Page</u>	HR_MSS_CT_MAGR_SCF	Review an employee's proposed salary changes in the context of the employee's salary grade.
<u>Attachments Page</u>	HR_MSS_CT_MAATT_FL	View files that the requester attached to a guided self-service transaction.
<u>Classic <Transaction Name> Page for Guided Self-Service Approvals</u>	HR_MSS_CT_APPR	Review and approve a guided self-service request using a classic (non-fluid) page.
<u><Transaction Name> Page for Final Administrator Approval</u>	WF_MSS_CT_EE	Perform an administrator approval action for a guided self-service transaction, and choose whether to make the database updates automatically (if possible) or manually.

Understanding Approvals for Guided Self-Service

This overview discusses the standard approvals for guided self-service transactions and the additional administrator approval that occurs when transactions are configured to require this extra approval.

Standard Approvers

When you configure a guided self-service transaction, you can identify an approval process to use for the transactions. The approval processes, which determines who approves the transaction, is defined using the common Approval Framework. For more information, see “Understanding Approvals” (Application Fundamentals).

Both fluid and classic pages exist for approving guided self-service transactions.

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

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

The following navigation options provide access to classic approval pages, but if the approver has security access to the fluid approval pages, conditional navigation will redirect the user to the fluid Pending Approvals page.

- Access the “Review Transactions Page” (Application Fundamentals), then click the **Approve/Deny** link for a guided self-service transaction.
- Click the link in the email that the system sends to approvers.

Administrator Approval

The “Workflow Configurations Page” (Application Fundamentals) for self-service transactions includes an **Allow DB Update** (allow database update) check box. When this check box is selected, the system updates the database immediately after the transaction is approved by the final approver in the regular approval chain. However, if this check box is not selected, an administrator must complete the request

Administrators use the [<Transaction Name> Page for Final Administrator Approval](#) to perform this final step. (Although other types of transactions can receive final administrator approval on the Monitor Approvals page, the Monitor Approvals page is read-only for guided self-service transactions.)

The administrator’s approval page lets the administrator choose whether to:

- Approve the transaction and automatically update the database.

This option is not available if the transaction updates a position-controlled field that cannot be automatically updated. Refer to the documentation for the [<Transaction Name> Page for Final Administrator Approval](#) page for additional details about when this occurs.
- Approve the transaction without updating the database. The administrator must then make the updates manually.
- Cancel the transaction

Note: In general, the page for final administrator approval does not permit the administrator to override transaction data. However, the *Clone Position* transaction is an exception, and administrators can edit any of the position data on the page.

Understanding Delivered Approval Process IDs for Guided Self-Service Transactions

Guided self-service approval processes are created using the common Approval Framework.

These are the approval transaction process IDs for the delivered guided self-service transactions:

- *GSSAdhocSalaryChange*
- *GSSDemoteEmployee*
- *GSSFTPTChangeEmployee*
- *GSSGroupUpdate*

Note: The *Update Job Details for Group* transaction creates a separate approval transaction for each employee in the group. This transaction type is enabled for mass approvals. That is, if you filter the Pending Approvals page so it displays only Group Update transactions, the page enables you to select one or more approval requests and act on all of them at once. For more information, see “Pending Approvals Page” (Application Fundamentals).

- *GSSLeaveOfAbsence*

Note: This approval process is used for both paid and unpaid leave of absence transactions. Because the two leave of absence transactions share an approval process, pages that list pending approvals (the fluid Pending Approvals page and the classic Review Transactions page) put paid and unpaid leave requests in the same transaction category.

- *GSSLocationChange*
- *GSSPositionClone*
- *GSSPromoteEmployee*
- *GSSReportingChgEmployee*
- *GSSRetireEmployee*
- *GSTerminateEmployee*
- *GSSTransferEmployee*

Note: If you create a new transaction or have specific approval requirements, an administrator can create, or clone, additional approval definitions within the same approval process.

Related Links

- “Understanding Approvals” (Application Fundamentals)
- “Configuring Approval Transactions” (Approval Framework)
- “Configuring Self-Service Transactions” (Application Fundamentals)

Fluid <Transaction Name> Page for Guided Self-Service Approvals

Use the fluid <Transaction Name> page (EOAWMA_TXNHDTL_FL) to review and approve a guided self-service request. The page title depends on the transaction type.

Navigation:

Click the Approvals tile on the Manager Self-Service home page or the Notifications button in the Oracle banner to access the Pending Approvals page. Then click a guided self-service entry on the Pending Approvals page.

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).

This is the first of two examples illustrating the fluid <Transaction Name> page for guided self-service approvals. This example shows a Promote Employee transaction.

Pending Approvals Promote Employee

Diane Palmer
Administrative Assistant **Approve** **Deny**

Summary

Transaction Date 11/12/16 Reason Outstanding Performance
Requester Betty Locherty

Proposed Changes

Description	After Approval	Before Approval
Job Code	Administrator - 120000	Administrative Assistant - 170005
Annual Rate	25,480.00 USD	19,600.00 USD

Salary Detail

Salary Change Details >

Unchanged Job Information

Business Unit Global Business Institute BU - GBIBU
Department Corporate Finance - 13100
Location Corporation Headquarters - KUNY00
Full/Part Time Full-Time
Supervisor Betty Locherty - KU0007
Standard Hours 40

This is the second of two examples illustrating the fluid <Transaction Name> page for guided self-service approvals.

Requester Comments

See attached file for justification.

Attachments >

Approver Comments

Approval Chain >

Approval Options

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

Field or Control	Description
Approve and Deny	Use these buttons to take action on the requested approval.

Summary

Field or Control	Description
Transaction Date	Displays the effective date for the transaction (not the date that the transaction was submitted).
Requester	Displays the name of the manager who submitted the transaction for approval.
Reason	If the transaction specified a reason to use in the new job data row, that reason appears here.
Expected Return	This field is visible only for the <i>Request Leave of Absence</i> approval transactions (used for both paid and unpaid leave requests).

Proposed Changes

For transactions that update employee data, this grid lists the specific data changes that are being requested. The fields vary depending on the transaction.

This section is not shown for the delivered *Request Leave of Absence*, *Retire Employee*, or *Terminate Employee* transactions. The leave request transaction doesn't update job data fields other than the Expected Return field, which appears in the **Summary** section of this page. The retirement and termination transactions don't make any changes to job data fields—they simply insert a new job data row with an action reason to record the retirement or termination.

Field or Control	Description
Description	Displays the name of the field to be updated. If the transaction includes salary changes, a single row in the grid shows the annual salary rate information. To view additional salary information, go to the Salary Detail section of this page and click the Salary Change Details item.
After Approval	Displays the proposed new value for the specified field.

Field or Control	Description
Before Approval	Displays the current value of the specified field so that you can compare the old data to the proposed change.

Note: Guided Self Service will not update Job Data with blank field values.

Salary Detail

For transactions that update employee data, this section provides additional salary details. The section is hidden for transactions that do not change an employee's salary. The delivered transactions that include this section are *Ad Hoc Salary Change*, *Demote Employee*, *Promote Employee*, and *Transfer Employee*.

Field or Control	Description
Salary Change Details	Click this item to open the Salary Change Details Page , where you can review the proposed salary changes for this transaction.

Unchanged Job Information

For transactions that update employee data, this section lists additional data that is relevant to the transaction but that is not changing. The fields in this section vary depending on the transaction.

If no fields are shown, the entire section is hidden. The delivered *Ad Hoc Salary Change* and *Full/Part Time Status* approval pages do not show any unchanged job information.

New Position Information

For the *Clone Position* transaction, this section displays the data for the new position that will be created. The transaction configuration controls which fields are visible.

Requester Comments

This section displays any comments that the requester added before submitting the transaction. If the requester did not enter any comments, the word *None* appears.

Attachments

<i>Field or Control</i>	<i>Description</i>
Attachments	<p>Click this item to open the Attachments Page, where you can access files that the requester attached to the request.</p> <p>Due to limitations on the number of sections that can appear on this page, certain transactions display this item within the Requester Comments section rather than in a separate Attachments sections.</p>

Approver Comments and Approval Chain

<i>Field or Control</i>	<i>Description</i>
Approver Comments	Enter any comments related to the approval action you take.
Approval Chain	Click this item to open the Approval Chain page, where you can review information about all approvers for the transaction.

Salary Change Details Page

Use the Salary Change Details page (HR_MSS_CT_MACMP_FL) to review detailed information about proposed changes to an employee's salary.

Navigation:

Click the **Salary Change Details** item on a guided self-service fluid approval page.

This example illustrates the Salary Change Details page.

Salary Change Details ×

Proposed Changes

Salary Information	After Approval	Before Approval	Change Amount
Monthly Salary	4,800.64 USD	4,000.53 USD	800.11 USD
Annual Salary	57,607.63 USD	48,006.36 USD	9,601.27 USD
Compa-Ratio	1.29	1.08	0.21
Position In Range	120.00	100.00	20.00

Pay Components

Component	New Amount	Change Amount	Change Percent	Frequency
Default NA Annual	4,800.64 USD	800.11	20.000	Monthly

Salary Grade
>

<i>Field or Control</i>	<i>Description</i>
Proposed Changes	<p>This grid displays salary information for the employee.</p> <p>The four rows in the grid display these types of salary information: <i>Monthly Salary</i>, <i>Annual Salary</i>, <i>Compa-Ratio</i>, and <i>Position in Range</i>.</p> <p>For each type of salary information, the grid columns display the value after approval, the value before approval, and the change amount.</p> <hr/> <p>Note: Guided Self Service will not update Job Data with blank field values.</p>
Pay Components	<p>This grid displays information about each component of pay in the employee's salary. The grid displays the pay component name and frequency along with before and after information and the change percent.</p>

Field or Control	Description
Salary Grade	Click to access the Salary Grade Information Page to review an employee’s proposed salary changes in the context of the employee’s salary grade.

Salary Grade Information Page

Use the Salary Grade information page (HR_MSS_CT_MAGR_SCF) to review an employee’s proposed salary changes in the context of the employee’s salary grade.

Navigation:

Click the **Salary Grade** item on the Salary Change Details page.

This example illustrates the Salary Grade Information page.

Salary Grade Information
×

Summary

Job Title Corporate Controller-600165

Salary Grade Standard Pay Grade 4 - 004

Status Full-Time

Salary Plan USA Salary Administration Plan - KU01

Salary Step 0

Standard Hours 40.00

Salary Grade

Minimum 41,000.00

Maximum 48,000.00

Midpoint 44,500.00

Market Reference Point 0.00

Proposed Changes

Compa-Ratio 1.29

Annual Salary 57,607.63

Position In Range 120.00

Field or Control	Description
Summary	This section displays the employee's job title; the salary grade, plan, and step; full-time/part-time status; and standard hours.
Salary Grade	This section displays the maximum, minimum, and midpoint salaries for the employee's salary grade.
Proposed Changes	<p>This section displays the compa-ratio, annual salary, and position in range for the salary change that has been requested.</p> <hr/> <p>Note: Guided Self Service will not update Job Data with blank field values.</p> <hr/>

Attachments Page

Use the Attachments page (HR_MSS_CT_MAATT_FL) to view files that the requester attached to the transaction.

Navigation:

Click the **Attachments** item on a guided self-service approval page. This item is visible only if the requester included an attachment with the request.

This example illustrates the Attachments page.

Attachments ×			
Attachments			
File Name	Description	Date Attached	Attached By
C_Adams_Justification.pdf	Transfer with promotion	11/13/2016	Betty Locherty

Field or Control	Description
File Name	Click the file name to open the attachment.
Description	The default description is the file name, but the requester can enter a more meaningful description before submitting the transaction.
Date Attached	Displays the date that the requester uploaded the file to the transaction.
Attached by	Displays the name of the requester who uploaded the file.

Classic <Transaction Name> Page for Guided Self-Service Approvals

Use the classic <Transaction Name> page (HR_MSS_CT_APPR) to review and approve a guided self-service request using a classic (non-fluid) page. The page title depends depending on the transaction type.


If an approver has access to the Fluid Approval pages, then conditional navigation redirects the approver to the Fluid Approval page that displays pending approvals.

Navigation:

- Click the link in the email that the system sends to approvers for guided self-service transactions.
- Click the **Approve/Deny** link for a guided self-service transaction on the “Review Transactions Page” (Application Fundamentals).

This is the first of two example illustrating the classic <Transaction Name> page for guided self-service approvals. This example shows the Promote Employee transaction.

Promote Employee



Diane Palmer
Administrative Assistant

Instructions
This transaction requires an action on your part. Enter your comments (optional) in the area provided, then select Approve or Deny button to process this request.

Transaction Details

Transaction Date	11/12/2016		
Reason	Outstanding Performance		
Workflow Status	In Approval Process		
Effective Sequence	2		
Requestor	Betty Locherty		

	After Approval		Before Approval	
Business Unit	Global Business Institute BU	GBIBU	Global Business Institute BU	GBIBU
Department	Corporate Finance	13100	Corporate Finance	13100
Location	Corporation Headquarters	KUNY00	Corporation Headquarters	KUNY00
Job Title ●	Administrator	120000	Administrative Assistant	170005
Full/Part Time	Full-Time		Full-Time	
Standard Hours	40.00		40.00	
Supervisor	Betty Locherty	KU0007	Betty Locherty	KU0007
Monthly Salary ●	2,123.33	USD	1,633.33	USD
Annual Rate ●	25,480.00	USD	19,600.00	USD

Salary Change Details

Compensation Details							
Pay Component	Current Amount	Change Percent	Change Points	Change Amount	New Amount	Type	Frequency
Default NA Annual	19,600.00	30.000	0	5,880.00	25,480.00 USD	Flat Amount	Annual

This is the second of two example illustrating the classic <Transaction Name> Page for guided self-service approvals.

Requestor Comments
See attached file for justification.

Attachment Details

File Name	Description	Attached By	Date Attached	Delete Attachment
Promotion_Justification.pdf	Promotion_Justification.pdf	Betty Locherty	11/12/2016	Delete Attachment

Approvals

Promotion Approval Chain

- :Pending** [View/Hide Comments](#)
 - Promotion Approval Chain**
 - Pending**
 - Jean Parsons (GSSByPosnSupervisor)
 - Comments**

Approver Comments

Approver Name: Jean Parsons

Comments:

Changes Made

Field or Control	Description
Transaction Details	This section of the page provides information about the changes that the user is being asked to approve. If the transaction affects an employee’s position data, a message provides additional information about the position data changes.
After Approval and Before Approval	For transactions that update an employee’s data, these two columns provide information about the requested updates. Note: Guided Self Service will not update Job Data with blank field values.
Salary Change Details	For transactions that update an employee’s salary data, a collapsible Salary Details section displays additional details about the proposed changes.
New Position Details	For the <i>Clone Position</i> transaction, this section displays the data for the new position that will be created. The transaction configuration controls which fields are visible.
Requestor Comments	Displays any comments that the requestor entered when submitting the transaction.

Field or Control	Description
Attachment Details	Displays a grid with any attachments that the requestor supplied. Click the file name to open the file. The Delete Attachment button enables you to remove a specific attachment from the transaction.
Approvals	Displays a graphical representation of the approval chain for the transaction. An expandable Comments section displays any comments entered by previous approvers.
Approver Comments	Enter any comments related to the approval action that you take on this page.
Approve and Deny	Use these buttons to approve or deny the request.

<Transaction Name> Page for Final Administrator Approval

Use the <Transaction Name> page (WF_MSS_CT_EE) to perform an administrator approval action for a guided self-service transaction and to choose whether to make the database updates automatically (if possible) or manually.

The page name depends on the transaction type.

Navigation:

Workforce Administration > Self Service Transactions > Guided Self Service Requests

The search page for this transaction includes the option to search by employee. For the *Clone Position* transaction, the employee is the person whose position was cloned.

This is the first of two examples that illustrate the <Transaction Name> page for final administrator approval.

Request Location Change

Cynthia Adams
 Administrator action is required for this transaction. Select one of the options under Administrator Actions and then select Save.

Transaction Details

Transaction Date 11/14/2016
 Workflow Status Administrator is Processing
 Effective Sequence 2
 Requestor Betty Locherty

This employee is in a position controlled by Position Management. Position Data will be updated as a result of this transaction.

	After Approval	Before Approval
Business Unit	Global Business Institute BU GBIBU	Global Business Institute BU GBIBU
Department	Corporate Accounting 13110	Corporate Accounting 13110
Location	California Location KUCA00	Corporation Headquarters KUNY00

Attachments

File Name	Description	Attached By	Date Attached
C_Adams_Location_Change.pdf	Cynthia Adams Location Change	Betty Locherty	11/14/2016

Location Change Approval Chain

Approved [View/Hide Comments](#)

Location Change Approval Chain

Approved

Jean Parsons
 GSSByPosnSupervisor
 11/14/16 - 3:33 PM

Comments

Jean Parsons-JPARSONS at 11/14/16 - 3:33 PM
 Approved

Betty Locherty-PS at 11/14/16 - 3:23 PM
 See attached file.

This is the second of two examples that illustrate the <Transaction Name> page for final administrator approval.

Administrator Processing

Administrator Betty Locherty

Comment

* Required Field

Administrator Actions

Current Transaction Status Administrator Action Required

Select this option to approve the transaction and automatically update the database.

Select this option to approve the transaction. You will be required to manually update the database.

Select this option to cancel the transaction.

[Go To Job](#)

[Go To Position Data](#)

[Monitor Approvals](#)

This example partially illustrates the administrator approval page for the *Clone Position* transaction. The sections for Attachments, the Approval Chain, Administrator Processing, and Administrator Actions are not shown, but they are the same for *Clone Position* as for all other transactions.

Clone Position

Cynthia Adams
 Administrator action is required for this transaction. Select one of the options under Administrator Actions and then select Save.

Transaction Details

Transaction Date 02/07/2017
 Workflow Status Administrator is Processing
 Effective Sequence 5
 Requestor Betty Locherty

New Position Details

New Position

*Title

*Business Unit Company CNA
 *Job Code Additional Appointment

Max Head Count

Union Code Construction

*Department Department 20101 *Regulatory Region United States

*Location Code Canadian Headquarters Supervisor Level

Reports To Finance Director *Standard Hours

Salary Plan

Salary Grade

Step

Work Period Weekly

Mon	Tue	Wed	Thu	Fri	Sat	Sun
<input type="text" value="8.00"/>	<input type="text"/>	<input type="text" value="8.00"/>	<input type="text" value="8.00"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Transaction Details

The Transaction Details section of the page provides information about the original request.

Field or Control	Description
Workflow Status	<p>Displays information about the transaction’s approval status.</p> <p>The status <i>Administrator is Processing</i> indicates that all regular approvals are complete, but the transaction is still awaiting a final administrative approval before the database is updated with the requested changes. For Guided Self Service transactions, the final administrative approval must occur on this page. (Although other types of transactions can receive final administrator approval on the Monitor Approvals page, the Monitor Approvals page is read-only for guided self-service transactions.)</p>

Field or Control	Description
Position Notice	If the transaction affects an employee' position data, a message provides additional information about the position data changes.
After Approval and Before Approval	<p>For transactions that update employee data, these sections provide details of the requested data changes.</p> <p>In some cases the new values are the same as the current values, but the field is displayed because it is part of the key structure for a field that is changing.</p> <p>For the <i>Update Job Details for Group</i> transactions, all three available fields are always visible, regardless of whether the data changed for the individual employee.</p> <hr/> <p>Note: Guided Self Service will not update Job Data with blank field values.</p> <hr/>

Field or Control	Description
New Position Details	<p>This section is visible only for the <i>Clone Position</i> transaction. It displays editable position data fields for the new position.</p> <hr/> <p>Note: The <i>Clone Position</i> transaction is unique in allowing the administrator to update data before approving the transaction.</p> <hr/> <p>This section includes these fields:</p> <ul style="list-style-type: none"> • The New Position field <p>This is for the unique identifier that will be assigned to the new position. If the system is set up to automatically assign position numbers, the administrator should accept the default value <i>00000000</i> so that the system can assign the next available number.</p> <ul style="list-style-type: none"> • Fields that are configured to be visible for this transaction. <hr/> <p>Important! The newly created position will include data from all fields that are available for configuration, even if some fields are not configured to be visible.</p> <hr/> <ul style="list-style-type: none"> • The Salary Plan, Salary Grade, and Salary Step fields, which are not part of the transaction configuration and are therefore never visible to the requestor or approvers. <p>Because the requesting manager and the approvers cannot see these fields, the administrator should review this data carefully. The data is copied from the position that was cloned, but if the requesting manager changed or cleared the default Business Unit for the transaction, the system cleared the copied data and the three salary-related fields are blank.</p>
Attachments	Displays files that the requestor attached to the transaction.

<Transaction Name> Approval Chain

This section of the page provides a graphical representation of the approval process. Any comments entered during the approval process appear here.

When a final administrator approval is required, it occurs after all approvals in the approval chain are complete.

Administrator Processing

<i>Field or Control</i>	<i>Description</i>
Comment	Enter a comment related to the final administrative approval for the transaction.

Administrator Actions

To act on a transaction, select the appropriate radio button and click the **Save** button. The radio button labels describe your options.

<i>Field or Control</i>	<i>Description</i>
Select this option to approve the transaction and automatically update the database.	<p>For transactions that update employee data, this option is not available if the transaction updates a position-controlled field that cannot be automatically updated. This occurs when:</p> <ul style="list-style-type: none"> • The transaction does not support position data updates. • The transaction can support position data updates, but automatic position data updates are not enabled on the Transaction Configuration - Position Data Options Page. • The employee's position has multiple incumbents. • The transaction changes the position for an employee whose original position data was overridden. • The transaction assigns an employee in a position to a supervisor who is not in a position. <p>This scenario is possible only if the <i>Update Job Details for Group</i> transaction for a group that includes both position and non-position employees specifies a new supervisor who is not in a position.</p> <p>Note that the <i>Clone Position</i> transaction does not update employee data, so this option is always available for that transaction.</p>
Select this option to approve the transaction. You will be required to manually update the database.	An administrator who chooses this option must make the database changes manually. To make job data or position data updates, the administrator can use the links at the bottom of the page.
Select this option to cancel the transaction.	Canceling the transaction is equivalent to denying an approval request. A canceled transaction cannot be resubmitted. Instead, the manager can submit a new transaction.

Links

<i>Field or Control</i>	<i>Description</i>
Go to Job	Click to access the Job Data component for the employee.
Go to Position Data	Click to access the Position Data component for the employee's position. This link appears only if the transaction updates position data.
Monitor Approvals	Click to access the Monitor Approvals page.

Chapter 8

(USF) Managing Direct Reports

Understanding Self-Service Transactions and Approvals

This overview describes:

- Manager self-service transactions.
- Approvals and the Approval Framework
- Work-in-progress statuses for approval steps.
- Personnel Action Request (PAR) defaults for approved transactions

Manager Self-Service Transactions

PeopleSoft eProfile Manager Desktop provides seven self-service transactions for managing direct reports.

- Change part-time or full-time status.
- Change work location.
- Promote employees.
- Reassign employees.
- Request reporting changes.
- Retire employees.
- Separate employees.

Approvals and the Approval Framework

The system uses the generic Approval Framework to manage approvals for federal self-service transactions. The Approval Framework is a tool for creating, running, and managing approval processes. Approval workflow is triggered when a requester submits a transaction, such as a promotion. The application hands the transaction over to the Approval Framework, which finds the appropriate approval process definition and launches the approval workflow. The approval process definition controls who must approve the transaction and in what order. Administrators have the ability to monitor the status of approval transactions and to perform various actions on submitted transactions.

Related Links

[“Understanding Approvals” \(Application Fundamentals\)](#)

Work-In-Progress Statuses for Approval Steps

The federal work-in-progress (WIP) management system works in tandem with approval processing to automate the tracking and processing of personnel action requests as they move through the steps of the approval process. Each transaction is configured to use specific WIP statuses at each stage of the approval process.

Because the Approval Framework is a generic workflow approval engine, additional setup outside of the framework is necessary so that you can associate federal work-in-progress statuses with approval steps. The setup for manager self-service transactions is the same as the setup for employee transactions.

Note: When associating WIP statuses with approval steps, you manually set up the steps that represent your approval processing steps. If you modify the delivered approval process, take care to keep these step definitions in sync with the Approval Framework process definitions.

Related Links

“Defining WIP Statuses for Approval Steps” (PeopleSoft eProfile)

“Understanding WIP Management System Setup” (Application Fundamentals)

PAR Defaults for Approved Transactions

In PeopleSoft HR, the PAR system automatically routes a wide variety of requests to reviewing officials in human resources. PAR processing is separate from the Approval Framework approval process and occurs only after all Approval Framework approvals are complete.

Four of the seven manager self-service transactions are automatically transferred to the PAR system after all approvals are complete. The system uses a component interface for this transfer. To support the push to the PAR system, you must provide default values for certain fields that are required in the PAR tables and that are not normally entered by the employee who originates the self-service request. You provide these defaults in the Transaction Setup component (the same component where you associate approval steps with WIP statuses).

See “Defining PAR Tracking Data” (PeopleSoft eProfile), “Understanding WIP Management System Setup” (Application Fundamentals).

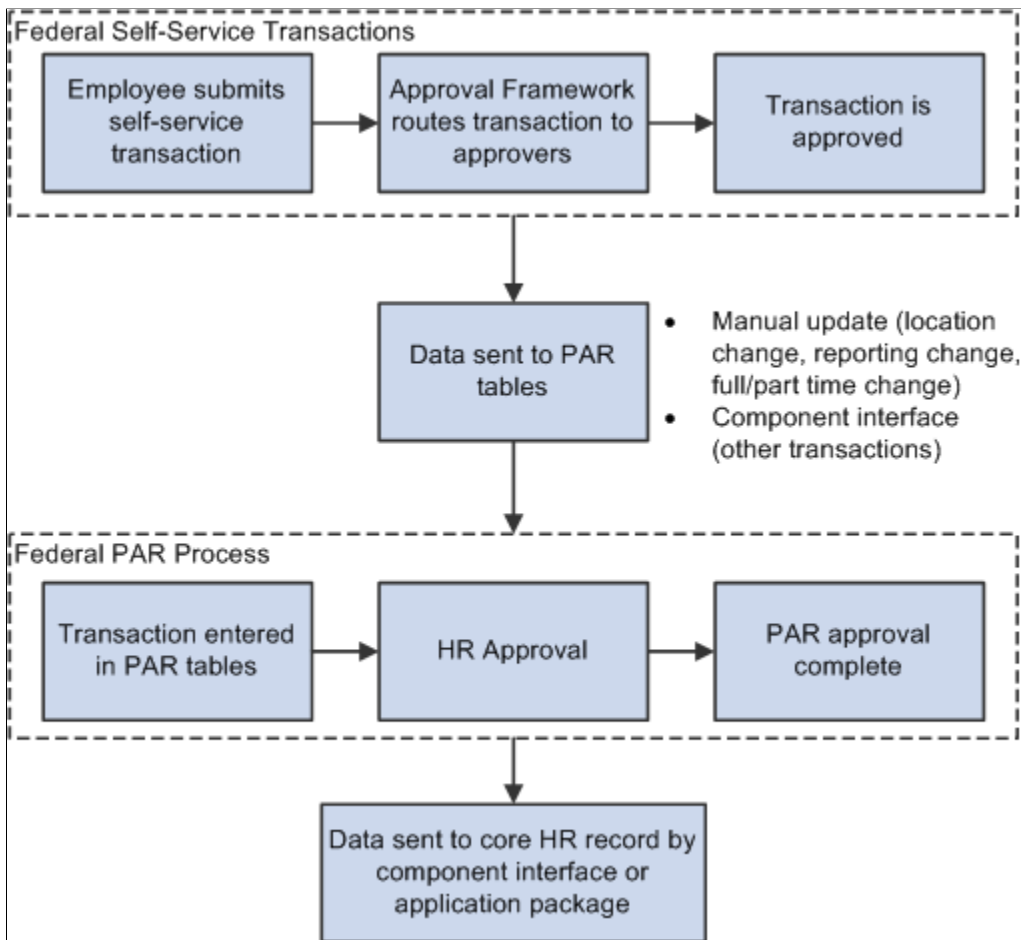
Three other transactions are position-controlled, so changes are made to the position and then propagated out to the persons in the positions. These transactions are not automatically pushed to the PAR system. Instead, the Personnelist / Federal Self Service Administrator must enter the information in the PAR system manually.

The following table shows which transactions are automatically pushed to the PAR tables and which ones require an administrator to manually enter data into the PAR tables:

<i>PAR Table Update Method</i>	<i>Transactions</i>
Manual (administrator)	<ul style="list-style-type: none"> • Request reporting changes. • Change part-time or full-time status. • Change work location.

PAR Table Update Method	Transactions
Automatic (component interface)	<ul style="list-style-type: none"> • Promote employees. • Reassign employees. • Retire employees. • Separate employees.

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



Prerequisites for Managing Direct Reports

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

1. Activate eProfile Manager Desktop on the Installation Table.
See “Products Page” (Application Fundamentals).
2. Define position management on the HCM Options page.

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

See “HCM Options Page” (Application Fundamentals).

See “Configuring Self-Service Transactions” (Application Fundamentals).

3. Set up security.

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

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

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

See “Understanding PeopleSoft Security” (Application Fundamentals).

4. Configure the Approval Framework for approval processing.

Oracle delivers preconfigured approval processing for all U.S. federal manager self-service transactions, but you should review the delivered configuration and modify it as necessary.

See “Understanding Approvals” (Application Fundamentals).

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

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

6. Set up group build if you plan to use Group ID as the access type for a manager's direct reports.

See “Understanding Group Build” (Application Fundamentals).

7. Configure the USFED WIP transaction.

See “Understanding WIP Management System Setup” (Application Fundamentals).

Changing Part-Time or Full-Time Status

These topics provide an overview of the process flow for part-time or full-time status changes.

Pages Used to Change Part-Time or Full-Time Status

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
Change Full/Part-time Status Page	HR_DR_ADDL_INFO	Enter the effective date for the change.
Change Full/Part-time Status – Select Employee Page	HR_DR_SELECT_EMPS	Select the employee to have the full/part-time status changed.
Full/Part Time Status Change Page	FE_MGR_FULL_PART	Submit a change to the employee's full/part-time status. After you submit the transaction, use this page to confirm that the transaction has been submitted and to review the approval process for the transaction.

Understanding the Process Flow for Part-Time or Full-Time Status Changes

To change an employee's part-time or full-time status, managers:

1. Access the Change Full/Part-time Status page.
2. Enter the effective date for the change, and click **Continue**.
3. Select the employee for whom the change in part-time or full-time status is being requested, and click **Continue**.

The Change Full/Part-time Status page appears with the employee's current job data. The New Status fields are populated by default with the new status for the employee.

4. Enter any relevant comments, and click **Submit**.

When the **Submit** button is clicked, the system invokes the Approval Framework approval process and displays a confirmation page that shows the chain of approvers.

Changing Work Location

These topics provide an overview of work location changes.

Pages Used to Change Work Location

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
Location Change Page	HR_DR_ADDL_INFO	Enter the effective date for the change.

Page Name	Definition Name	Usage
Location Change - Select Employees Page	HR_DR_SELECT_EMPS	Select one or more employees requiring a change in their work location.
Location Change - Employee Page	FE_MGR_LOC_CHG	Enter the location and submit the location change request. After you submit the transaction, use this page to confirm that the transaction has been submitted and to review the approval process for the transaction.

Understanding Work Location Changes

Requests can be made for an individual employee or a group of employees. To request a change to work location, managers:

1. Access the Location Change page.
2. Enter the date that the change in reporting structure goes into effect, and click **Continue**.
3. Select the employee or employees for whom the change in location is being requested, and click **Continue**.

The Location Change page appears with the employee or employees' current job row data.

4. Enter the new location and any relevant comments, and then click **Submit**.

When the **Submit** button is clicked, the system invokes the Approval Framework approval process and displays a confirmation page that shows the chain of approvers.

Promoting Employees

These topics provide an overview of employee promotions.

Pages Used to Promote Employees

Page Name	Definition Name	Usage
Promote Employee Page	HR_DR_ADDL_INFO	Enter the effective date for the change.
Promote Employee - Select Employee Page	HR_DR_SELECT_EMPS	Select an employee for whom you want to request a promotion.
Promote Employee - Employee Page	FE_MGR_PROMOTE	Submit a promotion request.

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
Promote Employee - Confirm Page	FE_PROMOTE_CONFIRM	Confirm that the transaction has been submitted and review the approval process for the transaction.

Understanding Employee Promotions

To request a promotion, managers:

1. Access the Promote Employee page.
2. Enter the date that the promotion goes into effect, and click **Continue**.
3. Click the name of the employee for whom the promotion is being requested.

The Promote Employee page appears and displays the employee's current job data.

4. Enter the information on the page, and click **Submit**.

When the **Submit** button is clicked, the system invokes the Approval Framework approval process and displays a confirmation page that shows the chain of approvers.

Reassigning Employees

These topics provide an overview of employee reassignments.

Pages Used to Reassign Employees

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
Reassign Employee Page	HR_DR_ADDL_INFO	Enter the effective date for the change.
Reassign Employee - Select Employee Page	HR_DR_SELECT_EMPS	Select an employee for whom you want to request a reassignment.
Reassign Employee Page	FE_MGR_REASSIGN	Submit a request for reassignment.
Reassign Employee - Employee Page	FE_REASSIGN_CONFRM	Confirm that the transaction has been submitted and review the approval process for the transaction.

Understanding Employee Reassignments

To reassign an employee, managers:

1. Access the Reassign Employee page.
2. Enter the effective date for the reassignment, and click **Continue**.
3. Select the employee for whom the reassignment is being requested, and click **Continue**.

The Reassign Employee page appears with the employee's current job data.

4. Enter the new position number, the reason for the reassignment, any comments, and click **Submit**.

When the **Submit** button is clicked, the system invokes the Approval Framework approval process and displays a confirmation page that shows the chain of approvers.

Requesting Reporting Changes

These topics provide an overview of reporting changes.

Pages Used to Request Reporting Changes

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
Reporting Change Page	HR_DR_ADDL_INFO	Enter the effective date for the change.
Reporting Change - Select Employees Page	HR_DR_SELECT_EMPS	Select one or several employees for whom you want to request a reporting change.
Reporting Change - Employee Page	FE_MGR_REPORT_CHNG	Submit the request for a reporting change. After you submit the transaction, use this page to confirm that the transaction has been submitted and to review the approval process for the transaction.

Understanding Reporting Changes

Requests can be made for an individual employee or a group of employees. To request a reporting change, managers:

1. Access the Reporting Change page.
2. Enter the date that the change in reporting structure goes into effect, and click **Continue**.
3. Select the employee or employees for whom a change in reporting structure is being requested, and click **Continue**.

The Reporting Change page appears with the employee or employees' current job data.

4. Enter the new reporting position, any relevant comments, and then click **Submit**.

When the **Submit** button is clicked, the system invokes the Approval Framework approval process and displays a confirmation page that shows the chain of approvers.

Retiring Employees

These topics provide an overview of retiring employees.

Pages Used to Retire Employees

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
Retire Employee Page	HR_DR_ADDL_INFO	Enter the effective date for the change.
Retire Employee - Select Employee Page	HR_DR_SELECT_EMPS	Select one or several employees for whom you want to request a retirement.
Retire Employee - Employee Page	FE_MGR_RETIRE	Submit the retirement request.
Retire Employee - Confirm Page	FE_RETIRE_CONFIRM	Confirm that the transaction has been submitted and review the approval process for the transaction.

Understanding Retiring Employees

To request an employee's retirement, managers:

1. Access the Retire Employee page.
2. Enter the effective date for the retirement, and click **Continue**.
3. Select the employee for whom the retirement is being requested, and click **Continue**.

The Retire Employee page appears with the employee's current job data.

4. In the **Retirement Type** field, select the reason for the retirement and click **Submit**.

When the **Submit** button is clicked, the system invokes the Approval Framework approval process and displays a confirmation page that shows the chain of approvers.

Separating Employees

These topics provide an overview of separating employees.

Pages Used to Separate Employees

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
Separate Employee Page	HR_DR_ADDL_INFO	Enter the effective date for the change.
Separate Employee - Select Employee Page	HR_DR_SELECT_EMPS	Select the employee to be separated.
Separate Employee - Employee Page	FE_MGR_SEPARATE	Submit a request for separation.
Separate Employee - Confirm Page	FE_SEPARATE_CONFRM	Confirm that the transaction has been submitted and review the approval process for the transaction.

Understanding Separating Employees

To request an employee's separation, managers:

1. Access the Separate Employee page.
2. Enter the effective date for the separation, and click **Continue**.
3. Select the employee for whom the separation is being requested, and click **Continue**.

The Separate Employee page appears with the employee's current job data.

4. Select the reason for the separation.

If **Transfer to New Agency** is selected as the reason for the separation, the **Agency** field appears.

5. If **Transfer to New Agency** was selected as the reason for the separation, select an agency.
6. Enter any relevant comments, and click **Submit**.

When the **Submit** button is clicked, the system invokes the Approval Framework approval process and displays a confirmation page that shows the chain of approvers.

Approving Change Requests

These topics provide an overview of approvals.

Pages Used to Approve Change Requests

Page Name	Definition Name	Usage
Review Transactions Page	HCM_APPR_STATUS	Search for and view summary information for self-service transactions that you submitted or for which you are an approver. This page supports only transactions that were submitted <i>after</i> implementation of the Approval Framework.
Name Change Page Marital Status Change Page Address Change Page Full/Part Time Status Change Page Approve Location Change Page Promote Employee Page Reassign Employee Page Approve Reporting Change Page Separate Employee Page	FE_EE_NAME_STS FE_MARITAL_STS FE_ADDRESS_STS FE_MGR_FULL_PART FE_MGR_LOC_CHG FE_PROMOTE_APPROVE FE_REASSIGN_APPROV FE_MGR_REPORT_CHNG FE_SEPARATE_APPRVE FE_RETIRE_APPROVE	Review transaction details and the status of the approval process. If you are the current approver, use this page to approve or deny the transaction.
Review Change Requests - Select a Request Page	FE_MGR_CHG_REQ_STA	Review information about change requests that were processed before federal self-service transactions began using the Approval Framework to manage approval processing. This page supports only transactions that were submitted <i>before</i> implementation of the Approval Framework.

Understanding Approvals

This topic describes how you approve change requests that have been submitted by employees or managers.

Employee and Manager Transactions

Managers approve change requests submitted by their direct reports, whether those direct reports are employees who submit requests through PeopleSoft eProfile or other managers who submit requests through eProfile Manager Desktop.

The Approval Framework controls the approval processes for both manager and employee transactions. PeopleSoft delivers fully configured approval processes for all of the U.S. federal self-service

transactions. As long as you use the delivered approval processes, no additional configuration is necessary, but you can use the common Approval Framework pages to review (or modify) the delivered configuration.

See “Understanding Approvals” (Application Fundamentals).

These are the delivered U.S. federal self-service transactions and their Approval Framework process definitions:

Transaction	Transaction Type	Navigation	Approval Process ID
Name change	Employee	Self Service, Personal Information, Name Change (USF)	FederalNameChg
Address change	Employee	Self Service, Personal Information, Address Change USF	FederalAddrChg
Marital status change	Employee	Self Service, Personal Information, Marital Status USF	FederalMarChg
Full time/part-time status change	Manager	Manager Self Service, Job and Personal Information, Change FTPT Status (USF)	FederalFTPTChange
Location change	Manager	Manager Self Service, Job and Personal Information, Location Change USF	FederalLocationChg
Promote employee	Manager	Manager Self Service, Job and Personal Information, Promote Employee USF	FederalPromoteEmployee
Reassign employee	Manager	Manager Self Service, Job and Personal Information, Reassign Employee USF	FederalReassignEmployee
Reporting change	Manager	Manager Self Service, Job and Personal Information, Reporting Change USF	FederalRportingChg
Retirement	Manager	Manager Self Service, Job and Personal Information, Retire Employee USF	FederalRetireEmployee

<i>Transaction</i>	<i>Transaction Type</i>	<i>Navigation</i>	<i>Approval Process ID</i>
Separation	Manager	Manager Self Service, Job and Personal Information, Separate Employee USF	FederalSeparateEmployee

Transaction Review and Approval

To review status information for transactions that use the Approval Framework to manage approval processing, use the generic Approval Framework transaction review pages. These pages displays grids that list all of the user’s approval transactions, including transactions that the user submitted and transactions that the user is being asked to approve. There are separate grids for each transaction type.

Links in the grids provide access to detail pages where you can see a graphical representation of the approval steps.

If you are the current approver, there is an Approve/Deny link that you use for accessing the detail page. In this mode, the detail page displays buttons that you use to either approve or deny the request.

If you are not the current approver, there is a View Details link instead of an Approve/Deny link. In this mode, the detail page displays transaction and approval details, but the Approve and Deny buttons are not available.

See “Working with Self-Service Approval Transactions” (Application Fundamentals).

Pre-Approval Framework Approval Data

Before federal self-service transactions began using the Approval Framework to manage approval processing, managers used a federal-specific review component to view lists of submitted transactions. This component is still available, but it does not display approval processes that use the Approval Framework. Use this component only to review transactions that were submitted for approval before implementation of the Approval Framework.

Like the page for reviewing Approval Framework transactions, the page for reviewing pre-Approval Framework transactions lists the user’s transactions and provides links to detail pages. The detail pages display the approval steps in a grid format rather than using the Approval Framework's graphical representation.

Note: Pre-Approval Framework transactions are view-only; you cannot take any approval-related action.

Administering Approvals

These topics provide an overview of approval administration.

Pages Used to Administer Approvals

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
Monitor Approvals Page	EOAW_ADM_MON_SRC	Review all Approval Framework transactions, including federal-self service transactions, and take action to resolve routing errors.
Workflow Inquiry (USF) Page	FE_SS_STAGED	Review activity for federal self-service transactions

Understanding Approval Administration

The Approval Framework provides its own approval monitor that you can use to review and, if necessary, perform the actions that have been configured as allowable for the federal transactions.

Additionally, the Workflow Inquiry (USF) page that you use to monitor federal self-service transactions supports both Approval Framework approval transactions and transactions that predate the conversion to Approval Framework processing.

Related Links

“Administering Approvals” (Application Fundamentals)

“(USF) Reviewing Federal Self-Service Transactions” (Application Fundamentals)

Chapter 9

Using the Manager Dashboard

Understanding the Manager Dashboard Content and Layout

The Manager Dashboard displays various pagelets showing a quick synopsis of information about your direct report. Many of the links within the pagelets will direct you to actually components throughout the HCM system with links on those pages to return you to the dashboard.

The Manager Dashboard provides actionable summaries of information for a manager's direct and indirect reports. A number of pagelets display information specific to the user. From the pagelets, managers have the ability to focus on items needing their attention and to act on those items by providing an immediate update from within the dashboard or by transferring to a specific application component. For example, managers can complete approval requests or initiate manager self service transactions for a specific employee by clicking on the **Actions** link all from the Manager Dashboard.

You can access the Manager Dashboard from the root menu, Manager Self Service, and the Direct Line Reports page in the Org Chart Viewer.

This example illustrates the Manager Dashboard page.

The screenshot displays the Manager Dashboard interface with several widgets:

- Alerts:** A list of notifications including license/certificate expirations for Edmund Donahue, Vicki Zinn, and Shawn Quilligan, and membership expirations for Shawn Quilligan and Vicki Zinn. It also shows annual review due dates for Christelle Stevenson, Daryl Reese, Edmund Donahue, Vicki Zinn, Shawn Quilligan, and Mei Lee.
- Pending Approvals:** A table listing approval requests for Performance Document, Promotion, Reporting Change, and Transfer, with columns for Name, Effective Date, and Approval Receipt Date.
- Direct Line Reports:** A table showing employee details for Christelle Stevenson, Daryl Reese, Edmund Donahue, Mei Lee, Shawn Quilligan, and Vicki Zinn, including Job Title and Position in Salary Range.
- Objective Alignment:** A bar chart titled "Objectives for Corporate Accounting" for the period 01/01/2009 to 12/31/2009, showing the number of employees for various organizational objectives.
- Company Directory:** A search interface for finding employees by name, job title, department, or email.
- My Open Jobs:** A table listing open positions with columns for Job ID, Job Title, Days Open, and Applicants in Process.
- Quick Links:** A list of navigation options such as "Search and Compare Profiles", "Allocate Compensation", "Smart HR Transactions", and "Manage My Objectives".

Use this dashboard to manage and analyze information about your direct report workforce. The Manager Dashboard enables you to:

- View important upcoming dates and events.
- Analyze company and employee objectives.
- Approve pending requests.
- Search for individuals in your company directory.
- Manage your current job openings.
- Examine details about your direct reports, such as job details, compensation, performance, career and succession plans, and time reporting.
- Initiate self service actions, such as creating a performance document or request a reporting change, which you would typically perform from Manager Self Service.
- Access and analyze a summary of your employee's abilities on the Talent Summary page.
- Manage your employee's learning.
- Access quick links to perform additional managerial tasks in the system.
- View reports that you run.
- View progress of employees' performance documents.

You can determine the dashboard content and layout. Use the **Personalize Content** and **Layout** links to access the Personalize Content: Manager Dashboard and Personalize Layout: Manager Dashboard pages respectively.

- The Personalize Content: Manager Dashboard page enables you to select or deselect pagelets you wish to view on your dashboard.
- The Personalize Layout: Manager Dashboard page enables you to determine whether you want your dashboard to display in a 2- or 3-column layout. You will also select which pagelets should appear in which column.

Click the header of each pagelet and drag it to manually move pagelets around on the dashboard. You can also minimize or remove pagelets from the dashboard by using the corresponding icons in the header. To have a pagelet appear after deleting it from the dashboard, access the Personalize Content: Manager Dashboard page to select the pagelet.

Defining the Manager Dashboard Content and Layout

These topics discuss how to define the Manager Dashboard content and layout.

Pages Used to Define the Manager Dashboard Content and Layout

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
Manager Dashboard Page	UX_MGR_DASHBOARD	View frequently-accessed manager information such as important manager alerts, messages, and employee details through various pagelets on one page.
<u>Personalize Content: Manager Dashboard Page</u>	PORTAL_HPCOMP	Define the Manager Dashboard pagelet content by selecting or deselecting pagelets that should appear on your Manager Dashboard page.
<u>Personalize Layout: Manager Dashboard Page</u>	PORTAL_HPLAYOUT	Define the Manager Dashboard pagelet layout by selecting either a 2- or 3-column layout style you wish to display on your Manager Dashboard page. Identify the pagelets that should appear in each column.

Personalize Content: Manager Dashboard Page

Use the Personalize Content: Manager Dashboard page (PORTAL_HPCOMP) to define the Manager Dashboard pagelet content by selecting or deselecting pagelets that should appear on your Manager Dashboard page.

Navigation:

- Click the **Personalize Content** link at the top of the Manager Dashboard page.
- Click the **Personalize Content** link on the Personalize Layout: Manager Dashboard page.

This example illustrates the fields and controls on the Personalize Content: Manager Dashboard page. You can find definitions for the fields and controls later on this page.

Personalized Home Page

Personalize Content: Manager Dashboard

Tab Name

Welcome Message

Choose Pagelets: Simply check the items that you want to appear on your homepage.
Remember to click "Save" when done.

Arrange Pagelets: Go to [Personalize Layout](#)

PeopleSoft Applications

[My Reports](#)

HCM Dashboard

[Quick Links](#)

[Direct Line Reports](#)

[Pending Approvals](#)

[Alerts](#)

[Objective Alignment](#)

[Company Directory](#)

[My Open Jobs](#)

[Taleo](#)

[Learning](#)

[Business Objective Alignment](#)

Save

Return to Home

Use this page to select or deselect pagelets you want to display on your Manager Dashboard page. Click the pagelet name link to preview the pagelet.

The following pagelets display the same information but in different formats:

- *Objective Alignment:* Displays a narrow graph illustrating the number of employees that are in alignment with the department business objectives.
- *Business Objective Alignment:* Displays a wide graph illustrating the number of employees that are in alignment with the department business objectives.

Personalize Layout: Manager Dashboard Page

Use the Personalize Layout: Manager Dashboard page (PORTAL_HPLAYOUT) to define the Manager Dashboard pagelet layout by selecting either a 2- or 3-column layout style you wish to display on your Manager Dashboard page.

Identify the pagelets that should appear in each column.

Navigation:

- Click the **Personalize Layout** link at the top of the Manager Dashboard page.
- Click the **Personalize Layout** link on the Personalize Content: Manager Dashboard page.

This example illustrates the fields and controls on the Personalize Layout: Manager Dashboard page. You can find definitions for the fields and controls later on this page.

Use this page to determine the number of columns you want on the dashboard. Move pagelets from one column to the next.

The columns will list only those pagelets you have selected on your personalization page to appear on the dashboard.

Viewing the Manager Dashboard Pagelets

These topics discuss viewing the Manager Dashboard pagelets.

Note: You can personalize many of these pagelets so they appear differently on the dashboard.

See [Personalizing Pagelets](#).

See [Personalizing Column and Sort Order within the Pagelet Grids](#).

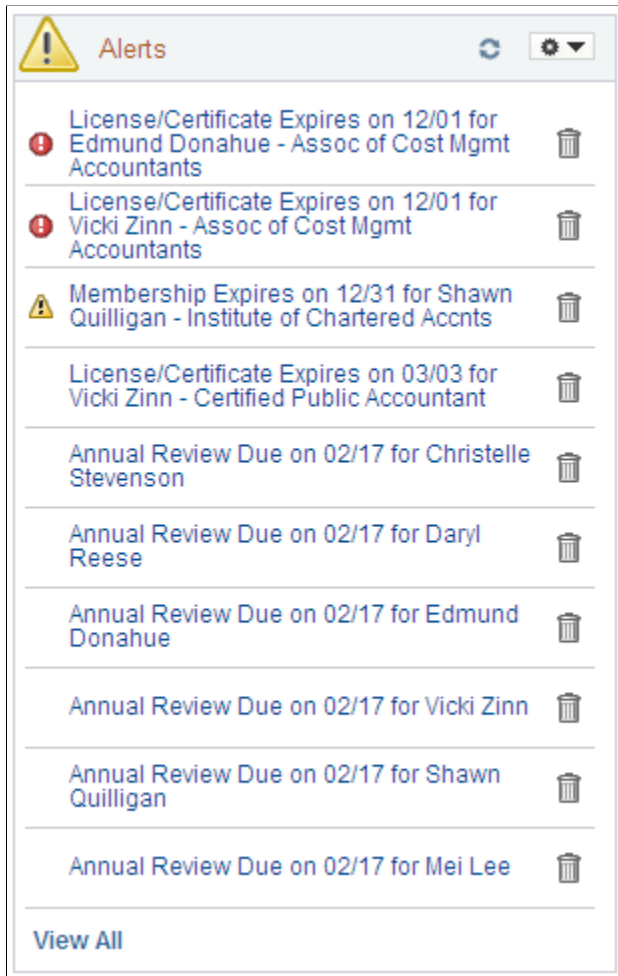
Pages Used to View Additional Manager Dashboard Pagelet Content

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
More Alert Information Page	UX_ALERT_DTL	View details regarding all alerts associated with your direct reports.
Objective Alignment Progress Page	UX_EPO_ALIGN_DET	View the detailed alignment information and the progress of the employee goals compared to the business objective.
My Reports Pagelet	UX_DIRECTS_HGRID	View information about your direct and indirect reports in a hierarchical list (or Hgrid) format.
Change Settings Page	EP_PG_DOCSTS_SEC	Edit the default settings used for launching the My Team's Performance Status pagelet.

Alerts Pagelet

The Alerts pagelet displays alerts associated with direct reports.

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



Use this pagelet to view past or upcoming events and dates related to your direct reports. These alerts are grouped by alert level: critical appearing first, then by all warning alerts, and finally informational alerts. Within each level, the pagelet then sorts the alerts by type. There are seven alert types delivered for the Alerts pagelet:

- ePerformance
- eCompensation
- Expiring Licenses/Certificates
- Expiring Memberships
- Scheduled Training
- Birthday Alerts
- Anniversary Alerts

The administrator defines the rules for when an alert moves to another level for each alert type. All alerts are time sensitive and the system generates them by comparing the current date to the date specified for each alert type and level.

Field or Control	Description
<alert message link>	Click the link of any of the alert messages to have the system display the appropriate application detail page to provide more information about the alert. These secondary pages are view only.
View All	Click this link to open the More Alert Information page and view all alerts associated with your direct reports.

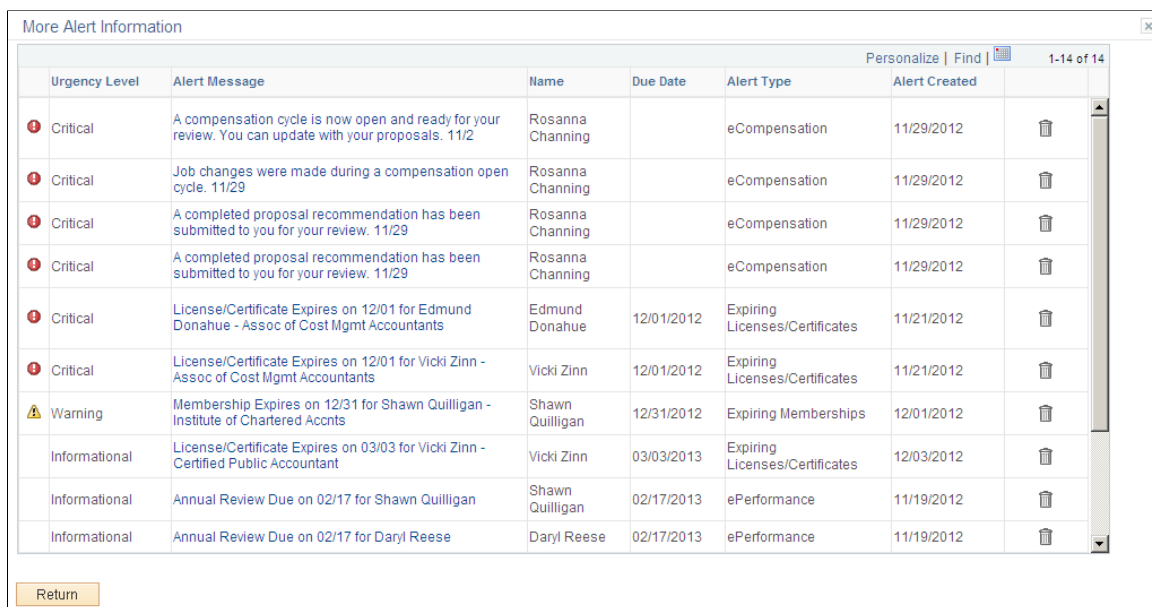
More Alert Information Page

Use the More Alert Information page (UX_ALERT_DTL) to view details regarding all alerts associated with your direct reports.

Navigation:

Click the **View All** link on the Alerts pagelet in Manager Dashboard.

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



Urgency Level	Alert Message	Name	Due Date	Alert Type	Alert Created	
Critical	A compensation cycle is now open and ready for your review. You can update with your proposals. 11/2	Rosanna Channing		eCompensation	11/29/2012	
Critical	Job changes were made during a compensation open cycle. 11/29	Rosanna Channing		eCompensation	11/29/2012	
Critical	A completed proposal recommendation has been submitted to you for your review. 11/29	Rosanna Channing		eCompensation	11/29/2012	
Critical	A completed proposal recommendation has been submitted to you for your review. 11/29	Rosanna Channing		eCompensation	11/29/2012	
Critical	License/Certificate Expires on 12/01 for Edmund Donahue - Assoc of Cost Mgmt Accountants	Edmund Donahue	12/01/2012	Expiring Licenses/Certificates	11/21/2012	
Critical	License/Certificate Expires on 12/01 for Vicki Zinn - Assoc of Cost Mgmt Accountants	Vicki Zinn	12/01/2012	Expiring Licenses/Certificates	11/21/2012	
Warning	Membership Expires on 12/31 for Shawn Quilligan - Institute of Chartered Acnts	Shawn Quilligan	12/31/2012	Expiring Memberships	12/01/2012	
Informational	License/Certificate Expires on 03/03 for Vicki Zinn - Certified Public Accountant	Vicki Zinn	03/03/2013	Expiring Licenses/Certificates	12/03/2012	
Informational	Annual Review Due on 02/17 for Shawn Quilligan	Shawn Quilligan	02/17/2013	ePerformance	11/19/2012	
Informational	Annual Review Due on 02/17 for Daryl Reese	Daryl Reese	02/17/2013	ePerformance	11/19/2012	

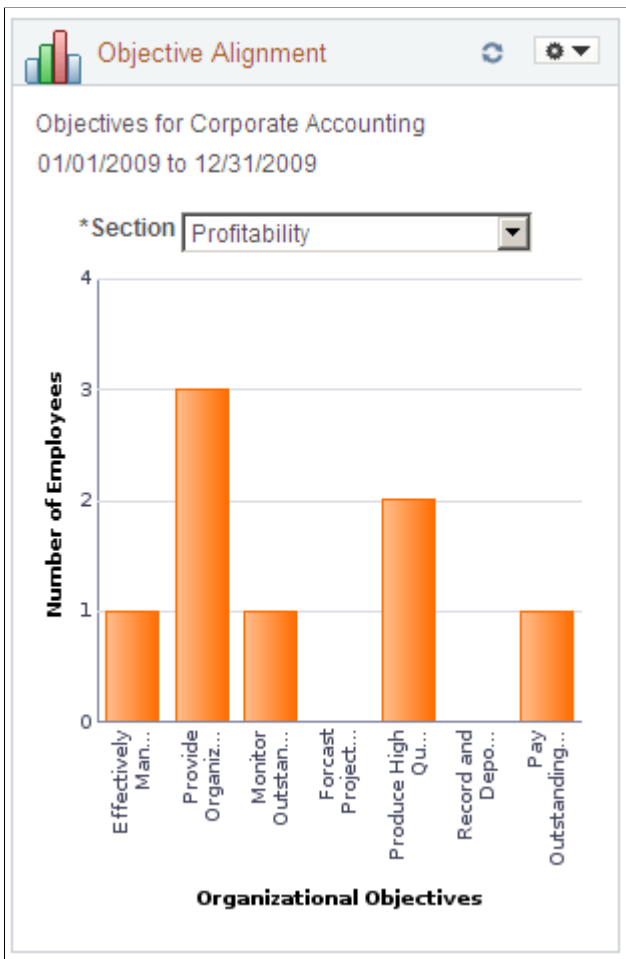
Use this page to view details regarding all alerts associated with your direct reports.

If you have set the number of alerts to appear on the pagelet as a number less than all the alerts in your queue, you can view all remaining alerts on this page.


Objective Alignment Pagelet

The Objective Alignment pagelet displays narrow version of the manager's department business objectives.

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



The business objective is listed at the top of the pagelet, with the business objective beginning and end date below it. If you have not saved a default value through the Personalize Business Objectives Alignment page, the system will display the most recently created business objective.

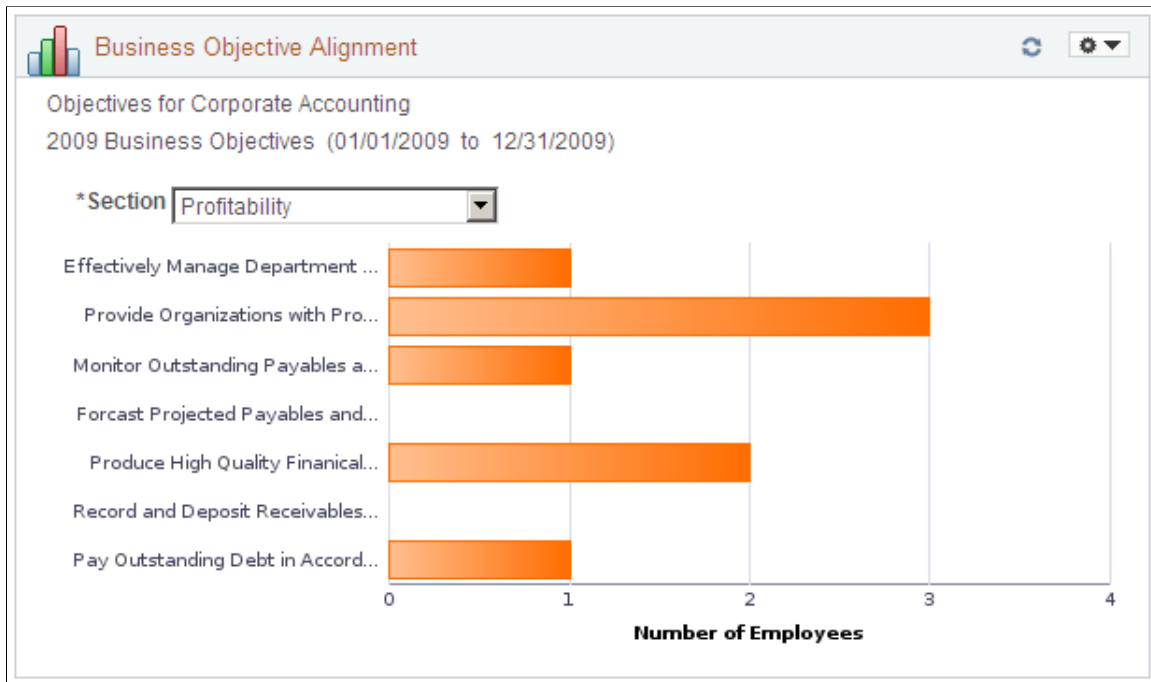
Field or Control	Description
	<p>Select the Pagelet Settings drop-down list in the header and select the Personalize option to open the Personalize Business Objectives Alignment page and define a default business objective and section. If you are associated with more than one department objective, you would select the business objective through this page.</p> <p>See Personalize Business Objectives Alignment Page.</p>

Field or Control	Description
Section	<p>Chose a section from the business objective of this department. The pagelet refreshes and displays a graphical representation of the corresponding Business Objective Alignment data.</p> <p>The chart is a 2D bar chart. The X-Axis lists all the objectives under the selected section. When you pause over a bar in the graphic, the objective name shows as well as the number of employee aligned to this objective. The Y-Axis gives the number of employees that currently have their goals aligned to the business objective. If no employees aligned, the bar does not appear, but the objective label still appears on the X-Axis.</p> <p>Click an objective bar within the graphic to open the Objective Alignment Progress page and see the detailed alignment information and the progress of the employee goals.</p> <p>See Objective Alignment Progress Page.</p>

Business Objective Alignment Pagelet

The Business Objective Alignment pagelet displays wide version of the manager’s department business objectives.

This example illustrates the fields and controls on the Business Objective Alignment pagelet. You can find definitions for the fields and controls later on this page.



The Business Objective Alignment pagelet works the same as the [Objective Alignment Pagelet](#), but the graph and bars are displayed in a horizontal, wide view with longer objective labels and the X- and Y-axis reversed.

See [Objective Alignment Progress Page](#).

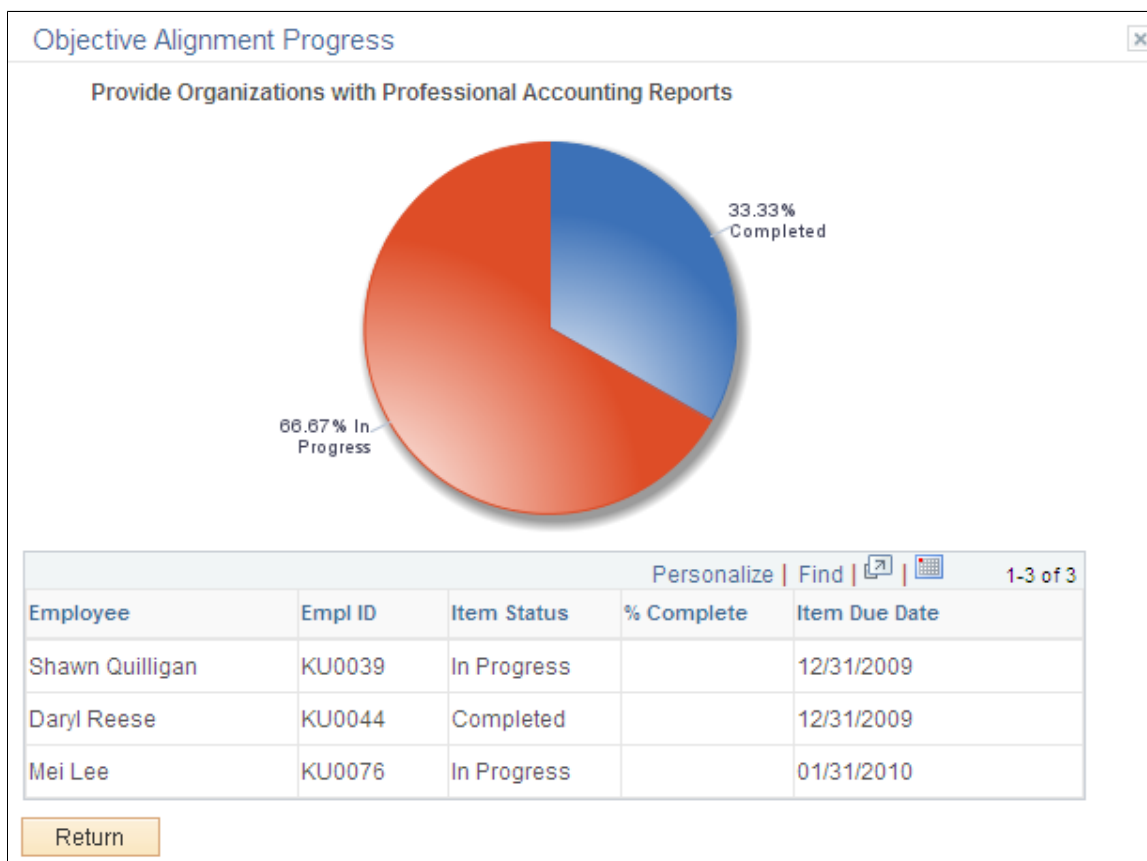
Objective Alignment Progress Page

Use the Objective Alignment Progress page (UX_EPO_ALIGN_DET) to view the detailed alignment information and the progress of the employee goals compared to the business objective.

Navigation:

- Click a bar from within the Objective Alignment pagelet.
- Click a bar from within the Business Objective Alignment pagelet.

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



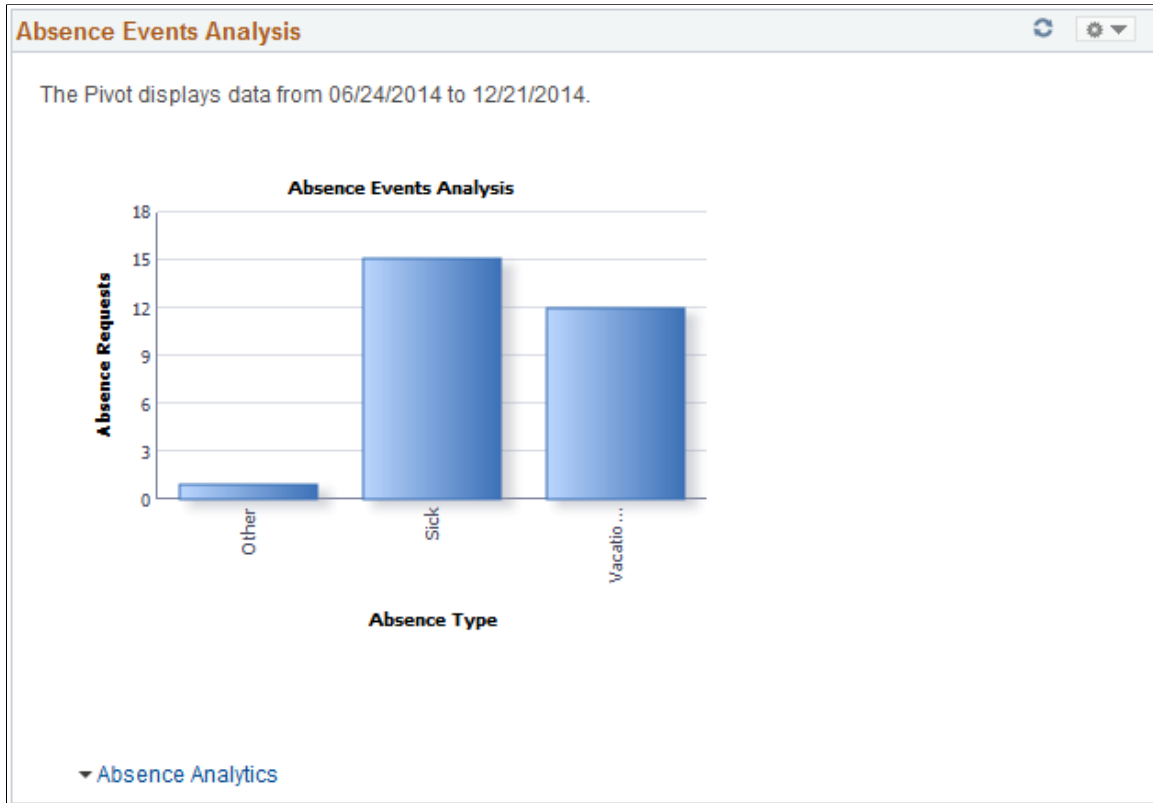
The objective name that corresponds to the bar you clicked. The page displays the goal progress chart for the department employees as a 2D pie chart.

The grid at the bottom shows all the employees that have their goal aligned to the objective. It includes the employee name, employee ID, status, percentage complete, and due date of the objective.

Absence Events Analysis Pagelet

The Absence Events Analysis pagelet displays a bar chart of your employees' absence requests organized by absence type.

This example illustrates the fields and controls on the Absence Events Analysis pagelet.



Field or Control	Description
Absence Analytics	<p>Click to access modal versions of the following pivot grids:</p> <ul style="list-style-type: none"> <p>Absence Event Analysis: This pivot grid enables you to analyze absence entries by status, absence type, absence take, and absence reason.</p> <p>For more information about this pivot grid, see the documentation for the “Absence Events Analysis Pagelet” (PeopleSoft Absence Management).</p> <p>Absence Cost Analysis: This pivot grid enables you to analyze the cost of reported absences by absence type, absence take, and absence reason.</p> <p>For more information about this pivot grid, see the documentation for the “Absence Cost Analysis Pagelet” (PeopleSoft Absence Management).</p> <p>Absence Liability & Trends: This pivot grid enables you to analyze the absence liability for all absence entitlements by period begin date.</p> <p>For more information about this pivot grid, see the documentation for the “Absence Liability and Trends Pagelet” (PeopleSoft Absence Management).</p> <p>Periodic Absence Rate: This pivot grid enables you to analyze absence entries by employee engagement factors such as absence rate for a business entity as of a specific date, absence rate for a given period, total number of absence days, average absence duration, and average absence days.</p> <p>For more information about this pivot grid, see the documentation for the “Periodic Absence Rate Pagelet” (PeopleSoft Absence Management).</p>

Adding the Absence Events Analytics Pagelet to the Manager Dashboard

By default, the Absence Events Analytics pagelet is not available to add to the Manager Dashboard using the [Personalize Content: Manager Dashboard Page](#). To enable managers to add the Absence Events Analytics pagelet to the Manager Dashboard:

1. Access the Manage Dashboard Pages page (**PeopleTools > Portal > Dashboard > Manage Dashboard Pages**)
2. Click the **Pagelets** button for the Manager Dashboard row to access the Tab Content page for Manager Dashboard.
3. Select the **Include all?** check box in the Absence Mgmt Manager Pagelets group box.

Pending Approvals Pagelet

The Pending Approvals pagelet displays time sensitive approvals requiring action by the manager.

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



The screenshot shows a 'Pending Approvals' pagelet with a table of pending approvals. The table has four columns: Approval, Name, Effective Date, and Approval Receipt Date. There is a 'Personalize' link in the top right corner of the table area. The table contains four rows of data:

	Approval	Name	Effective Date	Approval Receipt Date
	Performance Document	Joanna Strunsky	N/A	08/17/2012
⚠	Promotion	Carmichael Espinosa	04/19/2012	04/19/2012
⚠	Reporting Change	Joanna Strunsky	04/19/2012	04/19/2012
⚠	Transfer	Russell Parker	04/19/2012	04/19/2012

Use this pagelet to view the pending approvals for your direct reports and determine what approval actions must be taken right now. Only approvals that use the Approval Workflow Engine (AWE) framework appear in this pagelet. If enabled by the administrator, the pagelet can display the Response due or Response overdue icon, indicating that the date upon which an approval is required is nearing. These dates are set by the administrator.

When there are no pending approvals in your queue, then the Pending Approvals pagelet will display the text *No approvals are pending at this time.*

Field or Control	Description
<warning level icon>	<p>The first column displays a warning icon when warning levels are associated with transactions. When no warnings are associated with any of the transactions appearing in the grid, this column is hidden.</p> <p>The warning icons that can appear in the first column are determined using the rules the administrator defines on the Approvals Pagelet Setup page, and are based on the number of days before a transaction effective date or days after the approval receipt date. The two levels of warnings are:</p> <ul style="list-style-type: none"> • The Standard Warning or Response due icon. • The Overdue Warning or Response overdue icon.
Approval	<p>Click the approval transaction name link in the Approval column to view the application specific transaction approval page. Here you can view transaction details, approve or deny the transaction request, and enter comments regarding your response.</p> <p>See Approve <Transaction> Page.</p>

Field or Control	Description
Name	<p>Displays the name of the employee associated with the approval transaction. If multiple employees are linked to the same transaction, then the field will display the text Transaction Number X (where X is the number of transactions), with the exception of the Reporting Change approval.</p> <p>For Reporting Change approvals, the system will fetch the name of the first employee tied to the transaction and display it in this column, if there is more than one, an ellipsis (...) is added to indicate more employees are tied to the approval transaction.</p> <p>When there is no employee associated with an approval transaction, such as a nonperson job profile, then the field will display N/A (not applicable).</p>
Effective Date	<p>Displays the date on which a transaction is scheduled to take place. For example, the date an employee is scheduled for a promotion, and still needing your approval, will display here. When there is no transaction date associated with the approval transaction, then the field will display N/A (not applicable).</p> <p>The transaction effective date for Compensation approvals is the budget start date.</p>
Approval Receipt Date	Displays the date the approval was sent to you.

You can refresh your queue as by clicking the **Refresh** icon on the pagelet header.

Note: You can also personalize the columns of the grid in this pagelet by clicking the **Personalize** link above the grid in the pagelet.

Related Links

[Understanding Approvals](#)

[Approvals Pagelet Setup Page](#)

[Personalizing Column and Sort Order within the Pagelet Grids](#)

Approve <Transaction> Page

Access the application specific transaction approval page (click the approval transaction name link in the **Approval** column of the Pending Approvals pagelet).

This example illustrates an example of an application specific approval page for a Performance document.

The screenshot shows a web application window titled "Approve Transaction". At the top, there is a header bar with the title and a close button. Below the header, a message instructs the user to approve or deny the proposed information for the employee listed below, and to enter optional comments. The employee's name, "Joanna Strunsky", and "Empl ID KU0016" are displayed. A "Performance Document" label is shown in a light blue box. Below this, the document details are listed: "Doc Type Performance Document", "Author Christelle Stevenson", "Period Begin Date 01/01/2012", "Period End Date 04/30/2012", and "Rating 3-Good". A link for "Performance Document Details" is provided. The "Evaluation Approval Chain" section shows a "Review Employee: Pending" status with a "View/Hide Comments" link. Below this, the "Evaluation Approval Chain" is displayed as "Pending" with a clock icon and the name "[PS] Rosanna Channing - MGR ePerformance Approving Mgr". A "Comment History" section is also visible. At the bottom, there is a "Comment" text area, "Approve" and "Deny" buttons, and a "Go To" section with a link to "Approval Summary" and a "Cancel" button.

Use the approval page specific to the business process to approve, deny, or perform any other response to an approval. This approval page is identical to the application page you would typically access using the standard menu navigation.

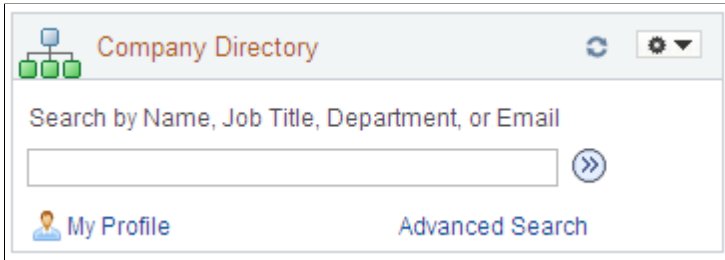
The page displays who the approval has been routed to and the approval status. Click the approver's name or the text **Multiple Approvers** to see a list of approvers.


The **Approve**, **Deny**, and other actions options appear at the bottom of the page. After clicking **Approve** or **Deny**, you should receive the appropriate confirmation. To return to the Pending Approvals pagelet and the Manager Dashboard, click the **Cancel** button.

Company Directory Pagelet

The Company Directory pagelet enables managers to search for employees in the company directory.

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



Field or Control	Description
 (Search)	Enter search criteria and click the Search button to retrieve a person in the Org Chart Viewer - Company Directory pages.
My Org Chart or My Profile	Click one of these links to access either the Org Chart page or your Profile page in the Company Directory. The link that appears here is determined by your personal preferences for the Org Chart Viewer - Company Directory.
Advanced Search	Click this link to open the Advanced Search page and enter multiple search criteria, like a name and department, to locate a person.

My Open Jobs Pagelet

The My Job Openings pagelet displays all job openings assigned to the manager.

This example illustrates the fields and controls on the My Job Openings pagelet. You can find definitions for the fields and controls later on this page.




Job	Job Title	Days Open	Applicants in Process
504024	Billing Manager - Medical Claims	190	1
504018	Administrative Assistant	188	0
504005	Administrative Assistant (Medical Operations)	188	2
504004	Executive Services Administrator	197	11
504003	Administrative Support Supervisor	192	5


[Browse Job Openings](#)
[Create Job Opening](#)

Use this pagelet to view your job openings with an *Open* status. You must be designated as the assigned hiring manager to have a job opening visible in this pagelet. Job openings in which you are assigned as the recruiter, interviewer, screener, approver, or reviewer, but not as the hiring manager, will not appear in this list.

If you are not assigned as a hiring manager to any open job openings, the grid will be hidden and the following will be displayed: *You are not assigned to any open jobs.*

The pagelet displays the job openings in sets of five. To view additional job openings, use the **Find** link, **View All** link, **Zoom** icon, or scroll arrows at the top of the grid. Job openings are listed in descending job number order by default but can personalize the columns and sort order by clicking the **Personalize** link.

Field or Control	Description
Job	Click the job number link to access the Find Job Opening - Job Opening page in the Talent Acquisition Manager application. Manage all aspects of a job opening, including managing applicants, finding applicants, reviewing activity, creating notes, attachments, and expenses, and viewing or updating the job opening itself from this page.
 Browse Job Openings	Click this link to open the Browse Job Openings page to view all existing job openings in the Talent Acquisition Manager application. This link is hidden if you do not have security access to the Browse Job Openings page.

Field or Control	Description
 Create Job Opening	Click this link to open the Enter Primary Job Opening Information page to enter the primary job opening details in the Talent Acquisition Manager application. This link is hidden if you do not have security access to create job openings.

Related Links

“Searching for Job Openings” (PeopleSoft Talent Acquisition Manager)

“Managing Job Openings” (PeopleSoft Talent Acquisition Manager)

“Understanding Job Openings” (PeopleSoft Talent Acquisition Manager)

Personalizing Column and Sort Order within the Pagelet Grids

Quick Links Pagelet

The Quick Links pagelet provides navigation links to menu items frequently used by the manager.

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



Use this pagelet as an alternative to navigating to frequently used pages. This enables you to access these pages with one click as opposed to traditional navigation. You must have security permission to access these quick link pages.

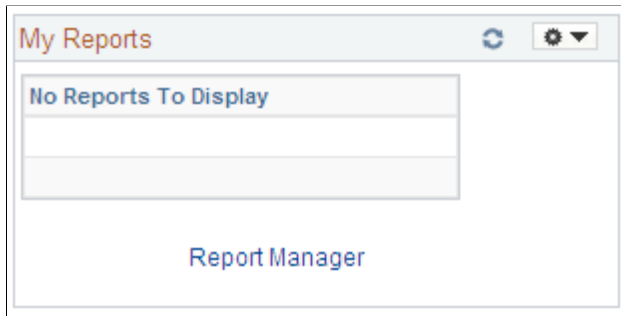
The administrator can create or add quick links to this pagelet by using Navigation Collections and Pagelet Wizard. To add additional links, you would use the following steps:

1. Navigate to **PeopleTools > Portal > Portal Utilities > Navigation Collections**.
2. Search for **Quick Links** and click the **Edit** link. Navigate to **PeopleTools > Portal > Portal Utilities > Navigation Collections**.
3. Click the **Add Link** button to add additional links to this pagelet.

My Reports Pagelet

The My Reports pagelet enables manager to display selected reports on the dashboard.

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

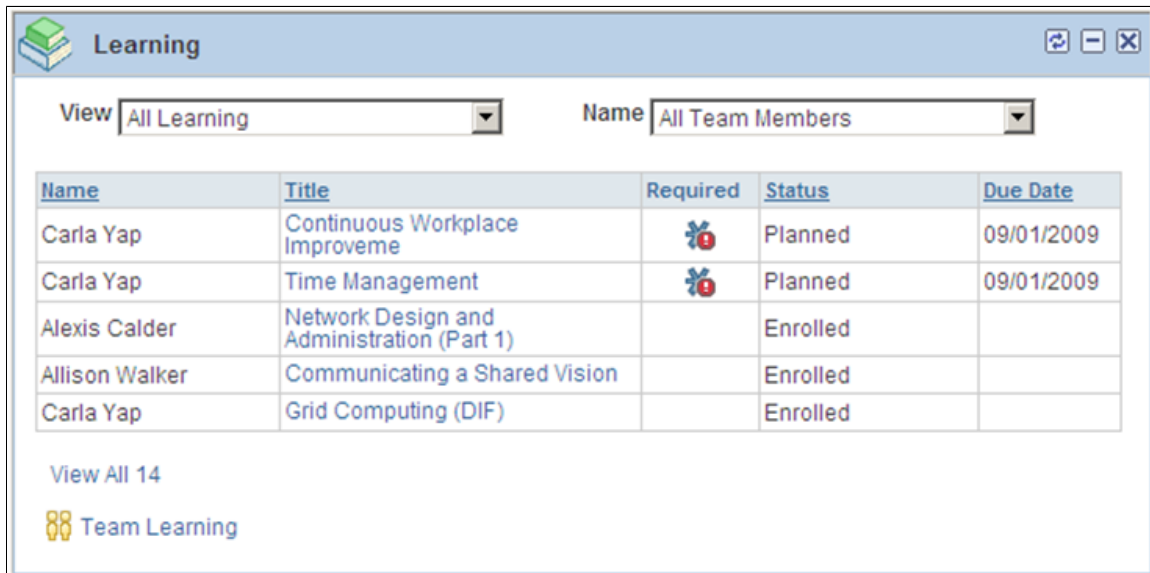


Click the report name to access the report run control page. Click the **Report Manager** link to access the Report Manager.

Learning Pagelet




The Learning pagelet displays the training status of employees. This information comes from the Enterprise Learning Management (ELM) system.

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



Use this pagelet to see an overview of learning events for direct reports. This pagelet highlights required learning and certifications which are expired or in warning status, with the Past Due and Due Soon warnings appearing first. The pagelet presents the classes, programs, and courses in *Planned* status for each direct report.

The **View** and **Name** drop-down fields enable you to filter the data that you see in the grid.

Field or Control	Description
View	Select which view of data you wish to display in the grid. Choices are: <ul style="list-style-type: none"> • <i>All Learning</i> - does not filter out information but shows all learning scheduled for your employees. • <i>Required Learning</i> - filters the grid to show only training that is marked as required, in warning status, or expired.
Name	Select the individuals you want to display in the grid. You can chose to display all team members by selecting <i>All Team Members</i> , or you can select an individual direct report team member by name. Indirect team member will not be available in this pagelet.
Title	Click the title link to open an application page that corresponds to the type of learning item it is, for example, a class, course, or program. Note: The data for ELM Learning is pulled from ELM database through IB Integration setup.
 (Past Due icon)	Indicates that this learning event is required and past due.
 (Due Soon icon)	Indicates that this learning event is required and due soon.
View All <number>	The pagelet displays five rows of information in the grid. Click this link to open a modal Learning grid page to view all rows of employee learning. The number of employees that appear in the page grid will appear in the link name.
 Team Learning	Click this link to open the Team Learning page in Manager Self Service.

See the documentation for *PeopleSoft Enterprise Learning Management*.

Direct Line Reports Pagelet

The Direct Line Reports pagelet displays data about a manager's direct reports from information stored across the HCM product line. Managers can view various details about their employees from this single location. Managers will use this pagelet to view job details, contact information, career and succession plans, compensation, performance reviews, and time tracking for their direct reports. This data comes from a number of PeopleSoft HCM products including ePerformance, Career Planning, Succession Planning, Time and Labor, Absence Management, Compensation, and ELM.

Note: The Direct Line Reports pagelet has been replaced by the My Team functionality in Fluid. For more information, see [Using the PeopleSoft Fluid User Interface to Perform Manager Tasks](#).

The HCM data that is brought into the pagelet is organized into a grid with tabs, as defined on the Direct Reports Pagelet Setup page and the user preferences. Each tab contains a group of fields displaying employee data from a specific area from within HCM. See [Understanding the Direct Line Reports Pagelet Features](#).

Note: Users can personalize the tabs and columns of the grid in this pagelet by clicking the **Personalize** link above the grid in the pagelet. Because of this, columns and tabs shown in this document may vary from your application. The tabs and columns shown here are the delivered default values.

See [Personalizing Column and Sort Order within the Pagelet Grids](#).

The Direct Line Reports pagelet uses access types to determine which employees report to a manager. The Direct Line Reports pagelet component uses the access type registered in the Direct Reports Setup under **Set Up HCM > Common Definitions > Direct Reports for Managers**.

See [Understanding the Direct Line Reports Pagelet Features](#).

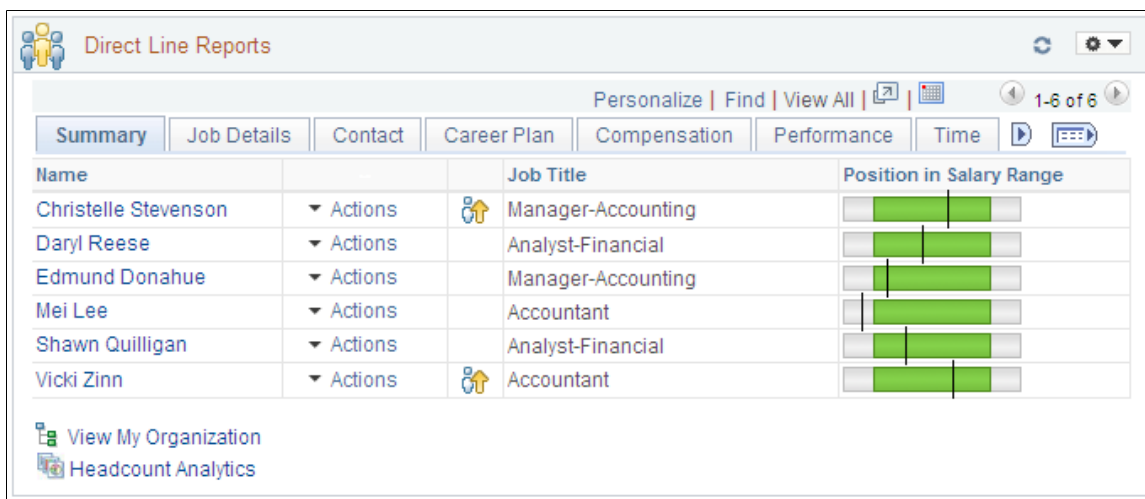
These topics discuss the:

- Direct Line Reports pagelet: Summary tab.
- My Organization page.
- Direct Line Reports pagelet: Job Details tab.
- Direct Line Reports pagelet: Contact tab.
- Direct Line Reports pagelet: Career Plan tab.
- Direct Line Reports pagelet: Compensation tab.
- Direct Line Reports pagelet: Performance tab.
- Direct Line Reports pagelet: Time tab.
- Direct Line Reports pagelet: Succession tab.

Direct Line Reports Pagelet: Summary Tab

The Summary tab displays a high level overview of employee's job and rankings.


This example illustrates the fields and controls on the Direct Line Reports pagelet: Summary tab. You can find definitions for the fields and controls later on this page.





The grid displays your direct reports based on the reporting structure specified in the Direct Reports Setup Access Type Security.

The employee **Name** and the **Action** columns are frozen in the grid and these columns will be available on every tab in the grid.

Field or Control	Description
Name	<p>Displays the employee’s full name. Click the employee’s name link in the Name column to access the Talent Summary page for a person. The Talent Summary page displays various pagelets displaying much of the information available in the Direct Line Reports grid in greater detail.</p> <p>Employees with an Inactive status in HR will be shown on the My Organization page, by clicking the View My Organization link, only when it is necessary, to display the name so that drilling down to direct reports is possible. An inactive employee will not appear if he or she does not have direct reports.</p> <p>When you are using Position Management and the administrator has selected to allow empty positions, the text Empty Position will appear in the name field. When the administrator has set the system not to allow empty position, the inactive employee name will display in the name field through the View My Organization link, My Organization page, if the employee has direct reports.</p>

Field or Control	Description
First Name and Last Name	Displays the first and last names of the employee. These fields are delivered hidden but can be added using the Direct Reports Pagelet Setup page. Click the employee's first or last name link to access the Talent Summary page for a person.
Actions	<p>Click this menu drop-down list to select manager self service actions to perform for your employees. The system will direct you to the appropriate manager self service page.</p> <p>PeopleSoft delivers various manager self service transactions to work in conjunction with the Manager Dashboard that enables managers to view or manage employee information in the PeopleSoft database, as they would from the manager self service pages. This menu list also enables you to quickly access the Company Directory and Talent Summary pages for an employee.</p> <p>For a list of manager self service action available through the Manager Dashboard, see the "Related Actions" subtopic under Understanding the Direct Line Reports Pagelet Features.</p>
 (high potential icon)	This column displays the High Potential icon if an employee is identified as a high potential in the career plan. You can access this information by navigating to Workforce Development > Career Planning > Prepare Evaluation/ Career Plan > Manage Career Plan .
Job Title	<p>Displays the employee's job title. For example, an employee who holds two jobs and reports to the same manager for both of those jobs will have two rows of data in the grid, one for each job title.</p> <p>The Job Title field is available in both the Summary tab and the Job Details tab. The administrator has the ability to hide the Summary tab job title column separately from the Job Details tab job title column.</p>

Field or Control	Description
<p>Performance Rating</p>	<p>Displays a graphical representation of the most recent performance review rating for an employee. The number of stars is determined by the rating model that is being used. There will be one star for each value in the rating model. The performance rating that is shown is taken from the last completed performance review of the document type specified in the Direct Reports Pagelet Setup page. Pause over the star image to see the rating as text.</p> <p>To get the column to display the stars, you must enter numeric values in the Numeric Rating column on the Rating Model page. The pagelet uses the Numeric Rating value to determine the number of stars that should appear for each rating. If there is no Numeric Rating value for a rating in the rating model, the stars will not display.</p> <hr/> <p>Note: The Numeric Rating field is not a required field, so be sure to enter numeric values to get the star ratings to appear.</p> <hr/> <p>See “Rating Model Page” (PeopleSoft Human Resources Manage Profiles).</p>
<p>Position in Salary Range</p>	<p>Displays a graphical representation of an employee’s position in the salary range for that job. The vertical bar depicts where the employee’s salary falls in that range.</p> <p>Pause on the graphic to view the actual salary of the employee and view the minimum, midpoint, and maximum salary values for the job.</p>
<p> View My Organization</p>	<p>Click this link when you are a higher level manager to access the My Organization pagelet and view the same data for direct and indirect reports in an hierarchical grid.</p> <hr/> <p>Note: You will not see the View My Organization link when you do not have indirect reports.</p> <hr/>
<p> Headcount Analytics</p>	<p>Select this link to display a list of headcount analytic reports: Headcount Movement and Current Headcount. Select the appropriate report from the list. See “Viewing Quick Analytics Headcount Pivot Grids” (PeopleSoft Human Resources Administer Workforce).</p>

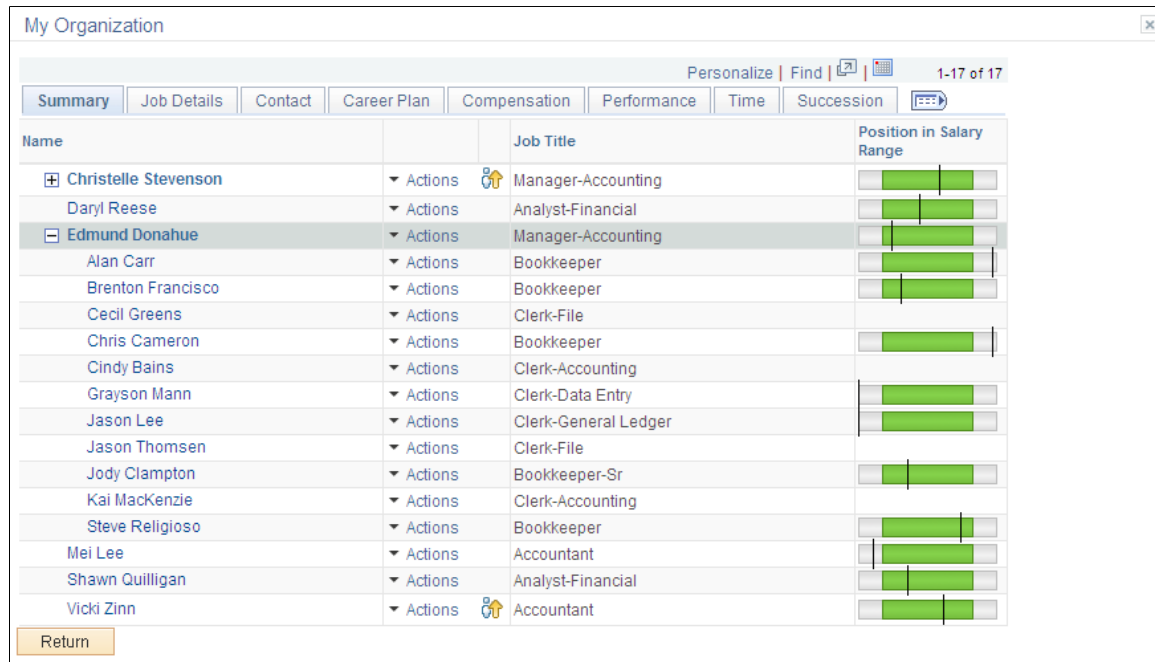
My Organization Pagelet

Use the My Organization pagelet (UX_DIRECTS_HGRID) to view information about your direct and indirect reports in a hierarchical list (or Hgrid) format.

Navigation:

Click the **View My Organization** link in the Direct Line Reports pagelet on the Manager Dashboard.

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



The screenshot shows the 'My Organization' pagelet interface. At the top, there are tabs for 'Summary', 'Job Details', 'Contact', 'Career Plan', 'Compensation', 'Performance', 'Time', and 'Succession'. Below the tabs is a table with columns for 'Name', 'Job Title', and 'Position in Salary Range'. The table lists 17 employees, with 'Edmund Donahue' selected. A 'Return' button is located at the bottom left of the pagelet.

Name	Job Title	Position in Salary Range
Christelle Stevenson	Manager-Accounting	
Daryl Reese	Analyst-Financial	
Edmund Donahue	Manager-Accounting	
Alan Carr	Bookkeeper	
Brenton Francisco	Bookkeeper	
Cecil Greens	Clerk-File	
Chris Cameron	Bookkeeper	
Cindy Bains	Clerk-Accounting	
Grayson Mann	Clerk-Data Entry	
Jason Lee	Clerk-General Ledger	
Jason Thomsen	Clerk-File	
Jody Clampton	Bookkeeper-Sr	
Kai MacKenzie	Clerk-Accounting	
Steve Religioso	Bookkeeper	
Mei Lee	Accountant	
Shawn Quilligan	Analyst-Financial	
Vicki Zinn	Accountant	

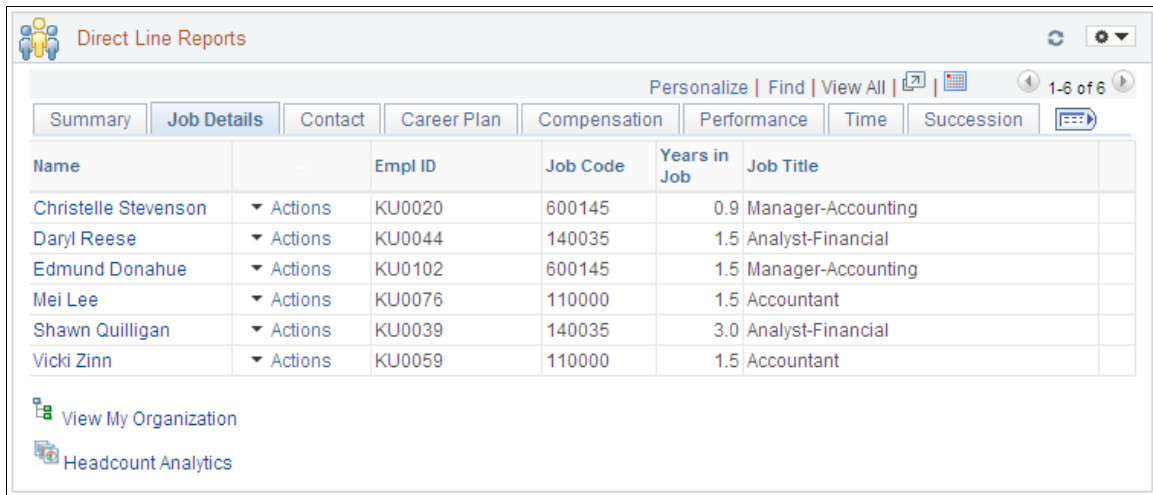
Higher level managers have the ability to view and complete actions for their direct and indirect employees. The page displays your reporting structure in an hierarchical list (Hgrid) format. Employees that are also managers are represented by a + or – sign preceding their name. You can expand (+) or collapse (–) different levels to view the reporting structure of managers and employees that report up to you.

Note: The page will display up to nine levels of managers and employees. The system will display a message when reporting structures exceed nine levels.






Direct Line Reports Pagelet: Job Details Tab

The Job Details tab displays information about the employee's current job and work history.

This example illustrates the fields and controls on the Direct Line Reports pagelet: Job Details tab. You can find definitions for the fields and controls later on this page.



The last column displays a schedule icon, if applicable. This indicates where an employee is today. The column displays only one icon to indicate the employee schedule for the day, even if more than one schedule applies. There are five icons and the grid determines which icon to display using this priority sequence:

Field or Control	Description
 (planned absence)	Indicates that the employee has a planned absence for today.
 (holiday)	Indicates that the employee is on a holiday break today.
 (not scheduled)	Indicates that the employee is not scheduled to work today based on the employee’s holiday schedule in Job Data.
 (training)	Indicates that the employee is in training today. Information is obtained from ELM or HR Training.
 (no show)	Indicates that the employee did not show up to work today when he or she is scheduled to work.

Direct Line Reports Pagelet: Contact Tab

The Contact tab displays different methods for contacting an employee.

This example illustrates the fields and controls on the Direct Line Reports pagelet: Contact tab. You can find definitions for the fields and controls later on this page.

Name	Actions	Telephone	Email	Location
Christelle Stevenson	▼ Actions	925.694.7920	HCMGENUser1	Corporation Headquarters
Daryl Reese	▼ Actions	925.555.5678	daryl.reese	Corporation Headquarters
Edmund Donahue	▼ Actions	925.694.7902	edmund.donahue	Corporation Headquarters
Mei Lee	▼ Actions	925.694.7976	mei.lee	Corporation Headquarters
Shawn Quilligan	▼ Actions	925.555.9856	shawn.quilligan	Corporation Headquarters
Vicki Zinn	▼ Actions	925.694.7959	vicki.zinn	Corporation Headquarters

View My Organization
Headcount Analytics

The employee's preferred phone number and email that appear on this page come from personal data in HR. The **Department** and **Chat** columns are hidden when delivered and must be enabled by the system administrator.

The last column displays an IM chat icon if the employee has defined an instant messaging ID in HR. A green icon will appear when the employee is active, or will be grayed out when the employee is not online. The icon will appear under the following conditions:

1. The employee has defined an instant messaging ID in HR.
2. The Instant Message Presence Icon is selected for direct line reports in the Org Chart Viewer.
3. The employee's IM protocol and IM domain matches the protocol and domain for the direct line reports in the Org Chart Viewer.

For more information about enabling the IM chat icon for direct reports, see the Columns field definition for instant messaging under [Direct Reports Pagelet Setup Page](#).

Direct Line Reports Pagelet: Career Plan Tab

The Career Plan tab displays information about the employee's mobility preferences and last review date.

This example illustrates the fields and controls on the Direct Line Reports pagelet: Career Plan tab. You can find definitions for the fields and controls later on this page.

Name		Review Date	Relocate?	International?	Travel?
Christelle Stevenson	▼ Actions	09/30/2010	✓		✓
Daryl Reese	▼ Actions	06/30/2010	✓	✓	✓
Edmund Donahue	▼ Actions	12/31/2010			✓
Mei Lee	▼ Actions	06/30/2010	✓		✓
Shawn Quilligan	▼ Actions	12/31/2010	✓		
Vicki Zinn	▼ Actions	09/30/2010	✓	✓	

View My Organization
Headcount Analytics

Use this page to view the data from the most recent effective dated career plan. The **Review Date** reflects the **Career Plan Review Date** for this current career plan. **Mobility** preferences are seen in the career plan, but are maintained in the person’s profile. A check mark identifies that an employee is willing to relocate, take an international assignment, or travel for a job.

Direct Line Reports Pagelet: Compensation Tab

The Compensation tab displays how employees fit into the salary range for their jobs.

This example illustrates the fields and controls on the Direct Line Reports pagelet: Compensation tab. You can find definitions for the fields and controls later on this page.

Name		Annual Salary	Currency	Minimum	Midpoint	Maximum	Compa-Ratio	Quartile
Christelle Stevenson	▼ Actions	32,240.00	USD	24,452.00	30,565.00	36,678.00	105	3
Daryl Reese	▼ Actions	40,560.00	USD	33,372.00	41,715.00	50,058.00	97	2
Edmund Donahue	▼ Actions	62,400.00	USD	58,916.00	73,645.00	88,374.00	85	1
Mei Lee	▼ Actions	40,040.00	USD	41,905.00	52,381.00	62,857.00	76	1
Shawn Quilligan	▼ Actions	48,006.40	USD	41,905.00	52,381.00	62,857.00	92	2
Vicki Zinn	▼ Actions	56,160.00	USD	41,905.00	52,381.00	62,857.00	107	3

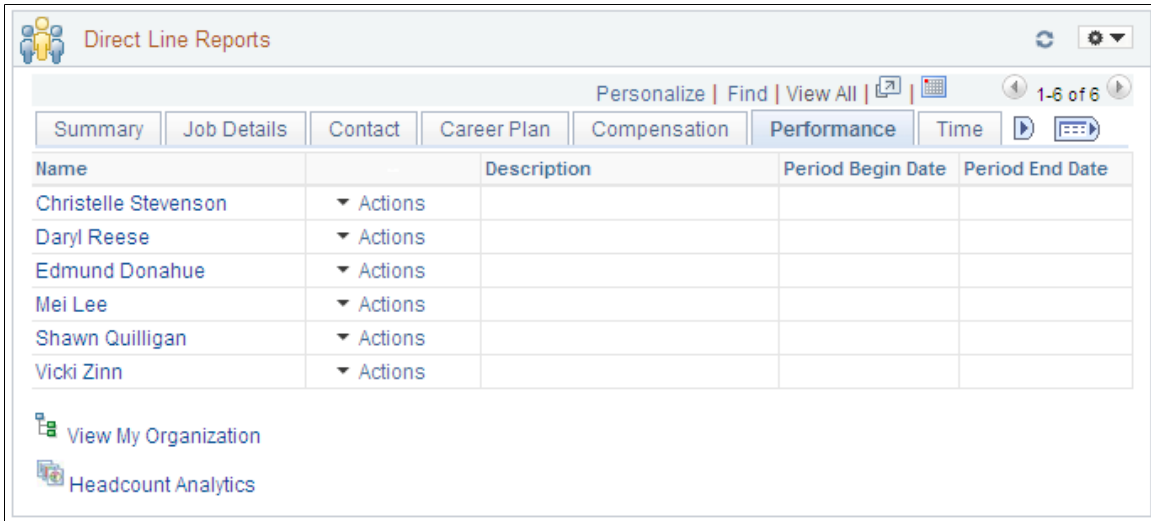
View My Organization
Headcount Analytics

Field or Control	Description
Minimum, Midpoint, and Maximum	Displays the minimum, midpoint and maximum amounts suggested for the salary range for the job code of the employee. If no salary grade is associated with the job code, no information will display. This information, along with the annual salary can be seen visually on the Summary tab in the Position in Salary Range column.
Compa-Ratio	<p>Indicates as a percentage where workers' salaries lie in relation to the midpoint range for their salary grades. The compa-ratio displays 100 percent, when the salary is exactly at the midpoint of the salary range. It is a number less than 100 when the salary is below the midpoint of the salary range. It is a number greater than 100 when the salary is greater than the midpoint.</p> <p>This field is delivered as available in both the Summary tab and the Compensation tab and displays the same information. The administrator has the ability to hide the Summary tab Compa-Ratio column separately from the Compensation tab Compa-Ratio column on the Direct Reports Pagelet Setup page.</p>
Quartile	Indicates where the employee's salary relates to the salary range when the range is divided into quarters. Values are 1, 2, 3, or 4, the higher the number, the higher the employee is within the salary range.
%Range	Displays how close the employee's salary is to the midpoint of the salary range. This field is delivered hidden by default.

Direct Line Reports Pagelet: Performance Tab

The Performance tab displays the latest performance review information for a manager's employees.

This example illustrates the fields and controls on the Direct Line Reports pagelet: Performance tab. You can find definitions for the fields and controls later on this page.

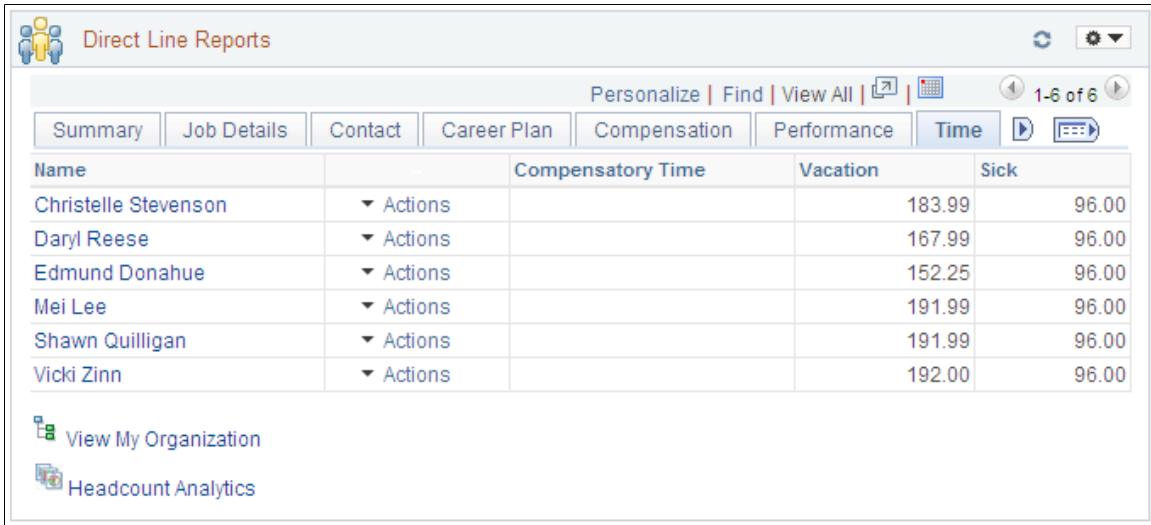


Field or Control	Description
Last Rating	Identifies the rating that the employee received on his or her last completed performance document for the document type that is specified on the Direct Reports Pagelet Setup page by the administrator. The rating is taken from the overall rating section of the performance document. If the document type has not been specified in the setup or the employee does not have a completed performance rating from the specified document, the performance rating information will not display.
Period Begin Date and Period End Date	Displays the dates the performance period began and ended where the employee received their Last Rating.

Direct Line Reports Pagelet: Time Tab

The Time tab displays the employee’s available compensatory, vacation, and sick hours.

This example illustrates the fields and controls on the Direct Line Reports pagelet: Time tab. You can find definitions for the fields and controls later on this page.

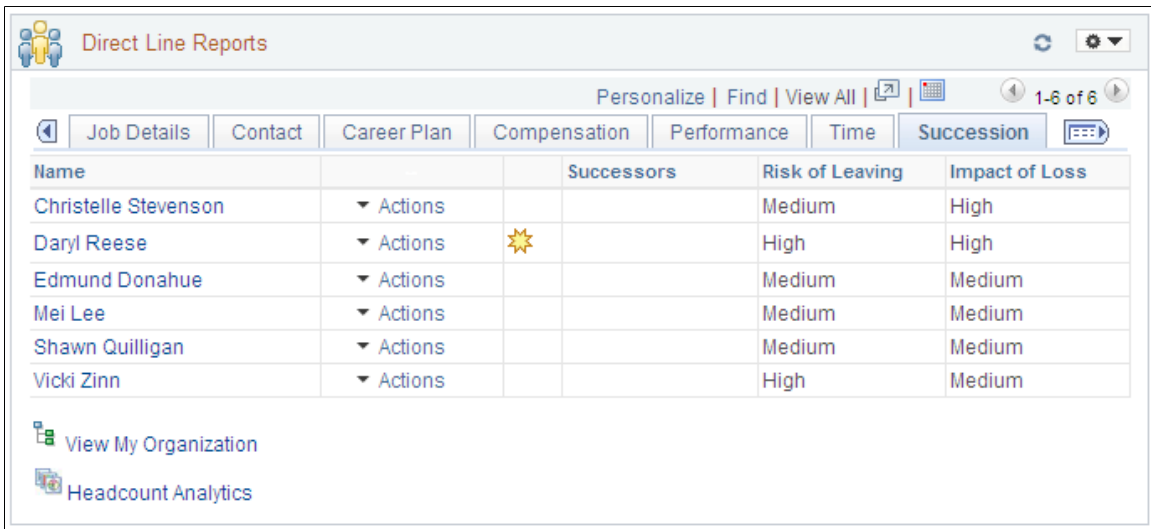



Field or Control	Description
Compensatory Time	Shows the number of comp time hours available to the employee. The comp time balance is retrieved from Time and Labor. An employee must be enrolled in Time and Labor to accrue compensatory time. You enroll employees in the Time and Labor by navigating to Time and Labor > Enroll Time Reporters > Maintain Time Reporter Data or by clicking the Time Reporter Data link on the Job Data - Employment Data page.
Vacation and Sick	Displays the number of vacation or sick hours available to the employee and balances are retrieved from Time and Labor. These fields are delivered hidden by default.
Absence Management Leave Balance 1, 2, and 3 (column label names will vary)	Displays user defined information from Absence Management. The administrator identifies these fields on the Direct Reports Pagelet Setup page in conjunctions with the Global Payroll and Absence Management pages. The Absence Management Leave Balance 3 field is delivered hidden by default.

Direct Line Reports Pagelet: Succession Tab

The Succession tab displays employee’s succession plan information.

This example illustrates the fields and controls on the Direct Line Reports pagelet: Succession tab. You can find definitions for the fields and controls later on this page.

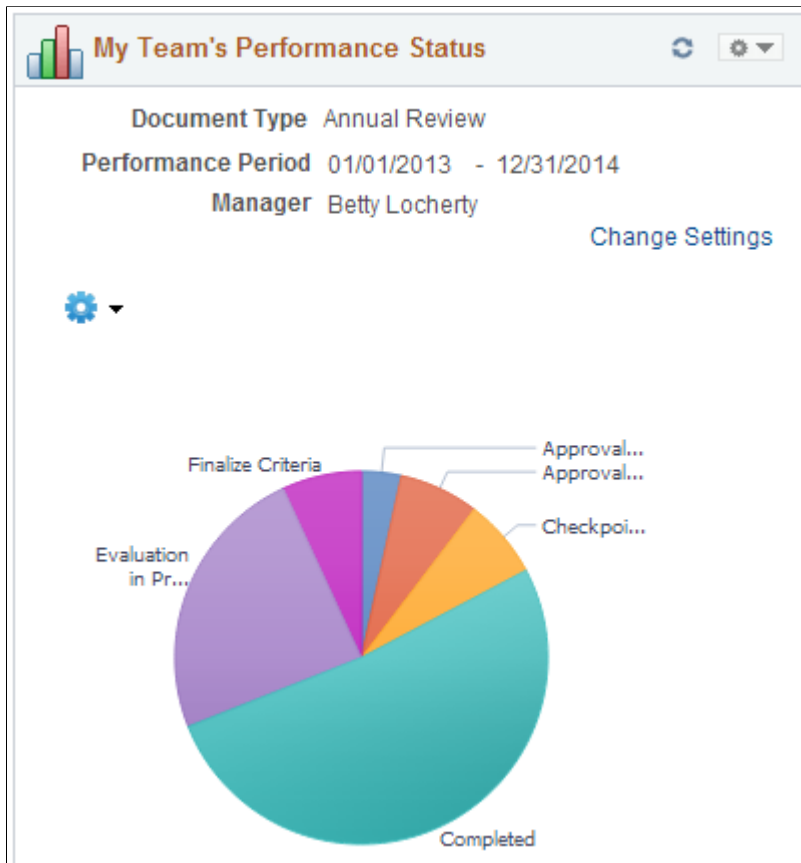


Field or Control	Description
 (key person)	The first column after the Actions field displays the Key Person icon to indicate that an employee has been identified as a vital, or key, employee within the organization for succession planning.
Successors	<p>Displays the number of candidates that have been identified as successors in the Succession Plan. The number of successors is the sum of the candidates listed on a succession plan for a key person.</p> <p>To add succession candidates to a person’s succession plan, create or modify a succession plan by navigating to Organizational Development > Succession Planning > Maintain Succession Plan and entering the candidates on the Candidates page.</p>
Risk of Leaving and Impact of Loss	Show the employee’s risk of leaving and the impact of that loss, as defined in the career plan for an employee.

My Team’s Performance Status Pagelet

The My Team’s Performance Status pagelet displays the performance status of documents that are owned by the manager’s team.

This example illustrates the fields and controls on the My Team's Performance Status pagelet.



Video: [ePerformance Team Performance Status Chart](#)


The pie chart shows the progress of ePerformance documents for the manager's organization. Documents represented in the pie chart are filtered by the document type, performance period, and manager that are specified at the top of the pagelet. The chart displays all supported document status, except for *Canceled*.

The performance status pivot chart supports these access types:

- By Supervisor ID (access type – 2)
- By Department Manager ID (access type – 3)
- By Reports To Position (access type – 4)
- By Part Posn Mgmt Supervisor (access type – 5)
- By Part Posn Mgmt Dept Mgr ID (access type – 6)

The chart uses the access type that is specified on the “Direct Reports Transaction Configuration Page” (Application Fundamentals) for the *EP_APPR_SELECT* component.

Note: To support the performance status pivot chart, run the Direct Reports Table Build process periodically. This process populates direct report flat tables corresponding to each access type. The pivot chart selects data from flat tables through PSQuery.

Field or Control	Description
Change Settings	<p>Click to access the Change Settings Page to update parameters that are used to build the chart.</p> <p>For example, if you wish to view the progress of a particular manager's team in your organization, you can change the manager using this link. The system updates the pie chart to show only documents that pertain to the newly selected manager.</p>
	<p>Click to select the Export Data option to export the data of the documents that are selected for the pie chart to a spreadsheet. This is the same as selecting the detailed view of a pie chart segment, except that this Export Data option includes all the documents, not just the ones in a particular document status.</p>
Filters and Status	<p>This control appears only if you click a pie chart segment and select a DrillDown To option to manipulate the pie chart data. By default, the document status of the clicked segment is selected.</p> <p>Select one or more document statuses for their documents to be included in the pie chart. For example, you may select two document statuses as filters and drill down to view documents of these two statuses by department.</p> <p>Click the Status link to return to the original pie chart display.</p>

Pie Chart Display

For all the documents that meet the filter criteria, they are represented in the pie chart by document status and sub-statuses (for example, *Approval Submitted*, *Checkpoint #*, and *Finalize Criteria*).

Hover over a pie chart segment to view its document status and the number of documents that are in this status.

Click a pie chart segment to:

- See a detailed view of the documents that are included in this status, in a grid format on a modal page.

The grid displays document information such as employee and manager names, document status, next due date and so on. A related action is available to users to open documents in the WorkCenter for edit (if the document status is not *Completed*) or review (if the document status is *Completed*, or if the user is not the manager listed on the document).

- Drill down to further segregate the data (documents) of the selected status (segment) by these options:
 1. Department—Data of the selected segment is represented by a pie chart, grouped by department.
 2. Location—Data of the selected segment is represented by a pie chart, grouped by location.
 3. Manager—Data of the selected segment is represented by a pie chart, grouped by manager.

Related Links

“Team Performance Status Page” (PeopleSoft ePerformance)

Change Settings Page

Use the Change Settings page (EP_PG_DOCSTS_SEC) to edit the default settings used for launching the My Team’s Performance Status pagelet.

Navigation:

Click the **Change Settings** link on the My Team’s Performance Status pagelet.

This example illustrates the fields and controls on the Change Settings page.

Name	Job Title	Department
Rosanna Channing	Senior Manager-Accounting	Corporate Accounting
Christelle Stevenson	Manager-Accounting	Accounts Receivable
Edmund Donahue	Manager-Accounting	Accounts Payable

Use this page to update the parameters used for launching the performance status chart. The system includes in the status chart documents that match the specified document type, period, and manager.

Field or Control	Description
Document Type, Period Begin and Period End	Update the default document type and evaluation period as needed. By default, the system displays the values that are specified in the “Assign Document Defaults Page” (PeopleSoft ePerformance).
Select a Different Manager	Displays the reporting structure that lists the direct and indirect managers of the logged on manager user, whose name is displayed in bold text in the grid. Select a manager for the system to filter documents for the chart to those that are owned by him or her.

Personalizing Pagelets

Each individual user can personalize the content for their pagelets by clicking the **Pagelet Settings** drop-down menu list on the pagelet headers. These topics discuss how to personalize pagelets.

Pages Used to Personalize Pagelets

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
<u>Personalize Alerts Page</u>	UX_ALERTS_PRS	Select alert types and urgency levels that should display in your Alerts pagelet. You can define the maximum number of rows to display on the pagelet.
<u>Personalize Business Objectives Alignment Page</u>	UX_EPO_ALIGN_PRS	Select the default objective to appear on the objective pagelets.
<u>Personalize My Reports Page</u>	PSRF_PGLT_OPTIONS	Personalize the My Reports pagelet.

Personalize Alerts Page

Use the Personalize Alerts page (UX_ALERTS_PRS) to select alert types and urgency levels that should display in your Alerts pagelet.

You can define the maximum number of rows to display on the pagelet.

Navigation:

Select the **Pagelet Settings** drop-down menu list in the Alerts pagelet header, and select **Personalize**.

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

Personalize Alerts

Alert Types to Include

- Anniversary Alerts
- Birthday Alerts
- eCompensation
- ePerformance
- Expiring Licenses/Certificates
- Expiring Memberships
- Scheduled Training

Alerts Level to Display

- Critical ()
- Warning ()
- Informational

Number of Alerts to Display

*Number of Alerts

Save
Cancel

Use this page to personalize which alert types and level should appear on the Alerts pagelet. This page can contain these three sections, if enabled by the administrator:

Field or Control	Description
Alert Types to Include	Select which alert types that the Alerts pagelets should display. Only those enabled by the administrator will be available for selection. Deselect an alert type to not have it appear on the Alert pagelet.
Alerts Level to Display	Select urgency levels to have only those alerts associated with these levels appear in the pagelet.
Number of Alerts	Define how many of alerts should appear in the pagelet. If your alerts exceed this number, you can click the View All link on the pagelet to view all alerts.

Related Links

[Alerts Pagelet Setup Page](#)

Personalize Business Objectives Alignment Page

Use the Personalize Business Objectives Alignment page (UX_EPO_ALIGN_PRS) to select the default objective to appear on the objective pagelets.

Navigation:

- Select the **Pagelet Settings** drop-down menu list in the Objective Alignment pagelet header, and select **Personalize**.
- Select the **Pagelet Settings** drop-down menu list in the Business Objective Alignment pagelet header, and select **Personalize**.

This example illustrates the fields and controls on the Personalize Business Objectives Alignment page. You can find definitions for the fields and controls later on this page.

<i>Field or Control</i>	<i>Description</i>
Business Objectives	Select the preferred business objective to show on the Objective Alignment and Business Objective Alignment pagelets when you are associated with more than one objective. The default objective you select here will show on both pagelets. If you have not defined a default value, the system will display the most recently created business objective.
Section	Select the preferred section of the business objective to show on the Objective Alignment and Business Objective Alignment pagelets. The default section you select here will show on both pagelets.

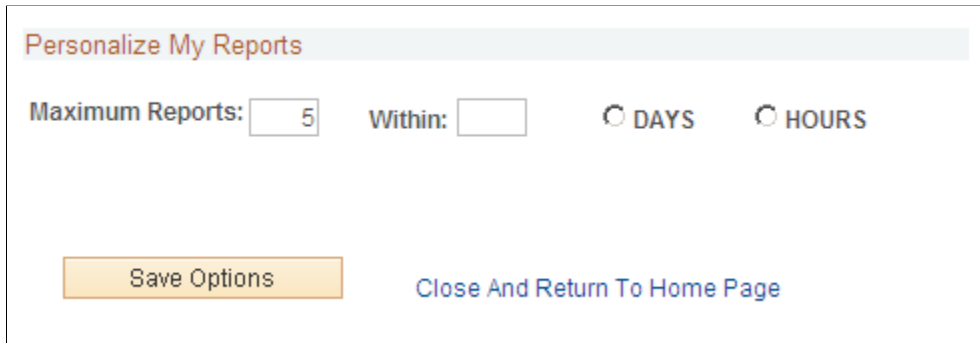
Personalize My Reports Page

Use the Personalize My Reports page (PSRF_PGLT_OPTIONS) to personalize the My Reports pagelet.

Navigation:

Select the **Pagelet Settings** drop-down menu list in the My Reports pagelet header, and select **Personalize**.

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



The screenshot shows a form titled "Personalize My Reports". It contains the following elements:

- A header bar with the text "Personalize My Reports".
- A label "Maximum Reports:" followed by a text input field containing the number "5".
- A label "Within:" followed by an empty text input field.
- Two radio buttons: "DAYS" (selected) and "HOURS".
- An orange button labeled "Save Options".
- A blue link labeled "Close And Return To Home Page".

Identify the number of reports that the My Reports pagelet should display in the grid as well and the time frame in which to display them.

Personalizing Column and Sort Order within the Pagelet Grids

Managers can personalize the columns that appear in many of the Manager Dashboard pagelets. You do this by clicking the Personalize link on the pagelet above the grid. These pagelets allow you to change column and sort order within the pagelet grids:

- Pending Approvals
- Direct Line Reports
- My Job Openings

This topic discusses how to personalize the content of the pagelet grids.

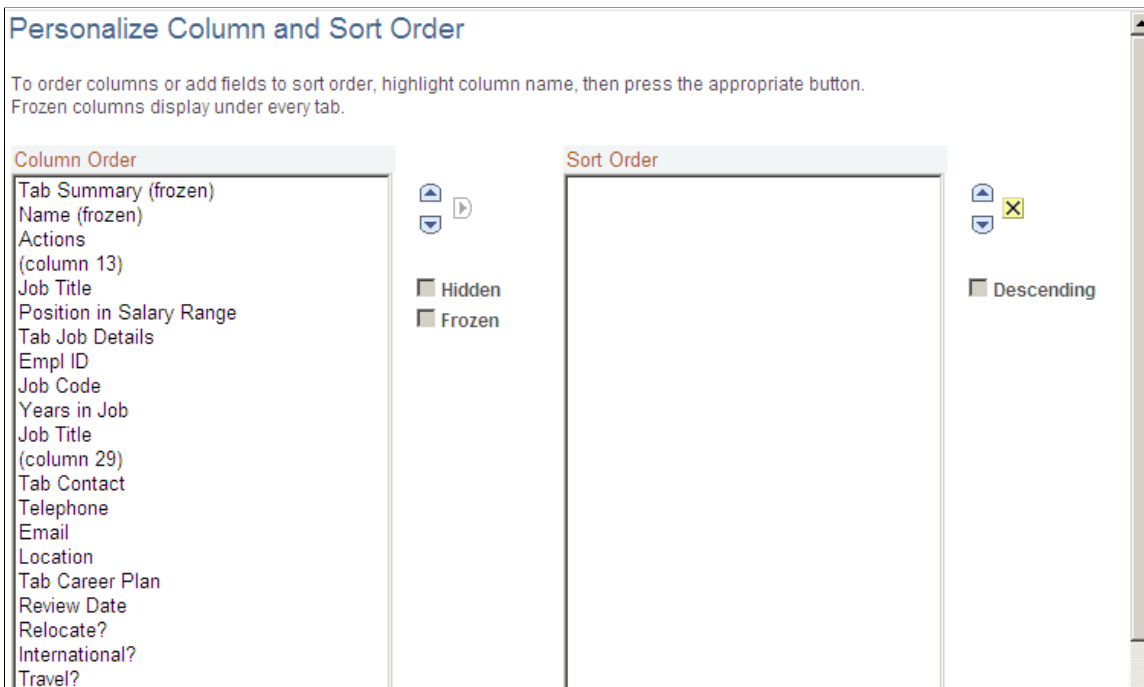
Personalize Column and Sort Order Page

Use the Personalize Column and Sort Order page to manage the column and sorting order of a grid within a pagelet.

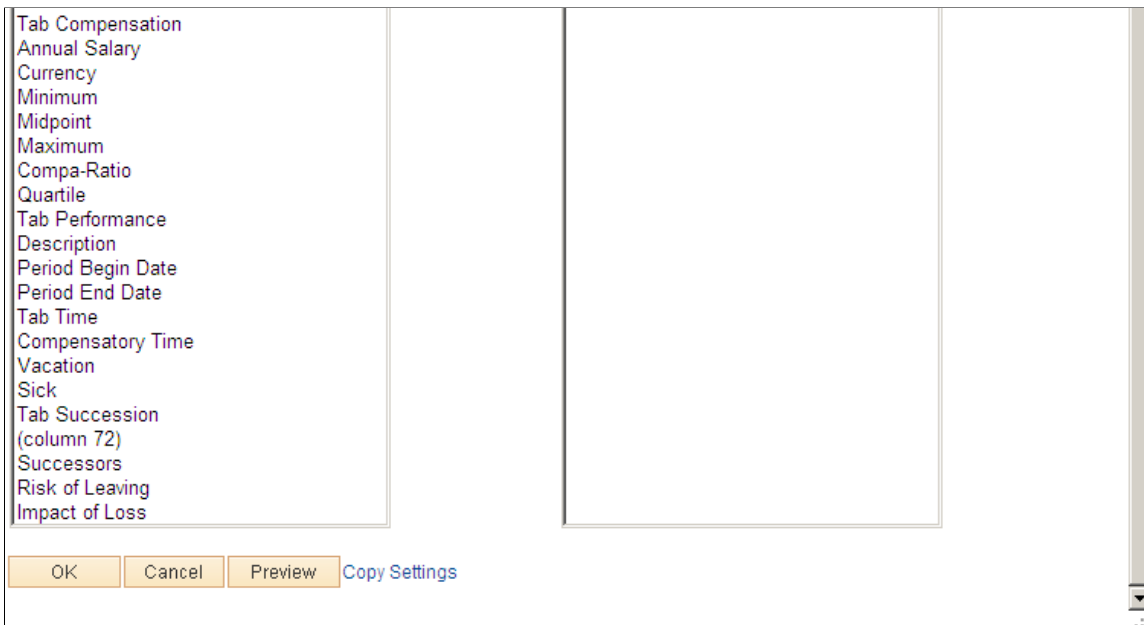
Navigation:

Select the **Personalize** link above the pagelet grid

This example illustrates the Personalize Column and Sort Order page for the Direct Line Report pagelet (1 of 2).



This example illustrates the Example of the Personalize Column and Sort Order page for the Direct Line Report pagelet (2 of 2).



Use this page to hide, freeze, or reorder columns in your pagelet. All the dashboard Personalize Column and Sort Order pages are similar to the example shown here, where the fields that available for personalizing are specific to the grid columns available in the pagelet.

To hide a column, click a column name in the left column and select the **Hidden** check box. When you freeze a column, all the columns that precede it will also be frozen.

The rows in a grid typically sort by a predefined order. For example, the My Job Openings pagelet displays rows of data in descending order of job opening number. To override this default sort order, click the column or columns you want to sort data by. Click the **Add to Sort** right arrow button to move the rows to the **Sort Order** group box. The grid rows sort by the order you have the columns listed here. Click a column name in the **Sort Order** group box and select the **Descending** check box to have the rows sort in descending order.

To change the order of columns, click the column and use the **Move Up** and **Move Down** arrows to change the column order.

Changing the Column Order to a Different Tab for Direct Line Reports

The Direct Line Reports pagelet is different in that the columns are grouped by tabs on the pagelet grid for ease of viewing. The page lists the tab names preceded by the word *Tab*. Columns that should appear in this tab are listed under this tab name. To change a column to a different tab, click the column name and move it under the designated Tab name.

Previewing Your Column Personalizations

To view your changes before saving them to the system, click the **Preview** button at the bottom of the page.

Chapter 10

Using the Talent Summary Pagelets

Understanding the Talent Summary Content and Layout

The Talent Summary page provides managers with a comprehensive view of talent data related to an individual employee through the use of a dashboard.

Note: Talent Summary has been replaced by Employee Snapshot in Fluid. For more information, see [Understanding the Employee Snapshot Content and Layout](#).

With the Talent Summary pagelets, managers have access to an employee's talent data from one location instead of accessing several components separately.

This example illustrates an example of the Talent Summary page.

The screenshot shows the Talent Summary page for Rosanna Channing. The page is divided into several sections:

- Profile Overview:** Includes a photo, name (Rosanna Channing), job title (Senior Manager-Accounting), job code (000135), address (4500 Corporate Lane, Pleasanton, CA 94588), work phone (925.555.1234), location (Corporation Headquarters, Building 2000), email (HCMGENUser1@ep6023fems.us.oracle.com), full/part time status (Full-Time), employee ID (KU0046), and birthday (01/04). HR Status is Active, Org Relationship is Employee, Talent Category is Achiever (★★★★), Last Start Date is 08/29/1988, Years of Service is 20.4, Date in Current Job is 11/04/2008, Years in Current Job is 4.2, Last Performance Period is Jan 2011 to Dec 2011, Potential Rating is High Potential Candidate, and Last Performance Rating is Exceeds Expectations.
- Job Related Competencies:** A bar chart showing proficiency levels for various competencies: Managerial Efficiency (High), Resource Planning (Medium), Develop & Implement... (High), Financial Accounting (High), Financial Analysis (High), Financial Planning (High), Provides Direction (High), and Directiveness/Asserti... (High).
- Base Salary History:** A line graph showing base salary from 2008 to 2012. The salary starts at approximately \$62K in 2008 and rises to over \$70K by 2012.
- Performance History:** A bar chart showing performance ratings from Dec 2007 to Dec 2011. Ratings range from Meets Expectations to Exceeds Expectations.
- Current Salary:** Annual Base Salary is \$72,800.00, Pay Frequency is Monthly, and the rate is 95%.
- Career History:** A table showing job titles, job codes, start dates, and end dates for previous roles.
- Succession Options:** A table showing successor information, including name (Betty Lochery), type (Person), order (1 of 3), and plan status (Draft).
- Responsibilities:** A table showing responsibilities and proficiency levels: Adhere to Accounting Standards (4-Very Good), Manage and motivate team (4-Very Good), Prepare and monitor department budgets (4-Very Good), and Research Analytical Trends (4-Very Good).
- Career Planning:** Includes mobility preferences (Travel, Take Global Assignments, Relocate) and an official path table.

Use the Talent Summary page to manage and analyze information about your workforce. This page enables you to:

- View an employee's profile details such as competencies, responsibilities, and certifications.

- Examine career and succession plans for your employees.
- View employee compensation data and compare it to the job salary range.
- Analyze performance history.
- Assess your staff's learning and education.

Note: The system checks direct report access for the Talent Summary page as a whole as well as for access to the contents of each pagelet. If a manager does not have security access to the component, the related pagelets will not show up in the dashboard. If a manager has access to the component, but not to the direct reports access needed for the component, then the related pagelet will display a message that the manager does not have access to this information for the employee.

For a list of pagelets delivered with the Talent Summary feature, see [Understanding the Talent Summary Dashboard Pagelets and Setup](#).

Customizing the Talent Summary Page

You can also customize the look of your Talent Summary page. On the Talent Summary dashboard, you can drag and drop pagelets to a desired location on the page. You can also minimize or remove pagelets from the dashboard by using the corresponding icons in the header. To have a pagelet appear after deleting it from the dashboard, access the Personalize Content: Talent Summary page to select the pagelet.

To further personalize Talent Summary dashboard content and layout, use the **Personalize Content** and **Layout** links:

- *The Personalize Content: Talent Summary page*—enables you to select or deselect pagelets you wish to view on your Talent Summary page.
- *The Personalize Layout: Talent Summary page*—enables you to determine whether you want your Talent Summary page to display in a 2- or 3-column layout. You will also select which pagelets should appear in which column.

Note: The pagelets available on the Personalize Content page are based on permission lists. If a user does not have access to a permission list, for example, if the Manager Dashboards - JPM (*HCCPJP2200*) permission list is removed from the Manager Dashboard role, the profile based pagelets may not be listed for selection from the Personalize content page.

Related Links

[Understanding Accessing Direct Line Report Information on the Dashboard Pagelets](#)
[Defining the Manager Dashboard Content and Layout](#)

Displaying the Talent Summary Page and Pagelets

These topics discuss how to display the Talent Summary page and pagelets.

Pages Used to Display the Talent Summary Page and Pagelets

Page Name	Definition Name	Usage
Talent Summary - Employee Selection Criteria Page	HR_DR_DIRECTREPORT	Select a direct or indirect report from this page to view the employee's talent summary data.
Talent Summary Page	HC_TALENT_SUMMARY	View the Talent Summary pagelet content by selecting or deselecting pagelets that should appear on your Talent Summary page.
Personalize Content: Talent Summary Page	PORTAL_HPCOMP	<p>Define the Talent Summary pagelet content by selecting or deselecting pagelets that should appear on your Talent Summary page.</p> <p>Standard PeopleSoft role-based security ensures that managers can access only the pagelets appropriate to their roles.</p> <p>The Talent Summary page delivers two performance history pagelets: a graphical view of performance history and a table view of performance history.</p> <p>The pagelets available on the Personalize Content page are based on permission lists. If a user does not have access to a permission list, for example, if the <i>Manager Dashboards - JPM</i> (HCCPJP2200) permission list is removed from the <i>Manager Dashboard</i> role, the profile based pagelets may not be listed for selection from the Personalize content page.</p> <p>The Personalize Content: Talent Summary works like the Personalize Content: Manager Dashboard Page.</p>

Page Name	Definition Name	Usage
Personalize Layout: Talent Summary Page	PORTAL_HPLAYOUT	<p>Define the Talent Summary pagelet layout by selecting either a 2- or 3-column layout style you wish to display on your Talent Summary page. Identify the pagelets that should appear in each column by moving pagelets from one column to the next. The columns list only those pagelets you have selected on your Personalize Content: Talent Summary page.</p> <p>The Talent Summary page is optimized using the 3-column layout.</p> <p>The Personalize Layout: Talent Summary works like the Personalize Layout: Manager Dashboard Page.</p>

Talent Summary - Employee Selection Criteria Page

Use the Talent Summary - Employee Selection Criteria page (HR_DR_DIRECTREPORT) to select a direct or indirect report from this page to view the employee’s talent summary data.

Navigation:

- **Talent Summary**
- **Manager Self Service > Talent Summary**

This example illustrates the fields and controls on the Talent Summary - Employee Selection Criteria page . You can find definitions for the fields and controls later on this page.

Talent Summary

Employee Selection Criteria



Select the employee whose Talent Summary you would like to view.

As Of Date

Betty Locherty's employees Personalize | Find | ⁽²⁾ First 1-13 of 13 Last

Select	Name	Empl ID	Job	Empl Status	HR Status	Position
<input type="button" value="Select"/>	Beatrice Test	K0G004	0	Active	Active	
<input type="button" value="Select"/>	<input type="checkbox"/> Cynthia Adams	KU0101	0	Active	Active	19000074
<input type="button" value="Select"/>	Diane Palmer	K0MTX005	0	Active	Active	
<input type="button" value="Select"/>	Ginger Buckalew	K0G005	0	Active	Active	
<input type="button" value="Select"/>	<input type="checkbox"/> Jill Chancellor	KUL702	0	Active	Active	
<input type="button" value="Select"/>	<input type="checkbox"/> John Breamar	HUX001	0	Active	Active	
<input type="button" value="Select"/>	Mei Lee	HXCMP0076	0	Active	Active	19000071
<input type="button" value="Select"/>	<input type="checkbox"/> Netty Owyang	KU0055	0	Active	Active	
<input type="button" value="Select"/>	<input type="checkbox"/> Rosanna Channing	KU0046	0	Active	Active	
<input type="button" value="Select"/>	<input type="checkbox"/> Steve Parsons	R-RDSP14	0	Active	Active	19000013
<input type="button" value="Select"/>	Susan Hoinck	KU0119	0	Active	Active	
<input type="button" value="Select"/>	<input type="checkbox"/> Tina Palisco	KU0071	0	Active	Active	
<input type="button" value="Select"/>	<input type="checkbox"/> Willies Ray	HXPSFT105	0	Active	Active	10101010

View information about your direct and indirect reports. As a higher level manager, you will see your employees in a hierarchical list, or hierarchal grid (Hgrid) format. This enables you to expand or collapse the list to view or hide the indirect reports that report to your direct report managers.

Field or Control	Description
As Of Date	Displays the current date, which dictates the reporting structure that appears in the employee list as of this date.
Find Employee	<p>The Find Employee link above the header grid enables you to select from the same list of direct and indirect reports as if you expanded all nodes.</p> <p>To search within your direct reports organization, click the Find Employee link. Enter criteria on the Find Employee page (HRDR_SRCH_EMPS_SEC), and then click Search. Select an employee to open in the transaction.</p> <p>The Find Employee link appears only when the transaction applies to individuals. It does not appear for transactions where you select groups of individuals until you get to the point where you select individuals in that group.</p> <hr/> <p>Note: The Direct Reports UI setup determines which employees are available for selection and which fields appear on the <Application Context> - Employee Selection Criteria page. See “Configuring Direct Reports Functionality” (Application Fundamentals).</p>
HR Status	<p>The HR Status field appears on the Employee Selection Criteria page only if the Allow Indirect Reports check box is selected on the Direct Report Transaction Configuration page.</p> <p>Inactive employees can have active employees reporting to them directly or indirectly.</p>
Select	<p>Click this button to open the Talent Summary page for this person.</p> <p>The Select button may display inactive for these reasons:</p> <ul style="list-style-type: none"> • You do not have access to an individual in the Direct Reports setup but you have access to their direct reports. • The employee’s status is inactive. Having the grid display the inactive person enables you to access employees under the inactive person who have not yet been reassigned to a new manager. • The row reflects a position instead of an employee.
 (Expand) or  (Collapse)	Click these buttons to expand or collapse the hierarchical grid to view or hide your indirect reports (the direct reports of your subordinates).

Talent Summary Page



Use the Talent Summary page (HC_TALENT_SUMMARY) to view the Talent Summary pagelet content by selecting or deselecting pagelets that should appear on your Talent Summary page.


Navigation:

- Click **Select** for an employee on the Talent Summary - Employee Selection Criteria page.
- Click the name link of an employee from the Direct Line Reports pagelet of the Manager Dashboard.
- Click the **View in Talent Summary** link from the Actions menu of an employee in the Direct Line Reports pagelet of the Manager Dashboard.
- Click the **View in Talent Summary** link from the **Actions** menu of an employee within the Org Chart Viewer pages.

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


The fields in the header are defined by the administrator and may vary from what is shown here.



Field or Control	Description
 (Additional Jobs icon)	Displays the Additional Jobs icon next to the employee’s name when an employee holds multiple jobs within the organization. Pause over the icon to see the name of the other job or jobs held by this person.
 (Key Person icon)	Displays the Key Person icon next to the employee’s name to indicate that this employee has been identified as a vital, or key, employee within the organization for succession planning.

Field or Control	Description
Actions	<p>Click this menu drop down list to select manager self service actions to perform for your employees. The system will direct you to the appropriate manager self service page.</p> <p>PeopleSoft delivers the various self service transactions to work in conjunction with the Talent Summary page that enables managers to view or manage employee information in the PeopleSoft database, as they would from the manager self service pages.</p> <p>For a list of self service actions available from the Talent Summary page, see Understanding Related Actions and Self Service Transactions.</p>
 (IM icon)	<p>Displays the IM icon, if enabled. Pause over the icon to see the employee's chat ID. Click the ID to open the chat window. The page uses the following conditions to determine if it should display the IM icon:</p> <ol style="list-style-type: none"> 1. The employee has defined an instant messaging ID in HR. 2. The Instant Message Presence Icon is selected for direct line reports in the Org Chart Viewer. 3. The employee's IM protocol and IM domain matches the protocol and domain for the direct line reports in the Org Chart Viewer.
Select Another Employee, Return To Manager Dashboard, or Return to Org Chart Viewer	Click this link to return to the page from which you accessed the Talent Summary page.
Personalize Content	Click this link above the header to open the Personalize Content: Talent Summary page and select or deselect pagelets you want to view on your Talent Summary page.
Personalize Layout	Click this link above the header to open the Personalize Layout: Talent Summary page to define the column layout of your Talent Summary page.

Viewing IM Icons in the Header

Different IM icons will be displayed based on the following:

Field or Control	Description
	Indicates the employee is available on the IM Protocol specified.

Field or Control	Description
	Indicates the employee is either not available on the IM Protocol specified or the employee does not have an account on that IM Protocol.
	Indicates there is an error connecting to the IM Protocol.

Related Links

[Understanding the Talent Summary Dashboard Pagelets and Setup Header Rate Boxes Page](#)

Viewing the HR Job and Plan Careers Pagelets

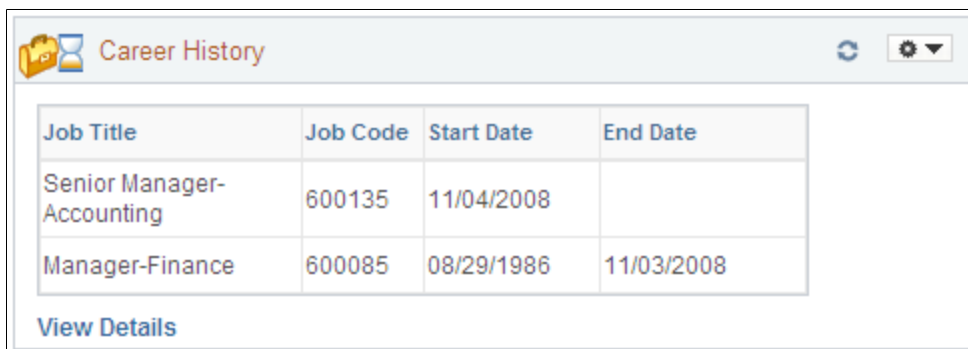
These topics discuss the:

- Career History pagelet.
- Career Planning pagelet.

Career History Pagelet

The Career History pagelet displays job summary information for the employee.

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



The screenshot shows the Career History pagelet interface. It features a title bar with a 'Career History' label and a settings icon. Below the title bar is a table with four columns: Job Title, Job Code, Start Date, and End Date. The table contains two rows of data. Below the table is a 'View Details' link.

Job Title	Job Code	Start Date	End Date
Senior Manager-Accounting	600135	11/04/2008	
Manager-Finance	600085	08/29/1986	11/03/2008

[View Details](#)

This pagelet displays a grid with a list of jobs that the employee holds and has held in the past, most recent jobs first.

Field or Control	Description
View Details or View All	<p>Click this link to open the Career History model window to view all of the employee’s job history. The Career History model window also displays the employment record number for the person.</p> <p>The View Details link appears when there are five or fewer rows of job history.</p> <p>The View All link appears when there are more than five rows of history.</p>

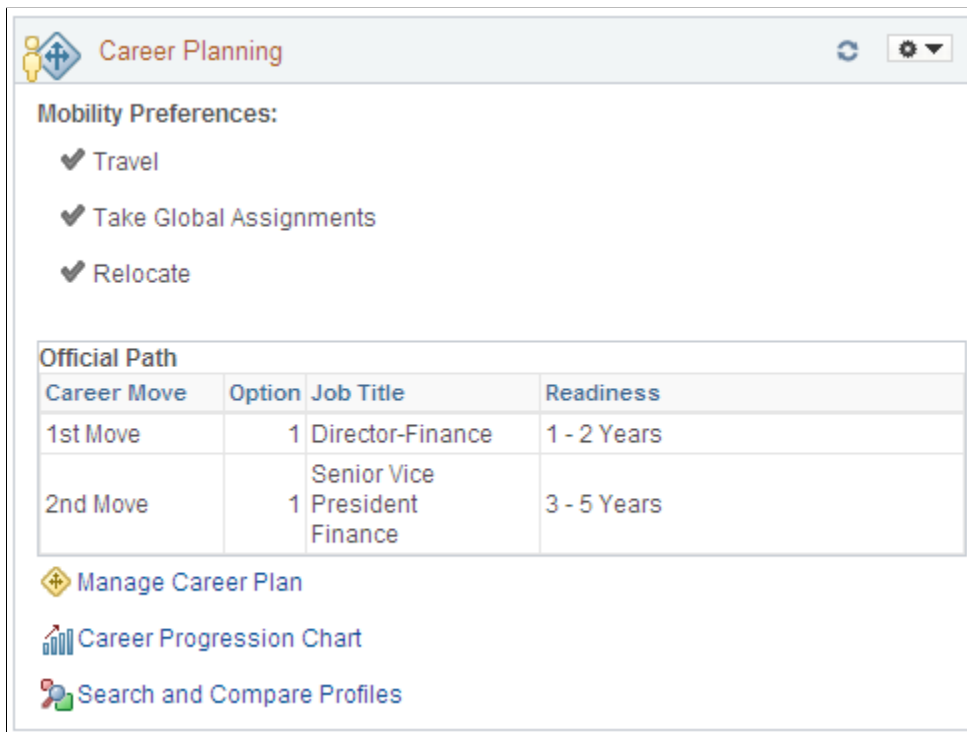
Related Links

“Viewing Worker Job History” (PeopleSoft Human Resources Administer Workforce)




Career Planning Pagelet

The Career Planning pagelet displays career paths for the employee.

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



Use this pagelet to view the mobility preferences for an employee. The pagelet may also display up to 3 grids to view the employee’s different types of career paths: the **Official Path**, the **Manager Approved Path**, and the **Personal Path**, if applicable. The grids will appear only when there is data to display. The **Personal Path** grid will appear only if it has data to display and if the employee has not marked the personal career path as private.

Field or Control	Description
Willing To	Display the mobility preferences for this employee. Mobility preferences are maintained in the person's profile. The check mark indicates an employee is willing to relocate, travel, or take an international assignment for his or her job.
Career Move	Identifies the order of career steps. For example, <i>1st Move</i> is the first step in the suggested career path.
Option	Displays the preference order of jobs when more than one job is associated with a career move.
Job Title	Identifies the suggested job for an employee's career progression.
Readiness	Displays when this employee is or will be ready for this career move. Values are: <i>1-2 Yrs</i> , <i>3-5 Yrs</i> , <i>Emergency</i> , <i>Ready Now</i> , and <i>Retirement</i> .
 Manage Career Plan	Click this link to open the Manage Career Plan component and manage career information for this employee.
 Career Progression Chart	Click this link to open the Career Progression Chart page and see a graphical representation of an employee's career path.
 Search and Compare Profiles	Click this link to open the Search for Profiles page to perform profile comparisons between this employee and other employees or jobs within the organization.
View All <number>	Click this link when more than five rows of data appear in a grid to view additional career move options for this person.

Related Links

[“Person Profile Page”](#) (PeopleSoft Human Resources Manage Profiles)

[“Understanding Plan Careers”](#) (PeopleSoft Human Resources Plan Careers and Successions)

Viewing the HR Manage Profiles Pagelets

These topics discuss the various HR Manager Profiles pagelets.

Related Links

[PeopleSoft Human Resources Manage Profiles](#)

[PeopleSoft eDevelopment](#)

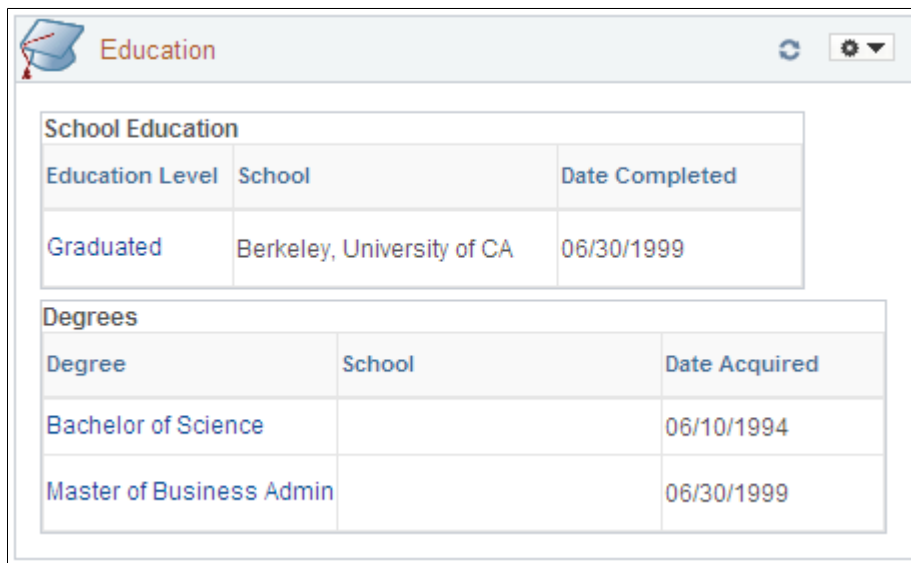
Pages Used to View Additional Manage Profiles Pagelet Content

Page Name	Definition Name	Usage
Job Related Competencies Pagelet	HCTS_JOB_COMP_SEC	View all job related competencies when there are more competencies associated with an employee's job than the 10 the pagelet can display.
Personal Competencies Pagelet	HCTS_PERS_COMP_SEC	View all the employee competencies not associated with the employee's job. This link is available when the employee has more than five non-job related competencies.

Education Pagelet

The Education pagelet displays the schools attended and degrees completed by this employee.

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



Up to two grids can display on this pagelet: the **School Education** grid and the **Degrees** grid. If there is not data to populate one of the grids, only one grid will appear.

View an employee's schooling and degrees acquired. You can click the names of the education level and degree name links to open the Profile Details page and view additional details about this employee's education.

Field or Control	Description
View All <number>	Click this link when more than five rows of data appear in either educational grid to view additional education of degrees for this person.

Honors and Awards Pagelet

The Honors and Awards pagelet displays the honors and awards this employee has received.

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



Managers use this pagelet to view a list of honors and awards obtained by an employee and the date it was received. The grid sorts the information by received date, more recent first.


Field or Control	Description
Honor and Award	Click the honor and award name link to open the View Profile page and view more details about the honor or award for this person.
View All <number>	Click this link when more than five honors or awards are associated with the employee's person profile.

Interest List Pagelet

The Interest List pagelet displays the job profiles in which an employee may have an interest.

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



Field or Control	Description
Profile	Displays a list of job profiles (in this case typically jobs or positions) that are of interest to the employee. Click the profile name link to open the Manager Self-Service Job Profile page and view more information about the job’s profile, such as competencies, responsibilities, or qualifications.
Assigned By	Identifies the person that added this job profile to the employee’s interest list.
Compare Profiles	Click the Compare icon button to open the Compare Profiles - Match Result page to compare this job’s skills and competencies with that of the employee’s current skills and competencies.
View All <number>	Click this link when the employee is associated with more than five profiles and view all profiles on the interest employee’s list.
 Interest List	Click this link to open the Team Interest List page in Manager Self Service. There you can review, update, or delete job interests for this person.

Job Related Competencies Pagelet

The Job Related Competencies pagelet displays the list of competencies associated with this employee’s job (non-person) profile compared to the employee’s (person) profile.

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



This pagelet displays the primary nonperson profile type as the target profile. Define Primary profile types by navigating to **Set Up HCM > Product Related > Profile Management > Profiles > Assign Default Profile Types**. For example, if the **Primary NonPerson Profile Type** field is *JOB*, only the profile competency types of *JOB* will show.

This pagelet displays a bar graph of the target versus actual proficiencies for competencies found on the job (non-person) profile related to the employee. The vertical line on the graphic represents the minimum target level an employee should have in this job. The colored horizontal bars represent the employee's proficiency level.



The color of the bar changes based on these employee proficiency levels:

- *Red bar that appears below the target line:* Employee's proficiency is less than the target level of the job.
- *Dark gray bar that appears even with the target line:* The employee is on target and matches the target level for a competency.
- *Green bar that appears beyond the target line:* The employee exceeds that of the target level for the job.
- *Only the light gray competency bar appears:* The employee has not been rated for this job competency.

Pause over a competency bar to view the full name of the competency, the target level rating, and the employee's rating. Click the bar to open the View Profiles page to see additional details about the rating for this employee.

The types of evaluations to display and the number of year to display them are defined on the Talent Summary Setup - Other Pagelets page.

See [Other Pagelets Page](#).

Field or Control	Description
View All <number>	Click this link when more than 10 competencies are associated with the job (non-person) profile.
Legend	Click this link to open the Legend page and view the bar descriptions.
 Exceptions	Click this link to open the Exceptions page and view chart exceptions where the competency actual rating model of the employee does not match the target rating model of the job.
 Search and Compare Profiles	Click to open the Search for Profiles page and perform a profile comparison between profiles.

Note: Competencies that the employee has been rated on but not associated with the employee's non-person job profile are visible on the Personal Competencies pagelet.

Personal Competencies Pagelet

The Personal Competencies pagelet displays the list of competencies associated with this employee's person profile, but not the employee's job (non-person) profile.

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



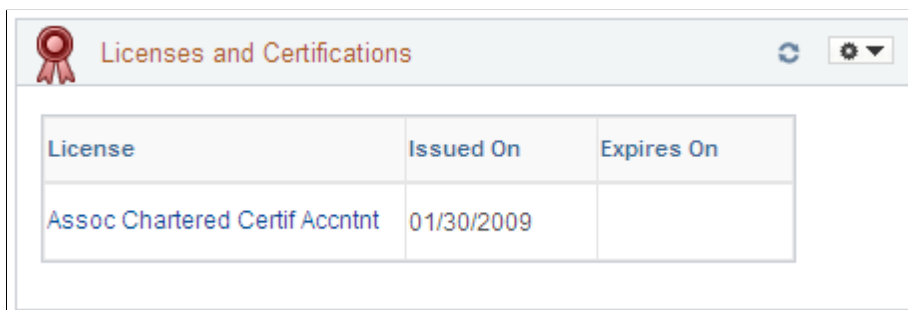
Competency	Proficiency
Business Banking	3-Good
Strategic Planning	4-Very Good

Field or Control	Description
Competency	<p>Click the competency name link to open the View Profile page and view more details about the competency rating for this person.</p> <p>For competencies that have multiple reviewers for the same evaluation type, data for the most recent effective date displays on the pagelet. The types of evaluations to display and the number of years to display them are defined on the Talent Summary Setup - Other Pagelets page.</p> <p>See Other Pagelets Page.</p>
View All <number>	Click this link when more than five non-job related competencies are associated with the employee's person profile.

Licenses and Certifications Pagelet

The Licenses and Certifications pagelet displays the licenses and certificate held by this employee and their expiration date.

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



License	Issued On	Expires On
Assoc Chartered Certif Acctnt	01/30/2009	

The grid sorts the rows by expiration date, then by issued date.

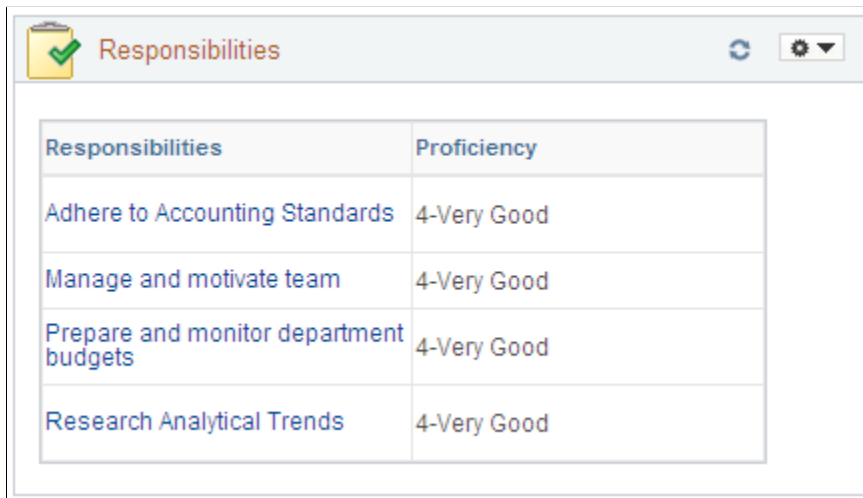
Field or Control	Description
<warning icon>	<p>This column displays a warning icon, if applicable. The grid can display the Critical or Warning icons based on the alert level definitions set up by the administrator on the Alerts Pagelet Setup page: The grid will also display this icon when a certificate or licenses is past due.</p> <p>See Alerts Pagelet Setup Page.</p>
License	Click the license name link to open the View Profile page and view more details about the license or certificate for this person.

<i>Field or Control</i>	<i>Description</i>
View All <number>	Click this link when more than five licenses or certificate are associated with the employee’s person profile.

Responsibilities Pagelet

The Responsibilities pagelet displays the list of responsibilities associated with an employee’s person profile.

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

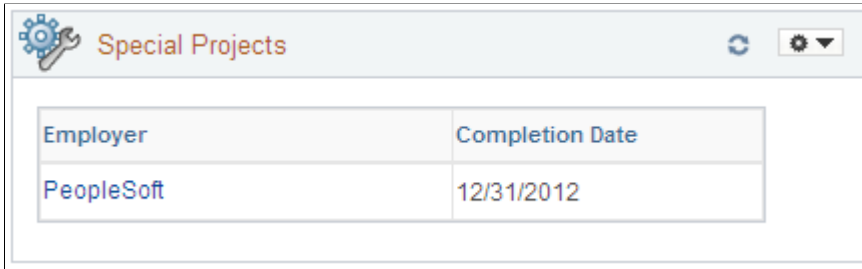


<i>Field or Control</i>	<i>Description</i>
Responsibilities	Lists the responsibilities held by this employee as defined on the person profile. Click the responsibilities name link to open the Profile Details page and view additional information about the responsibilities.
View All <number>	Click this link when more than five responsibilities are listed on the employee’s person profile.

Special Projects Pagelet

The Special Projects pagelet displays projects assigned to this employee.

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

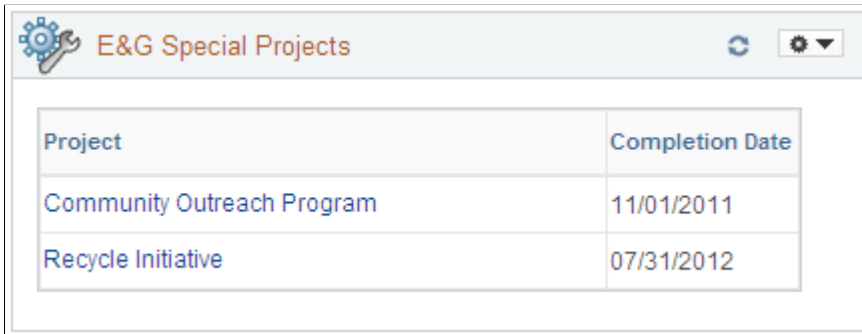


Field or Control	Description
Employer	Lists the projects assigned to this employee. Projects are sorted by completion date. Click the employer name link to open the Profile Details page. The number or years to display a project is defined on the Talent Summary Setup - Other Pagelets page. See Other Pagelets Page .
View All <number>	Click this link when more than five projects are listed for the employee.

(E&G) E&G Special Projects Pagelet

The E&G Special Projects pagelet displays Education and Government projects assigned to this employee.

This example illustrates the fields and controls on the E&G Special Projects pagelet . You can find definitions for the fields and controls later on this page.



Field or Control	Description
Project	Lists the E&G projects assigned to this employee. Projects are sorted by completion date. Click the project name link to open the Profile Details page. The number or years to display a project is defined on the Talent Summary Setup - Other Pagelets page. See Other Pagelets Page .

<i>Field or Control</i>	<i>Description</i>
View All <number>	Click this link when more than five projects are listed for the employee.

Viewing the Compensation Pagelets

These topics discuss the compensation pagelets.

Base Salary History Pagelet


The Base Salary History pagelet displays the compensation history for an employee.

This example illustrates the fields and controls on the Base Salary History pagelet. You can find definitions for the fields and controls later on this page.



Use this pagelet to view salary change history. The pagelet displays the last five years of compensation. Pause over the graph line points to view the exact employee's salary for a specific year.

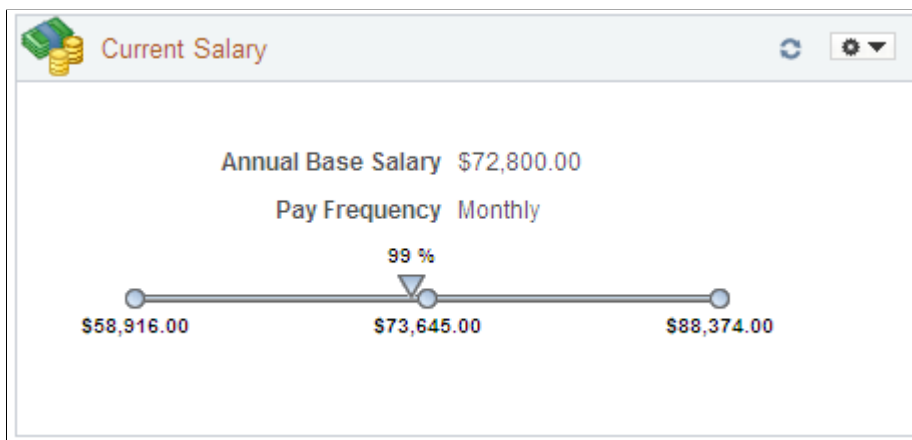
Note: In order for the pagelet to display data, it may be necessary to modify the access type for the View Compensation History (HR_SS_MG_COMP_HIST) component on the Direct Reports Configuration page by navigating to **Set Up HCM > Common Definitions > Direct Reports for Managers > Direct Reports Interface**

Field or Control	Description
 View Compensation History	Click this link to open the Compensation History page in self service and view the employee's salary, variable cash, and variable noncash information.

Current Salary Pagelet

The Current Salary pagelets displays the salary range for an employee's job and where the employee falls within that range.

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



The pagelet displays the minimum, midpoint, and maximum of the salary grade for this employee's job. The arrow icon that runs across the salary range bar indicates the employee's compa-ratio. The percentage that appears is in comparison to the midpoint of the range. You can pause over the arrow icon to view the employee's actual salary.

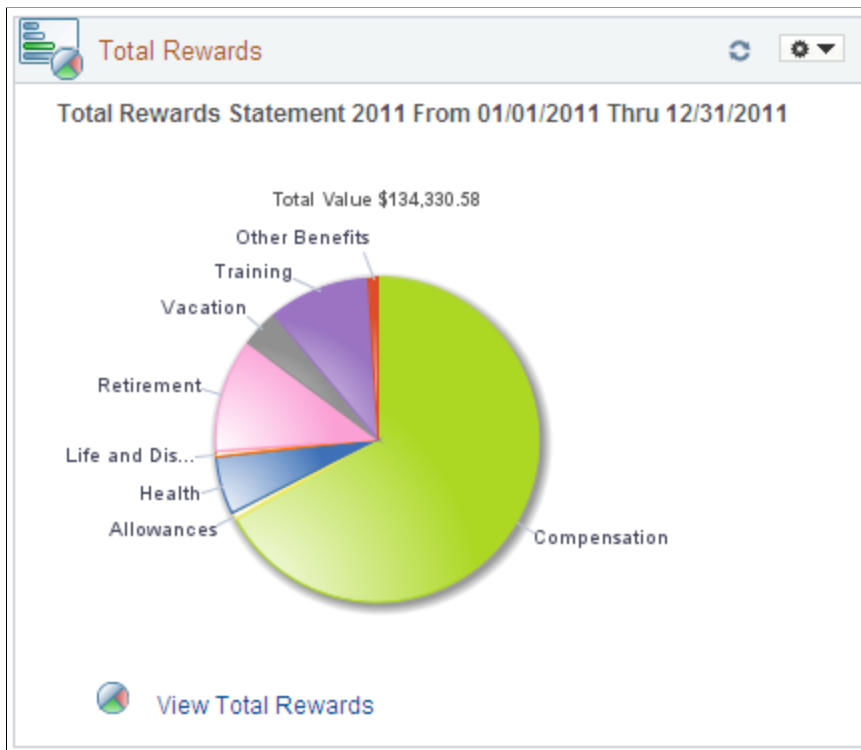
Related Links

“Understanding Salary Grades and Steps” (PeopleSoft Human Resources Manage Base Compensation and Budgeting)

Total Rewards Pagelet


The Total Rewards pagelets displays the composition of an employee's compensation and rewards package.

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



Use this pagelet to view a summary chart depicting a graphical representation of compensation and benefit summary information. The pagelet displays the most recent total rewards information for the employee.

The top of the pagelet displays the employee’s total rewards value amount. Pause over various pie slices in the graphic to see the amount associated with each rewards component and its percentage of the reward. Click each individual pie slice to view more details about that reward. For example, a health benefit may represent 10 percent of your total reward, and by clicking the Health pie slice, you can see that the benefit is comprised of health and dental insurance.

Field or Control	Description
 View Total Rewards	Click this link to open the View Total Rewards page. Review compensation and benefit summary information for a particular reward period.

Note: The Total Rewards pagelet will display data only when the Total Rewards feature has been implemented.

Related Links

“Understanding the Administer Compensation Total Rewards Statement” (PeopleSoft Human Resources Administer Compensation)

“Understanding Reward Data Sources” (PeopleSoft Human Resources Administer Compensation)

Viewing the ePerformance Pagelets

The Talent Summary page delivers two performance history pagelets and the user can choose to display either of them.

Data for the graph and grid is derived from the completed performance documents for an employee. The manager listed on the performance document can access both current and historical documents. When managers have access to the View Only Documents transaction, they can view any document for direct or indirect reports based upon the Direct Reports setup. This includes past documents for which the employee was not their direct or indirect report. If the manager does not have access to the View Only Documents transaction, then access is limited to the Historical Documents transaction where the user is listed as a manager on the document.

Note: It is best to use the graphical view of performance history when the rating model has not changed over performance periods. However, if the rating model has changed one or more times, it may be better to use the table grid view. The graphical view does not represent a change in rating model.

These topics discuss the ePerformance pagelets.

Performance History Pagelet as a Graph

This Performance History pagelet displays the overall rating (y-axis) for an employee from past performance periods (x-axis) using a bar graph.

This example illustrates the fields and controls on the Performance History pagelet in graphical format. You can find definitions for the fields and controls later on this page.




We recommend that you use the graphical view when the rating model has not changed over performance periods.

This pagelet displays a bar graph. The colored vertical bars represent the employee's overall performance rating for the period specified. Each distinct job title is represented by a different colored bar. A legend for each job title appears below the graph. The administrator determines the document type and how many periods worth of data to show on the Talent Summary Setup - Other Pagelets page.

See [Other Pagelets Page](#).

Pause over a period rating bar to view the performance dates and employee rating. Click the bar to open the Document Details page to see additional details about the rating for this employee and access the performance evaluation.

Field or Control	Description
View Details	Click this link to view the performance history in a grid format.
 Current Document - <status>	Click this link to view or manage the most current performance evaluation that is in progress in WorkCenter.

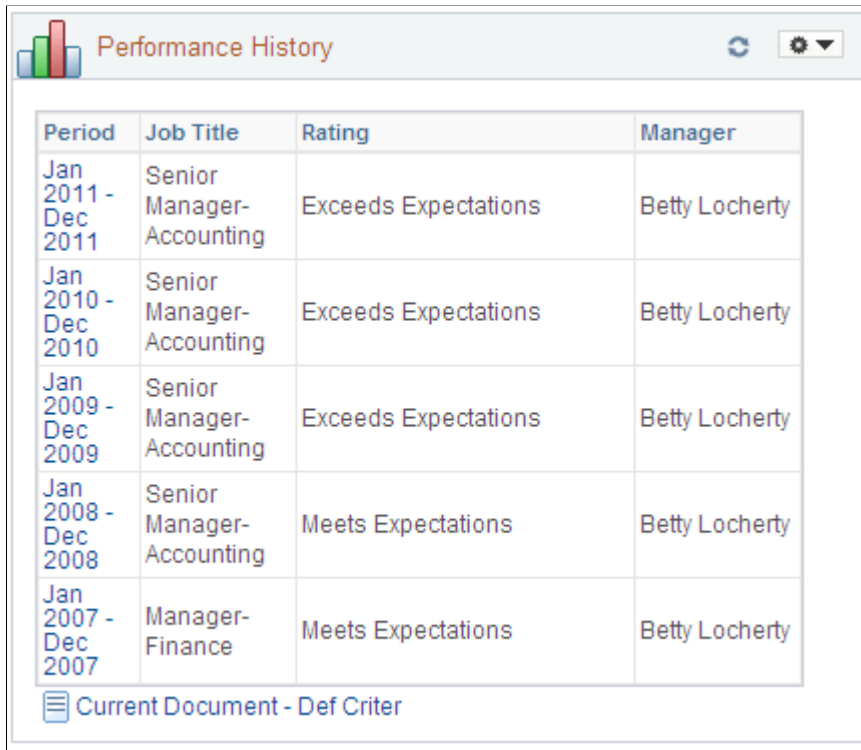
Related Links

“(Classic) Viewing Evaluation Ratings” (PeopleSoft ePerformance)

Performance History Pagelet in a Table Grid

This Performance History pagelet displays the overall rating for an employee from past performance periods using a table grid.

This example illustrates the fields and controls on the Performance History pagelet in a table grid format. You can find definitions for the fields and controls later on this page.



Period	Job Title	Rating	Manager
Jan 2011 - Dec 2011	Senior Manager- Accounting	Exceeds Expectations	Betty Locherty
Jan 2010 - Dec 2010	Senior Manager- Accounting	Exceeds Expectations	Betty Locherty
Jan 2009 - Dec 2009	Senior Manager- Accounting	Exceeds Expectations	Betty Locherty
Jan 2008 - Dec 2008	Senior Manager- Accounting	Meets Expectations	Betty Locherty
Jan 2007 - Dec 2007	Manager- Finance	Meets Expectations	Betty Locherty

Current Document - Def Criter

If a rating model has changed one or more times over performance periods, it is recommended you use the grid view. The graphical view does not represent a change in rating model. This format also supports ADA (Americans with Disability Act of 1990) accessibility.

The administrator determines the document type and how many periods worth of data to show on the Talent Summary Setup - Other Pagelets page.

See [Other Pagelets Page](#).

The grid sorts the rows by period end date, most recent first.

Field or Control	Description
Period	Display the performance review period. Click this link to open the Document Details page and view additional information about this performance review.
Current Document - <status>	Click this link to view or manage the most current performance evaluation that is in progress in WorkCenter.

Related Links

“(Classic) Viewing Evaluation Ratings” (PeopleSoft ePerformance)

Viewing the Plan Succession Pagelet

This topic discusses the Succession Options pagelet.

Succession Options Pagelet

The Succession Options pagelet displays all positions, jobs, and persons for which the employee is slated as a successor.

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



This pagelet displays succession plan data for which a manager has access to. The rows in the grid are sorted by status then readiness.

Field or Control	Description
Successor For	Displays the person, job, or position from a succession plan for which an employee is a successor. Click this link to open the Succession 360 page and view or update the succession plan details.
Type	Indicates the type of succession plan with which this person is associated. Succession plan types are <i>Person</i> , <i>Position</i> , or <i>Job</i> .
Order	Displays this employee's candidate ranking order for this succession plan.
<readiness status>	This column displays the readiness status of this person for this job or position. The icons that appear in this grid are defined in the Readiness ledger at the bottom of this pagelet, or pause over an icon to view text defining this icon.
Plan Status	Displays the status of this succession plan. Values are <i>Official</i> or <i>Draft</i> .

<i>Field or Control</i>	<i>Description</i>
View All <number>	Click this link when the employee is associated with more than five succession plans to view all succession plans linked to this employee.

Viewing the Enterprise Learning Management Pagelet

This topic discusses the Learning pagelet.

Learning Pagelet

The Learning pagelet displays an overview of learning events for a particular employee. This information comes from the Enterprise Learning Management (ELM) system.

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




<u>Title</u>	<u>Required</u>	<u>Status</u>	<u>Due Date</u>
Professional Development		In-Progress	
Business Management		Pending Approval	
Getting to Yes		Pending Approval	
Sales Pipeline Management		Pending Approval	
Basics of Management		Planned	

View All 7

Team Learning

Use this pagelet to see an overview of learning activities of an employee. This pagelet highlights required learning and certifications which are expired or in warning status, with the **Past Due** and **Due Soon** warnings appearing first. The pagelets presents the classes, programs, and courses in *Planned* status.

The **View** drop-down field enables you to filter the data that you see in the grid.

Field or Control	Description
View	Select which view of data you wish to display in the grid. Choices are: <ul style="list-style-type: none"> • <i>All Learning</i> – does not filter out information but shows all learning scheduled for your employee • <i>Required Learning</i> – filters the grid to show training that is only marked as required, in warning status, or expired.
Title	Click the title link to open an application page that corresponds to the type of learning item it is, for example, a class, course, or program. <hr/> Note: The data for ELM Learning is pulled from ELM database through IB Integration setup.
Required —  (Due Soon) and  (Past Due)	Displays the Due Soon or Past Due icon if the learning item has reached the date that defines an item as due soon or past due. If the item is not past due or due soon, the field is left blank.
View All <number>	The pagelet displays five rows of information in the grid. Click this link to open a modal Learning grid page to view all rows of employee learning. The number of employees that appear in the page grid will appear in the link name.
 Team Learning	Click this link to open the Team Learning page in manager self service.

See the documentation for *PeopleSoft Enterprise Learning Management*, “Defining Defaults”.

Viewing the Employee Snapshot

Understanding the Employee Snapshot Content and Layout

The Employee Snapshot feature provides managers and administrators with a comprehensive view of talent data related to an individual employee through the use of dashboards and tiles within the PeopleSoft Fluid User Interface pages. With Employee Snapshot, managers and administrators have access to an employee's talent data from one location instead of accessing several components separately.

These videos demonstrate Fluid Employee Snapshot features:

Video: [PeopleSoft Employee Snapshot](#)

Video: [Image Highlights, PeopleSoft HCM Update Image 19: Employee Snapshot](#)

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

Video: [Image Highlights, PeopleSoft HCM Update Image 23: Employee Snapshot for HR](#)

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

Video: [Image Highlights, PeopleSoft HCM Update Image 26: Employee Snapshot for Administrators](#)

Video: [Image Highlights, PeopleSoft HCM Update Image 28: Employee Snapshot Learning Integration and Tile](#)

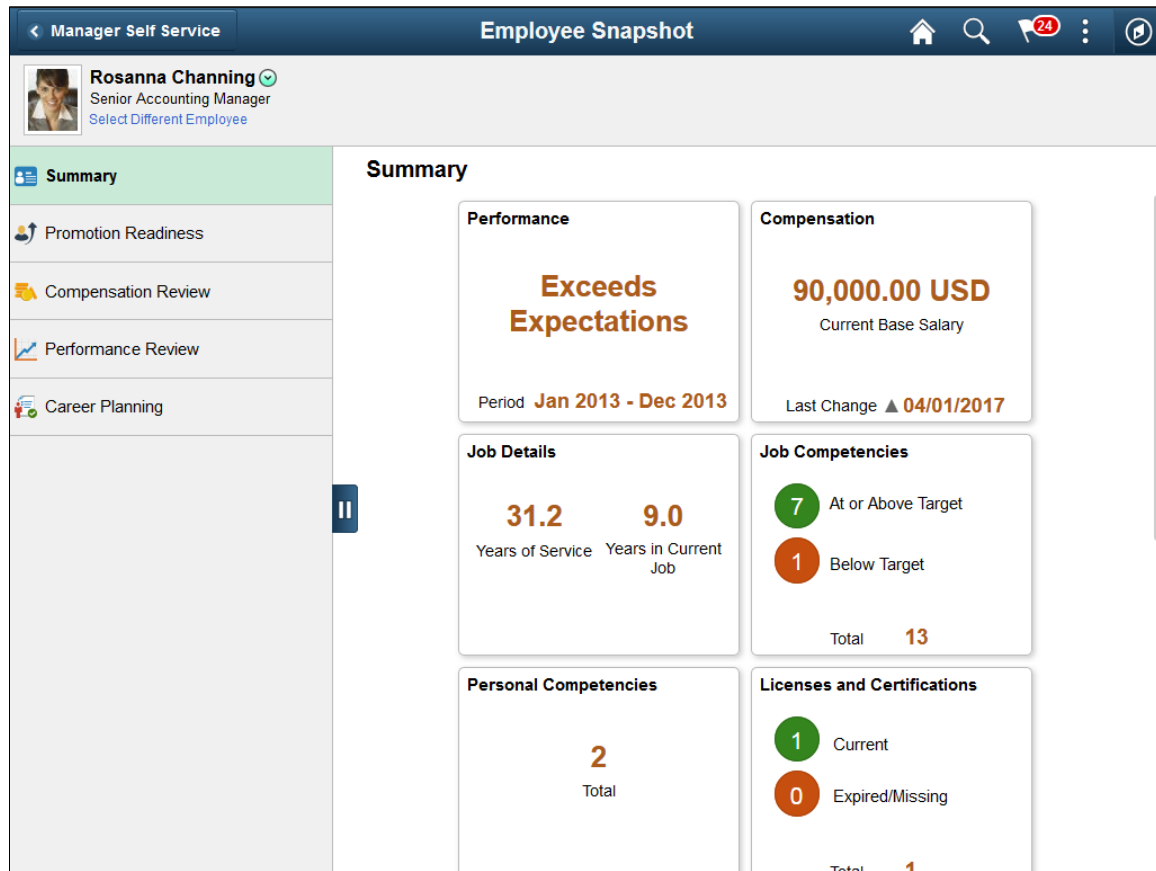
Video: [Image Highlights, PeopleSoft HCM Update Image 28: Employee Snapshot Related Actions and Nav Collection Updates](#)

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

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

The Employee Snapshot page appears in a three panel layout. The top panel displays the header and includes the employee's name, job title, and the Related Actions menu icon, where you can access other self service transactions for this employee, if applicable. The left panel lists the various dashboard categories delivered with the Employee Snapshot. When using a small form factor, such as a phone, this panel is collapsed when you access the Employee Snapshot and dashboards. Click the tab to open the category list and change dashboard views. The right main panel displays the employee content dashboard. Fluid dashboards are PeopleSoft pages that aggregate and display tiles that share a common or similar purpose. These dashboard pages provide quick access to useful information by presenting concise but feature-rich tiles to the user. These tiles can vary in function and complexity, enabling you to see not only an overview, but to drill into your data to access detailed information.

This example illustrates the Employee Snapshot layout and content.



The PeopleSoft HCM application delivers these Employee Snapshot dashboards and tiles, to manage and analyze information about your workforce:

- Employee Snapshot - Summary Dashboard: See a high level overview of data about one of your employees using these tiles:
 - Performance
 - Compensation
 - Job Details
 - Job Competencies *
 - Personal Competencies *
 - Licenses and Certifications *
 - Responsibilities *
 - Honors and Awards *
 - Job Interests
 - Development
 - Education

- Career Plans
- Employee Snapshot - Promotion Readiness Dashboard: Analyze promotion readiness for an employee using these tiles:
 - Current Salary
 - Job Competencies
 - Salary History
 - Performance History
 - Personal Competencies *
 - Learning
 - Job History
- Employee Snapshot - Compensation Review Dashboard: Review employee compensation data using these tiles:
 - Current Salary
 - Bonus Earnings
 - Salary History
 - Performance History
 - Total Rewards
 - Employee Impact
- Employee Snapshot - Performance Review Dashboard: View talent-related information about an employee to see their overall performance using these tiles:
 - Performance History
 - Responsibilities *
 - Special Projects *
 - E&G Special Projects *
 - Personal Competencies *
 - Licenses and Certifications *
 - Job Competencies
 - Development History

- [Employee Snapshot - Career Planning Dashboard](#): View employee career paths and assess their preparation for new roles using these tiles:
 - Career Plans
 - Succession Plans
 - Job Competencies
 - Employee Impact
 - Job Interests
 - Personal Competencies *

Important! * Indicates that viewable content may also be controlled by the of the person profile role security options. See the security access to tile and page content that follows for more information.

Creating Custom Profile Tiles

Note: Talent administrators can also add custom profile-related tiles to any dashboard. See the [Understanding How to Display Content on the Configurable Profile Tiles and Pages](#) and [Viewing Configurable Profile Content Tiles and Pages](#) topics for more information.

Security Access to Tile and Page Content: Direct Reports and Profile Management

The Employee Snapshot tiles and pages use direct report and profile management role security to enable or restrict managers or administrators in viewing potentially confidential data.

Direct Report Access

The system checks direct report access for the Employee Snapshot pages as a whole as well as for access to the contents of each tile. If a user (manager or administrator) does not have security access to a component or tile, then the related tile will display a message saying that he or she does not have access to the tile. If a user has access to that component and tile but not to the employee's data, then the related tile will display a message that he or she does not have access to this information for the employee.

Profile Management Role Security

When data is associated with a person's profile, the viewable content for the user may also be restricted by profile role security. A person's profile data is made up of content items—skills and abilities associated with content types such as competencies, languages, responsibilities, and so forth. For a list of dashboard tiles that contain profile data, see the previous section and those items marked with an asterisks (*).

Profile Management enables you to use PeopleTools security roles to further define your Profile Management security. When PeopleTools roles are associated with a profile role, the system looks to the user profile to see who has access to a content section for this profile type. Those users that have the direct report access and the role associated with the profile role will have access to the content according to the parameters set up for the profile type.

This video demonstrates the enhanced security for Profile Management:

Video: [Image Highlights, PeopleSoft HCM Update Image 31: Enhanced Security for Profile Management](#)

For more information on defining role security for a profile content type (or tile), see the “Content Section Page” (PeopleSoft Human Resources Manage Profiles), Role Security section.

Accessing the Employee Snapshot Pages and Tiles

As delivered, managers and administrator can access Employee dashboards and pages by selecting the following:

- Managers:
 - [Employee Snapshot Tile](#) from the *Manager Self Service* fluid home page.
 - Related Actions menu icon next to an employee’s name in fluid and select the **View Employee Snapshot** menu item. See the “Related Actions for Manager Self Service Pages” (Application Fundamentals) topic for a list of related actions.
- Administrators:
 - [Employee Snapshot Tile](#) from the *Talent Administrator* fluid home page.

When you have selected the Employee Snapshot tile, you will be prompted to select an employee.

- Managers will be presented with the [Employee Snapshot - Find Team Member Page \(for Managers\)](#), which displays a list of all their direct reports.
- Administrators will be presented with the [Employee Snapshot - Search Page \(for Administrators\)](#), which displays the **Search** field and a list of up to 20 of the most recently viewed employees.

This video provides an overview of Employee Snapshot for administrators:

Video: [Image Highlights, PeopleSoft HCM Update Image 26: Employee Snapshot for Administrators](#)

These topics discuss accessing the Employee Snapshot tiles and pages.

Pages Used to Access the Employee Snapshot Pages and Tiles

Page Name	Definition Name	Usage
Employee Snapshot Tile	HC_HCTS_START_PAGE_FL_GBL (this is the cref for the tile)	Click this tile to access a group of tiles and dashboards to see a comprehensive view of talent data related to an employee.
Employee Snapshot - Find Team Member Page (for Managers)	HR_PSEL_FLU	Select a direct or indirect report to view the employee’s snapshot data.

Page Name	Definition Name	Usage
Employee Snapshot - Search Page (for Administrators)	HCTS_CO_DIRECT_FL	Search for individuals within your organization for whom you wish to view Employee Snapshot data.
Employee Snapshot - Search Results Page	HCTS_SEARCH_FL	View a list of employees that meet your search criteria.

Employee Snapshot Tile

Use the Employee Snapshot tile to access a group of tiles and dashboards to see a comprehensive view of talent data related to an employee.

Navigation:

The Employee Snapshot tile is delivered as part of the fluid *Manager Self Service* and *Talent Administrator* home pages.

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

This example illustrates the Employee Snapshot tile.



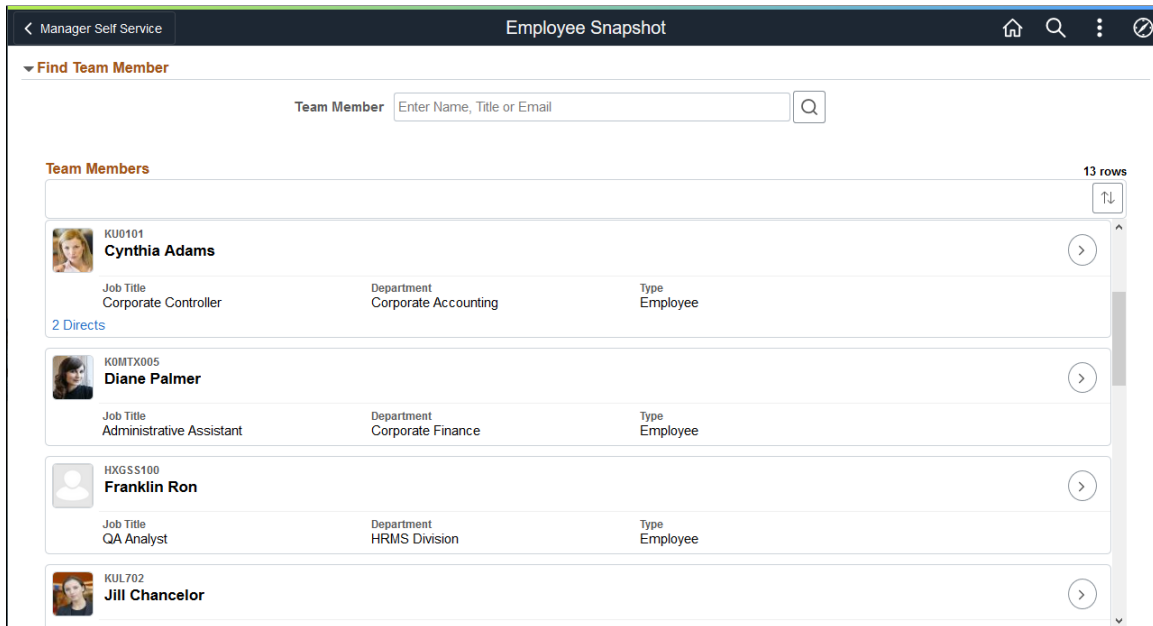
Employee Snapshot - Find Team Member Page (for Managers)

Use the Employee Snapshot - Find Team Member page (HR_PSEL_FLU) to select a direct or indirect report to view the employee's snapshot data.

Navigation:

- Click the **Employee Snapshot** tile on the Manager Self Service homepage.
- Click the **Select Different Employee** link in the sub-banner of the Employee Snapshot pages.

This example illustrates the Employee Snapshot - Find Team Member page when a manager accesses the page.



The Employee Snapshot - Find Team Member page displays all direct reports of the logged-in manager based on that manager's job.

For descriptions of fields and controls on this page, see “(Fluid) <Transaction Name> - Find Team Member Page” (Application Fundamentals).

Employee Snapshot - Search Page (for Administrators)

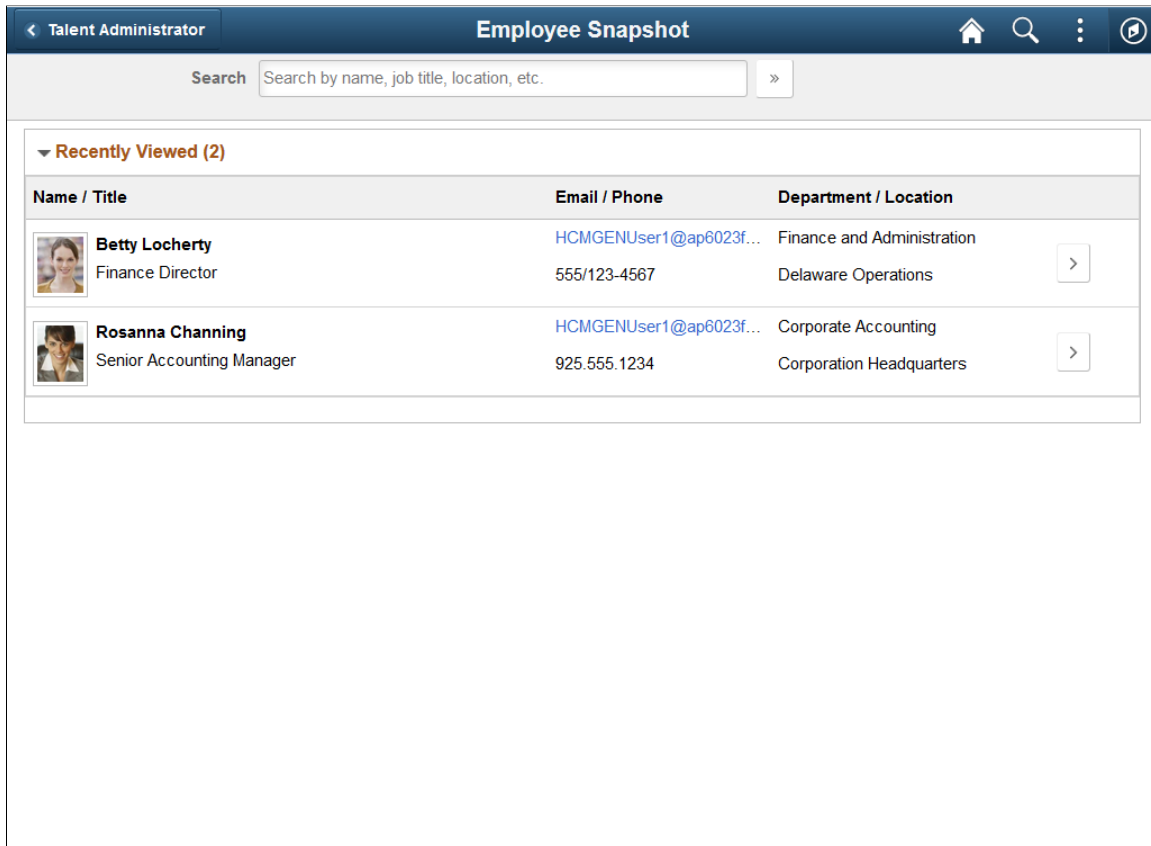
Use the Employee Snapshot - Search page (HCTS_CO_DIRECT_FL) to search for individuals within your organization for whom you wish to view Employee Snapshot data.

The landing page also displays one collapsible section that lists employees whose snapshot data you have recently viewed.



Navigation:

Click the **Employee Snapshot** tile on the Talent Administrator homepage (or any other home page with the tile when you have administrator access).

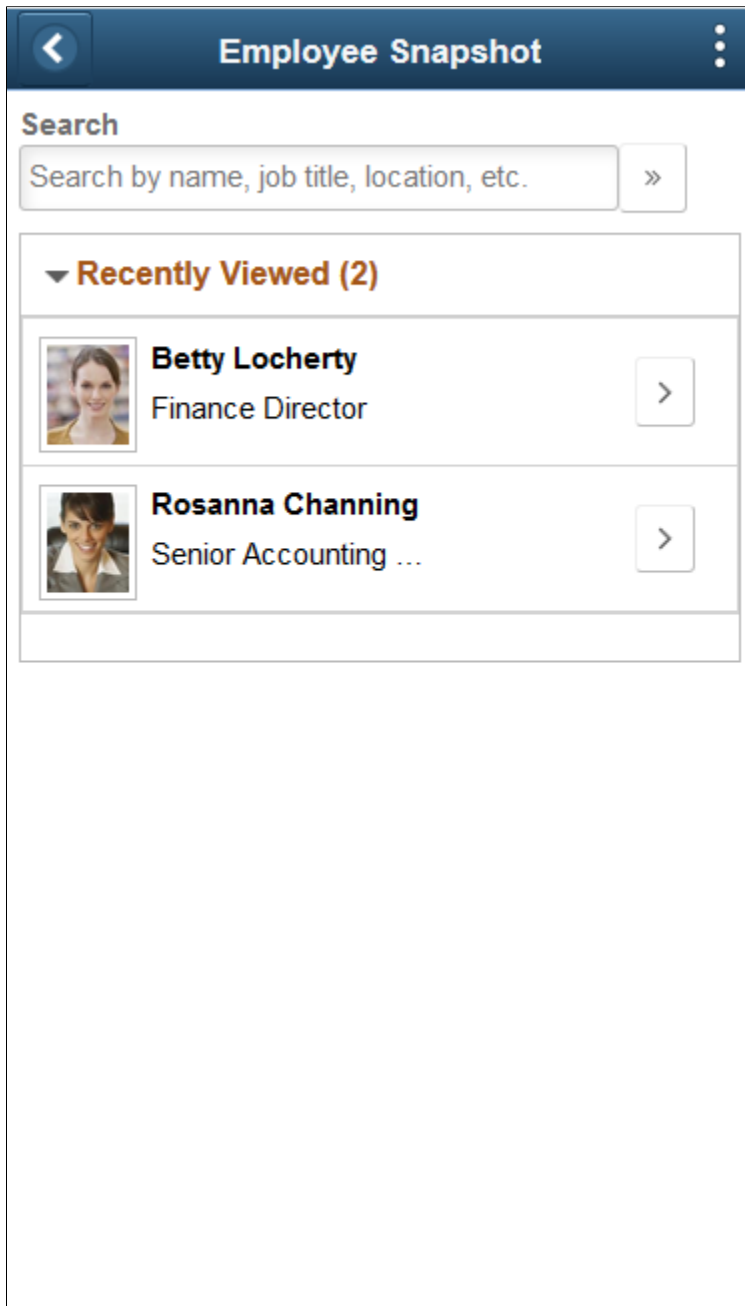
This example illustrates the Employee Snapshot - Search page for the tablet when an administrator accesses the page.




The screenshot displays the 'Employee Snapshot' interface for a tablet. At the top, there is a navigation bar with a back arrow, the text 'Talent Administrator', the title 'Employee Snapshot', and icons for home, search, and user profile. Below the navigation bar is a search bar with the placeholder text 'Search by name, job title, location, etc.' and a search icon. The main content area is titled 'Recently Viewed (2)' and contains a table with two rows of employee data. Each row includes a profile picture, the employee's name and title, their email and phone number, and their department and location. A right-pointing arrow is visible at the end of each row, indicating a link to the employee's profile.

Name / Title	Email / Phone	Department / Location
 Betty Locherty Finance Director	HCMGENUser1@ap6023f... 555/123-4567	Finance and Administration Delaware Operations
 Rosanna Channing Senior Accounting Manager	HCMGENUser1@ap6023f... 925.555.1234	Corporate Accounting Corporation Headquarters

This example illustrates the on the Snapshot - Search landing page for the smartphone.



A standard banner appears at the top of every fluid page. For more information see “Common Elements Used with PeopleSoft Fluid User Interface” (Application Fundamentals).

Field or Control	Description
Search	<p>Enter basic search criteria in this field, such as name, department, location, or so forth and click the Run Search button to locate specific individuals. For partial searches, PeopleSoft Search Framework supports the use of search wildcards to specify the type of search to be performed.</p> <p>The administrator Search field uses the PeopleTools Search Framework, based on the Company Directory tree. A person must be present in the tree to appear in the directory. For information on the process to building your company trees, see “Understanding the Org Chart Viewer and Company Directory Setup Steps” (PeopleSoft Human Resources Administer Workforce). For more information on searching, see <i>PeopleTools Search Technology</i>, “Working with PeopleSoft Search,” Working with Search Operators in PeopleSoft Search.</p>
Recently Viewed	<p>Use this section to view and access recently viewed snapshot data for a person, if any. A person appears in this list when you have viewed their Employee Snapshot data in the past. The list displays employees in descending order of date of access. The page displays a maximum of 20 people.</p>
 Select this Person arrow button	<p>Select the arrow button at the end of the employee row to access the Employee Snapshot dashboards for that person.</p>

Employee Snapshot - Search Results Page

Use the Employee Snapshot - Search Results page (HCTS_SEARCH_FL) to view a list of employees that meet your search criteria.

Navigation:

Enter search criteria in the **Search** field and select the **Run Search (>>)** button.

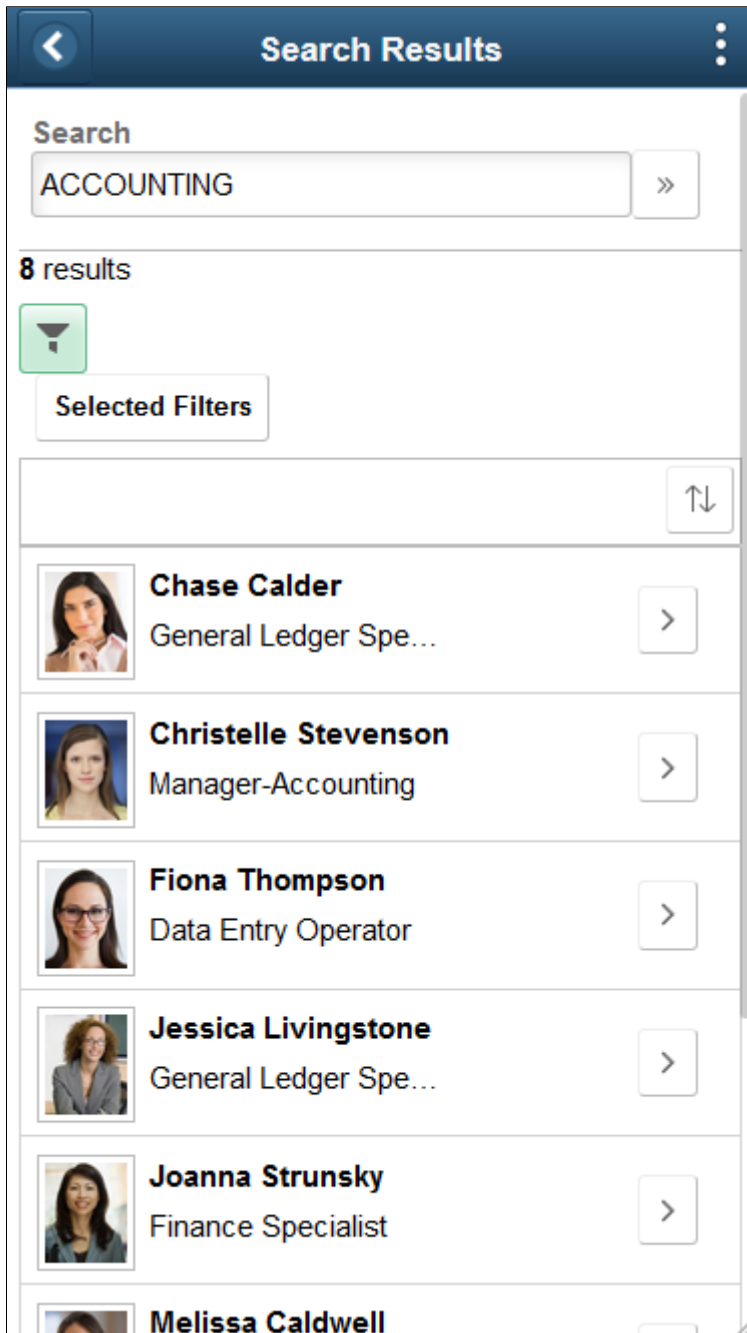
This example illustrates the Employee Snapshot - Search Results page for the tablet.

The screenshot displays the 'Employee Snapshot - Search Results' interface. At the top, there is a navigation bar with a back arrow, the title 'Employee Snapshot', and 'Search Results'. A search bar contains the text 'ACCOUNTING'. Below the search bar, there are filters for 'Country' (United States (8)), 'State' (New York (8)), 'City' (New York (8)), 'Business Unit' (Global Business Institute BU (8)), 'Department' (Accounts Receivable (8)), and 'Job Title' (Finance Specialist (2), General Ledger Specialist (2), Clerk (1), Data Entry Operator (1)).

The main content area shows '8 results' and includes filters for 'New York' and 'Accounts Receivable', with a 'Clear All' button. Below this is a table with columns for 'Name / Title', 'Email / Phone', and 'Department / Location'. Each row includes a profile picture, a right-pointing arrow, and a vertical scrollbar on the right side of the table.

Name / Title	Email / Phone	Department / Location
Chase Calder General Ledger Specialist	Chase.Calder@o...	Accounts Receivable Corporation Headquarters
Christelle Stevenson Manager-Accounting	HCMGENUser7... 925.555.8756	Accounts Receivable Corporation Headquarters
Fiona Thompson Data Entry Operator	Fiona.Thompson...	Accounts Receivable Corporation Headquarters
Jessica Livingstone General Ledger Specialist	Jessica.Livingsto...	Accounts Receivable Corporation Headquarters
Joanna Strunsky Finance Specialist	Joanna.Strunsky...	Accounts Receivable Corporation Headquarters


This example illustrates the Employee Snapshot - Search Results page for the smartphone.



After running a search using Keyword Search, the system presents the search results in an intuitive display, enabling interactive filtering and further navigation.

(Tablet) When using a large form factor, like a tablet or workstation, a filter panel appears on the left side of the page, which shows facets with counts of those that match that search criteria. Select the facet links to filter results further, seeing which employee meet the additional criteria. For large form factor devices, the page will reset to show only those that meet the additional criteria. The page also displays the criteria you have selected in boxes at the top of the page. Click the cancel icon (X) for a filter item, or select the **Clear All** link to remove all filters.

(Smartphone) When using a small form factor, like a smartphone, the page displays a **Search Filter** button. Select the button to access a separate Filters page and select your facets. When you have identified all your criteria, select **Done** to return to the Search Results page. When filters are in place, the **Filter** button will be green, and a **Select Filters** button now appears on the page. Click this button to view the filters that are in place or to remove filters.

<i>Field or Control</i>	<i>Description</i>
 Select this Person arrow button	Select the arrow button at the end of the employee row to access the Employee Snapshot dashboards for that person.

Viewing the Summary Tiles and Pages

When accessing the Employee Snapshot, the system displays the Summary dashboard by default. The Summary dashboard displays tiles with a variety of high level information you can quickly review.

These topics discuss the Employee Snapshot - Summary tiles and pages.

Pages Used to View the Employee Snapshot - Summary Tiles and Page

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
<u>Employee Snapshot - Summary Dashboard</u>	PT_LANDINGPAGE	Access a variety of high level summary tiles about an employee.
<u>Performance (Summary) Tile</u>	HCTS_PERF_SUM1_FL	View the overall rating for an employee from the last performance period.
<u>Performance History Page</u>	HCTS_PERFHIST_FL HCTS_PERFHIST_SCF	Review the overall rating for an employee from past performance periods using either a chart or table grid.
Manager Evaluation Page Mentor Evaluation Page (See “<Manager or Self-> Evaluation Page” (PeopleSoft ePerformance))	EP_APPR_MAIN1	Review evaluation data for an employee using ePerformance.
<u>Compensation (Summary) Tile</u>	HCTS_CMP_SAL1_FL	View the current base salary for an employee and when the employee's base salary was last changed.
<u>Compensation: Current Salary Page</u>	HCTS_COMP_SALRY_FL	View the salary range for an employee's job and where the employee falls within that range.

Page Name	Definition Name	Usage
<u>Compensation: Salary History Page</u>	HCTS_COMP_SALRY_FL	View the compensation history for an employee.
<u>Compensation History Page</u>	HCTS_COMP_HIST_SCF	Review or verify an employee's compensation history.
<u>Salary Change Details Page</u>	HCTS_COMP_VC_SCF	View details of a specific salary change.
<u>Compensation: Total Rewards Page</u>	HCTS_COMP_SALRY_FL HCTS_CMP_TRW_SBF	Review employee total rewards data.
“Total Rewards Page” (PeopleSoft Human Resources Administer Compensation)	TRW_SS_STMT_FL	Review your direct reports’ earnings, benefits, and other compensation information for a select review period.
<u>Job Details (Summary) Tile</u>	HCTS_JOBDTL_SUM_FL	View an individual employee’s years of service and time in the current job.
<u>Job Details: Job Information Page</u>	HCTS_JOB_DTLS_FL	Review detailed information about a person’s current job.
<u>Job Details: Job History Page</u>	HCTS_JOB_DTLS_FL	View a summary of a person’s job history.
<u>Job Competencies (Summary) Tile</u>	HCTS_JOBCOMP1_FL	Note the number of competencies where the employee’s profile rating is above or below the target for the employee’s job.
<u>Job Competencies Page</u>	HCTS_JOBCOMPDT_FL HCTS_JOBCOMPDTL_FL	Review a list of competencies associated with this employee’s job (non-person) profile compared to the employee’s (person) profile.
<u>Job Competency Details Page</u>	JPM_ITM_DTL_FL	View the details of an employee’s rating for a job competency.
Team Talent Profile Page (See the “Talent Profile Page (for Employees) or Team Talent Profile Page (for Managers)” (PeopleSoft eDevelopment) topic for information on the Team Profile Page for the manager.)	JPM_PERS_PROFL_FLU	View and update a team member’s talent profile data in fluid.

Page Name	Definition Name	Usage
<u>Personal Competencies (Summary) Tile</u>	HC_HCTS_PERS_COMP1_FL	View the total number of competencies associated with this employee's person profile, but not the employee's job (non-person) profile.
<u>Personal Competencies Page</u>	HCTS_PERS_COMP_FL	View a complete list of competencies associated with this employee's person profile, but not the employee's job (non-person) profile.
<u>Personal Competency Details Page</u>	JPM_ITM_DTL_FL	View additional details about the competency rating for this person.
<u>Licenses and Certifications (Summary) Tile</u>	HCTS_LICENSE_FL	View the number of current, expiring, or missing licenses and certifications held by this employee.
<u>Licenses and Certifications Page</u>	HCTS_LICENSE1_FL HCTS_LICENSE_SCF	View the licenses and certifications held by this employee. Note: This page will appear differently based on the setup defined on the Configure Employee Snapshot - Licenses and Certifications Page .
<u>Licenses and Certifications Details Page</u>	JPM_ITM_DTL_FL	View additional details about a license or certification held by this person.
<u>Responsibilities (Summary) Tile</u>	HC_HCTS_RESP_SUM1_FL	Note the number of responsibilities assigned to an employee.
<u>Responsibilities Page</u>	HCTS_RESP1_FL HCTS_RESP_FL	Review a list of responsibilities assigned to an employee.
<u>Responsibilities Details Page</u>	JPM_ITM_DTL_FL	View additional details about a responsibility assigned to a person.
<u>Honors and Awards (Summary) Tile</u>	HC_HCTS_HONAW_SUM1_FL	View the total number of honors and awards this employee has received.
<u>Honors and Awards Page</u>	HCTS_HONORS_FL	Review a list of the honors and awards this employee has received.
<u>Honors and Awards Details Page</u>	JPM_ITM_DTL_FL	View additional details about an honor or award for a person.

Page Name	Definition Name	Usage
<u>Job Interests (Summary) Tile</u>	HCTS_JOBIN_SUM1_FL	See a job as well as a count of the number of jobs in which a person has expressed interest.
<u>Job Interests Page</u>	HCTS_JOB_INT1_FL	Review a list of jobs in which the employee has expressed interest.
Maintain Job Profiles Page	JPM_MGRSS_PROFLIC	Review or update a job profile using the Profile Management system. For more information on managing job profiles, see the documentation “(Fluid) Viewing and Updating Job Profiles” (PeopleSoft eDevelopment).
<u>Development (Summary) Tile</u>	HCTS_DEV_SUM1_FL	View if there is a completed development document for this employee.
<u>Development History Page</u>	HCTS_DEVHIST_FL HCTS_DEVHIST_SCF HCTS_DEVHIST_SBF	View the most recently completed development documents for an employee.
<u>Education Tile</u>	HCTS_EDUCATION1_FL_GBL	See the most recent education level recorded for the employee and a number count of all other degrees and school levels.
<u>Education Page</u>	HCTS_EDUCATION_FL	See the school education levels attended and degrees completed by this employee.
<u>Education Details Page</u>	JPM_ITM_DTL_FL	View details about the education level or degree obtained by the employee.
<u>Career Plans (Summary) Tile</u>	HCTS_CAREERPLN1_FL_GBL	View the next step in this employee’s career path. The tile will also list the number of other career path options specified for this employee.
<u>Career Plans Page</u>	HCTS_CAREERPLN_FL	Review a list of all career path options defined for the employee.
<u>Career Move Details Page</u>	HCTS_CP_ADMPTH_SCF	View additional details about a career move for a person.

Page Name	Definition Name	Usage
“Manage Career Plans Component” (PeopleSoft Human Resources Plan Careers and Successions)	HR_CP_MANAGER	Perform career planning activities for your direct reports.
“Career Progression Chart Page” (PeopleSoft Human Resources Plan Careers and Successions)	HR_CP_PRO_CHART	View a graphical representation of the employee’s career paths and perform a competency gap/fit analysis.

Employee Snapshot - Summary Dashboard

Use the Summary dashboard page to access a variety of high level tiles about an employee.

Navigation:

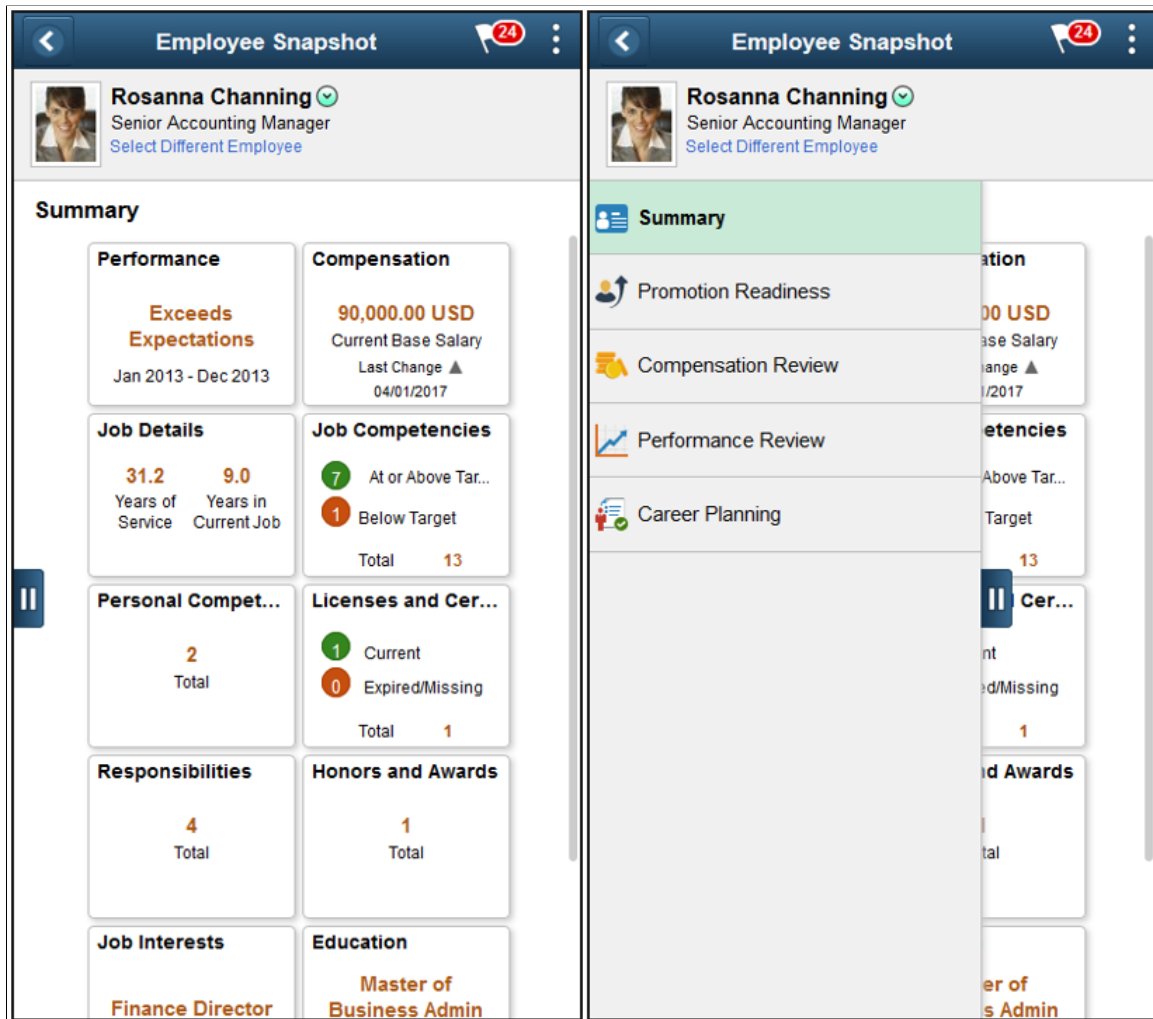
- Click the Employee Snapshot tile on the *Manager Self Service*, *Talent Administrator*, or any fluid homepage to which the tile has been added, then select an employee from the search page.
- (Managers only) Select the **Related Actions** icon next to a person’s name in fluid and select **View Employee Snapshot**.
- From the Employee Snapshot pages, select the Summary dashboard category item from the left panel.

This example illustrates the Employee Snapshot - Summary dashboard page for the tablet.

The screenshot displays the 'Employee Snapshot' page for Rosanna Channing, a Senior Accounting Manager. The interface includes a navigation menu on the left with options like 'Summary', 'Promotion Readiness', 'Compensation Review', 'Performance Review', and 'Career Planning'. The main content area is titled 'Summary' and contains several data tiles:

- Performance:** Exceeds Expectations (Period: Jan 2013 - Dec 2013)
- Compensation:** 90,000.00 USD (Current Base Salary, Last Change: 04/01/2017)
- Job Details:** 31.2 Years of Service, 9.0 Years in Current Job
- Job Competencies:** 7 At or Above Target, 1 Below Target (Total: 13)
- Personal Competencies:** 2 Total
- Licenses and Certifications:** 1 Current, 0 Expired/Missing (Total: 1)

This example illustrates the Employee Snapshot - Summary dashboard on a small form factor device. In the first image, the left panel is hidden. In the second image, the left panel is exposed.



The **Summary** dashboard appears by default when you access the Employee Snapshot pages. The Summary dashboard uses tiles to provide a very high level of information about the employee.


These tiles are delivered by default with the *Summary* dashboard:

- [Performance \(Summary\) Tile](#)
- [Compensation \(Summary\) Tile](#)
- [Job Details \(Summary\) Tile](#)
- [Job Competencies \(Summary\) Tile](#)
- [Personal Competencies \(Summary\) Tile](#)
- [Licenses and Certifications \(Summary\) Tile](#)
- [Responsibilities \(Summary\) Tile](#)
- [Honors and Awards \(Summary\) Tile](#)

- [Job Interests \(Summary\) Tile](#)
- [Development \(Summary\) Tile](#)
- [Education Tile](#)
- [Career Plans \(Summary\) Tile](#)

Note: These tiles are delivered by default to appear on the **Summary** dashboard page of Employee Snapshot; however, the administrator can move the tiles to appear on other Employee Snapshot dashboard folders. The navigation in these topics references the delivered navigation.

Administrators can also publish custom profile tiles to the **Summary** dashboard using the [Configure Employee Snapshot - Profile Content Page](#) and [Tile Attributes Page](#).

<i>Field or Control</i>	<i>Description</i>
Select Different Employee	(Manager view only) Select this link to access the Employee Snapshot - Find Team Member Page (for Managers) and change the Employee Snapshot view to another employee.
 Hide or Show Action Item List tab	Click this tab to view and select other Employee Snapshot dashboards or close the dashboard list panel.

Performance (Summary) Tile

Use the Performance (Summary) tile (HCTS_PERF_SUM1_FL) to view the overall rating for an employee from the last performance period.

Navigation:

Select the [Employee Snapshot - Summary Dashboard](#) category item from the Employee Snapshot pages.

This example illustrates the Performance (Summary) tile.



To view a list of this employee’s historical performance reviews, click the tile to access the [Performance History Page](#).

The performance document that should display is defined on the [Configure Employee Snapshot - Document History Page](#).

Note: When the administrator does not identify a valid document type, the tile will display a message that you need to contact the system administrator to configure this view.

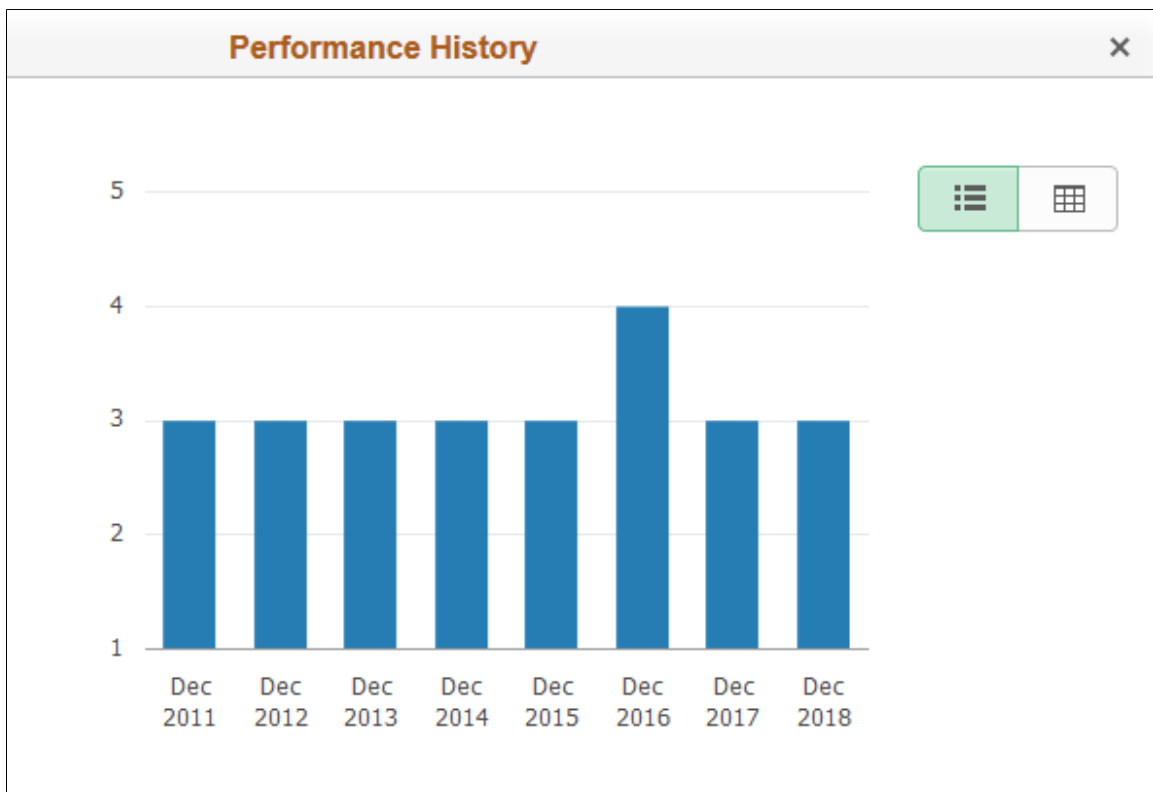
Performance History Page

Use the Performance History page (HCTS_PERFHIST_FL or HCTS_PERFHIST_SCF) to review the overall rating for an employee from past performance periods using either a chart or table grid.

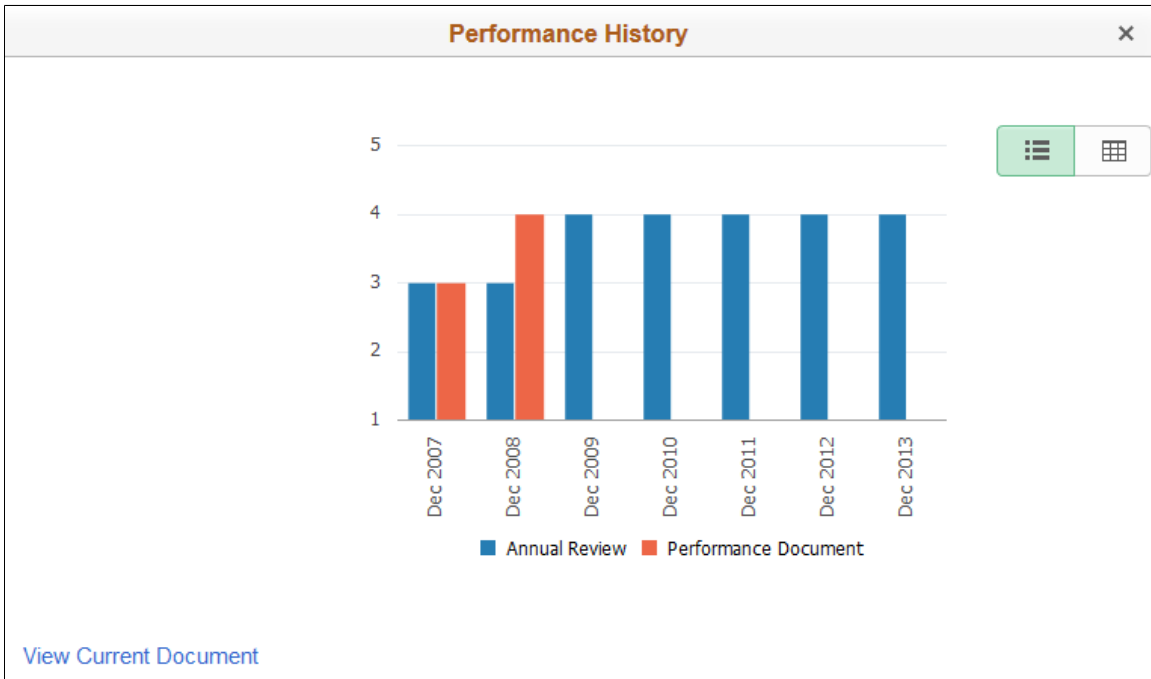
Navigation:

- Click the [Performance \(Summary\) Tile](#) from the [Employee Snapshot - Summary Dashboard](#) or any dashboard to which the tile has been added.
- Click the **View Details** link on the [Performance History Tile](#) from one of the non-summary (Performance Review, Promotion Readiness, and Compensation Review) dashboards.

This example illustrates the chart view of the Performance History page. The chart view is available on this page only when accessed from the Performance (Summary) tile.



This example illustrates the Performance History page in chart view where the employee has different performance document review types. The page displays reviews for the document review types in different colors. The chart view is available on this page only when accessed from the Performance (Summary) tile.



This example illustrates the Performance History page in grid view. This employee has reviews under different document types: *Project Review* and *Annual Review*.

Document Type	Period	Job Title	Rating	Manager
Project Review	Jan 2019 - Feb 2019	Financial Analyst	Meets Expectations	Rosanna Channing
Annual Review	Jan 2018 - Dec 2018	Financial Analyst	Meets Expectations	Rosanna Channing
Annual Review	Jan 2017 - Dec 2017	Financial Analyst	Exceeds Expectations	Rosanna Channing
Annual Review	Jan 2016 - Dec 2016	Financial Analyst	Meets Expectations	Rosanna Channing
Annual Review	Jan 2015 - Dec 2015	Financial Analyst	Needs Improvement	Rosanna Channing
Annual Review	Jan 2014 - Dec 2014	Financial Analyst	Needs Improvement	Rosanna Channing

This page displays the performance review types, periods, and the employee’s rating for each.



The document types and maximum number of performance reviews to display are defined on the [Configure Employee Snapshot - Document History Page](#). This page will display all document types held by the employee that match those as defined on the configuration page.

Note: When the administrator does not identify valid document types, the page will display a message that you need to contact the system administrator to configure this view.

For information on the performance documents, see “Manager Evaluation Page (Manage Employee Reviews)” (PeopleSoft Human Resources Manage Employee Reviews) or “(Classic) Accessing Documents” (PeopleSoft ePerformance) in ePerformance.

Accessing the Page from the Performance (Summary) Tile

The following options are available when you access the page from the [Performance \(Summary\) Tile](#).

<i>Field or Control</i>	<i>Description</i>
	<p>Click the Chart View button icon to view the information in a graphical format.</p> <p>When in Chart View, pause or hover over a bar item to view the review rating. Click a graph bar item to access the Annual Review - Manager Evaluation Page (see “<Manager or Self-> Evaluation Page” (PeopleSoft ePerformance)) and view additional details about the rating for this employee and access the performance evaluation.</p>
	<p>Click the Grid View button icon to view the information in a grid format.</p>
View Current Document	<p>This link is available when there is an open (in-progress) performance document for the employee.</p> <p>Click this link to access the ePerformance WorkCenter for the document that was most recently created. For information on this page, see the “Understanding ePerformance WorkCenter” (PeopleSoft ePerformance) documentation.</p>

Accessing the Page from a Non-Summary Performance Tile

When you click the **View Details** link from a non-summary [Performance History Tile](#), the Performance History page will display in grid mode only.

This example illustrates the Performance History page when accessed from a non-summary performance tile.

Performance History				
Document Type	Period	Job Title	Rating	Manager
Project Review	Jan 2019 - Feb 2019	Accountant	Meets Expectations	Rosanna Channing >
Annual Review	Jan 2018 - Dec 2018	Accountant	Meets Expectations	Rosanna Channing >
Annual Review	Jan 2017 - Dec 2017	Accountant	Exceeds Expectations	Rosanna Channing >
Annual Review	Jan 2016 - Dec 2016	Accountant	Meets Expectations	Rosanna Channing >
Annual Review	Jan 2015 - Dec 2015	Accountant	Exceeds Expectations	Rosanna Channing >
Annual Review	Jan 2014 - Dec 2014	Accountant	Meets Expectations	Rosanna Channing >

You can click the rows from the grid to access the Annual Review - Manager Evaluation Page (see “<Manager or Self-> Evaluation Page” (PeopleSoft ePerformance)) and view additional details about the rating for this employee and access the performance evaluation.

This video demonstrates the Fluid Employee Snapshot multiple document types feature:

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

Compensation (Summary) Tile

Use the Compensation (Summary) tile (HCTS_CMP_SAL1_FL) to view the current base salary for an employee and when the employee's base salary was last changed.

Navigation:

Select the [Employee Snapshot - Summary Dashboard](#) category item from the Employee Snapshot pages.

This example illustrates the Compensation (Summary) tile.



Use this tile to view the employee's current base salary. The tile also displays the last time the employee's pay was updated. An arrow pointing up indicates he or she received a salary increase, while an arrow pointing down indicates that the employee received a decrease in pay.

If no change exists the tile reads *Last Change None*.

When the manager does not have access to the employee's compensation, a tile will display text that the manager does not have access to the compensation information.

Click the tile to access the [Compensation: Current Salary Page](#).

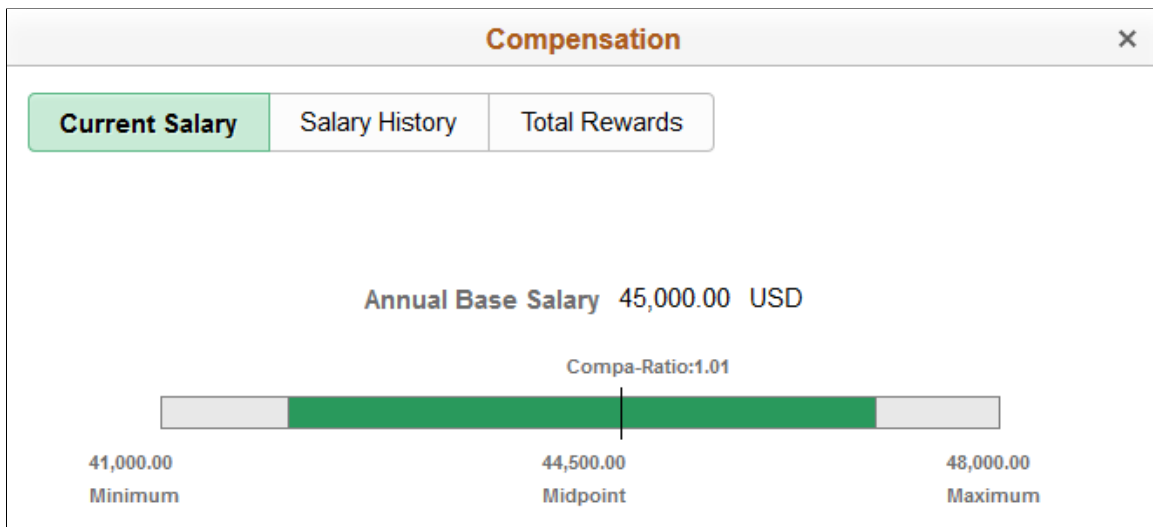
Compensation: Current Salary Page

Use the Compensation: Current Salary page (HCTS_COMP_SALRY_FL) to view the salary range for an employee's job and where the employee falls within that range.

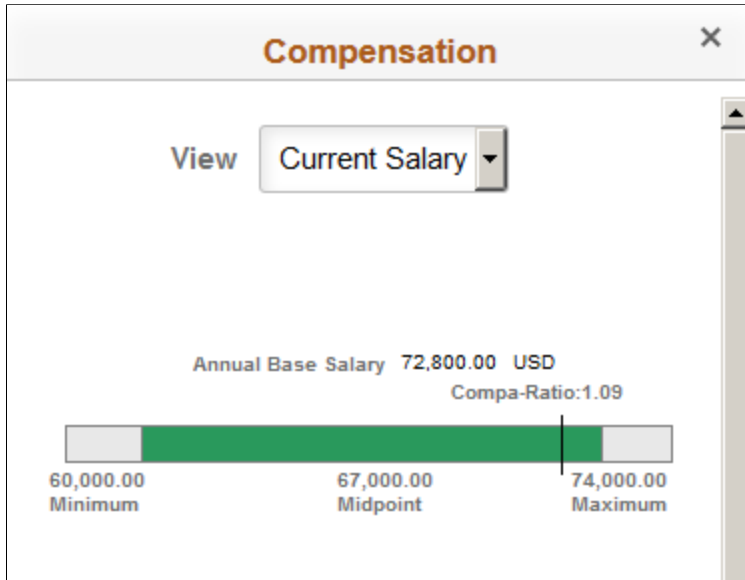
Navigation:

Click the [Compensation \(Summary\) Tile](#) from the [Employee Snapshot - Summary Dashboard](#) or any dashboard to which the tile has been added, then select the Current Salary touch point item (tablet or desktop) or select *Current Salary* from the **View** field.

This example illustrates the Compensation: Current Salary page for the tablet.



This example illustrates the Compensation: Current Salary page for the smartphone.



The page displays the minimum, midpoint, and maximum of the salary grade for this employee’s job. The line that runs through the salary range bar indicates the employee's current base salary. The compa ratio is the comparison of the current salary to the mid point of the range.

Field or Control	Description
View	(Smartphone) Select the compensation specific page from this field to view details related to this view. Page views include: <ul style="list-style-type: none"> • Compensation: Current Salary Page • Compensation: Salary History Page • Compensation: Total Rewards Page (Tablet or desktop) These page categories display across the top of the page as touch points. Click a touch point to access that data.

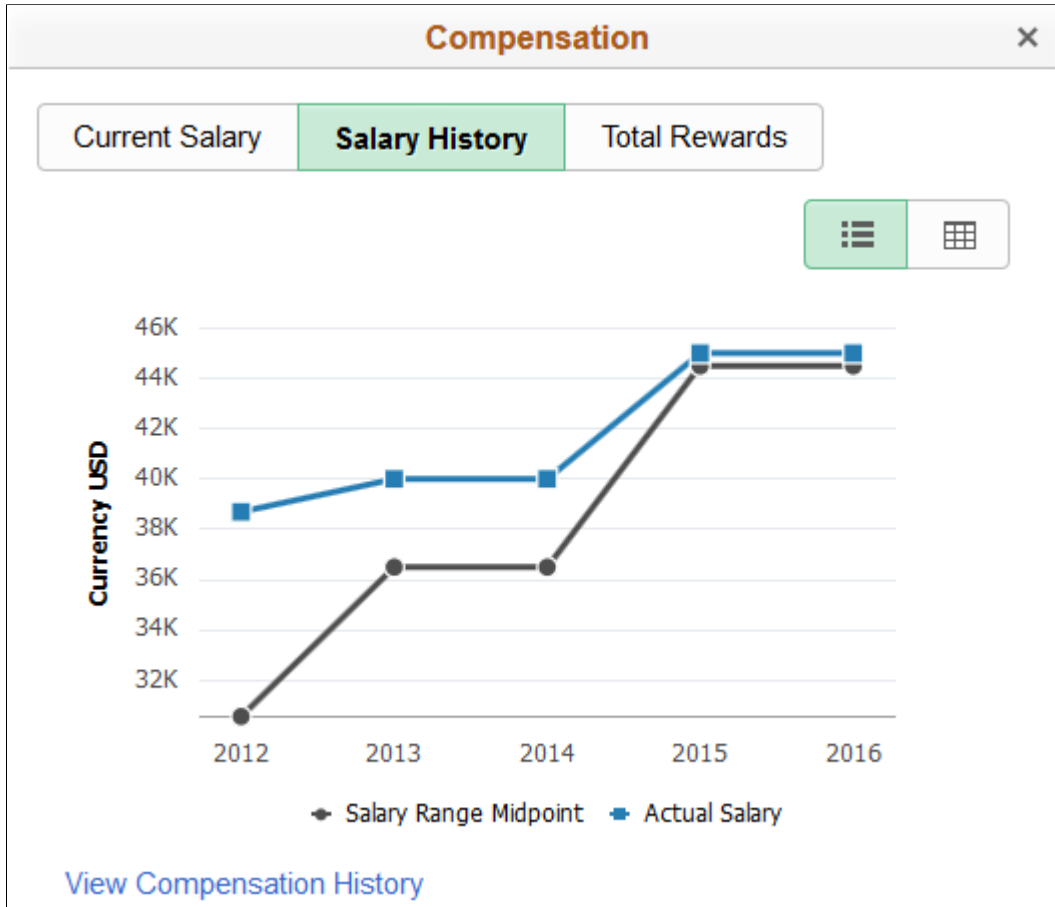
Compensation: Salary History Page

Use the Compensation: Salary History page (HCTS_COMP_SALRY_FL) to review or verify an employee's compensation history.

Navigation:

Click the [Compensation \(Summary\) Tile](#) from the [Employee Snapshot - Summary Dashboard](#) or any dashboard to which the tile has been added, then select the Salary History touch point item (tablet or desktop) or select *Salary History* from the **View** field.

This example illustrates the chart view of the Compensation: Salary History page.



This example illustrates the grid view of the Compensation: Salary History page for the tablet.

Compensation ×

Current Salary
Salary History
Total Rewards

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Year	Job Title	Annual Salary	Midpoint
2016	Manager-Revenue	45,000.00	44,500.00
2015	Manager-Revenue	45,000.00	44,500.00
2014	Manager-Revenue	40,000.00	36,500.00
2013	Senior Finance Specialist	40,000.00	36,500.00
2012	Senior Finance Specialist	38,700.00	30,565.00



[View Compensation History](#)

This example illustrates the grid view of the Compensation: Salary History page for the smartphone.

Year	Job Title	Annual Salary	Midpoint
2016	Manager-Revenue	45,000.00	44,500.00
2015	Manager-Revenue	45,000.00	44,500.00
2014	Manager-Revenue	40,000.00	36,500.00
2013	Senior Finance Specialist	40,000.00	36,500.00
2012	Senior Finance Specialist	38,700.00	30,565.00

[View Compensation History](#)

Use this page to view salary change history. The page displays the last five years of compensation for the employee as well as the midpoint range for the employee's job. Pause or hover over a data point on the graph to view the exact salary or salary midpoint for a specific year.

Field or Control	Description
View	<p>(Smartphone) Select the compensation specific page from this field to view details related to this view. Page views include:</p> <ul style="list-style-type: none"> • Compensation: Current Salary Page • Compensation: Salary History Page • Compensation: Total Rewards Page <p>(Tablet or desktop) These page view categories display across the top of the page as touch points. Click a touch point to access that data.</p>
	Click the Chart View button icon to view the information in a graphical format.
	Click the Grid View button icon to view the information in a grid format.
View Compensation History	<p>Click this link to open the “View Compensation History Page (Fluid Manager View)” (PeopleSoft eCompensation Manager Desktop) in self service and view the employee's salary, variable cash, and variable noncash information.</p> <p>If the manager does not have access to the fluid View Compensation History page, the Compensation History Page is displayed.</p>

Compensation History Page

Use the Compensation History page (HCTS_COMP_HIST_SCF) to review or verify an employee's compensation history.

Navigation:

- Click the **View Compensation History** link from the [Compensation: Salary History Page](#).
- Click the [Current Salary Tile](#) from the [Employee Snapshot - Promotion Readiness Dashboard](#).
- Click the **View Compensation History** link from the [Salary History Tile](#) from a non-summary dashboard.

This example illustrates the Compensation: Salary History page.

Compensation History							×
Date of Change	Amount	Change	Type	Source	Currency	Job Title	
02/22/2015	45,000.00	5,000.00	Pay Rate Change	Base Salary	USD	Manager-Revenue	>
12/01/2013	40,000.00	1,300.00	Data Change	Base Salary	USD	Senior Finance Specialist	>
04/01/2012	38,700.00	1,700.00	Parental Leave	Base Salary	USD	Senior Finance Specialist	>
01/01/2012	37,000.00		Hire	Base Salary	USD	Senior Finance Specialist	>

Use this page to view the history of all pay rate changes the worker has received to date.

Click an individual row to access the [Salary Change Details Page](#) and view further details for this specific salary change.

Related Links

“View Compensation History Page (Fluid Manager View)” (PeopleSoft eCompensation Manager Desktop)

Salary Change Details Page

Use the Salary Change Details page (HCTS_COMP_VC_SCF) to view details of a specific salary change.

Navigation:

Click a specific Compensation History row from the [Compensation History Page](#).

This example illustrates the Salary Change Details page.

Salary Change Details		×
Date of Change	02/22/2015	
Annual Salary	45,000.00 USD	
Previous Annual Salary	40,000.00 USD	
Change Amount	5,000.00 USD	
Change Percent	12.500	

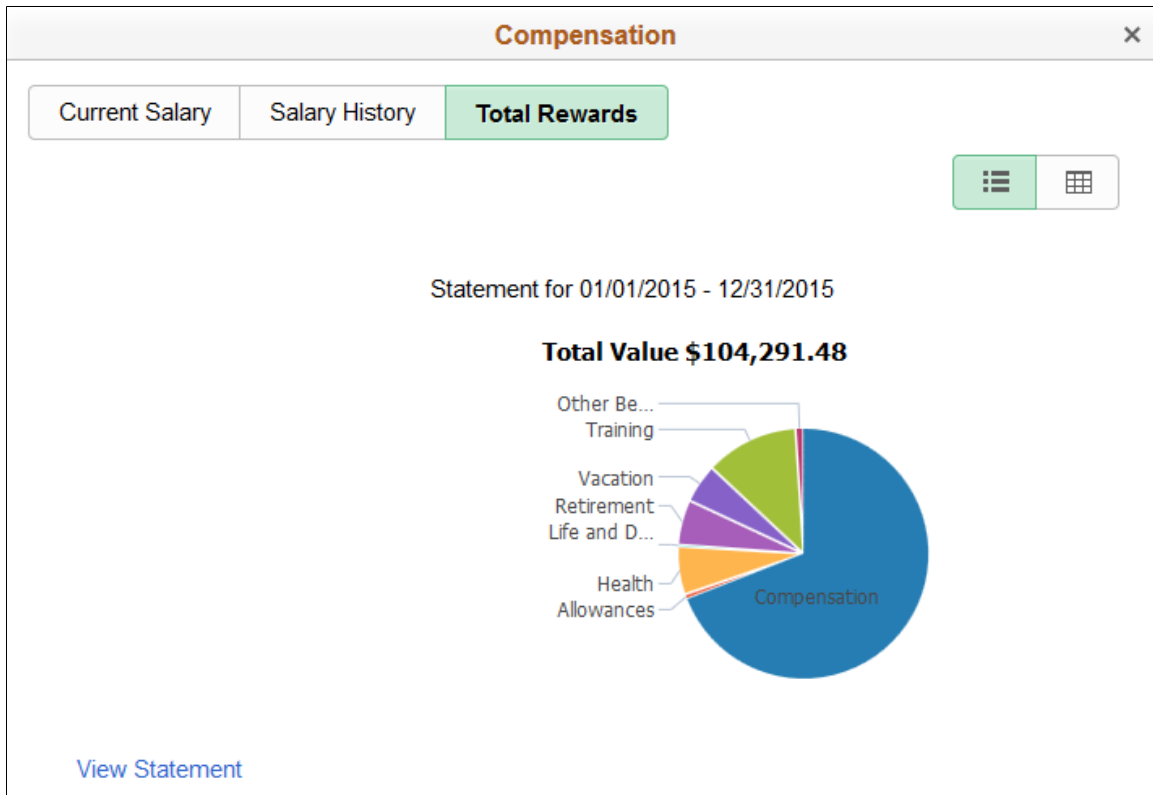
Compensation: Total Rewards Page

Use the Compensation: Total Rewards page (HCTS_COMP_SALRY_FL or HCTS_CMP_TRW_SBF) to review employee total rewards data.

Navigation:

Click the Compensation (Summary) Tile from the Employee Snapshot - Summary Dashboard or any dashboard to which the tile has been added, then select the Total Rewards touch point item (tablet or desktop) or select *Total Rewards* from the **View** field.

This example illustrates the chart view of the Compensation: Total Rewards page for the tablet.



This example illustrates the grid view of the Compensation: Total Rewards page for the tablet.

Compensation ×

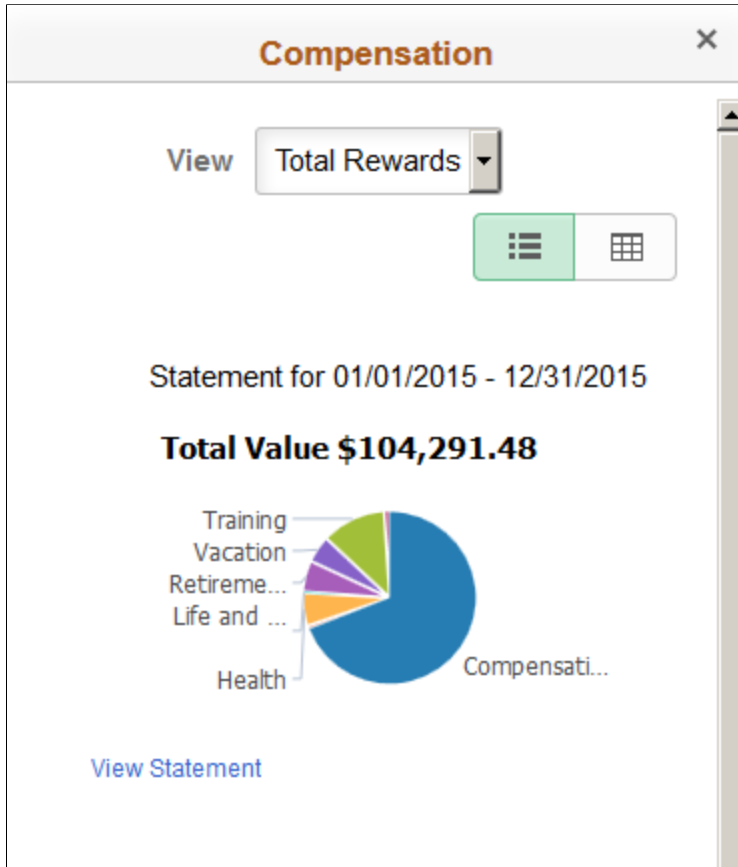
Current SalarySalary HistoryTotal Rewards

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Statement for 01/01/2015 - 12/31/2015

Reward Item	Employee Contribution	Employer Provided
Compensation	0.00	0.00
Allowances	0.00	0.00
Health	1,434.24	0.00
Life and Disability	688.20	0.00
Retirement	8,889.96	0.00
Vacation	0.00	5,250.00
Training	0.00	2,500.00



This example illustrates the chart view of the Compensation: Total Rewards page for the smartphone.



This example illustrates the grid view of the Compensation: Total Rewards page for the smartphone.

Compensation	
View	Total Rewards ▾
☰ ☒	
Statement for 01/01/2015 - 12/31/2015	
Compensation	
Your Contribution	0.00
Company Provided	0.00
Allowances	
Your Contribution	0.00
Company Provided	0.00
Health	
Your Contribution	1,434.24
Company Provided	0.00
Life and Disability	
Your Contribution	688.20
Company Provided	0.00
Retirement	
Your Contribution	8,889.96
Company Provided	0.00
Vacation	
Your Contribution	0.00
Company Provided	5,250.00
Training	
Your Contribution	0.00
Company Provided	2,500.00
Other Benefits	
Your Contribution	0.00

The page displays the most recent statement period information, the period identified at the top of the page. It lists all total rewards page sections that are included with the associated template, listing associated reward items and calculated amounts.

Field or Control	Description
View	<p>(Smartphone) Select the compensation specific page from this field to view details related to this view. Page views include:</p> <ul style="list-style-type: none"> • Compensation: Current Salary Page • Compensation: Salary History Page • Compensation: Total Rewards Page <p>(Tablet or desktop) These page views display across the top of the page as touch points. Click a touch point to access that data.</p>
	<p>Click the Chart View button icon to view the information in a graphical format.</p>
	<p>Click the Grid View button icon to view the information in a grid format.</p>
View Statement	<p>Click this link from the chart view to access the “Total Rewards Page” (PeopleSoft Human Resources Administer Compensation) to review employee’s earnings, benefits, and other compensation information in further detail for selected review periods.</p>

Job Details (Summary) Tile

Use the Job Details (Summary) tile (HCTS_JOBDTL_SUM_FL) to view an individual employee’s years of service and time in the current job.

Navigation:

Select the [Employee Snapshot - Summary Dashboard](#) category item from the Employee Snapshot pages.

This example illustrates the Job Details (Summary) tile.



Use this tile to view a person's years of service with the company and within the current job.

Click the tile to access the [Job Details: Job Information Page](#) to see additional information about this person's job history with the organization.

Job Details: Job Information Page

Use the Job Details: Job Information page (HCTS_JOB_DTLS_FL) to review detailed information about a person's current job.

Navigation:

Click the [Job Details \(Summary\) Tile](#) from the [Employee Snapshot - Summary Dashboard](#) or any dashboard to which the tile has been added.

This example illustrates the Job Details: Job Information page.

×
Job Details

Job Information

Job History

Business Unit Global Business Institute BU

Department Revenue Management

Location Kansas Operations

Job Title Manager-Revenue

Job Code 600155

Full/Part Time Full-Time

Standard Hours 40.00

HR Status Active

Org Relationship Employee

Years of Service 4.9

Last Start Date 01/01/2012

Years in Current Job 2.9

Date in Current Job 01/01/2014

Job Details: Job History Page

Use the Job Details: Job History page (HCTS_JOB_DTLS_FL) to view a summary of a person's job history.

Navigation:

Click the [Job Details \(Summary\) Tile](#) from the [Employee Snapshot - Summary Dashboard](#) or any dashboard to which the tile has been added and select the Job History page item, then select the Job History tab item.

This example illustrates the Job Details: Job History page.

Job Details		
Job Information	Job History	
Job Title	Dates	Years in Job
Manager-Revenue	01/01/2014 - Present	2.9
Senior Finance Specialist	01/01/2012 - 12/31/2013	2.0

Job Competencies (Summary) Tile

Use the Job Competencies (Summary) tile (HCTS_JOBCOMP1_FL) to note the number of competencies where the employee's profile rating is above or below the target for the employee's job.

Navigation:

Select the [Employee Snapshot - Summary Dashboard](#) category item from the Employee Snapshot pages.

This example illustrates the Job Competencies (Summary) tile.



The Job Competencies (Summary) tile displays a quick view of the number of employee competencies (Person profile) that rate at or above the job requirements and also those that rate below the target number associated with the job (Non-person profile). The tile also displays a **Total** number value. This is an accumulation of the employee's competencies that have been rated against the job profile, those that are not rated (the competencies associated with the job that have not been rated for the employee), and exceptions (competencies that use a different rating model between the Person and Non-Person profiles). The evaluation types and how long an evaluation should be included in the total count are defined on the

[Configure Employee Snapshot - Competencies Page](#). When evaluation types have not been defined on the configuration page, the tile will display a message that you need to contact the system administrator to configure this view.

When a person has not been rated for any of the competencies that are associated with his or her job, the tile will display the message that the competencies have not been rated. When a profile has not been set up for this person's job, the tile displays the message that no competencies exist for this person's job.

If the manager does not have access to the employee's person profile, a message will display indicating that the manager does not have access to job competencies.

To view further details about each competency rating and how it compares to the job target, click the tile to access the [Job Competencies Page](#).

Related Links

[Personal Competencies \(Summary\) Tile](#)







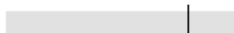
Job Competencies Page

Use the Job Competencies page (HCTS_JOBCOMPDT_FL) to review a list of competencies associated with this employee's job (non-person) profile compared to the employee's (person) profile.

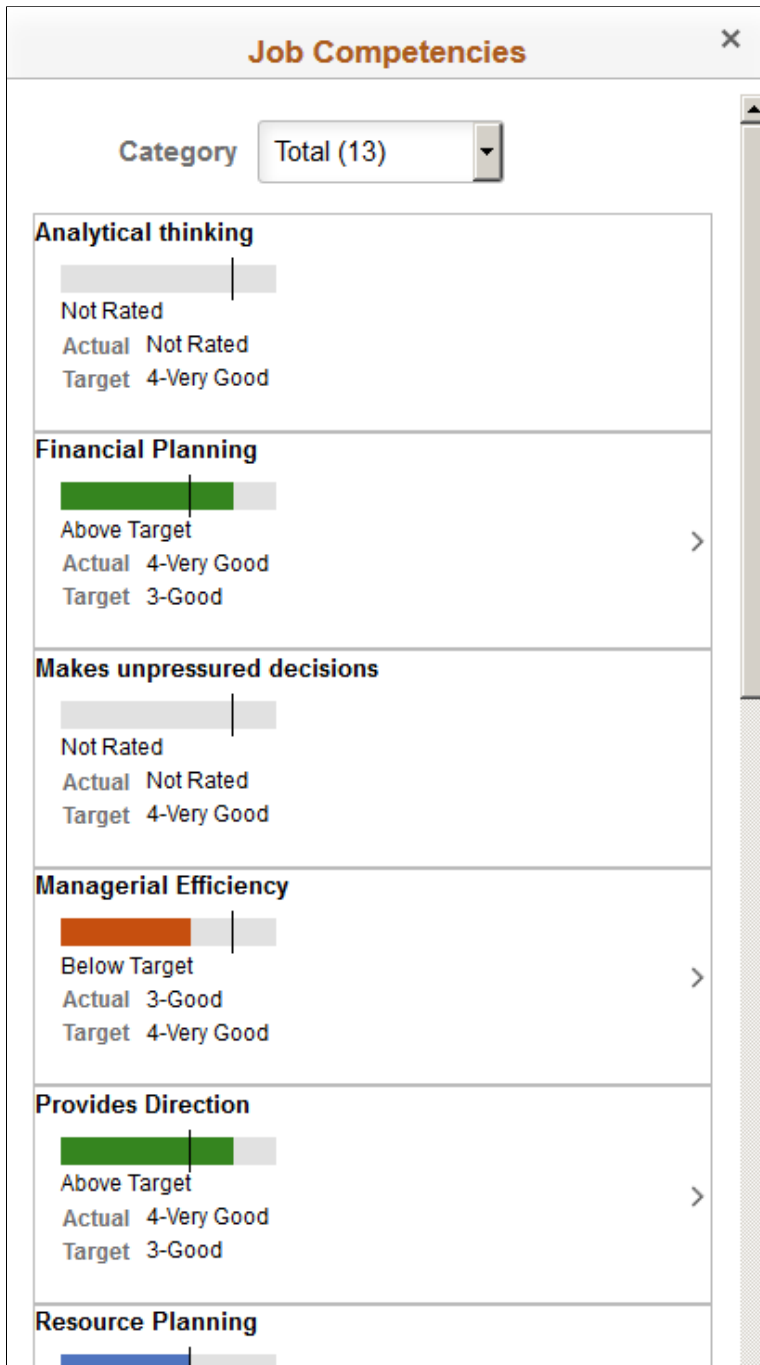
Navigation:

- Click the [Job Competencies \(Summary\) Tile](#) from the [Employee Snapshot - Summary Dashboard](#) or any dashboard to which the tile has been added.
- Click the [Job Competencies Tile](#) from one of the non-summary dashboards.

This example illustrates the Job Competencies page for the tablet.

Job Competencies				
Total (13)	Above Target (6)	Meets Target (1)	Below Target (1)	Not Rated (5)
Competency	Actual Versus Target	Actual Rating	Target Rating	
Analytical thinking	 Not Rated	Not Rated	4-Very Good	
Financial Planning	 Above Target	4-Very Good	3-Good	>
Makes unpressured decisions	 Not Rated	Not Rated	4-Very Good	
Managerial Efficiency	 Below Target	3-Good	4-Very Good	>
Provides Direction	 Above Target	4-Very Good	3-Good	>
Resource Planning	 Meets Target	3-Good	3-Good	>
Technical Knowledge	 Not Rated	Not Rated	4-Very Good	

This example illustrates the Job Competencies page for the smartphone.



When using a large form factor device, select a touch point category tab at the top of the page to view competencies by the target rating. When using a small form factor device, select the rating from the **Category** field.

These categories display a bar graph of the target versus actual proficiencies for competencies found on the job (non-person) profile related to the employee by touch point category. Categories display the following:

- *Total*: Lists all the competencies and the employee's rating for this person's job.

- *Above Target:* Lists those job competencies in which the employee exceeds that of the target level for the job. A dark green bar appears beyond the target line.
- *Meets Target:* Lists those job competencies in which the employee matches the target level for a competency. A light green bar appears even with the target line.
- *Below Target:* Lists those job competencies in which the employee’s proficiency is less than the target level of the job. An orange bar appears below the target line
- *Not Rated:* Displays the job competencies for which the employee has not been rated. The competency bar does not display a color bar.
- *Exceptions:* Shows the competencies that have a different rating model on the Job profile as compared to the Person profile.

Note: The evaluation types and number of years an evaluation should appear in the Employee Snapshot are defined on the [Configure Employee Snapshot - Competencies Page](#). When evaluation types have not been defined on the configuration page, the page will display a message that you need to contact the system administrator to configure this view.

Click a row to access the [Job Competency Details Page](#) and view more details about the job competency rating given for this employee. When the employee’s profile record displays a *Not Rated* row, you cannot click the row to view additional details, since the employee does not have rating information to display.

Field or Control	Description
View Talent Profile	<p>(Manager view only) The page displays this link when a manager is viewing an authorized direct report and profile content is available; it is not visible for indirect reports.</p> <p>Click this link to access the Team Talent Profile pages to view and update this team member’s talent profile data in fluid (see “(Fluid) Maintaining Person Profiles” (PeopleSoft eDevelopment)).</p>

Related Links

- “(Fluid) Maintaining Person Profiles” (PeopleSoft eDevelopment)
- “Person Profile Page” (PeopleSoft Human Resources Manage Profiles)
- “Add New <content type>, Update <content type>, or View <content type> Page” (PeopleSoft Human Resources Manage Profiles)

Job Competency Details Page

Use the Job Competency Details page (JPM_ITM_DTL_FL) to view the details of an employee’s rating for a job competency.

Navigation:

Click a competency row from the [Job Competencies Page](#).

This example illustrates the Job Competency Details page.

Job Competency Details	
Effective Date	08/03/2015
Competency	Financial Planning
Evaluation Type	Approved/Official
Reviewer ID	
Status	Active
Rating Model	Competency Management Scale
Proficiency	4-Very Good
Verified By	
Interest Level	
EmplID	
Year Last Used	
Reviewer Is Approved	No
Year Acquired	
Years Of Experience	
Review Active	No
Review Date	
Description	
Reviewer	
Long Description	Financial Planning
Workflow Status	Approved

Related Links

[“\(Fluid\) Maintaining Person Profiles” \(PeopleSoft eDevelopment\)](#)

[“Person Profile Page” \(PeopleSoft Human Resources Manage Profiles\)](#)

[“Add New <content type>, Update <content type>, or View <content type> Page” \(PeopleSoft Human Resources Manage Profiles\)](#)

[Personal Competency Details Page](#)

Personal Competencies (Summary) Tile

Use the Personal Competencies (Summary) tile (HC_HCTS_PERS_COMP1_FL) to view the total number of competencies associated with an employee's person profile, but not the employee's job (non-person) profile.

Navigation:

Select the [Employee Snapshot - Summary Dashboard](#) category item from the Employee Snapshot pages.

This example illustrates the Personal Competencies (Summary) tile.



The evaluation types and how long an evaluation should be included in the total count are defined on the [Configure Employee Snapshot - Competencies Page](#).

Click the tile to access the [Personal Competencies Page](#) to see a list of the personal competencies for this person that are not associated with his or her job.

Related Links

[Job Competencies \(Summary\) Tile](#)

Personal Competencies Page

Use the Personal Competencies page (HCTS_PERS_COMP_FL) to view a complete list of competencies associated with an employee's person profile, but not the employee's job (non-person) profile.

Navigation:

- Click the [Personal Competencies \(Summary\) Tile](#) from the [Employee Snapshot - Summary Dashboard](#) or any dashboard to which the tile has been added.
- Click the **View More** link on the [Personal Competencies Tile](#) from one of the non-summary dashboards.

This example illustrates the Personal Competencies page.

Personal Competencies ×	
Competency	Proficiency
Business Banking	3-Good
Strategic Planning	4-Very Good

[View Talent Profile](#)

The page displays competencies associated with this person's *Person* profile on the Person Profile or Talent Profile: Competencies tab, which are not associated with his or her job.

Note: The evaluation types and number of years a competency should appear on the Employee Snapshot are defined on the [Configure Employee Snapshot - Licenses and Certifications Page](#).

For competencies that have multiple reviewers for the same evaluation type, data for the most recent effective date displays on the page.

For competencies that have reviews using different evaluation types, the system uses those evaluations with the lowest sequence number. For more information on sequence numbers, see the "Instance Qualifiers Page" (PeopleSoft Human Resources Manage Profiles).

Click a row to access the [Personal Competency Details Page](#) and view more details about the personal competency rating given for the employee.

Field or Control	Description
View Talent Profile	<p>(Manager view only) The page displays this link when a manager is viewing an authorized direct report and profile content is available; it is not visible for indirect reports.</p> <p>Click this link to access the Team Talent Profile pages to view and update this team member's talent profile data in fluid (see "(Fluid) Maintaining Person Profiles" (PeopleSoft eDevelopment)).</p>

Related Links

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

"Maintaining Profiles as an Administrator" (PeopleSoft Human Resources Manage Profiles)

"Person Profile Page" (PeopleSoft Human Resources Manage Profiles)

Personal Competency Details Page

Use the Personal Competency Details page (JPM_ITM_DTL_FL) to view additional details about the competency rating for a person.

Navigation:

- Click a row from the [Personal Competencies Page](#).
- Click a row from the [Personal Competencies Tile](#) from one of the non-summary dashboards.

This example illustrates the Personal Competency Details page.

Personal Competency Details
×

Effective Date	03/23/2012
Competency	Business Banking
Evaluation Type	Approved/Official
Reviewer ID	
Status	Active
Rating Model	Competency Management Scale
Proficiency	3-Good
Verified By	
Interest Level	
EmplID	
Year Last Used	
Reviewer Is Approved	No
Year Acquired	
Years Of Experience	
Review Active	No
Review Date	
Description	
Reviewer	
Long Description	Business Banking
Workflow Status	Approved

Details for a person's competency evaluation are recorded on the "<Content Type> (Item Details) Page" (PeopleSoft eDevelopment) for the *Person* profile for the employee.

Related Links

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

"Maintaining Profiles as an Administrator" (PeopleSoft Human Resources Manage Profiles)

Job Competency Details Page

Licenses and Certifications (Summary) Tile

Use the Licenses and Certifications (Summary) tile (HC_HCTS_LICENSE1_FL) to view the number of current, expiring, or missing licenses and certifications held by an employee.

Navigation:

Select the [Employee Snapshot - Summary Dashboard](#) category item from the Employee Snapshot pages.

This example illustrates the Licenses and Certifications (Summary) tile.



The Licenses and Certifications (Summary) tile displays a quick view of the number of licenses and certifications held by the employee that are current, expiring soon, or have expired. The tile also displays a **Total** number. This is an accumulation of the employee's licenses and certification, regardless if they are required by the job profile or not.

To configure when the system should begin showing a licenses or certification as expiring soon, use the [Configure Employee Snapshot - Licenses and Certifications Page](#). When the administrator has configured the system to compare an employee's licenses and certifications with his or her job, the tile will display the **Expired/Missing** total count. When the compare with job option is turned off, the tile will display the **Expired** total count only and not identify missing items.

If the manager does not have access to the employee's person profile, a message will display indicating that.

Click the tile to access the [Licenses and Certifications Page](#) to see a list of licenses and certifications held by the employee.

Licenses and Certifications Page

Use the Licenses and Certifications page (HC_HCTS_LICENSE1_FL or HCTS_LICENSE_SCF) to view the licenses and certifications held by an employee.

Note: This page will appear differently based on the setup defined on the [Configure Employee Snapshot - Licenses and Certifications Page](#).

— When the **Compare Person with Job Profile** is set to *No*, the page will display all licenses and certifications held by the employee on one page.

— When the **Compare Person with Job Profile** is set to *Yes*, the page will display the licenses and certifications held by the employee on two different page tabs. The first tab of the page will show those items held by the employee that are required for the job, and the second tab of the page will display additional items held by the employee that are not required by the job.

Navigation:

- Click the [Licenses and Certifications \(Summary\) Tile](#) from the [Employee Snapshot - Summary Dashboard](#) or any dashboard to which the tile has been added.
- Click the [Licenses and Certifications Tile](#) from the [Employee Snapshot - Performance Review Dashboard](#) or any dashboard to which the tile has been added.

This example illustrates the Licenses and Certifications page when the person's licenses and certifications are not being compared with those required by the job.

Licenses and Certifications				
Alert	License or Certification	Issue Date	Expiration Date	
⚠ Expiring Soon	Certified Public Accountant	06/01/2015	06/01/2018	>
⚠ Expiring Soon	Certified General Accountant	05/21/2015	05/21/2018	>
⏰ Expired	Finance Analyst Certification	04/17/2013	04/17/2018	>
	WHIMIS Safety Associate	03/28/2017		>
	Assoc Chartered Certif Accntnt	01/30/2009		>

[View Talent Profile](#)

This example illustrates the Licenses and Certifications page showing the licenses and certifications held by the employee that are required by the job.

Licenses and Certifications ×				
Required for Job (2)		Additional Items (3)		
Alert	License or Certification	Issue Date	Expiration Date	
⚠ Expiring Soon	Certified Public Accountant	06/01/2015	06/01/2018	>
	Assoc Chartered Certif Accntnt	01/30/2009		>

[View Talent Profile](#)

This example illustrates the Licenses and Certifications page showing additional licenses and certifications held by the employee that are not required by the job.

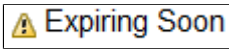
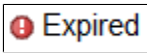
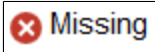
Licenses and Certifications ×				
Required for Job (2)		Additional Items (3)		
Alert	License or Certification	Issue Date	Expiration Date	
⚠ Expiring Soon	Certified General Accountant	05/21/2015	05/21/2018	>
⌚ Expired	Finance Analyst Certification	04/17/2013	04/17/2018	>
	WHIMIS Safety Associate	03/28/2017		>

[View Talent Profile](#)

The page lists the licenses and certifications held by this individual as defined for the *Person* profile on the Person Profile or Talent Profile: Qualifications tab.

Click a row to access the [Licenses and Certifications Details Page](#) to see additional information about this license or certification held by the employee.

Alerts

<i>Field or Control</i>	<i>Description</i>
	This icon appears when the expiration date, entered on the employee's profile for this licence or certification, is approaching. The page will display the Expiring Soon icon based on the number of days before its expiration, as defined in the Days for Warning Alert field on the Configure Employee Snapshot - Licenses and Certifications Page .
	This icon appears after the expiration date of the license of certification has passed.
	This icon appears when a license or certification required by the job is not held by the employee.

<i>Field or Control</i>	<i>Description</i>
View Talent Profile	<p>(Manager view only) The page displays this link when a manager is viewing an authorized direct report and profile content is available; it is not visible for indirect reports.</p> <p>Click this link to access the Team Talent Profile pages to view and update this team member's talent profile data in fluid (see "(Fluid) Maintaining Person Profiles" (PeopleSoft eDevelopment)).</p>

Licenses and Certifications Details Page

Use the Licenses and Certifications Details page (JPM_ITM_DTL_FL) to view additional details about a license or certification held by this person.

Navigation:

- Click a row from the [Licenses and Certifications Page](#).
- Click a row from the [Responsibilities Tile](#) from one of the non-summary dashboards.

This example illustrates the fields and controls on the Licenses and Certifications Details page.

Licenses and Certifications Details
×

Issue Date	06/01/2015
License	Certified Public Accountant
Status	Active
Country	
State	
Renewal Required	No
Renewal In Progress	Yes
License Verified	No
Expiration Date	06/01/2018
License/Certification Number	
Issued By	

Details for a person's licences and certifications are recorded on the "<Content Type> (Item Details) Page" (PeopleSoft eDevelopment) for the *Person* profile for the employee.

Responsibilities (Summary) Tile

Use the Responsibilities (Summary) tile (HC_HCTS_RESP_SUM1_FL) to note the number of responsibilities assigned to an employee.

Navigation:

Select the [Employee Snapshot - Summary Dashboard](#) category item from the Employee Snapshot pages.

This example illustrates the Responsibilities (Summary) tile.



Click the tile to access the [Responsibilities Page](#) to see a list of this person's responsibilities.

Responsibilities Page

Use the Responsibilities page (HCTS_RESP1_FL or HCTS_RESP_FL) to review a list of responsibilities assigned to an employee

Navigation:

- Click the [Responsibilities \(Summary\) Tile](#) from the [Employee Snapshot - Summary Dashboard](#) or any dashboard to which the tile has been added.
- Click the **View More** link on the [Responsibilities Tile](#) from one of the non-summary dashboards.

This example illustrates the Responsibilities page.

Responsibilities		
Responsibilities	Proficiency	
Adhere to Accounting Standards	4-Very Good	>
Manage and motivate team	4-Very Good	>
Prepare and monitor department budgets	4-Very Good	>
Research Analytical Trends	4-Very Good	>

[View Talent Profile](#)

The page lists the responsibilities held by this individual as defined for the *Person* profile on the Person Profile or Talent Profile: Responsibilities tab.

Click a row from this page to access the [Responsibilities Details Page](#) and view more details about the responsibility given this employee.

Field or Control	Description
View Talent Profile	<p>(Manager view only) The page displays this link when a manager is viewing an authorized direct report and profile content is available; it is not visible for indirect reports.</p> <p>Click this link to access the Team Talent Profile pages to view and update this team member's talent profile data in fluid (see "(Fluid) Maintaining Person Profiles" (PeopleSoft eDevelopment)).</p>

Related Links

"Maintaining Profiles as an Administrator" (PeopleSoft Human Resources Manage Profiles)

Responsibilities Details Page

Use the Responsibilities Details page (JPM_ITM_DTL_FL) to view additional details about a responsibility assigned to a person.

Navigation:

- Click a row from the [Responsibilities Page](#).
- Click a row from the [Responsibilities Tile](#) from one of the non-summary dashboards.

This example illustrates the Responsibilities Details page.

Responsibilities Details	
Effective Date	01/30/2009
Responsibility	Adhere to Accounting Standards
Status	Active
Rating Model	Competency Management Scale
Proficiency	4-Very Good
Comments	

Details for a person's competency evaluation are recorded on the "<Content Type> (Item Details) Page" (PeopleSoft eDevelopment) for the *Person* profile for the employee.

Related Links

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

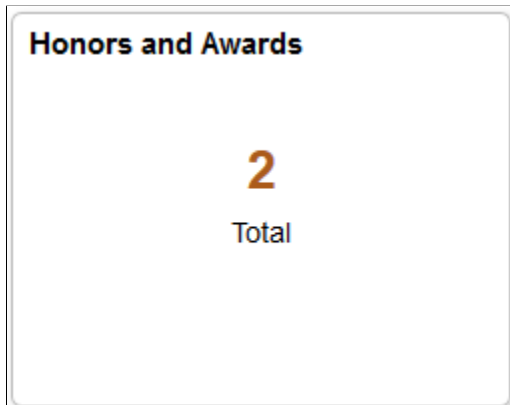
Honors and Awards (Summary) Tile

Use the Honors and Awards (Summary) tile (HC_HCTS_HONAW_SUM1_FL) to view the total number of honors and awards an employee has received.

Navigation:

Select the [Employee Snapshot - Summary Dashboard](#) category item from the Employee Snapshot pages.

This example illustrates the Honors and Awards (Summary) tile.



Click the tile to access the [Honors and Awards Page](#) to see a list of the employee's honors and awards.

Honors and Awards Page

Use the Honors and Awards page (HCTS_HONORS_FL) to review a list of the honors and awards an employee has received.

Navigation:

Click the [Honors and Awards \(Summary\) Tile](#) from the [Employee Snapshot - Summary Dashboard](#) or any dashboard to which the tile has been added.

This example illustrates the Honors and Awards page.

Honors and Awards	
Honor or Award	Received On
Distinguished Lectureship Awrd	05/01/2015 >
Outstanding Contributor Award	01/01/2006 >

[View Talent Profile](#)

The page displays honors and awards listed for this individual's *Person* profile on the Person Profile or Talent Profile: Qualifications tab.

Click a row from this page to access the [Honors and Awards Details Page](#) and view more details about the honors and award rating given for the employee.

Field or Control	Description
View Talent Profile	<p>(Manager view only) The page displays this link when a manager is viewing an authorized direct report and profile content is available; it is not visible for indirect reports.</p> <p>Click this link to access the Team Talent Profile pages to view and update this team member’s talent profile data in fluid (see “(Fluid) Maintaining Person Profiles” (PeopleSoft eDevelopment)).</p>

Related Links

“Maintaining Profiles as an Administrator” (PeopleSoft Human Resources Manage Profiles)

Honors and Awards Details Page

Use the Honors and Awards Details page (JPM_ITM_DTL_FL) to view additional details about an honor or award for a person.

Navigation:

Click a row from the [Honors and Awards Page](#).

This example illustrates the Honors and Awards Details page.



Details for a person’s honors and awards are recorded on the “<Content Type> (Item Details) Page” (PeopleSoft eDevelopment) for the *Person* profile for the employee.

Related Links

“(Fluid) Maintaining Person Profiles” (PeopleSoft eDevelopment)

“Maintaining Profiles as an Administrator” (PeopleSoft Human Resources Manage Profiles)

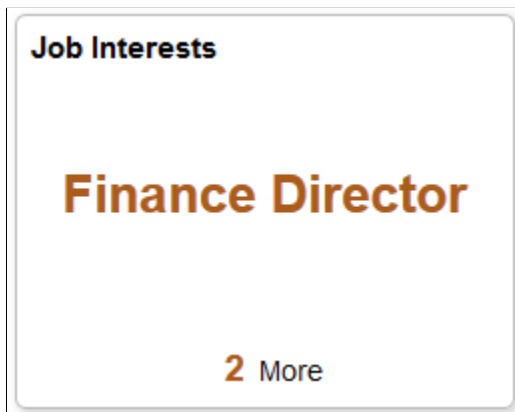
Job Interests (Summary) Tile

Use the Job Interests (Summary) tile (HCTS_JOBIN_SUM1_FL) to see a job as well as a count of the number of jobs in which a person has expressed interest.

Navigation:

Select the [Employee Snapshot - Summary Dashboard](#) category item from the Employee Snapshot pages.

This example illustrates the Job Interests (Summary) tile.



This tile displays the first job interest listed for the employee. It also provides a number count of all the other jobs in which the employee has expressed interest. Click the tile to access the [Job Interests Page](#) and view the full list of job interests.

Managers identify job interests for a person on the “Interest List by Person Page” (PeopleSoft Human Resources Manage Profiles). This page lists job interests alphabetically, thus the job that appears on this tile is the one that is alphabetically first.

Job Interests Page

Use the Job Interests page (HCTS_JOB_INT1_FL) to review a list of jobs in which the employee has expressed interest.

Navigation:

- Click the [Job Interests \(Summary\) Tile](#) from the [Employee Snapshot - Summary Dashboard](#) or any dashboard to which the tile has been added.
- Click the **View More** link on the [Job Interest Tile](#) from the [Employee Snapshot - Career Planning Dashboard](#) or from any dashboard where you have added the tile.

This example illustrates the Job Interests page.

Job Interests	
Job Profile	
Finance Director	>
Sr Analyst	>
Sr.Comp Oper	>

The page lists those jobs in which an individual has interest. The system lists jobs alphabetically.

Administrators identify job interests for a person on the “Interest List by Person Page” (PeopleSoft Human Resources Manage Profiles). Employees and managers use the My Interest List Page and Team Interest Lists Page respectively to maintain job a person’s interest list.

Click a row to access the Maintain Job Profile page in Profile Management where you can review or update a job profile using the Profile Management system. For more information on managing job profiles, see the documentation “(Fluid) Viewing and Updating Job Profiles” (PeopleSoft eDevelopment).

Related Links

“(Fluid) Maintaining Interest Lists” (PeopleSoft eDevelopment)

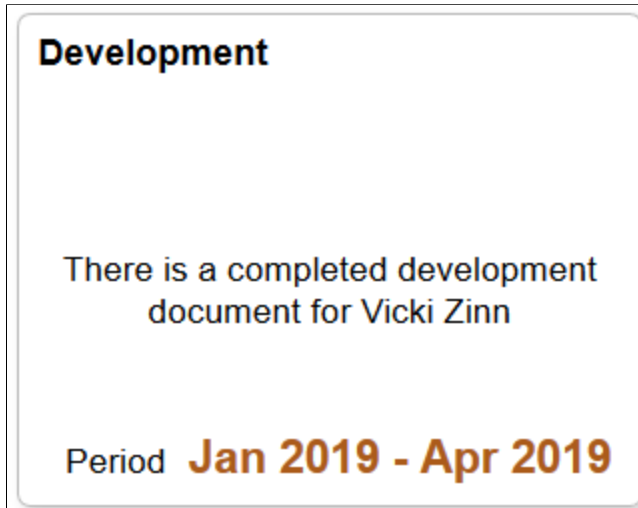
Development (Summary) Tile

Use the Development tile (HCTS_DEV_SUM1_FL_GBL) to view if there is a completed development document for this employee.

Navigation:

Select the [Employee Snapshot - Summary Dashboard](#) category item from the Employee Snapshot pages.

This example illustrates the Development (Summary) tile.



This tile displays whether or not there is a completed development document for the employee as follows:

- If there is a completed document with assigned rating, then the summary tile displays the rating and the associated review period.
- If there is a completed document with no assigned rating, then the tile displays a message *There is a completed development document for <employee name>* and the associated review period.
- If there is an in-progress document but no completed documents, then the tile displays a message *There is a development document in progress for <employee name>*.
- If there are no completed documents and no in-progress documents then the tile displays a message *There are no completed documents for <employee name>*.

When the employee has more than one document, the tile will display the information for the most recent document.

Click the tile to access the [Development History Page](#) and view the development document for the employee, if any.

Development History Page

Use the Development History page (HCTS_DEVHIST_FL or HCTS_DEVHIST_SCF) to view the most recently completed development documents for an employee.

Navigation:

- Click the [Development \(Summary\) Tile](#) from the [Employee Snapshot - Summary Dashboard](#) or any dashboard to which the tile has been added.
- Click the **View Details** link from the [Development History Tile](#) from the [Employee Snapshot - Performance Review Dashboard](#) or any dashboard to which the tile has been added.

This example illustrates the Development History page when accessed from the Development (Summary) tile. This example also shows an employee that has reviews for different document types.

Development History				
Document Type	Period	Job Title	Rating	Name
Leadership	Jan 2019 - Apr 2019	Manager-Revenue		Rosanna Channing
Performance Improvement Plan	Jan 2019 - Apr 2019	Manager-Revenue		Rosanna Channing

This example illustrates the Development History page when accessed from the non-summary Development History tile. This example also shows an employee that has reviews for different document types.

Development History				
Document Type	Period	Job Title	Rating	Manager
Leadership	Jan 2019 - Apr 2019	Accountant		Rosanna Channing >
Development Documents	Sep 2018 - Dec 2018	Accountant		Betty Locherty >

This page displays the development review types, periods, review ratings (if applicable), and job title held for completed development reviews for this employee based on the development document configuration. The document types and maximum number of development reviews to display are defined on the [Configure Employee Snapshot - Document History Page](#).

Note: When the administrator does not identify valid development document types, the page will display a message that you need to contact the system administrator to configure this view.

This video demonstrates the Fluid Employee Snapshot multiple development document types feature:

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

Accessing the Page from a Development (Summary)Tile

When you access this page from the [Development \(Summary\) Tile](#), you can only view a summary of development documents. To access the individual reviews, access the page from the non-summary Development History tile and select a row.

Accessing the Page from a Non-Summary Development History Tile

When you click the **View Details** link from the [Development History Tile](#), you can click the rows in the grid to access the Mentor Evaluation - Completed Page (see “<Manager or Self-> Evaluation Page” (PeopleSoft ePerformance)) and view additional details about the document for this employee.

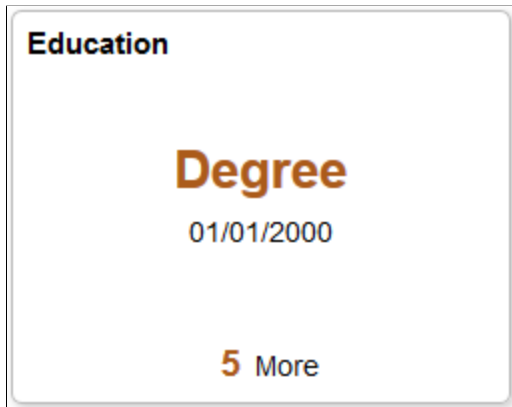
Education Tile

Use the Education tile (HCTS_EDUCATION1_FL_GBL) to see the most recent education level recorded for the employee and a number count of all other degrees and school levels.

Navigation:

Select the [Employee Snapshot - Summary Dashboard](#) category item from the Employee Snapshot pages.

This example illustrates the Education (Summary) tile.



This tile displays the most recent education level listed for the employee. It also provides a number count of all the other education levels and degrees recorded for the employee. Click the tile to access the [Education Page](#) and view the education and degrees completed by the employee.

Education Page

Use the Education page (HCTS_EDUCATION_FL) to see the school education levels and degrees completed by this employee.

Navigation:

Click the [Education Tile](#) from the [Employee Snapshot - Summary Dashboard](#) or any dashboard to which the tile has been added.

This example illustrates the Education page.

Education			
Degrees			
Degree	School	Date Acquired	
Doctor of Philosophy	Houston, University of	01/01/2000	>
Master of Business Admin		06/30/1999	>
Bachelor of Science		06/10/1994	>
School Education			
Education Level	School	Date Attended	
Degree	New York University	01/01/2000	>
General University	Westwood	01/01/2000	>
Graduated	Berkeley, University of CA	01/01/2000	>
View Talent Profile			

The page displays the degrees and education levels recorded on this individual's *Person* profile on the Person Profile or Talent Profile: Education tab in the Profile Management system.

Click a row from this page to access the Education Details Page and view more details about the education or degree.

Field or Control	Description
View Talent Profile	<p>(Manager view only) The page displays this link when a manager is viewing an authorized direct report and profile content is available; it is not visible for indirect reports.</p> <p>Click this link to access the Team Talent Profile pages to view and update this team member's talent profile data in fluid (see "(Fluid) Maintaining Person Profiles" (PeopleSoft eDevelopment)).</p>

Related Links

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

Education Details Page

Use the Education Details page (JPM_ITM_DTL_FL) to view details about the education level or degree obtained by the employee.

Navigation:

Click a row from the [Education Page](#).

This example illustrates the fields and controls on the Education Details page (1 of 2).

Education Details	
Date Acquired	01/01/2000
Degree	Doctor of Philosophy
Major Code	Sociology
Status	Active
Country	United States
State	Texas
School Code	KUS023
School Description	Houston, University of
Major Description	Sociology
Minor Code	
Minor Description	
Average Grade	
GPA	
Graduated	Yes
Year Acquired	2000
Terminal Degree for Discipline	No
Educator	

This example illustrates the fields and controls on the Education Details page (2 of 2).

The screenshot displays the Education Details page for three countries: Germany, Australia, and Japan. Each country section is separated by a horizontal line and includes a small icon of the country's flag.

- Germany:**
 - Practical Grade (DEU)
 - Theoretical Grade (DEU)
 - Intern. Professional Education: No
- Australia:**
 - Education Level (AUS)
 - Education Level Detail (AUS)
- Japan:**
 - Faculty Code (JPN)
 - Faculty Description
 - Sub-Faculty Code (JPN)
 - Subfaculty Description
 - Major Category (JPN)

This page displays differently depending on whether you are reviewing a degree of education level item.

This information comes from the Profile Management system. Details for a person's education are recorded on the "<Content Type> (Item Details) Page" (PeopleSoft eDevelopment) for the *Person* profile for the employee.

Career Plans (Summary) Tile

Use the Career Plans (Summary) tile (HCTS_CAREERPLN1_FL_GBL) to view the next step in this employee's career path. The tile will also list the number of other career path options specified for this employee.

Navigation:

Select the [Employee Snapshot - Summary Dashboard](#) category item from the Employee Snapshot pages.

This example illustrates the Career Plans (Summary) tile.



Career Plans Page

Use the Career Plans page (HCTS_CAREERPLN_FL) to review a list of all career path options defined for the employee.

Navigation:

- Click the [Career Plans \(Summary\) Tile](#) from the [Employee Snapshot - Summary Dashboard](#) or any dashboard to which the tile has been added.
- Click the [Career Plans Tile](#) from the [Employee Snapshot - Career Planning Dashboard](#) or from any dashboard to which this tile has been added.

This example illustrates the Career Plans page.

Career Plans ×

Official Path

Career Move	Option	Job Title	Previous Option	Previous Job Title	
1st Move	1	Finance Director	1	Senior Accounting Manager	>
1st Move	2	Senior Financial Analyst	1	Senior Accounting Manager	>
2nd Move	1	Chief Finance Officer	1	Finance Director	>

Manager Approved Path

Career Move	Option	Job Title	Previous Option	Previous Job Title	
1st Move	1	Corporate Controller	1	Senior Accounting Manager	>
2nd Move	1	Chief Finance Officer	1	Corporate Controller	>

Personal Path

Career Move	Option	Job Title	Previous Option	Previous Job Title	
1st Move	1	Finance Director	1	Senior Accounting Manager	>
2nd Move	1	Chief Finance Officer	1	Finance Director	>

[Manage Career Plan](#)

[Career Progression Chart](#)

Information shown on this page is stored on the “Career Path Page” (PeopleSoft Human Resources Plan Careers and Successions) (administrator), “Manage Career Plans Component” (PeopleSoft Human Resources Plan Careers and Successions) (manager self service), and “Career Path Page” (PeopleSoft Human Resources Plan Careers and Successions) (employee self service) in the Career Planning module.

The page displays up to three career path section types, when available:

- **Official Path:** This section displays those career paths that use the evaluation type *Approved/Official*.
- **Manager Approved Path:** This section displays those career paths that use the evaluation type *Supervisor/Manager*.
- **Personal Path:** This section displays those career paths that use the evaluation type *Self*.

Field or Control	Description
Career Move	Identifies the next job that the employee will move to from the current job or from the job option number specified in the Previous Option field.
Option	Displays the job options number. This sorts the job codes in the preferred order. For example, an employee may have career paths defined to move either to the Financial Director job (option 1) or the Senior Financial Analyst job (option 2) as his next move. This option number should then be referenced in the Previous Option field for the next move for this career path option.
Previous Option	Shows the previous move Option number field value for the current movement, when the previous movement has more than one option available. This value should reference the Option field of the previous job step. For example, this will identify if this is the second job move is for job option number 1 or job option number 2.

Click any row to access the [Career Move Details Page](#) and view more details about the job move.

Field or Control	Description
Manage Career Plan	Click this link to access the “Manage Career Plans Component” (PeopleSoft Human Resources Plan Careers and Successions) as a manager where you can view or modify an employee’s career path using the Career Planning module.
Career Progression Chart	Click this link to access the “Career Progression Chart Page” (PeopleSoft Human Resources Plan Careers and Successions) as a manager to view a graphical representation of the employee’s career paths and perform career planning analysis using the Career Planning module.

Related Links

- “Understanding Career Planning Self Service” (PeopleSoft Human Resources Plan Careers and Successions)
- “Manage Career Plans Component” (PeopleSoft Human Resources Plan Careers and Successions)
- “Understanding the Career Progression Chart” (PeopleSoft Human Resources Plan Careers and Successions)
- “Career Progression Chart Page” (PeopleSoft Human Resources Plan Careers and Successions)

Career Move Details Page

Use the Career Move Details page (HCTS_CP_ADMPATH_SCF) to view additional details about a career move for a person.

Navigation:

Click a row from the [Career Plans Page](#).

This example illustrates the Career Move Details page.

Career Move Details
×

Previous Option 1

Career Move 1st Move

Job Option 2

Position Sr Financial Analyst

Department Finance and Administration

Job Title Senior Financial Analyst

Readiness 1 - 2 Years

Target Date 04/01/2018

Manager Level

Salary Plan KU01

Salary Grade 006

Military

Rank

Salary Grade 006

Information shown on this page is stored on the “Career Path Page” (PeopleSoft Human Resources Plan Careers and Successions) in the Career Planning module.

Related Links

- “Understanding Career Planning Self Service” (PeopleSoft Human Resources Plan Careers and Successions)
- “Manage Career Plans Component” (PeopleSoft Human Resources Plan Careers and Successions)
- “Understanding the Career Progression Chart” (PeopleSoft Human Resources Plan Careers and Successions)
- “Career Progression Chart Page” (PeopleSoft Human Resources Plan Careers and Successions)

Viewing the Promotion Readiness Tiles and Pages

Use the Promotion Readiness dashboard from the Employee Snapshot to view tiles and pages that can aid in determining if an employee is ready for a promotion.

These topics discuss the Employee Snapshot - Promotion Readiness tiles and pages.

Pages Used to View the Employee Snapshot - Promotion Readiness Tiles and Pages

Page Name	Definition Name	Usage
Employee Snapshot - Promotion Readiness Dashboard	PT_LANDINGPAGE	Access tiles related to an employee's promotion readiness.
Current Salary Tile	HCTS_CMP_SALCUR_FL	View the salary range for an employee's job and where the employee falls within that range.
Compensation History Page	HCTS_COMP_HIST_SCF	Review or verify an employee's compensation history.
Job Competencies Tile	HCTS_JOBCOMPSTUM_FL	View a summary graphic of how the employee's (primary person) profile matches the competencies associated with this employee's job (primary non-person) profile.
Job Competencies Page	HCTS_JOBCOMPDT_FL	Review a list of competencies associated with this employee's job (non-person) profile compared to the employee's (person) profile.
Job Competency Details Page	JPM_ITM_DTL_FL	View the details of the employee's rating for a job competency.
Salary History Tile	HCTS_CMP_SALHST_FL	View the compensation history for an employee in a graph.
Salary History Details Page	HCTS_CMP_SALHS_SCF	View the compensation history for an employee in grid format.
Salary Change Details Page	HCTS_COMP_VC_SCF	View details of a specific salary change.
Performance History Tile	HCTS_PERFHIST2_FL	View a summary of current and historical performance documents.
Performance History Page	HCTS_PERFHIST_FL HCTS_PERFHIST_SCF	Review the overall rating for an employee from past performance periods using a table grid. Note: When you access the Performance History page from the Promotion Readiness - Performance History tile, you can click the rows on the page to access the Annual Review - Manager Evaluation Page.

Page Name	Definition Name	Usage
Annual Review - Manager Evaluation Page	EP_APPR_MAIN1	Evaluate performance data for an employee. See “<Manager or Self-> Evaluation Page” (PeopleSoft ePerformance) for information on this page.
<u>Personal Competencies Tile</u>	HC_HCTS_PERS_COMP2_FL	View a list of competencies associated with this employee’s person profile, but not the employee’s job (non-person) profile.
<u>Personal Competencies Page</u>	HCTS_PERS_COMP_FL	View a complete list of competencies associated with this employee’s person profile, but not the employee’s job (non-person) profile.
<u>Personal Competency Details Page</u>	JPM_ITM_DTL_FL	View additional details about the competency rating for this person.
<u>Learning Tile</u>	LM_MYCOURSE_FL	View a graphical summary of learning statuses associated with an employee’s profile.
My Learning Page: Current Tab	LM_MYCOURSE_FL	View a list of all the courses, programs and supplemental learnings in which a person is currently enrolled or registered. For information on the All Learning pages, see the <i>PeopleSoft Enterprise Learning Management</i> , “Using the PeopleSoft Fluid User Interface for Learning Self-Service,” Managing Learning Using the PeopleSoft Fluid User Interface documentation.
My Learning Page: Planned Tab	LM_MYCOURSE_FL	View an employee’s learning plan. For information on the All Learning pages, see the <i>PeopleSoft Enterprise Learning Management</i> , “Using the PeopleSoft Fluid User Interface for Learning Self-Service,” Managing Learning Using the PeopleSoft Fluid User Interface documentation.

Page Name	Definition Name	Usage
My Learning Page: History Tab	LM_MYCOURSE_FL	View a person's completed learning. For information on the All Learning pages, see the <i>PeopleSoft Enterprise Learning Management</i> , "Using the PeopleSoft Fluid User Interface for Learning Self-Service," Managing Learning Using the PeopleSoft Fluid User Interface documentation.
<Learning Item> Details Page	LM_HR_ACT_SECF (for classes) LM_HR_CI_SECF (for courses) LM_HR_SL_SECF (for supplemental learning) LM_HR_PRG_SECF (for programs)	View the details of a learning type, such as a course, program, or supplemental learning. For information on the All Learning pages, see the <i>PeopleSoft Enterprise Learning Management</i> , "Using the PeopleSoft Fluid User Interface for Learning Self-Service," Using the PeopleSoft Fluid User Interface for Manager Self-Service documentation.
Team Learning Pages	LM_HR_CUR_LRNG_FLU LM_MANAGER_HM LM_FND_LRN_PG LM_MGR_GRP_CURNT LM_MGR_CERT_STATUS LM_OBJV_MTM LM_ADHC_MGR_HM LM_LPLN_MGR	Access a collection of frequently-used team learning management components For information on the All Learning pages, see the <i>PeopleSoft Enterprise Learning Management</i> , "Using the PeopleSoft Fluid User Interface for Learning Self-Service," Using the PeopleSoft Fluid User Interface for Manager Self-Service, Team Learning Tile documentation.
<u>Job History Tile</u>	HCTS_JOB_HIST_FL	See the last two jobs held by the employee.
<u>Job History Page</u>	HCTS_JOBHST_MDL_FL	View a complete list of the employee's job history.

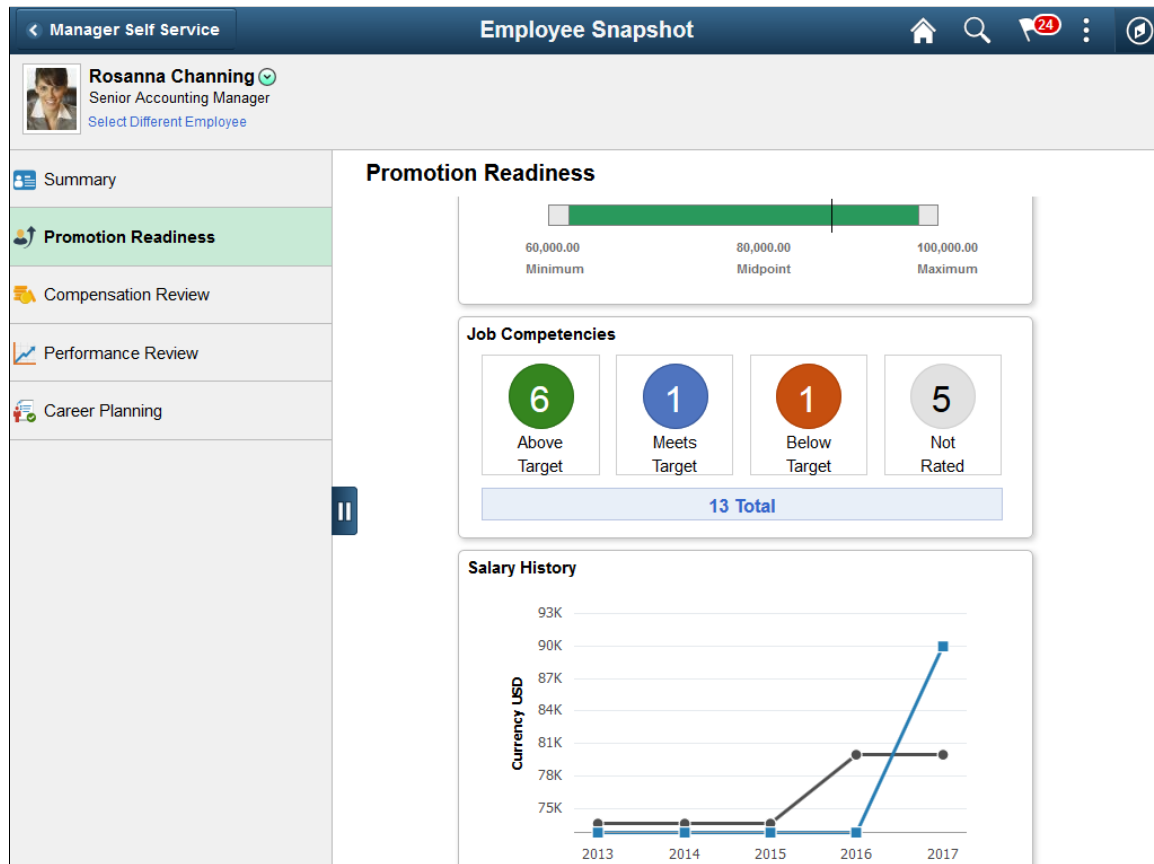
Employee Snapshot - Promotion Readiness Dashboard

Use the Promotion Readiness dashboard page to access tiles related to an employee's promotion readiness.

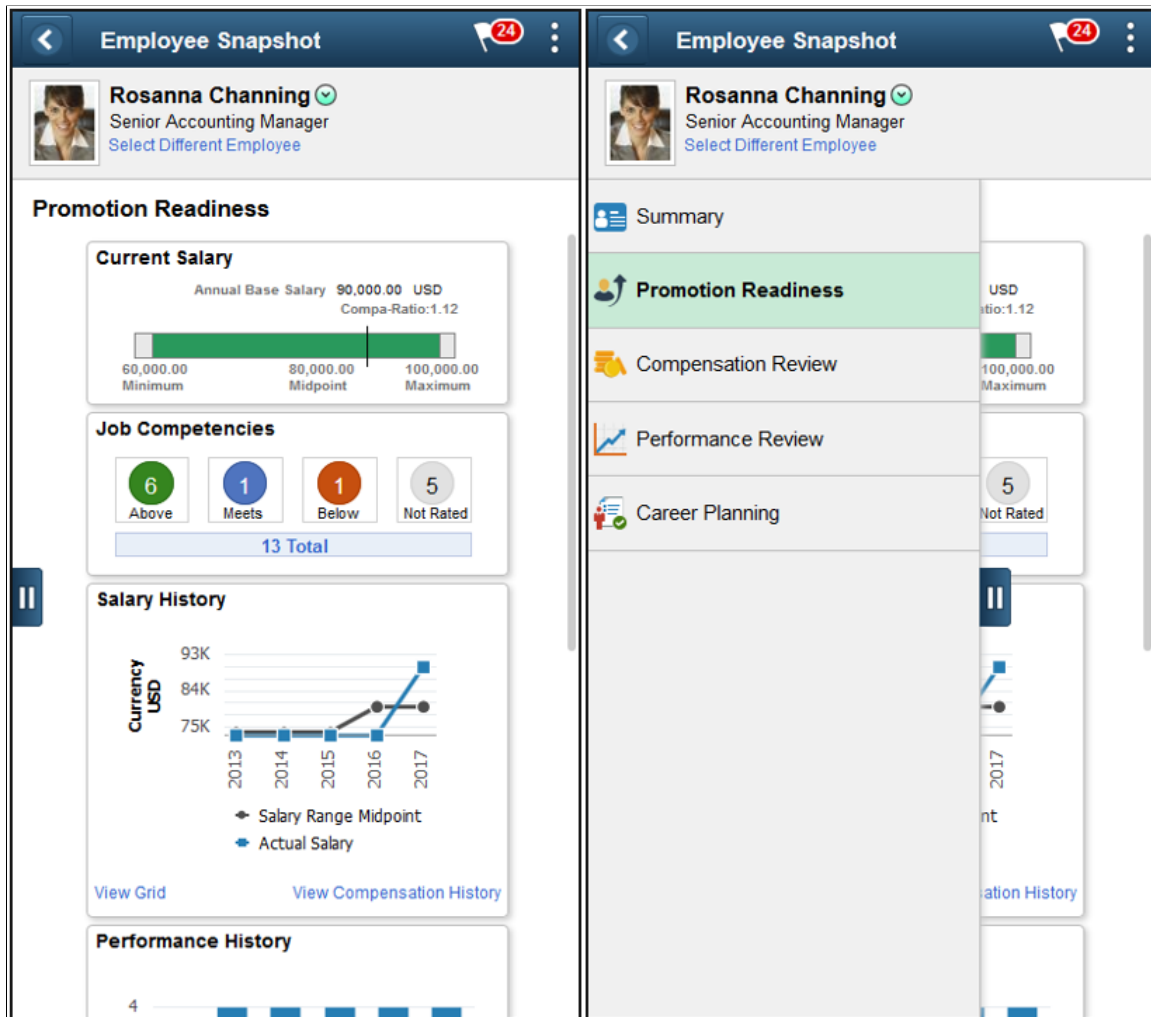
Navigation:

- Click the Employee Snapshot tile on the *Manager Self Service*, *Talent Administrator*, or any fluid homepage to which the tile has been added, select an employee from the search page, and then select **Promotion Readiness** from the left panel.
- (Managers only) Select the **Related Actions** icon next to a person's name in fluid, select **View Employee Snapshot**, then select the Promotion Readiness dashboard category from the left panel.
- From the Employee Snapshot pages, select the Promotion Readiness category item from the left panel.

This example illustrates the Employee Snapshot - Promotion Readiness dashboard for the tablet.



This example illustrates the Employee Snapshot - Promotion Readiness dashboard on a small form factor device. In the first image, the left panel is hidden. In the second image, the left panel is exposed.




Use the **Promotion Readiness** dashboard to access tiles related to your employee's readiness for advancement. These tiles show more details than those which appear on the **Summary dashboard**.

These tiles are delivered by default with the *Promotion Readiness* dashboard:

- [Current Salary Tile](#)
- [Job Competencies Tile](#)
- [Salary History Tile](#)
- [Performance History Tile](#)
- [Personal Competencies Tile](#)
- [Learning Tile](#)
- [Job History Tile](#)

Note: These tiles are delivered by default to appear on the **Promotion Readiness** dashboard page of Employee Snapshot; however, the administrator can move the tiles to appear on other Employee Snapshot dashboard folders. The navigation in these topics references the delivered navigation.

Field or Control	Description
Select Different Employee	(Manager view only) Select this link to access the Employee Snapshot - Find Team Member Page (for Managers) and change the Employee Snapshot view to another employee.
 Hide or Show Action Item List tab	Click this tab to view and select from other Employee Snapshot dashboard categories or close the dashboard list panel.

Note: When you click a tile to access a secondary page and then click the back button to return to the Employee Snapshot pages, the system will return you to the [Employee Snapshot - Summary Dashboard](#) by default. Access the left panel to select another dashboard.

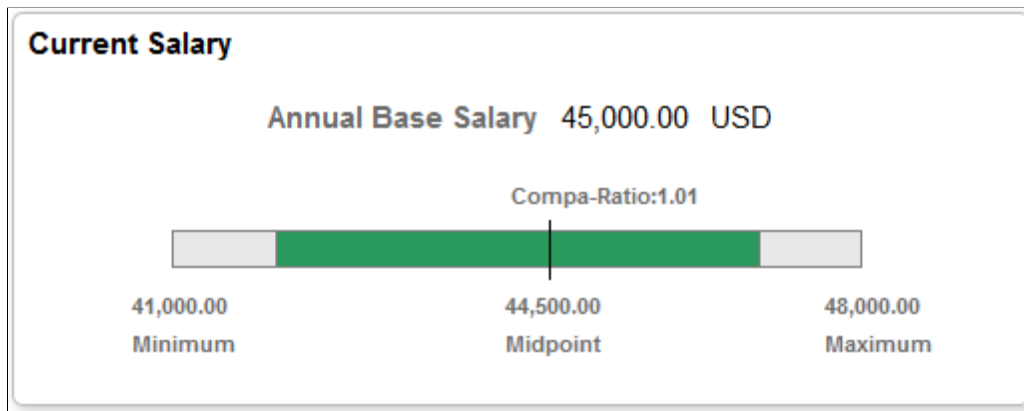
Current Salary Tile

Use the Current Salary tile (HCTS_CMP_SALCUR_FL) to view the salary range for an employee’s job and where the employee falls within that range.

Navigation:

Select the [Employee Snapshot - Promotion Readiness Dashboard](#) item from the left panel of the Employee Snapshot pages.

This example illustrates the Current Salary tile.



The tile displays the minimum, midpoint, and maximum of the salary grade for this employee’s job. The vertical line that runs through the salary range bar indicates the employee's current base salary. The compa ratio is the comparison of the current salary to the mid point of the range.

Click this tile to access the “View Compensation History Page (Fluid Manager View)” (PeopleSoft eCompensation Manager Desktop) to review an employee's compensation history. If the manager does not have access to the fluid View Compensation History page, the [Compensation History Page](#) is displayed.

Job Competencies Tile

Use the Job Competencies tile (HCTS_JOBCOMPSUM_FL) to view a summary graphic of how the employee's (primary person) profile matches the competencies associated with this employee's job (primary non-person) profile.

Navigation:

Select the [Employee Snapshot - Promotion Readiness Dashboard](#) or [Employee Snapshot - Performance Review Dashboard](#) item from the left panel of the Employee Snapshot pages.

This example illustrates the Job Competencies tile.



The tile is very similar to the [Job Competencies \(Summary\) Tile](#), located on the Summary dashboard, however it displays all the employee rating types in comparison to the competency ratings associated with the job. Rating types include:

- *Above Target*: The employee's competency rating is beyond what is required of the job.
- *Meets Target*: The employee's competency rating meets the requirements of the job.
- *Below Target*: The employee's competency rating does not meet the requirements of the job.
- *Not Rated*: The employee has not been evaluated for this job requirement.
- *Total*: The total number of competencies associated with this job and the employee.
- *Exception(s)*: Competencies where the employee's Person profile uses a rating model that is different from the rating model used for the Job profile. When there is not a rating model discrepancy, this option will not appear in the tile.

Select any rating type to access the [Job Competencies Page](#) and view detail lists of the employee's rating for the competencies by rating type.

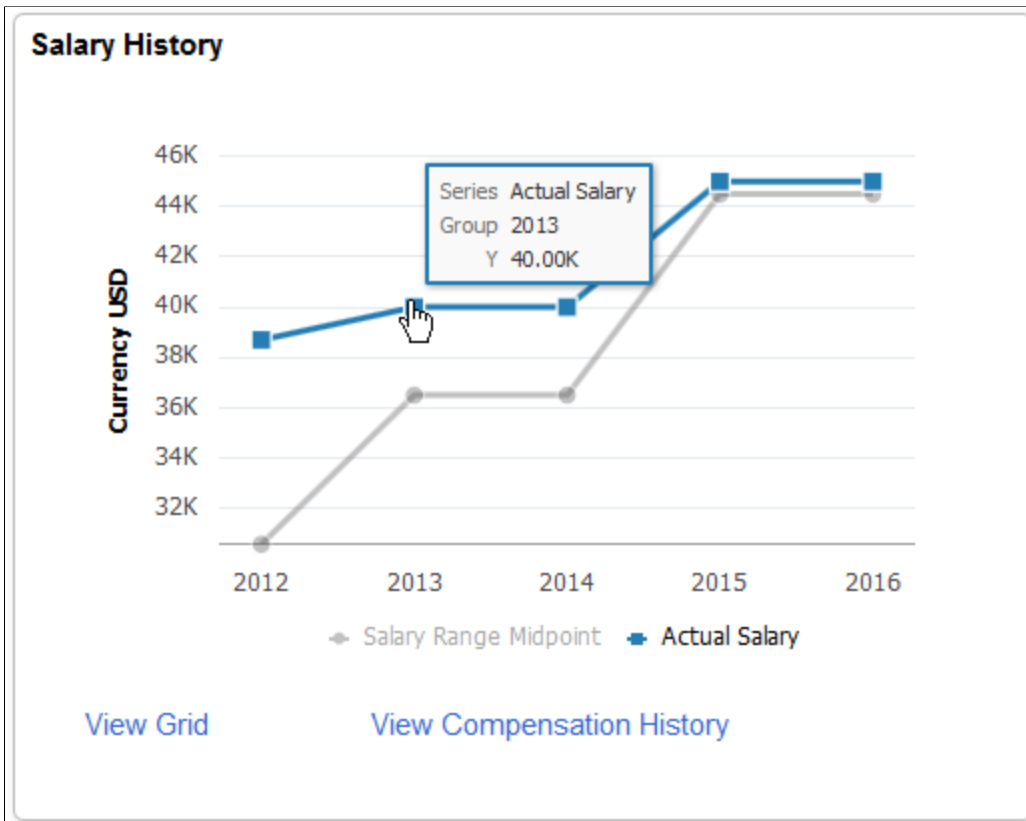
Salary History Tile

Use the Salary History tile (HCTS_CMP_SALHST_FL) to view the compensation history for an employee in a graph.

Navigation:

Select the [Employee Snapshot - Promotion Readiness Dashboard](#) or [Employee Snapshot - Compensation Review Dashboard](#) item from the left panel of the Employee Snapshot pages.

This example illustrates the Salary History tile.



Use this tile to view salary change history. The tile displays the last five years of compensation for the employee as well as the midpoint range for the employee’s job. Pause or hover over a data point on the graph to view the exact salary or salary midpoint for a specific year.

Field or Control	Description
View Grid	Click this link to open the Salary History Details Page to view this information in a grid format.
View Compensation History	Click this link to open the “View Compensation History Page (Fluid Manager View)” (PeopleSoft eCompensation Manager Desktop) in a modal window where you can view the employee's salary, variable cash, and variable noncash information. If the manager does not have access to the fluid View Compensation History page, the Compensation History Page is displayed.

Salary History Details Page

Use the Salary History Details page (HCTS_CMP_SALHS_SCF) to view the compensation history for an employee in grid format.

Navigation:

Click the **View Grid** link from the [Salary History Tile](#) from any dashboard to which the tile has been added.

This example illustrates the Salary History Details page.

Salary History Details ×			
Year	Job Title	Annual Salary	Midpoint
2016	Manager-Revenue	45,000.00	44,500.00
2015	Manager-Revenue	45,000.00	44,500.00
2014	Manager-Revenue	40,000.00	36,500.00
2013	Senior Finance Specialist	40,000.00	36,500.00
2012	Senior Finance Specialist	38,700.00	30,565.00

Related Links

[Compensation: Salary History Page](#)

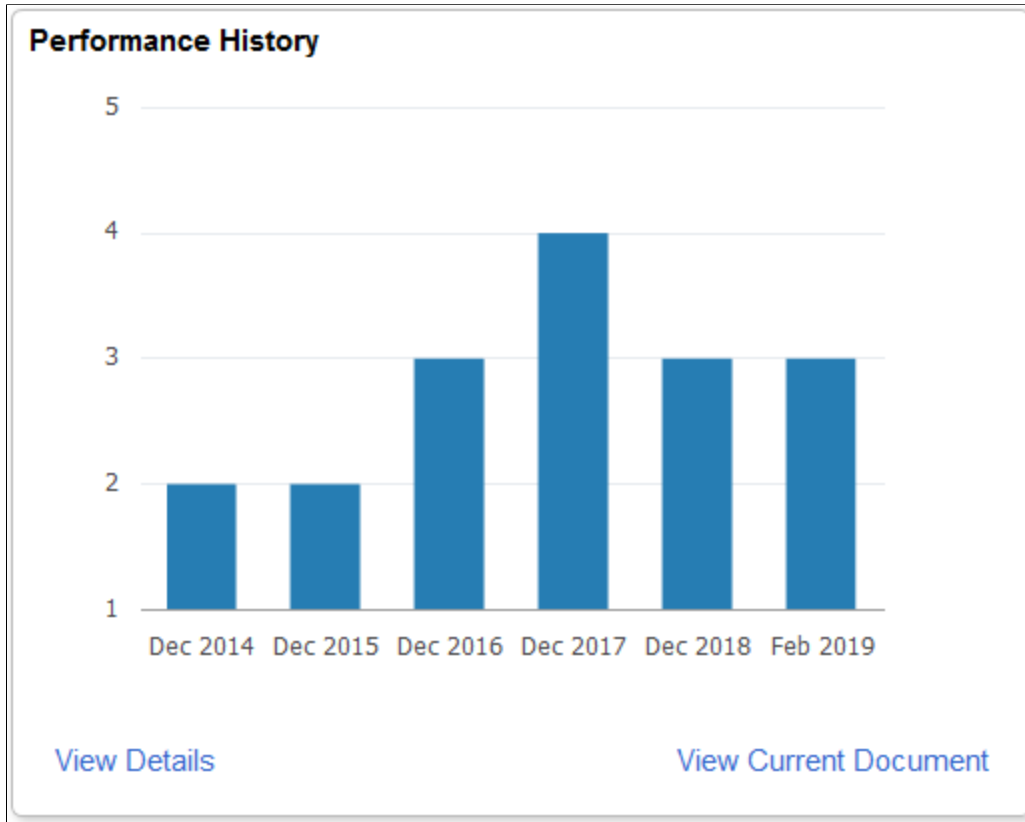
Performance History Tile

Use the Performance History tile (HCTS_PERFHIST2_FL) to view a summary of current and historical performance documents.

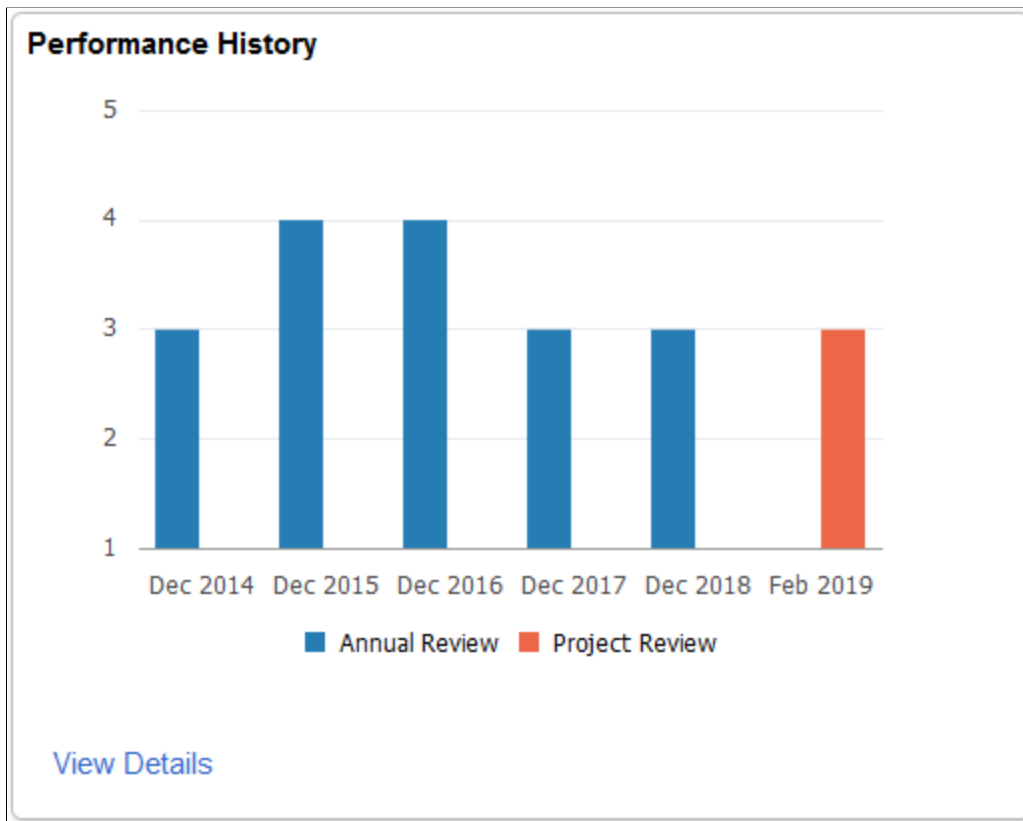
Navigation:

Select from any of the non-summary dashboard item from the left panel of the Employee Snapshot pages.

This example illustrates the Performance History tile.



This example illustrates the Performance History tile and shows an employee has different performance document review types. The page displays reviews for the document review types in different colors.



The Performance History tile displays the overall rating (y-axis) for an employee from past performance periods (x-axis) using a bar graph. The tile displays reviews based on the setup of the [Configure Employee Snapshot - Document History Page](#) for the performance history data.

Note: When the administrator does not identify valid document types in the setup, the page will display a message that you need to contact the system administrator to configure this view. You will also not be able to access the [Performance History Page](#) by clicking the tile.

The colored vertical bars represent the employee's overall performance rating for the period specified. Each distinct performance review is represented by a different colored bar. A legend for performance review title appears below the graph. The color is specific to the performance review.

Pause or hover over a period rating bar to view the performance dates and employee rating. Click the bar to open the Manager Evaluation page to view additional details about the rating for this employee and access the performance evaluation. For information on the performance documents, see “Manager Evaluation Page (Manage Employee Reviews)” (PeopleSoft Human Resources Manage Employee Reviews) or “(Classic) Accessing Documents” (PeopleSoft ePerformance) in ePerformance.

Field or Control	Description
View Details	Click this link to open the Performance History Page and view the performance history in grid format. From that page, you can also access the Manager Evaluation page by clicking a row in the grid.
View Current Document	<p>This link is available when there is an open (in-progress) performance document for the employee when the employee is using the same Document Type as defined on the Configure Employee Snapshot - Document History Page.</p> <p>Click this link to access the ePerformance WorkCenter. For information on this page, see the “Understanding ePerformance WorkCenter” (PeopleSoft ePerformance) documentation.</p>

Personal Competencies Tile

Use the Personal Competencies tile (HC_HCTS_PERS_COMP2_FL) to view a list of competencies associated with this employee’s person profile, but not the employee’s job (non-person) profile.

Navigation:

Select the [Employee Snapshot - Promotion Readiness Dashboard](#) or [Employee Snapshot - Performance Review Dashboard](#) item from the left panel of the Employee Snapshot pages.

This example illustrates the fields and controls on the Personal Competencies tile.

Personal Competencies		
Competency	Proficiency	
Ability to manage own time	4-Very Good	>
Business Banking	3-Good	>
Organize people and goal tasks	3-Good	>
Set & achieve goals	3-Good	>
Shows honesty & integrity	4-Very Good	>
Strategic Planning	4-Very Good	>
View More	View Talent Profile	

The evaluation types and how long an evaluation should be included in the list are defined on the [Configure Employee Snapshot - Competencies Page](#).

Click a row to access the [Personal Competency Details Page](#) and view more details about the competency rating for the employee.

Field or Control	Description
View More	The View More link appears when there are more than six valid personal competencies for an employee. Click this link to access the Personal Competencies Page and view a list of all valid personal competencies for this employee.
View Talent Profile	(Manager view only) The page displays this link when a manager is viewing an authorized direct report and profile content is available; it is not visible for indirect reports. Click this link to access the Team Talent Profile pages to view and update this team member’s talent profile data in fluid (see “(Fluid) Maintaining Person Profiles” (PeopleSoft eDevelopment)).

Learning Tile

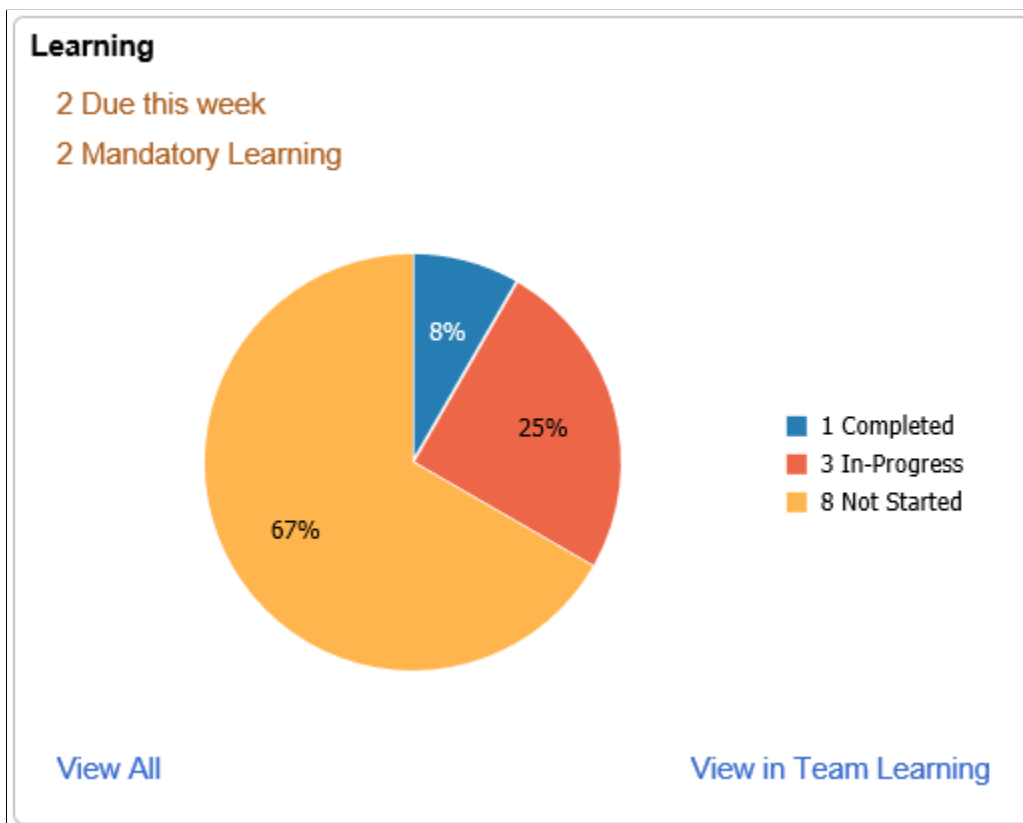
Use the Learning tile (LM_MYCOURSE_FL) to view a graphical summary of learning statuses associated with an employee's profile.

Note: You must have the Enterprise Learning application installed and the Learning tile configured to view data on this tile. When this configuration is incomplete, the tile will display the message that data is not available.

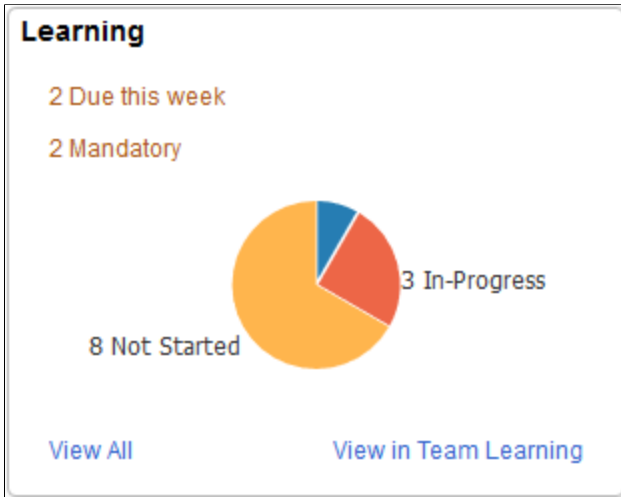
Navigation:

Select the [Employee Snapshot - Promotion Readiness Dashboard](#) item from the left panel of the Employee Snapshot pages to view this tile.

This example illustrates the Learning tile.



This example illustrates the Learning tile as seen on a smartphone.



The Learning tile displays the following learning information:

Field or Control	Description
<number> Due this week or <number> Due this month	Displays the number of courses that are approaching due date in the current week or month for the selected employee.
<number> Mandatory Learning	Displays the number of Mandatory Learnings that the selected employee is currently enrolled in.
Enrolled Courses pie chart	<p>On a desktop or tablet device, the learning pie chart of the selected employee is displayed with slice values representing percentages of <i>Completed</i>, <i>In-Progress</i> and <i>Not Started</i> course statuses. This information appears only when there are courses to which the selected employee is enrolled. A legend with the actual number of courses in each status is also available.</p> <p>On a smartphone, the pie chart displays the actual number of the courses in each status.</p> <hr/> <p>Note: The enrollment should be within the date range as given in the Install Defaults - Fluid Defaults Page of the Enterprise Learning application. If date range is not indicated in the setup page then the data in the pie chart will be displayed for 365 days.</p> <hr/> <p>The pie chart is not displayed, when there are no learning enrollments for the selected employee.</p>
View All	Click the View All link to access the All Learning pages for the selected employee in the ELM application.

Field or Control	Description
View in Team Learning	<p>(Manager view only) The tile displays this link when a manager is viewing an authorized direct report and profile content is available; it is not visible for indirect reports.</p> <p>Click the View in Team Learning link to access the Team Learning pages in the ELM application. The page is pre-filtered to the selected employee's list of learnings.</p>

When the individual is not enrolling in learning, the tile will display the message that there is no enrolled learning for this person.

When you are not granted access to a person's information, the tile will display the message that you are not permitted to view learning information for this person.

For information on the All Learning pages, see the *PeopleSoft Enterprise Learning Management*, "Using the PeopleSoft Fluid User Interface for Learning Self-Service," *Managing Learning Using the PeopleSoft Fluid User Interface* and *Using the PeopleSoft Fluid User Interface for Manager Self-Service* documentation topics.

This video demonstrates Fluid Employee Snapshot Learning Integration feature:

Video: [Image Highlight, PeopleSoft HCM Update Image 28: Employee Snapshot Learning Integration and Tile](#)

Job History Tile

Use the Job History tile (HCTS_JOB_HIST_FL) to see the last two jobs held by the employee.

Navigation:

Select the [Employee Snapshot - Promotion Readiness Dashboard](#) item from the left panel of the Employee Snapshot pages.

This example illustrates the fields and controls on the Job History tile.

Job History		
Job Title	Dates	Years in Job
Senior Accounting Manager	11/04/2008 - Present	8.8
Manager-Finance	08/29/1986 - 11/03/2008	22.2

[View More](#)

<i>Field or Control</i>	<i>Description</i>
View More	Select this link to open the Job History Page and view a full list of the employee's job history.

Job History Page

Use the Job History page (HCTS_JOBHST_MDL_FL) to view a complete list of the employee's job history.

Navigation:

Select the **View More** link on the [Job History Tile](#).

This example illustrates the fields and controls on the Job History page.

Job History ×		
Job Title	Dates	Years in Job
Senior Accounting Manager	11/04/2008 - Present	8.8
Manager-Finance	08/29/1986 - 11/03/2008	22.2

Viewing the Compensation Review Tiles and Pages

Use the Compensation Review dashboard from the Employee Snapshot to view tiles and pages that show data related to an employee's compensation and potentially aid in determining compensation changes for an employee.

These topics discuss the Employee Snapshot - Compensation Review tiles and pages.

Pages Used to View the Employee Snapshot Compensation Review Tiles and Pages

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
Employee Snapshot - Compensation Review Dashboard	PT_LANDINGPAGE	Access a variety of high level tiles about an employee's compensation.

Page Name	Definition Name	Usage
<u>Current Salary Tile</u>	HCTS_CMP_SALCUR_FL	View the salary range for an employee's job and where the employee falls within that range.
<u>Bonus Earnings Tile</u>	HCTS_BONUS2_FL	View a history of bonus amounts received by the employee over the past few years.
<u>Salary History Tile</u>	HCTS_CMP_SALHST_FL	View the compensation history for an employee in a graph or click the links on the tile to access additional salary information.
<u>Compensation History Page</u>	HCTS_COMP_HIST_SCF	Review or verify an employee's compensation history.
<u>Salary Change Details Page</u>	HCTS_COMP_VC_SCF	View details of a specific salary change.
<u>Salary History Details Page</u>	HCTS_CMP_SALHS_SCF	View the compensation history for an employee in grid format.
<u>Performance History Tile</u>	HCTS_PERFHIST2_FL	View a summary of current and historical performance documents in a graph or click the links on the tile to access additional performance information.
<u>Performance History Page</u>	HCTS_PERFHIST_FL HCTS_PERFHIST_SCF	Review the overall rating for an employee from past performance periods using a table grid.
"<Manager or Self-> Evaluation Page" (PeopleSoft ePerformance)	EP_APPR_MAIN1	Enter and maintain evaluation data for an employee using ePerformance.
"Checkpoint <#> Page" (PeopleSoft ePerformance)	EP_APPR_BASE1	Track the checkpoint progress of a performance or development document using the ePerformance pages.
<u>Total Rewards Tile</u>	HCTS_CMP_TRW_FL	View the most recent total rewards statement to review earnings, benefits, and other compensation information of a direct report in a chart format.
<u>Total Rewards Details Page</u>	HCTS_CMP_TRGRD_SCF	View the list of reward items that make up the employee's total rewards.

Page Name	Definition Name	Usage
“Total Rewards Page” (PeopleSoft Human Resources Administer Compensation)	TRW_SS_STMT_FL	Review employee’s earnings, benefits, and other compensation information for a specified review period.
<u>Employee Impact Tile</u>	HCTS_RATINGBOX2_FL	Assess the impact of loss, risk of leaving, performance and potential rating for an employee within the context of ratings boxes.
<u>Employee Impact Page</u>	HCTS_RB_DTLS_SCF	Assess the employee’s performance rating and potential rating in text format.
“Manage Career Plans Component” (PeopleSoft Human Resources Plan Careers and Successions)	HR_CP_MANAGER	Perform career planning activities for your direct reports.

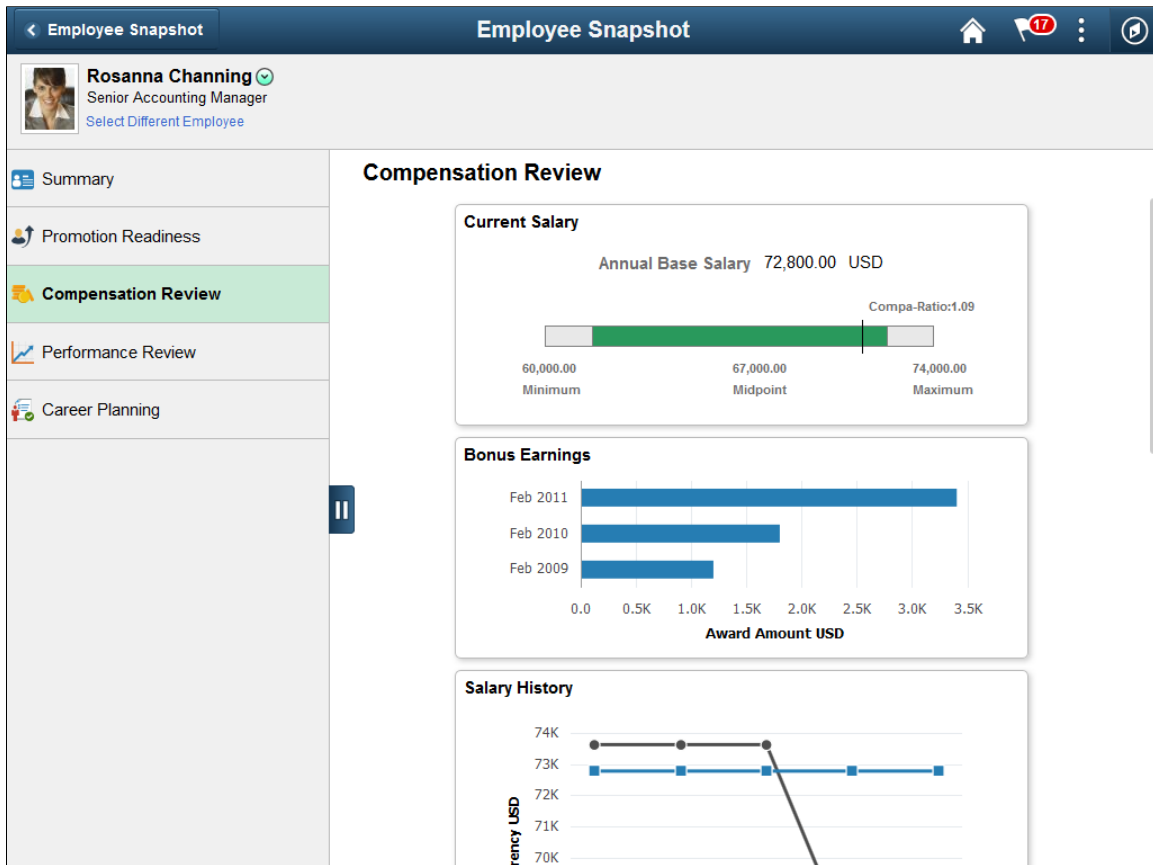
Employee Snapshot - Compensation Review Dashboard

Use the Compensation Review dashboard page to access a variety of high level tiles about an employee’s compensation.

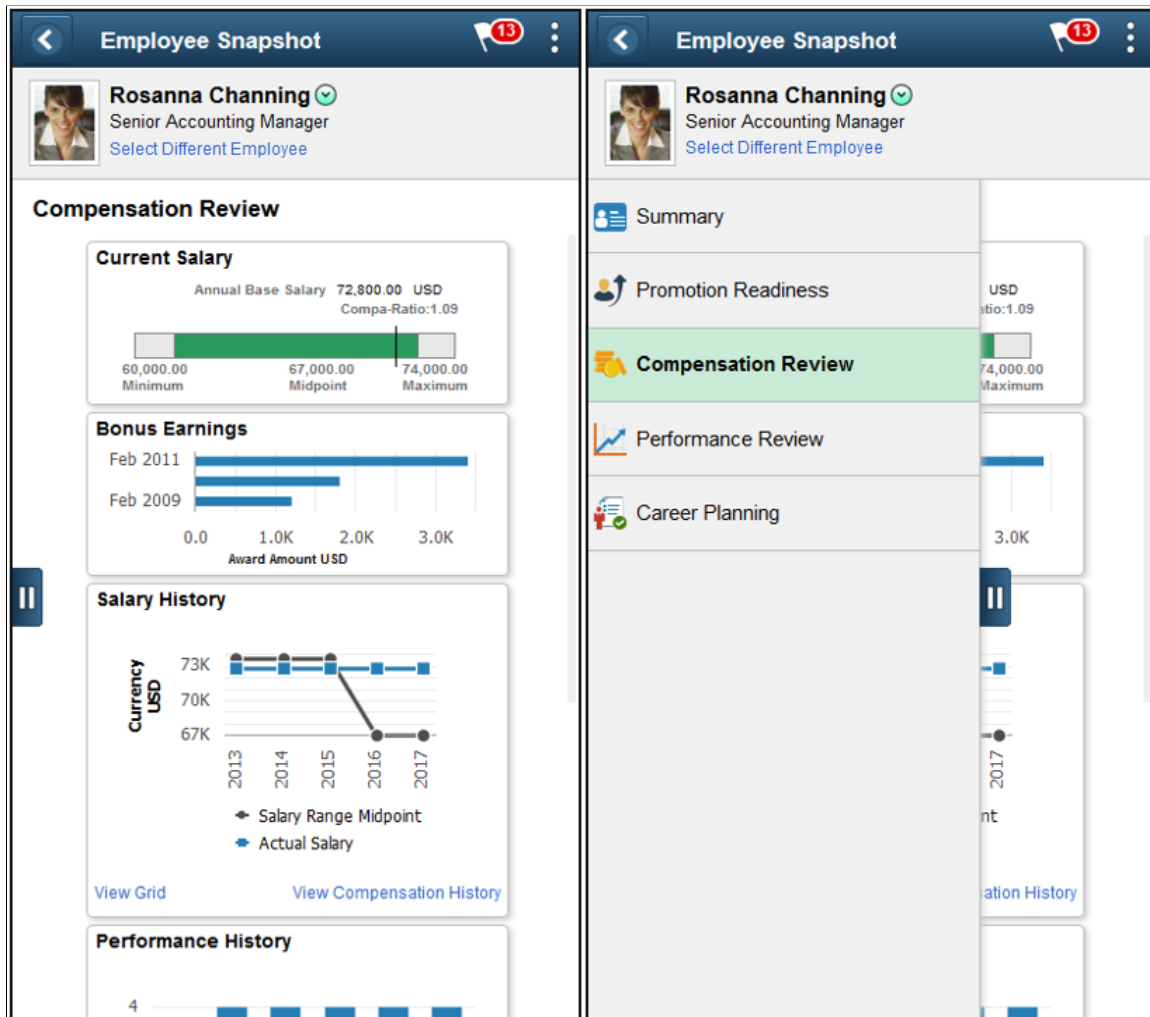
Navigation:

- Click the Employee Snapshot tile on the *Manager Self Service*, *Talent Administrator*, or any fluid homepage to which the tile has been added, select an employee from the search page, and then select **Compensation Review** from the left panel.
- (Manager only) Select the **Related Actions** icon next to a person’s name in fluid, select **View Employee Snapshot**, then select the Compensation Review dashboard category from the left panel.
- From the Employee Snapshot pages, select the Compensation Review dashboard category item from the left panel.

This example illustrates the Employee Snapshot - Compensation Review dashboard page for the tablet.



This example illustrates the Employee Snapshot - Compensation Review dashboard on a small form factor device. In the first image, the left panel is hidden. In the second image, the left panel is exposed.




Use the **Compensation Review** dashboard to access tiles related to your employee's compensation. These tiles show more details than those which appear on the **Summary** dashboard.

These tiles are delivered by default with the *Compensation Review* dashboard:

- [Current Salary Tile](#)
- [Bonus Earnings Tile](#)
- [Salary History Tile](#)
- [Performance History Tile](#)
- [Total Rewards Tile](#)
- [Employee Impact Tile](#)

Note: These tiles are delivered by default to appear on the **Compensation Review** dashboard page of Employee Snapshot; however, the administrator can move the tiles to appear on other Employee Snapshot dashboard folders. The navigation in these topics references the delivered navigation.

Field or Control	Description
Select Different Employee	(Manager view only) Select this link to access the Employee Snapshot - Find Team Member Page (for Managers) and change the Employee Snapshot view to another employee.
 Hide or Show Action Item List tab	Click this tab to view and select other Employee Snapshot dashboards.

Note: When you click a tile to access a secondary page and then click the back button to return to the Employee Snapshot pages, the system will return you to the [Employee Snapshot - Summary Dashboard](#) by default. Access the left panel to select another dashboard.

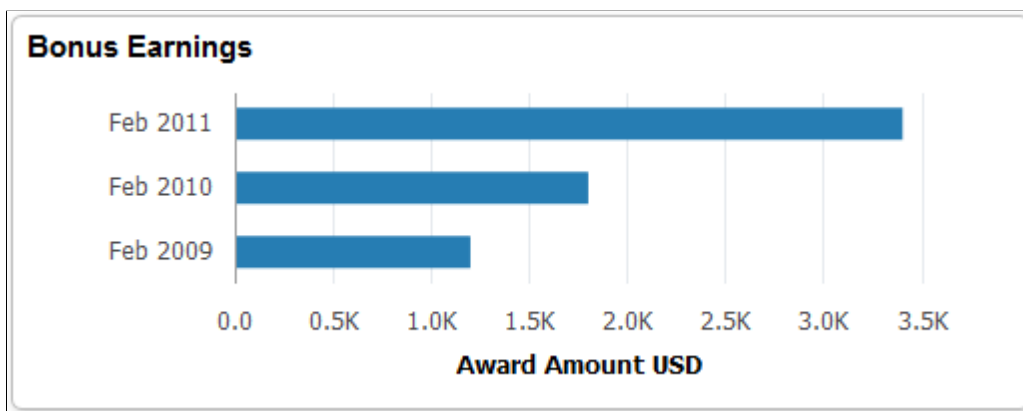
Bonus Earnings Tile

Use the Bonus Earnings tile (HCTS_BONUS2_FL) to view a history of bonus amounts received by the employee over the past few years.

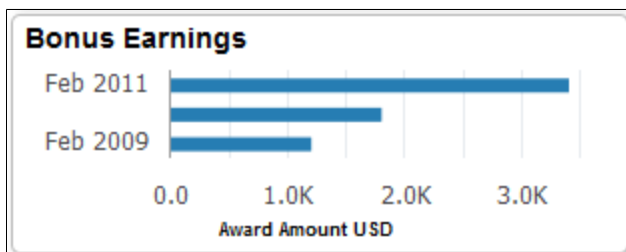
Navigation:

Select the [Employee Snapshot - Compensation Review Dashboard](#) action item from the Employee Snapshot pages.

This example illustrates the fields and controls on the Bonus Earnings tile for a tablet.



This example illustrates the fields and controls on the Bonus Earnings tile for a smartphone.



The tile displays the date and amount for up to the last three bonuses the employee received. Pause or hover over a bar item to view individual information. All currency amounts are shown according to the currency specified at the bottom of the tile.

Click this tile to access the “View Compensation History Page (Fluid Manager View)” (PeopleSoft eCompensation Manager Desktop), which will display all rows of compensation history in addition to the bonus earnings. If the manager does not have access to the fluid View Compensation History page, the [Compensation History Page](#) is displayed.

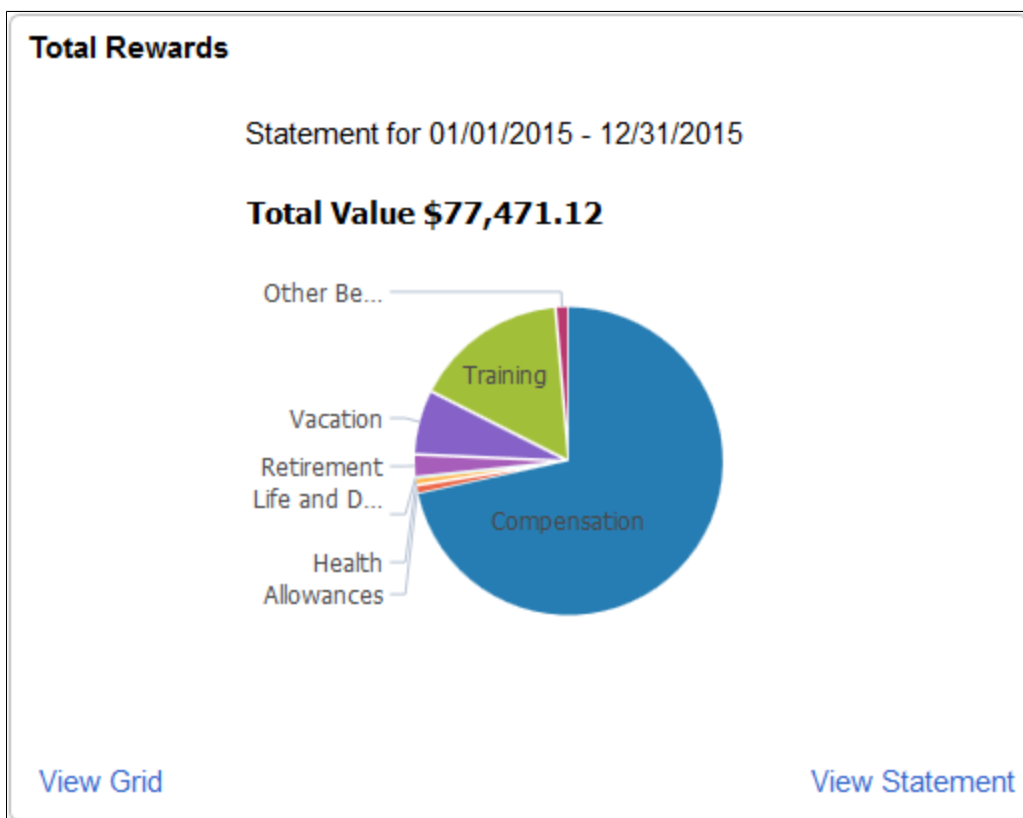
Total Rewards Tile

Use the Total Rewards tile (HCTS_CMP_TRW_FL) to view the most recent total rewards statement to review earnings, benefits, and other compensation information of a direct report.

Navigation:

Select the [Employee Snapshot - Compensation Review Dashboard](#) action item from the Employee Snapshot pages.

This example illustrates the fields and controls on the Total Rewards tile.



The tile displays the most recent statement period information, the period and total value shown at the top of the page. Pause or hover over a reward item to view the item amount and reward percentage for this period.

Field or Control	Description
View Grid	Click this link to access the Total Rewards Details Page to view the reward items that make up an employee's total rewards.
View Statement	Click this link to access the "Total Rewards Page" (PeopleSoft Human Resources Administer Compensation) to review employee's earnings, benefits, and other compensation information for a specified review period.

Total Rewards Details Page

Use the Total Rewards Details page (HCTS_CMP_TRGRD_SCF) to view the list of reward items that make up the employee's total rewards.

Navigation:

Click the **View Grid** link from the [Total Rewards Tile](#).

This example illustrates the fields and controls on the Total Rewards Details page.

Total Rewards Details ×			
Currency USD			
Reward Item	Employer Paid	Employee Contribution	Employer Provided
Compensation	55,442.30	0.00	0.00
Allowances	720.00	0.00	0.00
Health	286.65	327.06	0.00
Life and Disability	39.96	0.00	0.00
Retirement	365.05	1,460.10	0.00
Vacation	0.00	0.00	5,250.00
Training	10,000.00	0.00	2,500.00
Other Benefits	0.00	0.00	1,080.00
Total	66,853.96	1,787.16	8,830.00

This grid include the earnings, benefits, credits, and any additional compensation received during the most recent statement period.

Related Links

“Reward Item Details Page” (PeopleSoft Human Resources Administer Compensation)

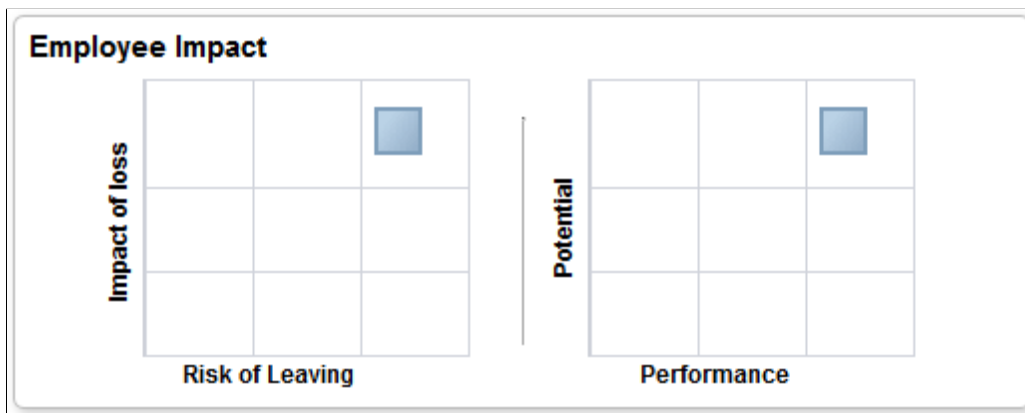
Employee Impact Tile

Use the Employee Impact tile (HCTS_RATINGBOX2_FL) to assess the impact of loss, risk of leaving, performance and potential rating for an employee within the context of ratings boxes.

Navigation:

Select the [Employee Snapshot - Compensation Review Dashboard](#) or [Employee Snapshot - Career Planning Dashboard](#) action item from the Employee Snapshot pages.

This example illustrates the fields and controls on the Employee Impact tile.



Use this tile to view to compare an employee’s risk lose versus leaving the organization as well as an employee’s performance rating in relationship to his or her potential.

The impact of loss, risk of leaving, and potential rating are defined on the career plan. The performance rating comes from the most recently completed performance document.

Click the tile to access the [Employee Impact Page](#) to see the individual ratings values.

Note: When the administrator has not enabled either of the boxes, the tile will display a message that you need to contact the system administrator to configure this view.

Impact of Loss Versus Risk of Leaving Ratings Box

The administrator configures the Risk versus Loss ratings box on the [Configure Employee Snapshot - Risk versus Loss Page](#). Here the administrator selects to show or not show this rating box on the Employee Snapshot tile and page. The administrator can also define the axis labels for this table.

Potential Versus Performance Ratings Box

The administrator configures the Performance versus Potential ratings box on the [Configure Employee Snapshot - Performance versus Potential Page](#). Here the administrator defines the size of the ratings boxes, axis labels, and maps the values to the rating models that are associated with the employees’ evaluations.

Related Links

“Career Plan Page” (PeopleSoft Human Resources Plan Careers and Successions)

“Career Ranking and Potential Page” (PeopleSoft Human Resources Plan Careers and Successions)

“(Classic) Accessing Documents” (PeopleSoft ePerformance)

“Completing Manager Evaluation Documents” (PeopleSoft Human Resources Manage Employee Reviews)

Employee Impact Page

Use the Employee Impact tile (HCTS_RB_DTLS_SCF) to assess the employee’s performance rating and potential rating in text format.

Navigation:

Click the ratings boxes on the [Employee Impact Tile](#).

This example illustrates the fields and controls on the Employee Impact page.



The impact of loss, risk of leaving, and potential rating are defined on the career plan. The performance review rating comes from the most recently completed performance document.

<i>Field or Control</i>	<i>Description</i>
Manage Career Plan	Click this link to access the “Manage Career Plans Component” (PeopleSoft Human Resources Plan Careers and Successions) where you can view or modify an employee’s career path using the Career Planning module.

Viewing the Performance Review Tiles and Pages

Use the Performance Review dashboard from the Employee Snapshot to view tiles and pages that show data related to an employee’s performance data, such as reviews, responsibilities, and certifications.

These topics discuss the Employee Snapshot - Performance Review tiles and pages.

Pages Used to View the Performance Review Tiles and Pages

Page Name	Definition Name	Usage
<u>Employee Snapshot - Performance Review Dashboard</u>	PT_LANDINGPAGE	View tiles related to an employee's performance.
<u>Performance History Tile</u>	HCTS_PERFHIST2_FL	View a summary of current and historical performance documents.
<u>Performance History Page</u>	HCTS_PERFHIST_SCF	Review the overall rating for an employee from past performance periods using a table grid.
Manager Evaluation Page Mentor Evaluation Page (See "<Manager or Self-> Evaluation Page" (PeopleSoft ePerformance))	EP_APPR_MAIN1	Review evaluation data for an employee using the ePerformance pages.
"Checkpoint <#> Page" (PeopleSoft ePerformance)	EP_APPR_BASE1	Track the checkpoint progress of a performance or development document using the ePerformance pages.
<u>Responsibilities Tile</u>	HCTS_RESP_CMP_FL	View a short list of responsibilities associated with an employee.
<u>Responsibilities Page</u>	HCTS_RESP_FL	View a list of responsibilities associated with an employee.
<u>Responsibilities Details Page</u>	JPM_ITM_DTL_FL	View additional information about a responsibility assigned to an employee.
<u>Special Projects Tile</u>	HCTS_PROJECTS_FL	View a short list of projects assigned to this employee.
<u>Special Projects Page</u>	HCTS_PROJECTS_SCF	View a complete list of projects assigned to this employee.
<u>Special Projects Details Page</u>	JPM_ITM_DTL_FL	View additional details about a project assigned to an employee.
<u>E&G Special Projects Tile</u>	HCTS_EGPROJ_CMP_FL	View a short list of education and government projects assigned to this employee.

Page Name	Definition Name	Usage
E&G Special Projects Page	HCTS_EGPROJ_SCF	View a complete list of education and government projects assigned to this employee.
E&G Special Projects Details Page	JPM_ITM_DTL_FL	View additional details about an education and government project assigned to an employee
Personal Competencies Tile	HCTS_PERS_COMP2_FL	View a list of competencies associated with this employee's person profile, but not the employee's job (non-person) profile.
Personal Competencies Page	HCTS_PERS_COMP_FL	View a complete list of competencies associated with this employee's person profile, but not the employee's job (non-person) profile.
Personal Competency Details Page	JPM_ITM_DTL_FL	View additional details about the competency rating for this person.
Licenses and Certifications Tile	HCTS_LICENSE_FL	View the number of current, expiring, or missing licenses and certifications held by this employee. This tile will appear differently based on the setup defined on the Configure Employee Snapshot - Licenses and Certifications Page .
Licenses and Certifications Page	HCTS_LICENSE_SCF	View the licenses and certifications held by an employee. This page will appear differently based on the setup defined on the Configure Employee Snapshot - Licenses and Certifications Page .
Job Competencies Tile	HCTS_JOBCOMPSTUM_FL	View a summary graphic of how the employee's (primary person) profile matches the competencies associated with this employee's job (primary non-person) profile.
Job Competencies Page	HCTS_JOBCOMPDT_FL	Review a list of competencies associated with this employee's job (non-person) profile compared to the employee's (person) profile.

Page Name	Definition Name	Usage
<u>Development History Tile</u>	HCTS_DEVHIST2_FL	View and overview of completed development documents along with document type, period, and job title for this employee. You can also access the details of the development document from this tile.
<u>Development History Page</u>	HCTS_DEVHIST_SCF	View the completed development documents for an employee. <hr/> Note: When you access the Development History page from the Performance Review - Development History tile, you can click the rows on the page to access the Mentor Evaluation - Completed Page. <hr/>

Employee Snapshot - Performance Review Dashboard

Use the Employee Snapshot - Performance Review dashboard page to view tiles related to an employee's performance.

Navigation:

- Click the Employee Snapshot tile on the *Manager Self Service*, *Talent Administrator*, or any fluid homepage to which the tile has been added, select an employee from the search page, and then select **Performance Review** from the left panel.
- (Manager only) Select the **Related Actions** icon next to a person's name in fluid, select **View Employee Snapshot**, then select the Performance Review dashboard category from the left panel.
- From the Employee Snapshot pages, select the Performance Review dashboard category item from the left panel.

This example illustrates the fields and controls on the Employee Snapshot - Performance Review Dashboard page.

Employee Snapshot

Rosanna Channing
Senior Accounting Manager
[Select Different Employee](#)

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

Performance Review

Performance History

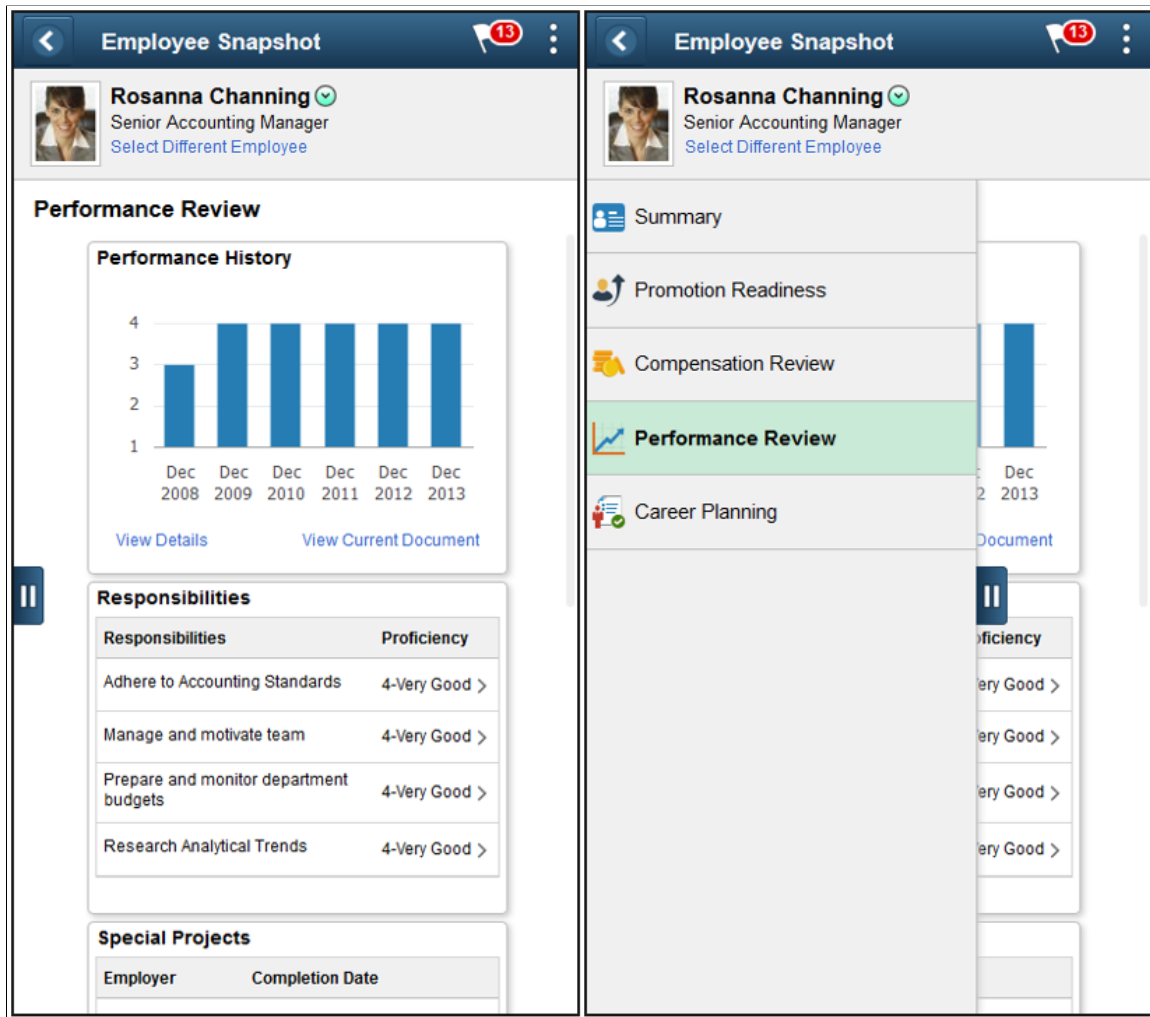
Year	Score
Dec 2008	3
Dec 2009	4
Dec 2010	4
Dec 2011	4
Dec 2012	4
Dec 2013	4

[View Details](#) [View Current Document](#)

Responsibilities

Responsibilities	Proficiency
Adhere to Accounting Standards	4-Very Good >
Business Process Analysis	>

This example illustrates the Employee Snapshot - Performance Review dashboard on a small form factor device. In the first image, the left panel is hidden. In the second image, the left panel is exposed.




Use the **Performance Review** dashboard to access tiles related to your employee's performance reviews. These tiles show more details than those which appear on the **Summary** dashboard.

These tiles are delivered by default with the *Performance Review* dashboard:

- [Performance History Tile](#)
- [Responsibilities Tile](#)
- [Special Projects Tile](#)
- [E&G Special Projects Tile](#)
- [Personal Competencies Tile](#)
- [Licenses and Certifications Tile](#)
- [Job Competencies Tile](#)
- [Development History Tile](#)

Note: These tiles are delivered by default to appear on the **Performance Review** dashboard page of Employee Snapshot; however, the administrator can move the tiles to appear on other Employee Snapshot dashboard folders. The navigation in these topics references the delivered navigation.

Field or Control	Description
Select Different Employee	(Manager view only) Select this link to access the Employee Snapshot - Find Team Member Page (for Managers) and change the Employee Snapshot view to another employee.
 Hide or Show Action Item List tab	Click this tab to view and select other Employee Snapshot dashboards.

Note: When you click a tile to access a secondary page and then click the back button to return to the Employee Snapshot pages, the system will return you to the [Employee Snapshot - Summary Dashboard](#) by default. Access the left panel to select another dashboard.

Responsibilities Tile

Use the Responsibilities tile (HCTS_RESP_CMP_FL) to view a short list of responsibilities associated with an employee's profile.

Navigation:

Select the [Employee Snapshot - Performance Review Dashboard](#) action item from the left panel of the Employee Snapshot pages to view this tile.

This example illustrates the fields and controls on the Responsibilities tile.

Responsibilities	
Responsibilities	Proficiency
Adhere to Accounting Standards	4-Very Good >
Business Process Analysis	>
Manage and motivate team	4-Very Good >
Prepare and monitor department budgets	4-Very Good >
Prepare various financial reports	>
Research Analytical Trends	4-Very Good >
View More	View Talent Profile

The tile lists the responsibilities held by this individual as defined for the *Person* profile on the Person Profile or Talent Profile: Responsibilities tab.

Click a row from this page to access the [Responsibilities Details Page](#) and view more details about the responsibility given this employee.

Field or Control	Description
View More	The View More link appears when there are more than six responsibilities listed for an employee. Click this link to access the Responsibilities Page and view a list of all active responsibilities associated with the employee.
View Talent Profile	(Manager view only) The page displays this link when a manager is viewing an authorized direct report and profile content is available; it is not visible for indirect reports. Click this link to access the Team Talent Profile pages to view and update this team member’s talent profile data in fluid (see “(Fluid) Maintaining Person Profiles” (PeopleSoft eDevelopment)).

Special Projects Tile

Use the Special Projects tile (HCTS_PROJECTS_FL) to view a short list of projects assigned to this employee.

Navigation:

Select the [Employee Snapshot - Performance Review Dashboard](#) action item from the left panel of the Employee Snapshot pages.

This example illustrates the fields and controls on the Special Projects tile.

Special Projects		
Employer	Completion Date	
Firmware Inc.	01/20/2018	>
Corporate Marketing	06/01/2017	>
Micro Resesarch	05/15/2017	>
New Beginnings LLC	03/02/2017	>
Fly High Airlines	09/01/2016	>
Legends Marketing	06/12/2016	>
View More		View Talent Profile

The tile lists the special projects held by this individual as defined for the *Person* profile on the Person Profile or Talent Profile: Projects tab.

Projects are sorted by completion date. Click a row to access the [Special Projects Details Page](#).

The number of years to display a project is defined on the [Configure Employee Snapshot - Projects Page](#).

Field or Control	Description
View More	The View More link appears when there are more than six projects listed for an employee. Click the link to open the Special Projects Details Page and view a list of all active projects associated with the employee.

Field or Control	Description
View Talent Profile	<p>(Manager view only) The page displays this link when a manager is viewing an authorized direct report and profile content is available; it is not visible for indirect reports.</p> <p>Click this link to access the Team Talent Profile pages to view and update this team member's talent profile data in fluid (see "(Fluid) Maintaining Person Profiles" (PeopleSoft eDevelopment)).</p>

Special Projects Page

Use the Special Projects page (HCTS_PROJECTS_SCF) to view a complete list of projects assigned to this employee.

Navigation:

Click the **View More** link from the [Special Projects Tile](#).

This example illustrates the fields and controls on the Special Projects page.

Special Projects		
Employer	Completion Date	
Fly High Airlines	01/19/2018	>
Kwality Icecream	01/19/2018	>
Legends Marketing	01/19/2018	>
New Beginnings LLC	01/19/2018	>
Mircro Research	01/20/2018	>
Eclips Software	01/20/2018	>
Star Textiles	01/20/2018	>
Firmware Inc.	01/20/2018	>
Fortune Inc	01/20/2018	>
Tactonic LLC	01/20/2018	>
Agile Corp	01/30/2018	>
PeopleSoft	12/02/2018	>

[View Talent Profile](#)

The page lists the special projects held by this individual as defined for the *Person* profile on the Person Profile or Talent Profile page: Projects tab.

Projects are sorted by completion date. Click a row to access the [Special Projects Details Page](#).

The number of years to display a project is defined on the [Configure Employee Snapshot - Projects Page](#).

Field or Control	Description
View Talent Profile	<p>(Manager view only) The page displays this link when a manager is viewing an authorized direct report and profile content is available; it is not visible for indirect reports.</p> <p>Click this link to access the Team Talent Profile pages to view and update this team member’s talent profile data in fluid (see “(Fluid) Maintaining Person Profiles” (PeopleSoft eDevelopment)).</p>

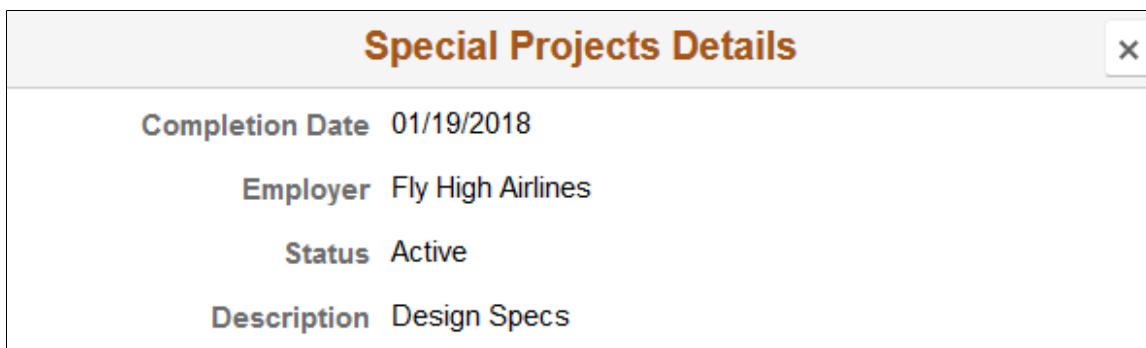
Special Projects Details Page

Use the Special Projects Details page (JPM_ITM_DTL_FL) to view additional details about a project assigned to an employee.

Navigation:

- Click a row on the [Special Projects Tile](#), which is on the [Employee Snapshot - Performance Review Dashboard](#).
- Click a row from the [Special Projects Page](#).

This example illustrates the fields and controls on the Special Projects Details page.



Projects are assigned to an employee on the “<Content Type> (Item Details) Page” (PeopleSoft eDevelopment) for the *Person* profile.

E&G Special Projects Tile

Use the E&G Special Projects tile (HCTS_EGPROJ_CMP_FL) to view a short list of education and government projects assigned to this employee.

Navigation:

Select the [Employee Snapshot - Performance Review Dashboard](#) action item from the left panel of the Employee Snapshot pages.

This example illustrates the E&G Special Projects tile.

E&G Special Projects		
Project	Completion Date	
Parson's Inc	08/31/2017	>
Pilot Project for Test Assessment	06/01/2017	>
Carpenter LLC	03/15/2017	>
Finance Education Program	01/31/2017	>
International Correspondence	08/31/2016	>
Review of Emergency Evacuation Procedu...	04/29/2016	>
View More	View Talent Profile	

The tile lists the Education and Government special projects held by this individual as defined for the *Person* profile on the Person Profile or Talent Profile: Projects tab.

Projects are sorted by completion date. Click a row to access the [E&G Special Projects Details Page](#).

The number of years to display a project is defined on the [Configure Employee Snapshot - Projects Page](#).

Field or Control	Description
View More	The View More link appears when there are more than six Education and Government projects listed for an employee . Click the link to open the E&G Special Projects Page and view a list of all active projects associated with the employee.
View Talent Profile	(Manager view only) The page displays this link when a manager is viewing an authorized direct report and profile content is available; it is not visible for indirect reports. Click this link to access the Team Talent Profile pages to view and update this team member’s talent profile data in fluid (see “(Fluid) Maintaining Person Profiles” (PeopleSoft eDevelopment)).

E&G Special Projects Page

Use the E&G Special Projects page (HCTS_EGPROJ_SCF) to view a complete list of education and government projects assigned to this employee.

Navigation:

Click the **View More** link from the [Special Projects Tile](#).

This example illustrates the E&G Special Projects page.

E&G Special Projects		×
Project	Completion Date	
Parson's Inc	08/31/2017	>
Pilot Project for Test Assessment	06/01/2017	>
Carpenter LLC	03/15/2017	>
Finance Education Program	01/31/2017	>
International Correspondence	08/31/2016	>
Review of Emergency Evacuation Procedures	04/29/2016	>
Self service user interface	02/14/2016	>

The page lists the Education and Government projects held by this individual as defined for the *Person* profile on the Person Profile or Talent Profile: Projects tab.

Projects are sorted by completion date. Click a row to access the [E&G Special Projects Details Page](#).

The number of years to display a project is defined on the [Configure Employee Snapshot - Projects Page](#).

Field or Control	Description
View Talent Profile	<p>(Manager view only) The page displays this link when a manager is viewing an authorized direct report and profile content is available; it is not visible for indirect reports.</p> <p>Click this link to access the Team Talent Profile pages to view and update this team member’s talent profile data in fluid (see “(Fluid) Maintaining Person Profiles” (PeopleSoft eDevelopment)).</p>

E&G Special Projects Details Page

Use the E&G Special Projects Details page (JPM_ITM_DTL_FL) to view additional details about an education and government project assigned to an employee.

Navigation:

- Click a row on the [E&G Special Projects Tile](#), which is on the [Employee Snapshot - Performance Review Dashboard](#).
- Click a row on the [E&G Special Projects Page](#).

This example illustrates the fields and controls on the Special Projects Details page.

E&G Special Projects Details
×

Completion Date 06/01/2017

Project Pilot Project for Test Assessment

Status Active

Department ID

Organization Alameda County School District

Description Conduct initial study of academic testing effectiveness

Projects are assigned to an employee on the “<Content Type> (Item Details) Page” (PeopleSoft eDevelopment) for the *Person* profile.

Licenses and Certifications Tile

Use the Licenses and Certifications tile (HCTS_LICENSE_FL) to view the number of current, expiring, or missing licenses and certifications held by this employee.

Note: This tile will display differently based on the setup defined on the [Configure Employee Snapshot - Licenses and Certifications Page](#).

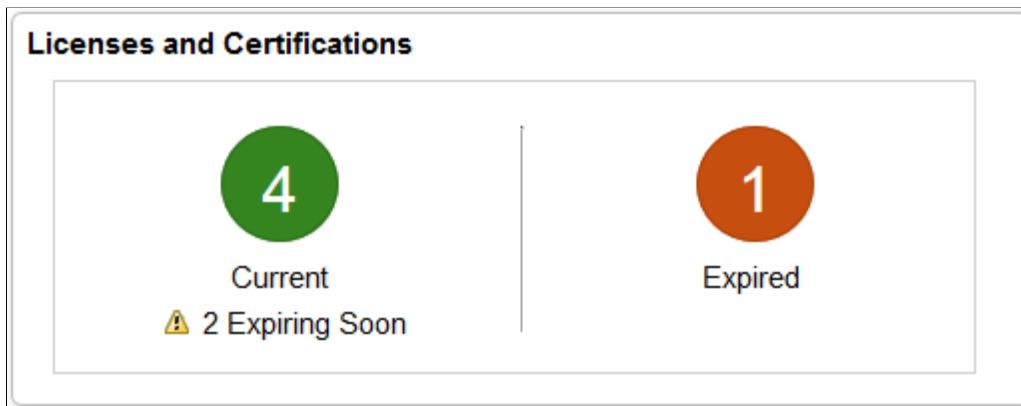
— When the **Compare Person with Job Profile** is set to *No*, the tile will display the number count of all current and expired licenses and certifications held by the employee within a one box layout.

— When the **Compare Person with Job Profile** is set to *Yes*, the tile will display the licenses and certifications held by the employee within a two box layout. The first box will show the number count of current, expired, and missing items of job required items. The second box will show only the number count of additional items held by the employee.

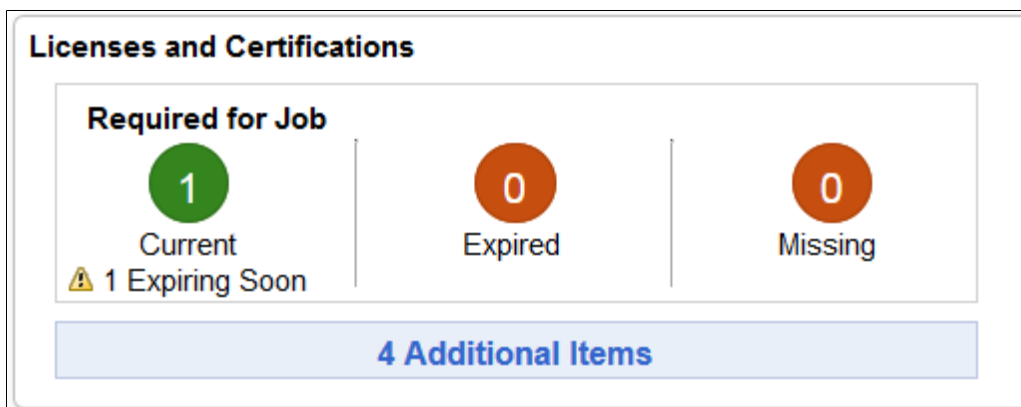
Navigation:

Select the [Employee Snapshot - Performance Review Dashboard](#) action item from the left panel of the Employee Snapshot pages.

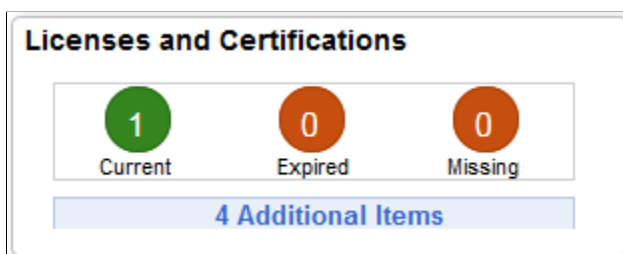
This example illustrates the Licenses and Certifications tile when the person's licenses and certifications are not being compared with those required by the job.



This example illustrates the fields and controls on the Licenses and Certifications tile for the tablet when the **Compare Person to Job Profile** is enabled.



This example illustrates the fields and controls on the Licenses and Certifications tile for the smartphone when the **Compare Person to Job Profile** is enabled.



The tile will display the number count of required-for-job items that have expired or that are expiring soon. It will not list the number count of additional items that are expired or are expiring soon. Click the **<number count> Additional Items** box on the tile to view expiring soon or expired items that are not required by the job.

The tile will display the **Expiring Soon** icon based on the number of days before it's expiration, as defined in the **Days for Warning Alert** field on the [Configure Employee Snapshot - Licenses and Certifications Page](#).

When comparing profiles to a job and viewing the tile in a small form factor, such as a smartphone, the **Expiring Soon** warning message and icon will not appear in the tile. Click the tile to access the [Licenses and Certifications Page](#) and view if there are any soon to be expiring items.

Field or Control	Description
Current	<p>Lists the number count of licenses and certifications held by the employee and have not expired. If you are comparing the items to the job profile, only those required by the job will be included in the number count. If you are not comparing the items to the job profile, then all current items will be included in the count.</p> <p>Click anywhere in this first box to access the Licenses and Certifications Page. If job comparison is enabled, the system will display the Required by Job tab. When job comparison is not enabled, all items will appear on one page.</p>
Expired	<p>Lists the number count of licenses and certifications held by the employee that have expired. If you are comparing the items to the job profile, only those required by the job will be included in the number count. If you are not comparing the items to the job profile, then all expired items will be included in the count.</p> <p>Click anywhere in this first box to access the Licenses and Certifications Page. If job comparison is enabled, the system will display the Required by Job tab. When job comparison is not enabled, all items will appear on one page.</p>
Missing	<p>Lists the number count of licenses and certifications required by the job but not held by the employee.</p> <p>Click anywhere in this first box to access the Licenses and Certifications Page. The system will display the Required by Job tab.</p> <p>This box item is not available when the Compare Profile to Job Profile is not enabled.</p>
<number count> Additional Items	<p>Lists the number count of additional licenses and certifications not required by the job but held by the employee.</p> <p>Click anywhere in this second box to access the Licenses and Certifications Page. The system will display the Additional Items tab.</p> <p>This box item is not available when the Compare Profile to Job Profile is not enabled.</p>

Development History Tile

Use the Development History tile (HCTS_DEVHIST2_FL) to view an overview of completed development documents along with document type, period, and job title for this employee.

You can also access the details of the development document from this tile.

Navigation:

Select the [Employee Snapshot - Performance Review Dashboard](#) category item from the Employee Snapshot pages.

This example illustrates the Development History tile.

Development History		
Document Type	Period	Job Title
Leadership	Jan 2019 - Apr 2019	Manager-Revenue
Performance Improvement Plan	Jan 2019 - Apr 2019	Manager-Revenue

[View Details](#)

This tile can display development document content in one of the following ways:

- A *chart* - if there are completed development documents with ratings. This is similar to the [Performance History Tile](#).
- A *grid* - if there are completed documents that do not have ratings. When a completed development document exists without a rating, the tile will display the document with the most recent period start date along with the period dates and the employee's job title in a grid format.

If no current document exists, the tile will indicate that there are no development documents for this employee.

Field or Control	Description
Period	Click the dates for the document type to access the Mentor Evaluation - Completed Page (see "<Manager or Self-> Evaluation Page" (PeopleSoft ePerformance)) and view additional details about the document for this employee.

Field or Control	Description
View Details	Click this link to access the Development History Page and view the development documents completed for the employee, if any.

This video demonstrates the Fluid Employee Snapshot multiple development document types feature:

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

Related Links

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

Viewing the Career Planning Tiles and Pages

Use the Career Planning dashboard from the Employee Snapshot to view tiles and pages to view an employee's career planning.

These topics discuss the Employee Snapshot - Career Planning tiles and pages.

Pages Used to View the Employee Snapshot - Career Planning Tiles and Pages

Page Name	Definition Name	Usage
Employee Snapshot - Career Planning Dashboard	PT_LANDINGPAGE	Access tiles related to an employee's career planning.
Career Plans Tile	HCTS_CAREERPLN2_FL_GBL	Note the career paths for the employee.
Career Plans Page	HCTS_CAREERPLN_FL HCTS_CAREERPLN_SCF	Review a list of all career path options defined for the employee.
Succession Plans Tile	HCTS_SUCC_PLN2_FL	View the next two jobs and persons for which the employee is slated as a successor.
Succession Plans Page	HCTS_SUCC_PLN_FL	View all jobs and persons for which the employee is slated as a successor.
"Succession 360 Page" (PeopleSoft Human Resources Plan Careers and Successions)	HR_VT_DASHBOARD	Visually review and manage the succession plan within the context of the organization.

Page Name	Definition Name	Usage
“Manage Succession Plans Page” (PeopleSoft Human Resources Plan Careers and Successions)	HR_SUCC_PLN_MGR	Review or edit plan details such as effective date, plan status, and projected vacancy date. The page is also used to review incumbent job and career plan details.
<u>Job Competencies Tile</u>	HCTS_JOBCOMPSUM_FL	View a summary graphic of how the employee’s (primary person) profile matches the competencies associated with this employee’s job (primary non-person) profile.
<u>Job Competencies Page</u>	HCTS_JOBCOMPDTL_FL	Review a list of competencies associated with this employee’s job (non-person) profile compared to the employee’s (person) profile.
<u>Employee Impact Tile</u>	HCTS_RATINGBOX2_FL	Assess the impact of loss, risk of leaving, performance and potential rating for an employee within the context of ratings boxes.
<u>Employee Impact Page</u>	HCTS_RB_DTLS_SCF	Assess the employee’s performance rating and potential rating in text format
<u>Job Interest Tile</u>	HCTS_JOB_INT2_FL_GBL	View the job profiles in which an employee may have an interest
<u>Job Interests Page</u>	HCTS_JOB_INT1_FL	Review a list of jobs in which the employee has expressed interest.
Maintain Job Profiles Page	JPM_MGRSS_PROFLIC	Review or update a job profile using the Profile Management system. For more information on managing job profiles, see the documentation “(Fluid) Viewing and Updating Job Profiles” (PeopleSoft eDevelopment).
Team Interest Lists page	JPM_INTEREST_MGR	Lists the job profiles in the employee’s interest list. The Assigned By column shows who added the profile to the interest list. Employees can add profiles to their interest list, managers can add job profiles to their employees’ interest lists, and profile administrators can add profiles to employees’ interest lists. Employees and managers can only delete a job profile from the interest list if they added the profile to the list.

Page Name	Definition Name	Usage
<u>Personal Competencies Tile</u>	HC_HCTS_PERS_COMP2_FL	View a list of competencies associated with this employee's person profile, but not the employee's job (non-person) profile.
<u>Personal Competencies Page</u>	HCTS_PERS_COMP_FL	View a complete list of competencies associated with this employee's person profile, but not the employee's job (non-person) profile.
<u>Personal Competency Details Page</u>	JPM_ITM_DTL_FL	View additional details about the competency rating for this person.

Employee Snapshot - Career Planning Dashboard

Use the Career Planning dashboard to access tiles related to an employee's career planning.

Navigation:

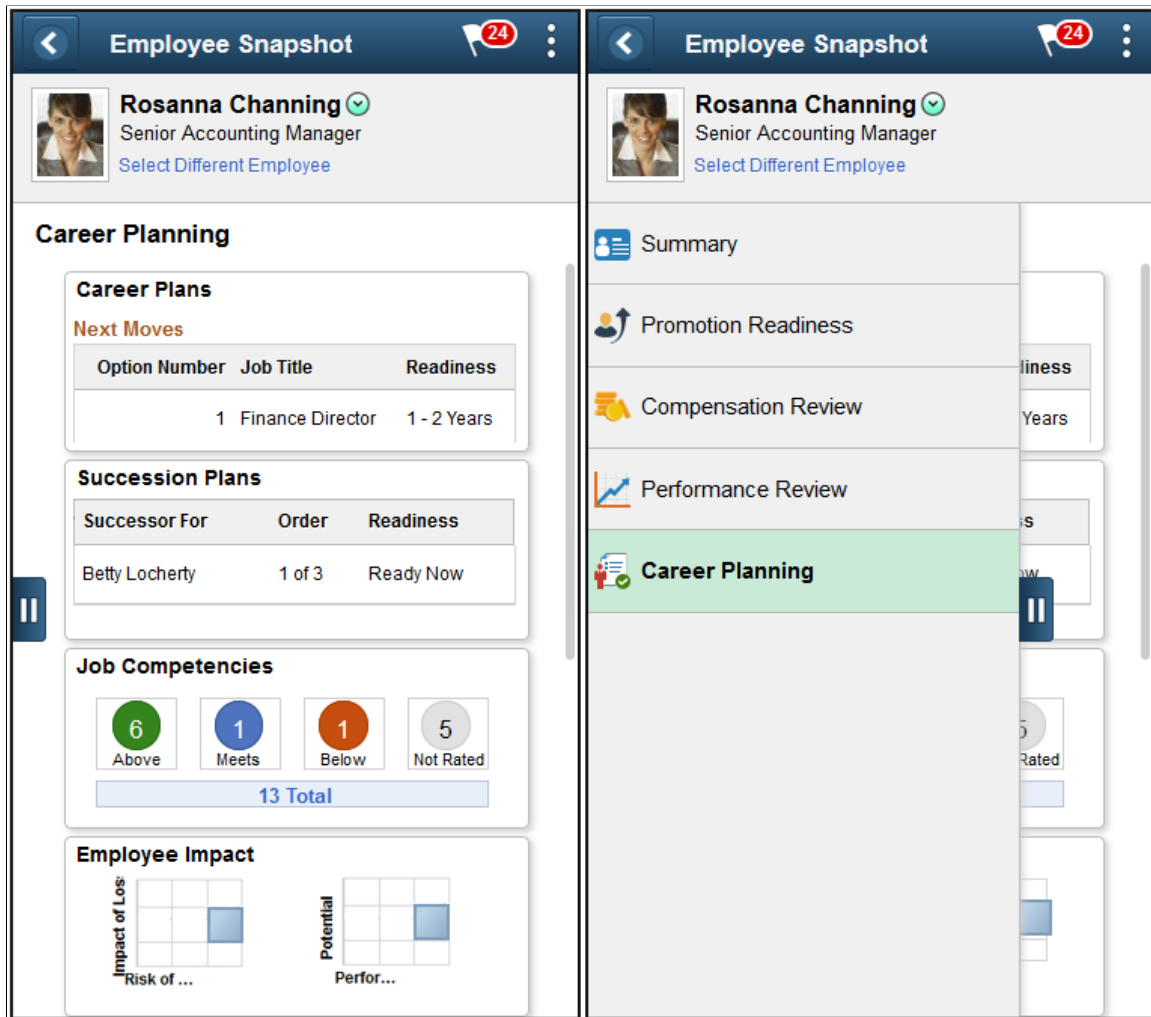
- Click the Employee Snapshot tile on the *Manager Self Service*, *Talent Administrator*, or any fluid homepage to which the tile has been added, select an employee from the search page, and then select **Career Planning** from the left panel.
- (Manager only) Select the **Related Actions** icon next to a person's name in fluid, select **View Employee Snapshot**, then select the Career Planning dashboard category from the left panel.
- From the Employee Snapshot pages, select the Career Planning category item from the left panel.

This example illustrates the fields and controls on the Career Planning dashboard for the tablet.

The screenshot displays the 'Employee Snapshot' interface for 'Rosanna Channing', a Senior Accounting Manager. The dashboard is titled 'Career Planning' and features a left-hand navigation menu with options: Summary, Promotion Readiness, Compensation Review, Performance Review, and Career Planning (which is currently selected and highlighted in green). The main content area is divided into three sections:

- Career Plans**: A section titled 'Next Moves' containing a table with one entry: Option Number 1, Job Title Finance Director, and Readiness 1 - 2 Years.
- Succession Plans**: A table showing successors for the Finance Director role. It lists Betty Locherty and Finance Director as successors, both at Order 1 of 3 and with a Readiness of 'Ready Now'.
- Job Competencies**: A section showing four competency status indicators: 'Above Target' (6), 'Meets Target' (1), 'Below Target' (1), and 'Not Rated' (5). A total of 13 competencies is indicated at the bottom.

This example illustrates the Employee Snapshot - Career Planning dashboard on a small form factor device. In the first image, the left panel is hidden. In the second image, the left panel is exposed.




Use the **Career Planning** dashboard to access tiles related to your employee's career planning and advancement. These tiles show more details than those which appear on the **Summary dashboard**.

These tiles are delivered by default with the *Career Planning* dashboard:

- [Career Plans Tile](#)
- [Succession Plans Tile](#)
- [Job Competencies Tile](#)
- [Employee Impact Tile](#)
- [Personal Competencies Tile](#)
- [Job Interest Tile](#)

Note: These tiles are delivered by default to appear on the **Career Planning** dashboard page of Employee Snapshot; however, the administrator can move the tiles to appear on other Employee Snapshot dashboard folders. The navigation in these topics references the delivered navigation.

Field or Control	Description
Select Different Employee	(Manager view only) Select this link to access the Employee Snapshot - Find Team Member Page (for Managers) and change the Employee Snapshot view to another employee.
 Hide or Show Action Item List tab	Click this tab to view and select from other Employee Snapshot dashboard categories or close the dashboard list panel.

Note: When you click a tile to access a secondary page and then click the back button to return to the Employee Snapshot pages, the system will return you to the [Employee Snapshot - Summary Dashboard](#) by default. Access the left panel to select another dashboard.

Career Plans Tile

Use the Career Plans tile (HCTS_CAREERPLN2_FL_GBL) to note the career paths for the employee.

Navigation:

Select the [Employee Snapshot - Career Planning Dashboard](#) action item from the left panel of the Employee Snapshot pages.

This example illustrates the Career Plans tile.

Career Plans		
Next Moves		
Option	Job Title	Readiness
1	Finance Director	1 - 2 Years
1	Chief Finance Officer	3 - 5 Years

Click this tile to access the [Career Plans Page](#) and view a list of all career path options defined for the employee.

Succession Plans Tile

Use the Succession Plans tile (HC_HCTS_SUCC_PLN2_FL) to view the next two jobs and persons for which the employee is slated as a successor.

Navigation:

Select the [Employee Snapshot - Career Planning Dashboard](#) action item from the left panel of the Employee Snapshot pages.

This example illustrates the Succession Plans tile.

Succession Plans		
Successor For	Order	Readiness
Betty Locherty	1 of 3	Ready Now
Finance Director	1 of 3	Ready Now

[View More](#)

For a manager, this tile will display *Draft* or *Official* succession plan options for this employee based on the administrator configuration on the [Configure Employee Snapshot - Succession Options Page](#). If both plan types are disabled on the configuration page, the tile will display the text to the manager to contact the system administrator to configure the view. The configuration setting applies to the manager only; the administrator will not be restricted by these setup options.

Field or Control	Description
View More	Click this link to access the Succession Plans Page and view a list of all succession plan options defined for the employee.

Related Links

- “Creating Succession Plans” (PeopleSoft Human Resources Plan Careers and Successions)
- “Managing Succession Plans” (PeopleSoft Human Resources Plan Careers and Successions)

Succession Plans Page

Use the Succession Plans page (HCTS_SUCC_PLN_FL) to view all jobs and persons for which the employee is slated as a successor.

Navigation:

Click the **View More** link on the [Succession Plans Tile](#) from the [Employee Snapshot - Career Planning Dashboard](#).

This example illustrates the Succession Plans page.

Succession Plans				
Successor For	Type	Order	Readiness	Plan Status
Betty Locherty	Person	1 of 3	Ready Now	Draft
Finance Director	Position	1 of 3	Ready Now	Draft

View Succession 360 View Succession Plan

For a manager, this page will display *Draft* or *Official* succession plan options for this employee based on the administrator configuration on the [Configure Employee Snapshot - Succession Options Page](#). The configuration settings apply to the manager only; the administrator will not be restricted by the setup options.

Field or Control	Description
View Succession 360	Click this link to access the “Succession 360 Page” (PeopleSoft Human Resources Plan Careers and Successions) and manage the succession plan for a person.
View Succession Plan	Click this link to access the “Manage Succession Plans Page” (PeopleSoft Human Resources Plan Careers and Successions) and review or edit plan details such as effective date, plan status, and projected vacancy date. The page is also used to review incumbent job and career plan details.

Related Links

“Creating Succession Plans” (PeopleSoft Human Resources Plan Careers and Successions)

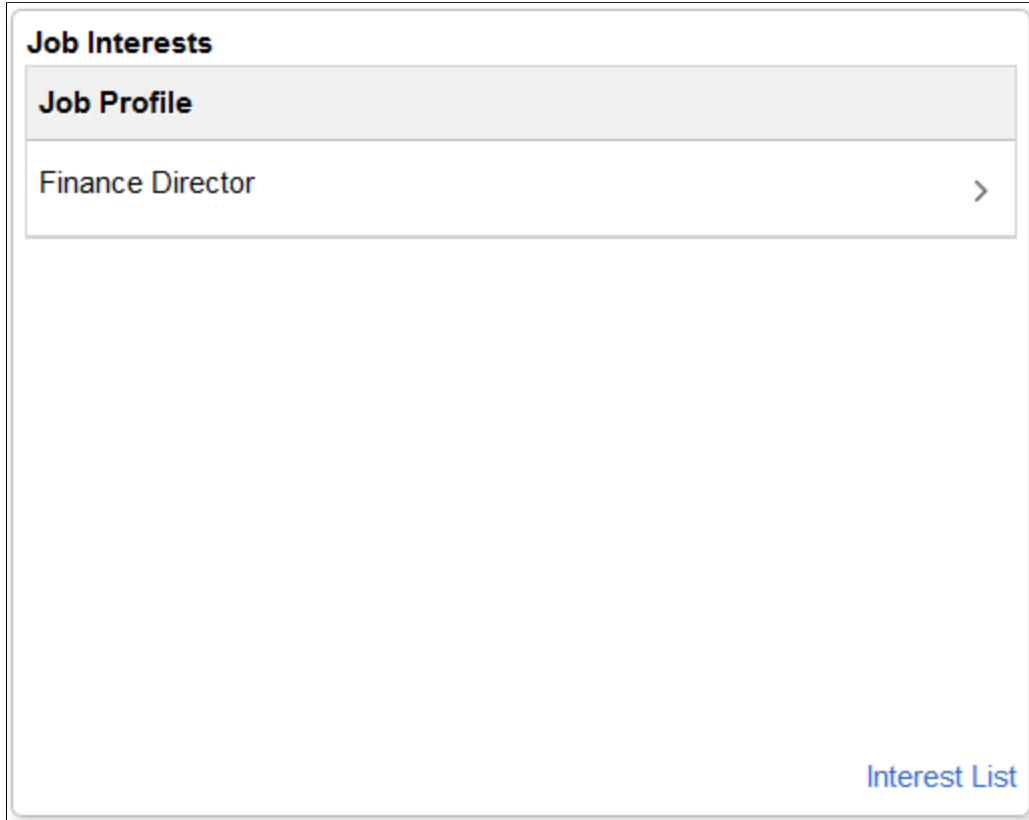
Job Interest Tile

Use the Job Interest tile (HCTS_JOB_INT2_FL_GBL) to view the job profiles in which an employee may have an interest.

Navigation:

Select the [Employee Snapshot - Career Planning Dashboard](#) action item from the left panel of the Employee Snapshot pages.

This example illustrates the Job Interest tile.



Click a row to access the Maintain Job Profiles Page and view or edit the profile for this job.

Field or Control	Description
View More	The View More link appears when there are more than six valid personal jobs in which the employee has expressed interest. Click this link to access the Job Interests Page and view a list of all job interests for this employee.
Interest List	Click this link to access the Team Interest Lists Page and review or edit the interest list for this employee.

Related Links

“(Fluid) Viewing and Updating Job Profiles” (PeopleSoft eDevelopment)

Viewing Configurable Profile Content Tiles and Pages

The PeopleSoft HCM Employee Snapshot feature delivers various dashboards and tiles for managers and administrators to view employee data (see [Understanding the Employee Snapshot Content and Layout](#) for a list of delivered dashboards and tiles).

The system also enables talent administrators to create and publish other tiles for profile-related content. For setting up configurable profile content, see the [Configure Employee Snapshot - Profile Content Page](#) and [Tile Attributes Page](#) topics.

After the administrator has configured and published tiles, managers and administrators can view profile content that may not already part of the delivered tiles or to display custom profile content that you have created in Profile Management. Employee Snapshot displays these configurable profile tiles much the same as the delivered tiles and pages.

This video demonstrates the Fluid Employee Snapshot configurable profile content:

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

These topics discusses viewing configurable profile content.

Related Links

“Manage Profiles Overview” (PeopleSoft Human Resources Manage Profiles)

“Understanding the Content Catalog” (PeopleSoft Human Resources Manage Profiles)

“Setting Up Profile Types” (PeopleSoft Human Resources Manage Profiles)

Pages Used to View Configurable Profile Content Tiles and Pages

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
<u><Content Type> Tile</u>	HC_CUST_<Content Type>_SUM1_FL HC_CUST_<Content Type>_DTL2_FL HC_CUST_<Content Type>_DTL3_FL HC_CUST_<Content Type>_DTL4_FL HC_CUST_<Content Type>_DTL5_FL (These are the crefs for these tiles) (Dashboard numbers are as follows: <ul style="list-style-type: none"> • 2 = Promotion Readiness, • 3 = Compensation Review • 4 = Performance Review • 5 = Career Planning For example, if you are accessing a tile from the Promotion Readiness dashboard, the cref will end in _DTL2_FL.)	View a summary of profile items within a content type.
<u><Content Type> Page</u>	HCTS_CONT_SUM1_FL HCTS_CONT_DTL_FL (2x1 tiles) HCTS_CONT_DTL2_FL (2x2 tiles)	Review a list of the employee help items associated with this content type.
<u><Content Item> Details Page</u>	JPM_ITM_DTL_FL	View details of a specific content item.

Note: The name of the tiles and pages will display differently based on the content type you are viewing. This documentation uses <Content Type> or <Content Item> to represent these different tiles and pages, although the talent administrator will define the actual name in the **Tile Title** field of the [Tile Attributes Page](#).

<Content Type> Tile

Use the <Content Type > tile to view a summary of profile items within a content type.

Note: The name of the tile will vary based on the content type selected (see the **Tile Title** value on the [Tile Attributes Page](#)).

The Summary and non-summary dashboard tiles display tiles differently:

- The Summary dashboard tiles will display only a count of content items held by the employee.

- Non-summary dashboard tiles will display a short list of items held by the employee.

See the examples that follow.

Summary Dashboard Tiles

Use tiles on the Summary dashboard to view the number of items held by an employee for a content type.

Note: Summary tiles can be configured as 1x1 tiles only.

Navigation:

Select the [Employee Snapshot - Summary Dashboard](#) where the configurable profile content tile has been added to the Summary dashboard.

This example illustrates a configurable 1x1 tile (Language Skills) on the Summary dashboard.



Click the tile to access the corresponding [<Content Type> Page](#) and view the list of related content items for the employee.

Non-Summary Dashboard Tiles

Use tiles on the non-summary dashboards to view a list of items held by an employee for a content type.

This section discussed the tile options for the 2x1 or 2x2 non-summary tiles.

Navigation:

Select from a non-summary dashboard on which a configurable profile content tile has been added. Non-summary dashboards are:

- [Employee Snapshot - Promotion Readiness Dashboard](#)
- [Employee Snapshot - Compensation Review Dashboard](#)
- [Employee Snapshot - Performance Review Dashboard](#)
- [Employee Snapshot - Career Planning Dashboard](#)

This example illustrates a configurable 2x1 tile (Memberships) on a non-summary dashboard. 2x1 tiles display up to two rows of data.

Memberships	
Membership	Membership Date
Alliance of Gov't Managers	01/30/2009 >
Association Intl Toastmasters	07/24/2006 >

[View More](#) [View Talent Profile](#)

This example illustrates a configurable 2x2 tile (Memberships) on a non-summary dashboard. 2x2 tiles display up to six rows of data on a large form factor device, like a desktop, and four rows of data on a small form factor device, like a smartphone.

Memberships	
Membership	Membership Date
Alliance of Gov't Managers	01/30/2009 >
Association Intl Toastmasters	07/24/2006 >
Business & Professional Women	11/18/2003 >
Financial Executives Institute	06/15/2017 >
Institute of Chartered Accnts	01/26/2011 >
Institute of Managers	09/08/2016 >

[View More](#) [View Talent Profile](#)

View a list of items held by this employee. The tile will show up to two columns of data, typically the content item title and either a proficiency rating or the date if there is no rating available. The number of item rows that appear are based on the number of valid items recorded for the employee, the tile size configuration (see [Tile Attributes Page](#)), and the device you are using:

- 2x1 tiles:

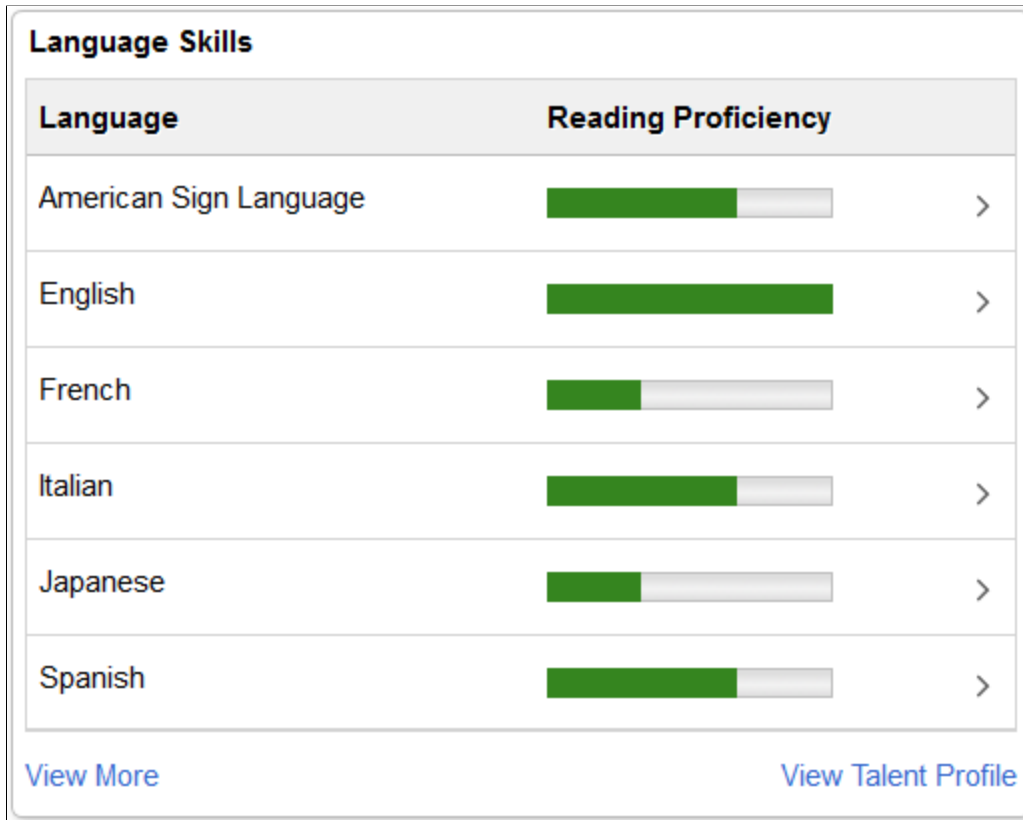
(All devices) Displays up to 2 item rows.

- 2x2 tiles:
 - (Smartphone) Displays up to 4 item rows.
 - (Workstation or tablet) Displays up to 6 item rows.

Click a row to access the [<Content Item> Details Page](#) to view the employee details related to this item.

Field or Control	Description
View More	<p>The View More link appears when there are more items for an employee than can display on the tile for a content type (see the information above for row limits).</p> <p>Click this link to access the <Content Type> Page and view a complete list of items held by this employee for this content type.</p>
View Talent Profile	<p>(Manager view only) The page displays this link when a manager is viewing an authorized direct report and profile content is available; it is not visible for indirect reports.</p> <p>Click this link to access the Team Talent Profile pages to view and update this team member's talent profile data in fluid (see "(Fluid) Maintaining Person Profiles" (PeopleSoft eDevelopment)).</p>
<Content Type> Date	<p>This field displays when a content type is associated with a date, such as a test date, effective date, membership date, or completion date. This allows you to view some detail of the content item without having to access the item detail page.</p>
<Content Type> Proficiency	<p>This field displays when a content type is associated with a ratings model, such as a language proficiency. The tile will show the first proficiency only. Click the row to view more details or other proficiencies, if available.</p> <p>Proficiency, or ratings fields, can display as either text (as shown above) or as a graphical ratings bar (as shown below), based on the tile configuration for a content type (see Tile Attributes Page).</p>

This example illustrates a configurable tile on a non-summary dashboard showing a ratings bar.



Pause or hover over a bar graph to view the proficiency values.

Related Links

[Configure Employee Snapshot - Profile Content Page](#)

[Accessing the Employee Snapshot Pages and Tiles](#)

<Content Type> Page

Use the <Content Type> page (HCTS_CONT_SUM1_FL, HCTS_CONT_DTL_FL, or HCTS_CONT_DTL2_FL) to review a list of the employee help items associated with this content type.

Note: The name of the page will vary based on the content type selected (see the **Tile Title** value on the [Tile Attributes Page](#)).

Navigation:

Click a View More link from the from any dashboard to which the tile has been added.

This example illustrates a configurable <Content Type> page not associated with ratings.

Memberships		
Membership	Membership Date	
Alliance of Gov't Managers	01/30/2009	>
Association Intl Toastmasters	07/24/2006	>
Business & Professional Women	12/10/2019	>

[View Talent Profile](#)

This example illustrates a configurable <Content Type> page that shows ratings as text.

Memberships		
Membership	Membership Date	
Alliance of Gov't Managers	01/30/2009	>
Association Intl Toastmasters	07/24/2006	>
Business & Professional Women	12/10/2019	>

[View Talent Profile](#)

This example illustrates a configurable <Content Type> page showing ratings bars.

Language Skills			
Language	Reading Proficiency	Speaking Proficiency	Writing Proficiency
American Sign Language	<div style="width: 25%; background-color: green;"></div>	<div style="width: 25%; background-color: green;"></div>	>
English	<div style="width: 100%; background-color: green;"></div>	<div style="width: 100%; background-color: green;"></div>	<div style="width: 100%; background-color: green;"></div>
French	<div style="width: 20%; background-color: green;"></div>	<div style="width: 20%; background-color: green;"></div>	<div style="width: 20%; background-color: green;"></div>
Italian	<div style="width: 25%; background-color: green;"></div>	<div style="width: 25%; background-color: green;"></div>	<div style="width: 25%; background-color: green;"></div>
Japanese	<div style="width: 20%; background-color: green;"></div>	<div style="width: 20%; background-color: green;"></div>	<div style="width: 20%; background-color: green;"></div>
Spanish	<div style="width: 25%; background-color: green;"></div>	<div style="width: 25%; background-color: green;"></div>	<div style="width: 25%; background-color: green;"></div>

[View Talent Profile](#)

When the content type is associated with ratings, the page will show up to three proficiency ratings.

When showing a ratings bar, pause or hover over a bar graph to view the proficiency values.

Click a row to access the <Content Item> Details Page and view more details about this content item for the employee.

Field or Control	Description
View Talent Profile	<p>(Manager view only) The page displays this link when a manager is viewing an authorized direct report and profile content is available; it is not visible for indirect reports.</p> <p>Click this link to access the Team Talent Profile pages to view and update this team member’s talent profile data in fluid (see “(Fluid) Maintaining Person Profiles” (PeopleSoft eDevelopment)).</p>

Related Links

[Configure Employee Snapshot - Profile Content Page](#)

[Accessing the Employee Snapshot Pages and Tiles](#)

<Content Item> Details Page

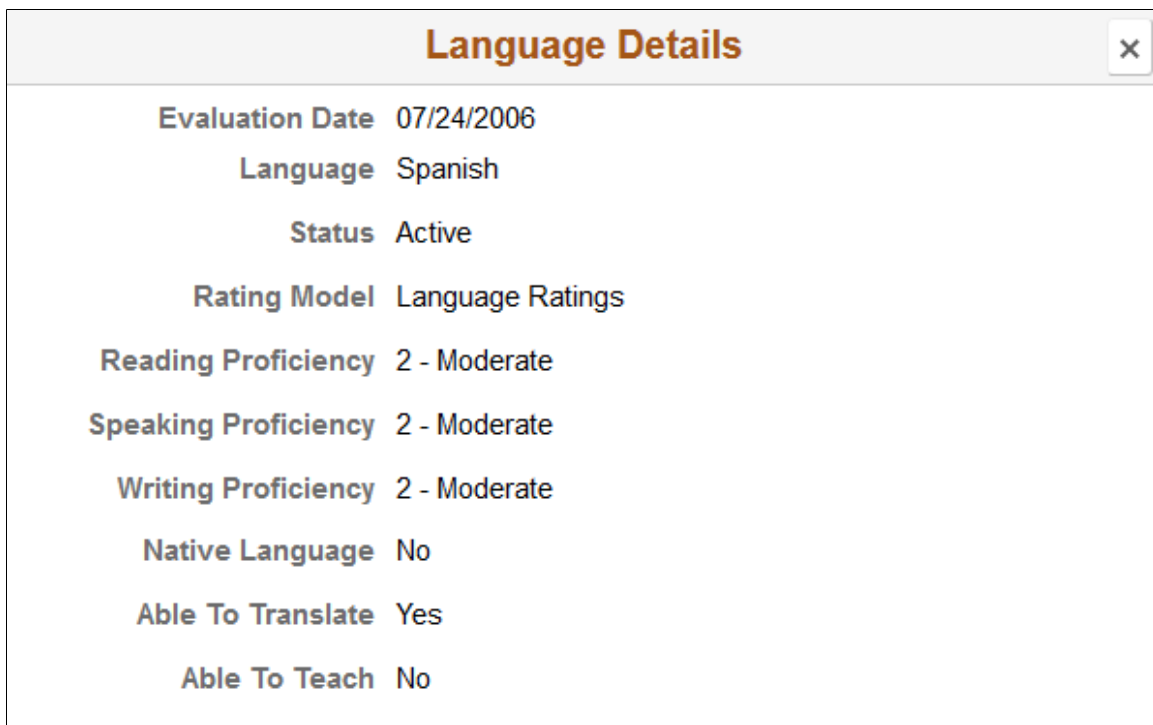
Use the <Content Item> Details page (JPM_ITM_DTL_FL) to view details of a specific content item.

<Content Item> Details Page

Navigation:

Click a content item row from a <Content Type> Tile or <Content Type> Page.

This example illustrates a configurable <Content Item> Details page.



The detail page will display text only, even when ratings bars have been enabled for display.