# PeopleSoft HCM 9.2: PeopleSoft eDevelopment

October 2025

## Documentation Accessibility

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## Access to Oracle Support

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# Contents

# Preface

## Understanding the PeopleSoft Online Help and PeopleBooks

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

### Hosted PeopleSoft Online Help

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

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

### Locally Installed PeopleSoft Online Help

If you’re setting up an on-premises PeopleSoft environment, and your organization has firewall restrictions that prevent you from using the hosted PeopleSoft Online Help, you can install the online help locally. Installable PeopleSoft Online Help is made available with selected PeopleSoft Update Images and with PeopleTools releases for on-premises installations, through the Oracle Software Delivery Cloud.

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

To configure the context-sensitive help for your PeopleSoft applications to use a locally installed online help website, see Configuring Context-Sensitive Help Using a Locally Installed Online Help Website.

### Downloadable PeopleBook PDF Files

You can access downloadable PDF versions of the help content in the traditional PeopleBook format on the Oracle Help Center. The content in the PeopleBook PDFs is the same as the content in the PeopleSoft Online Help, but it has a different structure and it does not include the interactive navigation features that are available in the online help.

### Common Help Documentation

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

- Application Fundamentals

- Using PeopleSoft Applications

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

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

## Field and Control Definitions

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

## Typographical Conventions

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

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

# Contact Us

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

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

# Follow Us

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|---|---|
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| | Follow @PeopleSoft_Info on X. |
| | Read PeopleSoft Blogs |
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## Chapter 1

# Getting Started with eDevelopment

## eDevelopment Business Processes

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

Employees use eDevelopment to:

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

Managers use eDevelopment to:

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

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

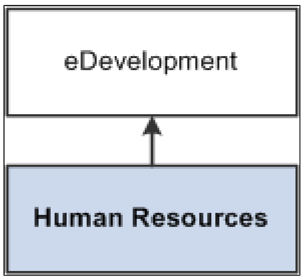
- Professional training.
- Activities, administrative posts, and teaching responsibilities.
- Presentations and publications.
- Committees.

- Student advising.

## eDevelopment Integrations

eDevelopment integrates with PeopleSoft HR.

This diagram shows information flowing from HR to eDevelopment.




## eDevelopment Implementation

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

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

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

Chapter 2

# Maintaining Person and Non-Person Profiles

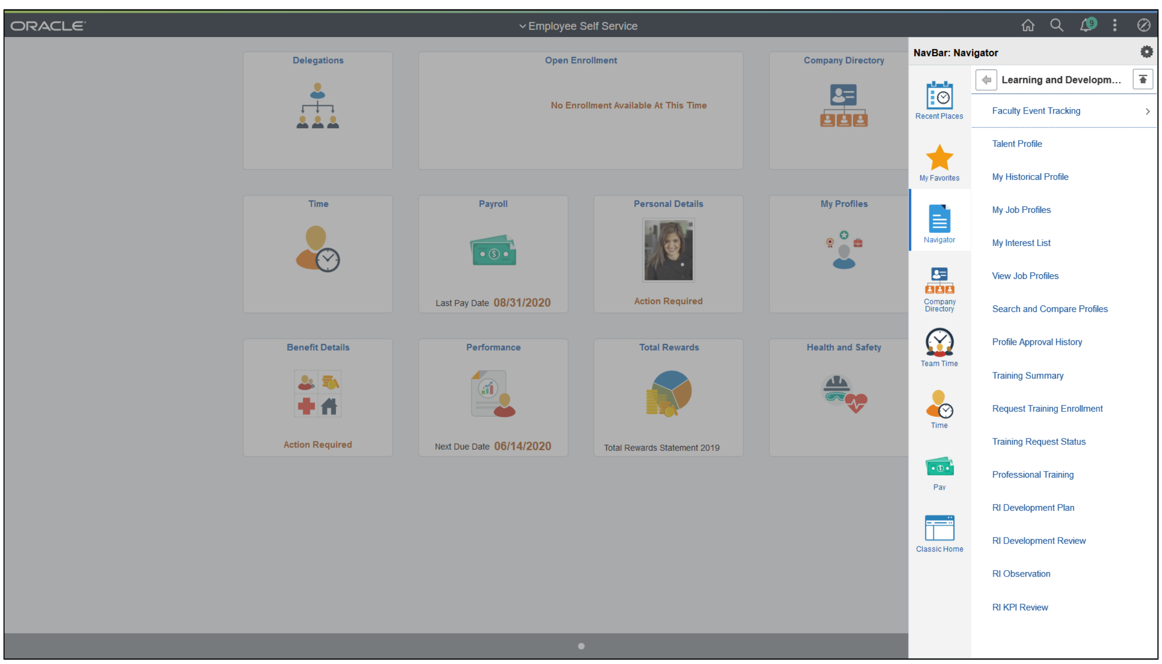
## Navigating in eDevelopment

The standard menu-driven navigation path is the standard access method for eDevelopment.

(Classic) If using the classic user interface, users access eDevelopment by selecting the following from the Navigator menu:

- *Employee:* **Self Service** > **Learning and Development.**
- *Manager:* **Manager Self Service** > **Learning and Development.**

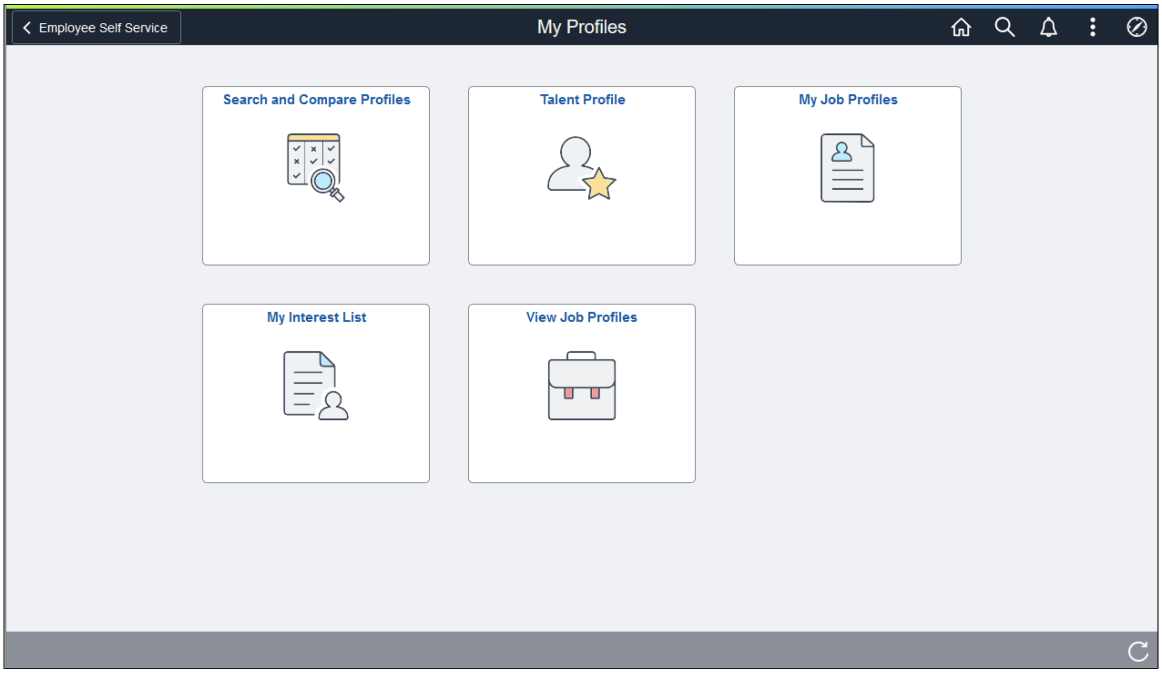
This is an example of an eDevelopment navigation path for an employee using the classic user interface.




(Fluid) If using the fluid user interface, users access eDevelopment by selecting the following navigation:

- *Employee:* From the Employee Self Service fluid home page, select the My Profiles tile.
- *Manager:* From the Manager Self Service fluid home page, select the Team Profiles tile.

This is an example of one of the eDevelopment dashboards, My Profiles, for an employee using the fluid user interface.




## Roles

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

(Classic) These delivered roles for employees and managers are configured specifically for Profile Management self service using the classic pages:

- *Profile Mgmt Employee*
- *Profile Mgmt Manager*

(Fluid) These delivered roles for employees and managers are configured specifically for Profile Management self service using the fluid pages:

- *Profile Mgmt Employee Fluid*
- *Profile Mgmt Manager Fluid*

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

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## Security

The user profile that you create for each individual who accesses the self-service components determines the components that the user can access by default. Create user profiles by using the User Profiles component (USERMAINT). Assign a role to each user profile, which is linked to permission lists. Each permission list identifies components that individuals can access. To modify the access for specific components for each role, modify the permission list for the user's role. Define which data the user can access in the user profile.

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

# Understanding Profile Maintenance

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

- Person profiles.

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

- Job profiles.

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

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

See “Understanding Profiles and Profile Types” (PeopleSoft Human Resources Manage Profiles).

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

| ***Profile Management Transaction*** | ***Classic User Interface Pages*** | ***Fluid User Interface Pages*** |
|---|---|---|
| Create and maintain your own person profile. | Employees use the My Current Profile transaction to view and edit their existing person profiles and create new profiles.<br><br>Employees also use the My Historical Profile option to view historical rows of their profile.<br><br>See (Classic) Maintaining Person Profiles as an Employee or Manager. | Employees use the Talent Profile Tile and page to view and edit their existing person profiles and create new profiles. When historical profile data exists for an item, theses pages will display the View History button for the row, which opens the View Profile Item History page to access historical rows of their profile. |

| ***Profile Management Transaction*** | ***Classic User Interface Pages*** | ***Fluid User Interface Pages*** |
|---|---|---|
| Create and maintain your team members' profiles. | Managers can create, view, and update the person profiles for their team using the Current Team Profiles Page.<br><br>The manager Team Historical Profile transaction displays historical profile items in effect for direct reports as of the as of date.<br><br>See (Classic) Maintaining Person Profiles as an Employee or Manager. | Managers can create, view, and update the person profiles for their team using the Team Talent Profile Tile and pages. When historical profile data exists for a profile item, theses pages display the View History button for that row, where you can access historical data. |
| Approve changes to person or non-person profiles. | Managers use the Approve Profiles page to review changes to their employees' person profiles that require approval, and approve or deny the changes.<br><br>See (Classic) Approving Person Profile Changes and Viewing Approval History. | Managers use the Pending Approvals - Person Profile Page or Pending Approvals - Non-Person Profile Page to review changes to their employees' person profiles or non-person profile changes that require approval, and approve or deny the changes. |
| View approval history. | Employees use the Profile Approval History page in classic to view the approval status of profile changes that they have submitted for approval and view the history of profile approvals.<br><br>See (Classic) Approving Person Profile Changes and Viewing Approval History. | Employees use the "Approvals History Page" (Application Fundamentals)Approval History option in fluid to view the approval status of profile changes that they have submitted for approval and view the history of profile approvals. |
| Manage interest lists.<br><br>**Note:** An interest list is a collection of job profiles that is associated with an employee. Typically interest lists are used to identify jobs that an employee is interested in applying for, or jobs that match an employee's profile, or jobs that an employee wants to include in a career planning discussion with their manager. | Employees can add to and remove job profiles from their interest list using the My Interest List Page.<br><br>Managers can view and update their employees' interest lists using the Team Interest Lists Page.<br><br>See (Classic) Maintaining Interest Lists. | Employees can add to and remove job profiles from their interest list using the My Interest List Tile and pages.<br><br>Managers can view and update their employees' interest lists using the Team Interest List Tile and pages. |
| View job profiles. | Employees have two options for viewing job (non-person) profiles:<br><br>• My Job Profiles lists job profiles related to their current jobs.<br><br>• View Job Profiles is a general option for viewing any job profile.<br><br>See (Classic) Viewing and Updating Job Profiles. | Employees have two options for viewing job (non-person) profiles:<br><br>• My Job Profiles Tile (for Employees) and pages give access to a list of job profiles related to their current jobs.<br><br>• View Job Profiles Tile (for Employees) and pages provide a general option for viewing any job profile. |

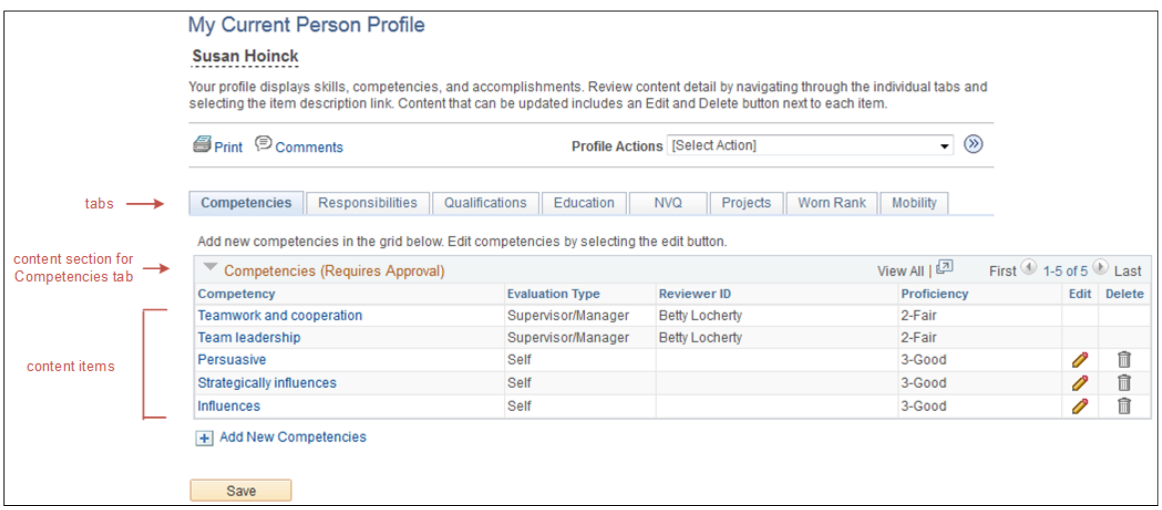
| ***Profile Management Transaction*** | ***Classic User Interface Pages*** | ***Fluid User Interface Pages*** |
|---|---|---|
| Create and maintain job profiles (manager only).<br><br>**Note:** Depending on the configuration of your profile types, approvals workflow is triggered when managers update job profiles. The typical approver for job profiles is the profile administrator, although this can be configured according to your business needs. | Managers can create and update job profiles using the Maintain Job Profiles page.<br><br>See (Classic) Viewing and Updating Job Profiles. | Managers can create and update job profiles using the Maintain Job Profiles Tile (for Managers) and pages. |
| Search and compare profiles. | Employees and managers use Search and Compare Profiles to run any of the search types that have been configured for them.<br><br>See “(Classic) Searching and Comparing Profiles” (PeopleSoft Human Resources Manage Profiles). | Employees and managers use “Search / Compare Profiles Tile” (PeopleSoft Human Resources Manage Profiles) and pages to run any of the search types that have been configured for them. |

## Understanding Profiles

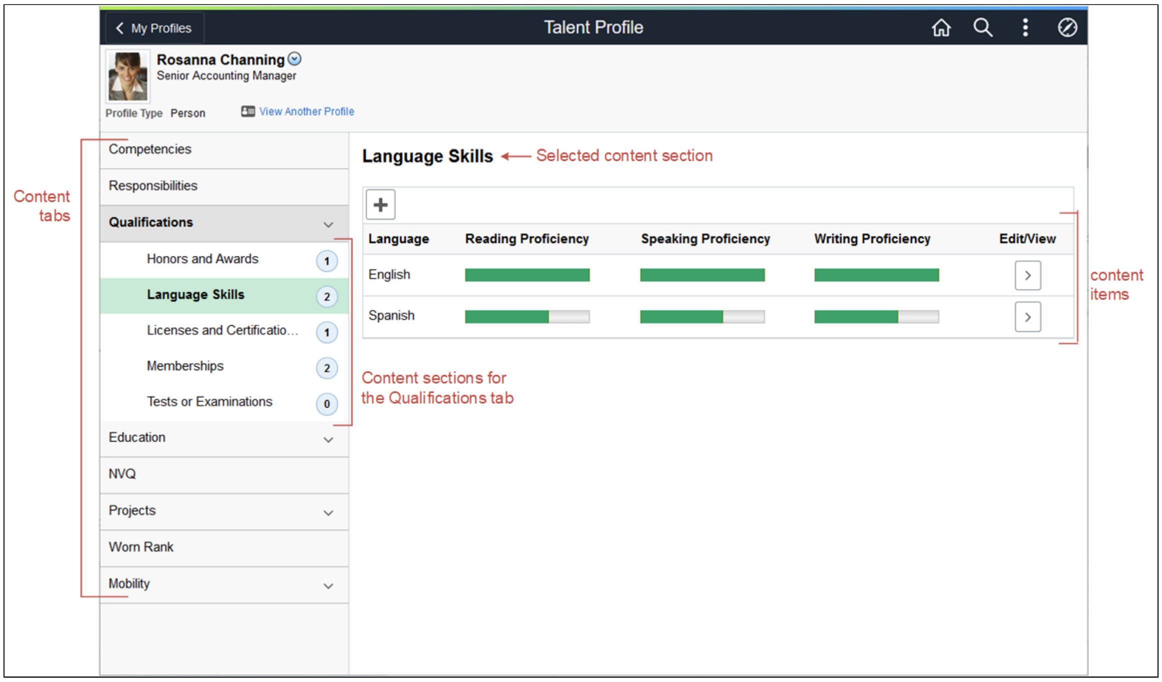
Employees can have one or more profiles, but only one profile per profile type. The PeopleSoft application delivers the profile type PERSON to create person profiles, but you can create other profile types according to your organizational requirements. For further information about creating profile types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

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

This is an example of a person profile using the classic user interface.



This is an example of a person profile using the fluid user interface.




Profile content is divided into tabs which appear as tabs on the page. Under the navigation tabs, the page lists the content sections of the tab. When the employee or manager selects a different tab, the system updates the page to show the content sections for that tab. The content sections that employees and managers can view and update is determined by the security settings for the content sections in the profile type definition. This means that the profile content can vary according to the role accessing the profile.

Employees and managers add items to the person profile from the content catalog that you set up in Manage Profiles.

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**Note:** (Classic) When using the classic pages, they can also copy items from job profiles that are related to the employee's job, by selecting *Copy From Job Profile* in the **Profile Actions** field and clicking the **Go** icon. The system searches for job profiles that match the employee's job data. There could be more than one profile related to the employee's job data. For example, if you have set up profiles for job codes and positions and the person has a position selected in job data, the system lists these profiles and the employee or manager selects the profile that they want to use.

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The profile pages list items within the content sections of the page. If changes have been made to the profile but not yet approved, The pages indicates that there are items that are either new and awaiting submission for approval, pending approval, or denied. In classic mode, the employee or manager click a link to view a list of the items with that approval status. In fluid mode, the Status field appears, indicating which items have that approval status.

Content requiring approval whose items are added, updated, or deleted from a profile are assigned a saved status in the classic pages when the employee or manager saves and submits the information for approval.

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

***Warning!*** (Classic) After those items requiring approval are submitted using the classic page, the content section on the profile page is refreshed to show approved items only. This means that the changes that were saved are no longer visible because these items do not have an approved status. However, a link appears to indicate that there are items pending approval.
(Fluid) After those items requiring approval are submitted using the fluid pages, the content section on the profile page is refreshed to show the *Pending Approval* status for the item.

### Related Links

“Person Profile Page” (PeopleSoft Human Resources Manage Profiles)
“Understanding the Content Catalog” (PeopleSoft Human Resources Manage Profiles)
“Understanding Profile Management” (PeopleSoft Human Resources Manage Profiles)

## Prerequisites

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

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

  The use of approval processing for profiles is optional. You associate approvals workflow to profile types.
- Define search types and run the Build Manager List and Build Profile Search Indexes processes required by the profile search and compare feature.
- Set up the text on the self-service pages.

  The profile management self-services pages use the Text Catalog. You can modify the delivered text to meet your organization's business needs. See “Configuring the Text Catalog” (Application Fundamentals).
- Configure the Direct Reports functionality for your organization.

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

### Related Links

“Understanding the Content Catalog” (PeopleSoft Human Resources Manage Profiles)
“Understanding Profile Management” (PeopleSoft Human Resources Manage Profiles)
“Understanding PeopleSoft HCM Common Components” (Application Fundamentals)

# (Classic) Maintaining Person Profiles as an Employee or Manager

This topic provide an overview of search and compare profiles scores and discuss how to search for and compare profiles using the classic user interface.

**Note:** This feature has been replaced by the Profile Management functionality in Fluid. For more information, see (Fluid) Maintaining Person Profiles.

For an overview of maintaining profiles, see Understanding Profile Maintenance.

## Pages Used to Review and Update Person Profiles Using the Classic User Interface

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

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

| ***Page Name*** | ***Definition Name*** | ***Usage*** |
|---|---|---|
| Select New As Of Date Page | JPM_JP_SELECT_DATE | Employees and managers enter a different effective date and click **OK** to view the profile as of the new effective date. All profile items in effect as of that date will display as long as the employee is still a direct report of the manager." |
| Profile Information Page | JPM_PROF_INFO_SEC | Enter or view additional profile information such as comments or the owner ID for job profiles. |
| Add New <content type> Page<br>View <content type> Page<br>Update <content type> Page | JPM_ITM_EMPDTL_SEC | Employees and managers use this page to add, view, or update profile item details. The fields on the page vary according to the content type of the item and the profile type definition. Changes that require approval are submitted for approval processing when the employee or manager clicks the **Submit** button on the Summary of Changes page. |
| Content Item Details Page | JPM_CAT_ITEMS_DSP | View details about a specific content item. |
| Rating Model Page | HCR_RATEMDL_POPUP | Displays the rating model details of the selected profile item. When accessing the page from the update or add new pages, the you can modify the rating as well. |
| Related Items Page | JPM_PROF_SSRELITMS | Displays details of the selected profile item that is related to the profile item. |
| Items Awaiting Submission Page<br>Pending Items Page<br>Denied Items Page | JPM_JP_PRF_VW_CHGS | This page lists saved items awaiting to be submitted for approval, items awaiting approval (pending items), or items that were not approved (denied items). Employees and managers can only delete their own saved items; the Pending Items page and the Denied Items page are display-only. |

| ***Page Name*** | ***Definition Name*** | ***Usage*** |
|---|---|---|
| View Historical Items Page | JPM_PROF_HIST_SEC | View all effective-dated rows for an item on a person's profile or a job profile. This page lists the current, future, and historical rows for a profile item. Employees and managers use this page to track the history of a profile item. They click the profile item link to view details of the profile item for the selected effective date. Future dated rows do not appear in the Historical Profiles page. Only the Current Profile page displays future dated rows. |
| View <content type> Page | JPM_APR_DTL_SEC | Displays the details of the saved but not submitted, pending, or denied item. Employees and managers can delete saved items. However, they cannot update pending or denied items. |
| Summary of Changes Page | JPM_JP_PERSUMM_SEC | Lists the changes made to the profile. There is a scroll area for each section of the profile that was modified, which lists any items added, deleted, or edited. Only items requiring approval are displayed on this page. Changes to items not requiring approval have already been saved.<br><br>Employees and managers can enter comments for the approver before clicking the **Submit** button. The comments box is only displayed if there are items requiring approval. |
| Submit Confirmation Page | JPM_JP_PROFL_APPR | Displays a confirmation of the approval submission. The **Approval Routing** group box provides a summary of the approval routing. |

# (Classic) Approving Person Profile Changes and Viewing Approval History

**Note:** This feature has been replaced by Fluid Approvals. For more information, see (Fluid) Approving Profile Items.

## Pages Used to Approve Profile Changes and View Approval History Using the Classic User Interface

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

## Understanding Profile Approvals

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

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

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

### Related Links

“Understanding Profile Management” (PeopleSoft Human Resources Manage Profiles)

“Understanding Approvals” (Application Fundamentals)

# (Classic) Viewing and Updating Job Profiles

Employees can view how the their profile compares to their job profile using the My Job Profiles component. Employees and manager can also view other job profiles within the organization using the View Job Profiles and Maintain Job Profiles components.

**Note:** This feature has been replaced by My Job Profiles, View Job Profiles and Maintain Job Profiles in Fluid. For more information, see (Fluid) Viewing and Updating Job Profiles.

**Note:** To access these self service tiles and components, the user must be assigned these roles:
—Employee: *Profile Mgmt Employee*
—Manager: *Profile Mgmt Manager*

This topic discusses viewing and updating job profiles using the classic user interface.

## Pages Used to View Job Profiles Using the Classic User Interface

| ***Page Name*** | ***Definition Name*** | ***Usage*** |
|---|---|---|
| Select Profile Page | JPM_JP_REL_PRF_EMP | Lists the profiles that are associated with the employee's job. Employees select the job profile that they want to view or use in the search and compare.<br><br>This page is only displayed if there are two or more active job profiles related to the employee. If there is only one active job profile, this page is not displayed. The system determines which job profiles are related to an employee by searching the employee's job data record. If the employee has multiple jobs, the system checks all the person's active jobs for matching profiles. |
| Select a Profile Page<br><br>Add Profiles Page<br><br>Add Profiles for a team member Page | JPM_COM_PROF_SRCH | Employees and managers search for a job profile by either selecting a profile type or entering a profile name. They can view job profiles that are defined as end profiles. This is defined in the profile type definition on the Profile Type - Attributes page. From the list of profiles, employees and managers click the profile name to view the profile details.<br><br>Managers can create a new profile by clicking the **Add a Profile** link on this page through the Maintain Job Profiles component. This link is not available to employees. |

| ***Page Name*** | ***Definition Name*** | ***Usage*** |
|---|---|---|
| Maintain Job Profiles Page | JPM_MGRSS_PROFL1C | Managers select the profile type for the new profile. The system then displays the content sections that are set up for the selected profile type.<br><br>The system displays only those content sections that are authorized for the manager role in the profile type definition. Managers can also use this page to create and edit job profiles. If the manager clicks the **Edit** icon for the item, the system opens up the Update <content type> page and makes the fields available for edit. Managers can only update content sections to which they have update access, as defined on the Content Section page in the profile type definition. |
| My Job Profiles Page | JPM_MGRSS_PROFL1C | Displays the job profile that the employee selected.<br><br>The system displays only those content sections that are authorized for the employee role in the profile type definition. |
| View Job Profiles Page | JPM_MGRSS_PROFL1C | Displays the job profile that the employee selected.<br><br>The system displays only those content sections that are authorized for the employee role in the profile type definition. |
| View <content type> Page<br><br>Add New <content type> Page<br><br>Update <content type> Page | JPM_ITM_EMPDTL_SEC | Displays the details of a profile item. The fields on this page vary according to the content type of the item. Managers can update this information. Changes that require approval are submitted for approval processing when the manager clicks the Submit button on the Job Profiles - Summary of Changes page. |
| Content Item Details Page | JPM_CAT_ITEMS_DSP | View details about a specific content item. |
| Rating Model Page | HCR_RATEMDL_POPUP | Displays the rating model details of the selected profile item. When accessing the page from the update or add new pages, the you can modify the rating as well. |

| ***Page Name*** | ***Definition Name*** | ***Usage*** |
|---|---|---|
| Related Items Page | JPM_PROF_SSRELITMS | Displays details of the selected profile item that is related to the profile item. |
| Add New Profile Identity Page<br>Update Profile Identity Page | JPM_MGRPID_SEC | Add or edit profile identities associated with the profile. |
| Summary of Changes Page | JPM_JP_NPSUMM_SEC | Lists the changes that the manager has made to the job profile that require approval. The manager clicks the **Submit** button next to the **Items awaiting submission** link to submit the changes for approval or click **Cancel** to return to the Maintain Job Profiles page. The **Cancel** button will retain the changed items with a *Saved* status. |

# (Classic) Maintaining Interest Lists

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

**Note:** This feature has been replaced by My Interest List and Team Interest Lists in Fluid. For more information, see (Fluid) Maintaining Interest Lists.

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

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

**Note:** To access these self service tiles and components, the user must be assigned these roles:
—Employee: *Profile Mgmt Employee*
—Manager: *Profile Mgmt Manager*

This topic lists the pages used to maintain interest lists using the classic user interface.

### Related Links

(Classic) Viewing and Updating Job Profiles

## Page Used to Maintain Employee Interest Lists Using the Classic User Interface

| ***Page Name*** | ***Definition Name*** | ***Usage*** |
| --- | --- | --- |
| Team Interest List Page | HR_DR_ADDL_INFO | Displays the instructions for the transaction and the effective date field. Managers can change the default effective date. |
| Team Interest List - Select Employees to Process Page | HR_DR_SELECT_EMPS | Displays a list of the people who report to the manager. Managers select the person whose interest they want to view and click **Continue.** Managers can also click the **Drill Down** icon to view employees under the employee listed on that row. |
| My Interest List Page<br><br>Team Interest Lists Page | JPM_INTEREST | Lists the job profiles in the employee's interest list. The **Assigned By** column shows who added the profile to the interest list. Employees can add profiles to their interest list, managers can add job profiles to their employees' interest lists, and profile administrators can add profiles to employees' interest lists.<br><br>Employees and managers can only delete a job profile from the interest list if they added the profile to the list. |

# (Classic) Searching and Comparing Profiles

**Note:** This feature has been replaced by the Search and Compare functionality in Fluid. For more information, see (Fluid) Searching and Comparing Profiles.

## Pages Used to Search and Compare Profiles Using the Classic Pages

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

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

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

**Note:** The JPM Person Profile (HC_JPM_PERSON_PROFILE) search index supports real time indexing (RTI) with PeopleTools version 8.59.10 or higher. When enabled, RTI allows real-time updates to the indexed data to provide job search using the latest information.
For more information about Real Time Indexing, refer to PeopleTools Search Technology, “Administering Real Time Indexing."

## Understanding Search and Compare Profiles

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

Depending on how the search is configured, employees and managers can set up or modify the search criteria before running the search. The system assigns matching profiles a score that indicates how well the profile matches the search criteria. For further information about how the system calculates the scores, see “Understanding Search and Compare Profile Scores Using the Classic Pages” (PeopleSoft Human Resources Manage Profiles).

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

# Using the PeopleSoft Fluid User Interface to Manage Profile Data as an Employee and Manager

This topic lists the pages that employees and managers can access from a single location in the PeopleSoft Fluid User Interface to access profile tasks for themselves or their team members.

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

This video provides and overview of the talent profile self-service tiles and dashboards for employees and managers:

Video: Image Highlights, PeopleSoft HCM Update Image 37: Talent Profile Self Service Enhancements

## Pages Used to Manage Profile Data as an Employee and Manager Using Fluid

| ***Page Name*** | ***Definition Name*** | ***Usage*** |
|---|---|---|
| My Profiles Tile | HC_JPM_EE_DASHBOARD_LINK (this is the cref for this tile) | Access the employee My Profiles dashboard, where the employees can view and maintain various profile transactions for themselves. |
| My Profiles Dashboard | HC_JPM_EE_DASHBOARD | Select from tiles to view and maintain profile data related to the logged in user. |

| Page Name | Definition Name | Usage |
|---|---|---|
| Team Profiles Tile | HC_JPM_MGR_DASHBOARD_LINK (this is the cref for this tile) | Access the manager Team Profiles dashboard, where managers can view and maintain various profile transactions related to their team. |
| Team Profiles Dashboard | HC_JPM_MGR_DASHBOARD | Select from tiles to view and maintain profile data related to the logged in user's team. |

## My Profiles Tile

Employees use the My Profiles tile to access the My Profiles dashboard, where they can view and maintain various profile transactions for themselves.

**Note:** To access these self service tiles and components, the employee must be assigned the *Profile Mgmt Employee Fluid* role.

Navigation:

The My Profiles tile is delivered as part of the Employee Self Service home page, but the location can change if you change the delivered home pages or if employees personalize their home pages.

This example illustrates the My Profiles tile.


Employees click the My Profiles tile to access the My Profiles Dashboard and select from tiles to view and maintain profile data related to themselves.

## My Profiles Dashboard

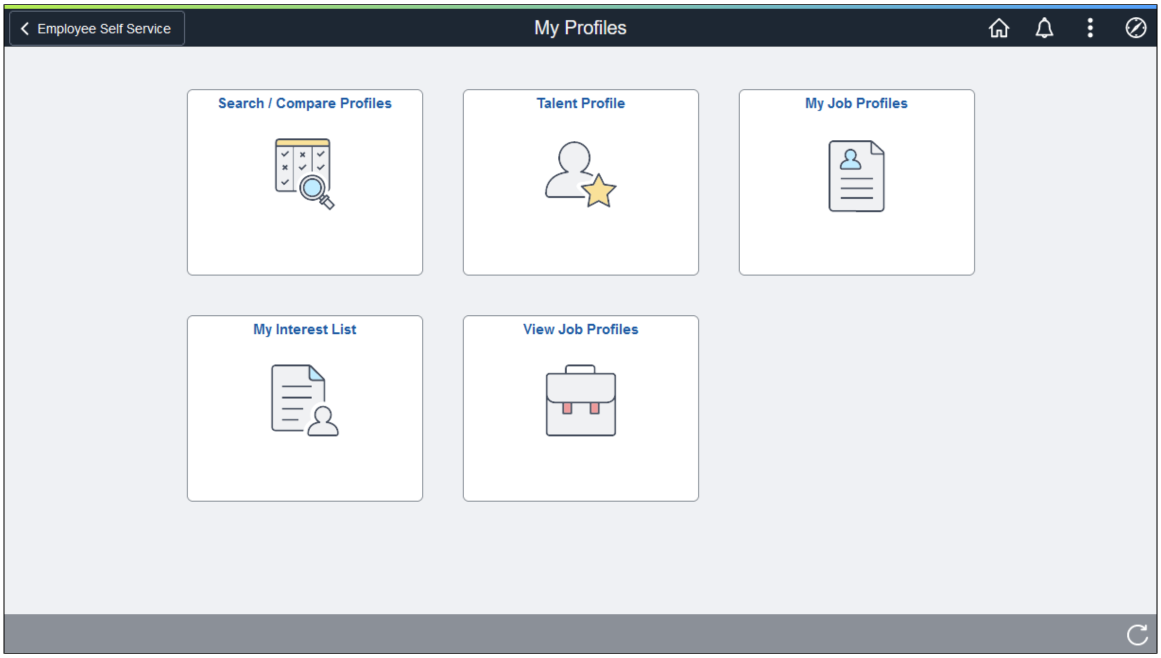
Use the My Profiles dashboard (HC_JPM_EE_DASHBOARD) to select from tiles to view and maintain profile data related to the logged in user.

Navigation:

Click the My Profiles Tile, which is delivered as part of the Employee Self Service home page, but the location can change if you change or personalize the home pages.

This example illustrates the My Profiles dashboard.




This My Profiles dashboard enables employees to access frequently-used Profile Management components from one location.

The dashboard lists the components collected under these tiles:

| ***Tile Name*** | ***Usage*** |
|---|---|
| "Search / Compare Profiles Tile" (PeopleSoft Human Resources Manage Profiles) | Access and search for profiles that match selected search criteria and compare those profiles. |
| Talent Profile Tile | Access the fluid pages where you can view and update your person talent profile. |
| My Job Profiles Tile (for Employees) | View your job profile using fluid. |
| My Interest List Tile | View and manage a list of job profiles in your interest list. You can also compare profiles within your list to determine the degree of a fit. |
| View Job Profiles Tile (for Employees) | View job (non-person) profiles using fluid. |

## Team Profiles Tile

Managers use the Team Profiles tile to access the Team Profiles dashboard, where they can view and maintain various profile transactions related to their team.

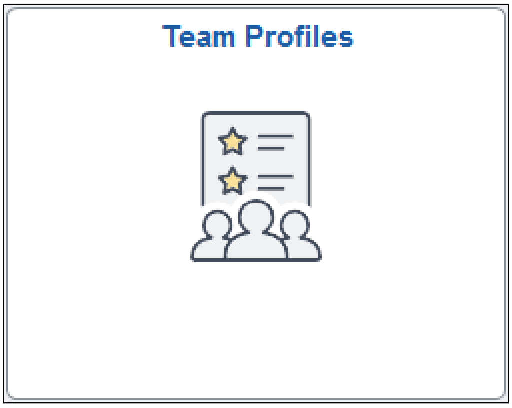
 

**Note:** To access these self service tiles and components, the manager must be assigned the *Profile Mgmt Manager Fluid* role.

Navigation:

The Team Profiles tile is delivered as part of the Manager Self Service home page, but the location can change if you change the delivered home pages or if managers personalize their home pages.

This example illustrates the Team Profiles tile.




Managers click the Team Profiles tile to access the Team Profiles Dashboard and select from tiles to view and maintain profile data related to their team.

## Team Profiles Dashboard

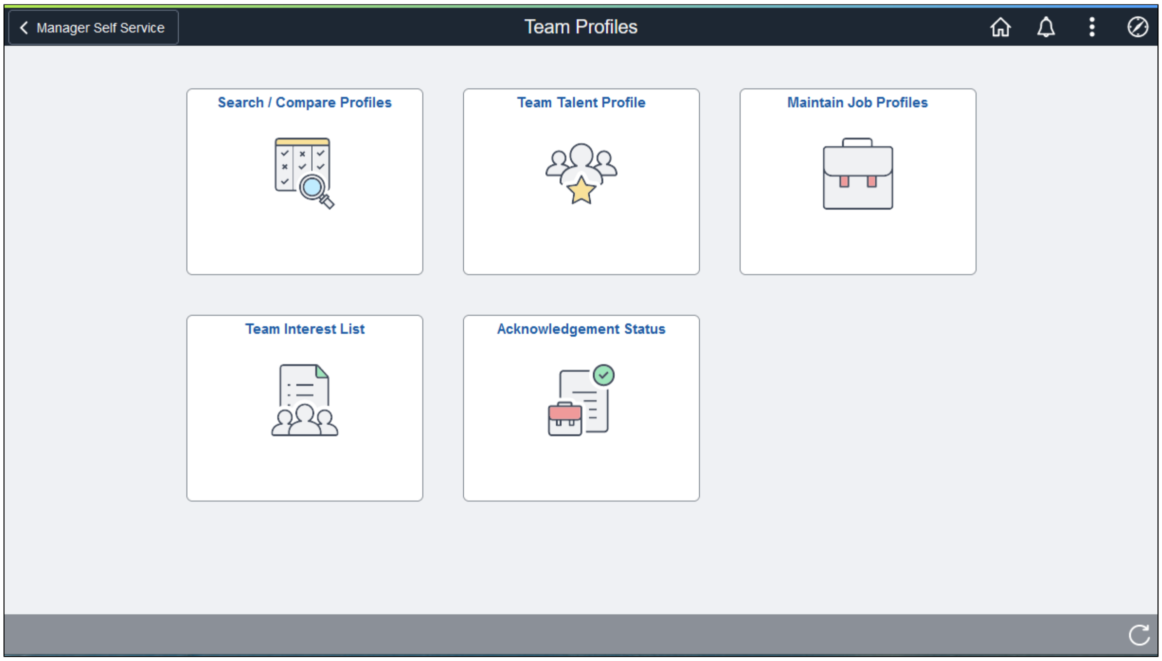
Use the Team Profiles dashboard (HC_JPM_MGR_DASHBOARD) to select from tiles to view and maintain profile data related to your team.

Navigation:

Click the Team Profiles Tile, which is delivered as part of the Manager Self Service home page, but the location can change if you change or personalize the home pages.

This example illustrates the Team Profiles dashboard.




This Team Profiles dashboard enables managers to access frequently-used Profile Management components from one location.

The dashboard lists the components collected under these tiles:

| ***Tile Name*** | ***Usage*** |
|---|---|
| "Search / Compare Profiles Tile" (PeopleSoft Human Resources Manage Profiles) | Access and search for profiles that match selected search criteria and compare those profiles. |
| Team Talent Profile Tile | Access the fluid pages where you can view and update your team member's talent profiles. |
| Maintain Job Profiles Tile (for Managers) | View and manage job (non-person) profiles using fluid. |
| Team Interest List Tile | View and manage a list of job profiles in an employee's interest list. You can also compare profiles within the list to determine the degree of a fit. |
| Acknowledgement Status Tile | Access the pages to select and view your team member's acknowledgements of their job-related profiles. |

# (Fluid) Maintaining Person Profiles

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

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

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

These videos demonstrate the Manage Profile enhancements:

Video: Image Highlights, PeopleSoft HCM Update Image 25: Manage Profile Enhancements

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

Video: Image Highlights, PeopleSoft HCM Update Image 28: Manage Profiles-Viewing Historical Profile Items in Fluid

Video: Image Highlights, PeopleSoft HCM Update Image 28: Manage Profiles-Support for Multiple Profiles

Video: Image Highlights, PeopleSoft HCM Update Image 38: Copy Job Items to a Person Profile

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

| *Page Name* | *Definition Name* | *Usage* |
|---|---|---|
| Talent Profile Tile | HC_JPM_PROFILE_XFR_FL_GBL (this is the cref for the tile) | Select this tile to access the fluid pages where you can view and update your person talent profile. |
| Team Talent Profile Tile | HC_JPM_PROFILE_XFR_FL_GBL2 (this is the cref for the tile) | Select this tile to access the fluid pages where you can view and update your team member's talent profiles. |
| Team Talent Profile - Find Team Member Page (for Managers) | HR_PSEL_FLU | Select one of your direct report team members to view summary information about his or her profile data. |
| Talent Profile Page (for Employees) or Team Talent Profile Page (for Managers) | JPM_PERS_PROFL_FLU | View summary information about your own profile data or one of your direct report's profile data. |

| ***Page Name*** | ***Definition Name*** | ***Usage*** |
|---|---|---|
| Pending Items Page, Denied Items Page, or Approved Items Page | JPM_APPR_ITMS_SCF | View the profile items that are pending approval, have been denied, or have been approved for a profile. |
| Select Profile Type Page | JPM_PROFTYP_SEL_FL | Choose from a list of valid *Person* profile types for which you want to view or update profile information for yourself (from the Talent Profile pages) or for one of your direct reports (from the Team Talent Profile pages). |
| <Related Content Type> (Summary) Page | JPM_RLITMSUM_SCF | View a list of related items assigned to this person for this content item. |
| <Related Content Type> (Details) Page | JPM_ITM_UPD_FL | Add, view details, or delete related items for a profile content item. |
| View Profile Item History Page | JPM_ITM_HIST_SCF | Select from a list of effective dated rows for a given profile content item to view historical data. |
| <Content Type> (Item Details) Page | JPM_ITM_UPD_FL | Add, update, or delete a content item. When enabled, you can also view or manage attachments related to the item. |
| <Content Item> Page | JPM_CAT_ITEM_FL | View the content item details defined in the Content Catalog setup pages, such as descriptions and rating model for the item. |
| Proficiency Descriptions Page | JPM_RTMDL_POPUP_FL | View and select from a list of detailed descriptions for this content item. |
| Request Approval Page | JPM_APPROVAL_FLU | Submit profile content changes for approval. |
| My Job Profiles Page or Job Profiles for <Employee Name> Page | JPM_EMP_RELPROF_FL | Select a job profile from which you want to copy items. |
| Copy Job Items Page | JPM_COPY_JOB_FL | View and select items that are part of the person’s job profile but are not yet part of the employee’s profile. |
| Update Details Menu Popup Page | JPM_MENU_ITM_SCF | Select the type of item you want to update. |

| Page Name | Definition Name | Usage |
| --- | --- | --- |
| Copy Job Items - <Related Content Type> (Summary) Page | JPM_CPY_RLITM_SCF | View and select from a list of related items associated with this job content item to add to the person's profile. |
| Profile Item Detail Page | JPM_ITM_UPD_FL | Make updates to an item to indicate the person's qualifications and capabilities. |
| Profile Item Detail (Related Content Type) Page | JPM_ITM_UPD_FL | Make updates to a related item to indicate the person's qualifications and capabilities. |
| Copy Profile Items Page | JPM_CPYJOBSAVE_SCF | View a summary of and submit the items you are copying to the person's profile. |

## Understanding Fluid Pages for Viewing Profiles

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

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

- Users do not have "Save as Draft" functionality for content items, nor can users access content items that were saved as draft in classic pages.
- Fluid pages show only the fields (properties) where the Detail attribute is selected on the "Content Section Page" (PeopleSoft Human Resources Manage Profiles), regardless of whether the Summary attribute is selected.

### Roles to Access Talent Profile Pages in Fluid

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

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

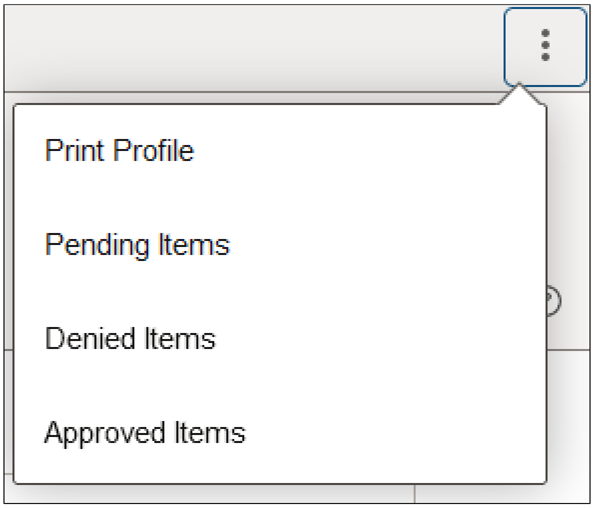
## Accessing Additional Profile Actions

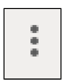
From the Talent Profile and Team Talent Profile pages in fluid, additional actions are available from these menu options:

- **More Actions** menu (three dot icon on the right side of the page banner)

This example illustrates the Profile - More Actions menu icon options.




| ***Term*** | ***Definition*** |
| --- | --- |
|  (More Actions) menu icon button | (Available for the manager and employee) Select the More Actions icon to print the profile or view approval statuses.<br><br>Available options are:<br><br>• **Print Profile**: Select to print all approved items in this profile using the Person Profile report (JPM_JPPP_RPT). This is a PDF that shows all current items in a person's profile. It is the same report that administrators run from the Person Profile Report page **(Workforce Development > Profile Management > Reports > Person Profile Report).**<br><br>• These menu items appear only when corresponding approval transaction statuses exist for this profile:<br><br>  • **Pending Items**<br>  • **Denied Items**<br>  • **Approved Items**<br><br>Select a status menu item to access the Pending Items Page, Denied Items Page, or Approved Items Page and view a list of the approval transactions that fall under the corresponding item category.<br><br>**Note:** Approved and Denied transactions display profile items that fall within the **Days of Approval History** threshold defined on the "Profile Management Installation Page" (PeopleSoft Human Resources Manage Profiles). |

- **Related Actions** menu (icon next to the employee's name), **Development** menu item

| ***Term*** | ***Definition*** |
|---|---|
| (Related Actions) icon button | The **Related Actions** > **Development** menu item gives the user access to several actions to manage profile data.<br><br>The **Development** menu item allows you to view and manage profile related actions such as perform profile comparisons and manage profile data. Actions may include:<br><br>• *View My Historical Profile* (Employee) or *View Team Historical Profiles* (Manager): View your own or a team member's profile data as of a given date.<br><br>• *View My Job Profiles* (Employee) or *View Employee Job* Profiles (Manager): View all the job profiles that the system identifies as related to your or a team member's Job data.<br><br>• *My Interest List* (Employee) or *Team Interest List* (Manager): View and add job profiles to your or your team member's interest list.<br><br>• *Search and Compare Profiles* (both): Search for or compare a variety of profiles.<br><br>• *Compare My Profile* (Employee) or *Compare Employee Profiles* (Manager): Compare your or a team member's person profile with their own job profile.<br><br>• *Copy Job Items* (both): Copy content items that are part of your or a team member's job profile.<br><br>For additional information on copying job items into a person's profile, see the following topic. |

## Copying Job Items into a Person's Profile

The Talent Profile and Team Talent Profile pages allow you to view or manage talent profile data for yourself or your direct reports, based on your role and privileges. This includes being granted the ability to add or update content items to a person's profile. To streamline the process of creating and maintaining a person's profile data in fluid, the system also allows you to automatically copy job items that have been defined for a non-person profile (job profile related to the person's job) into the person's profile.

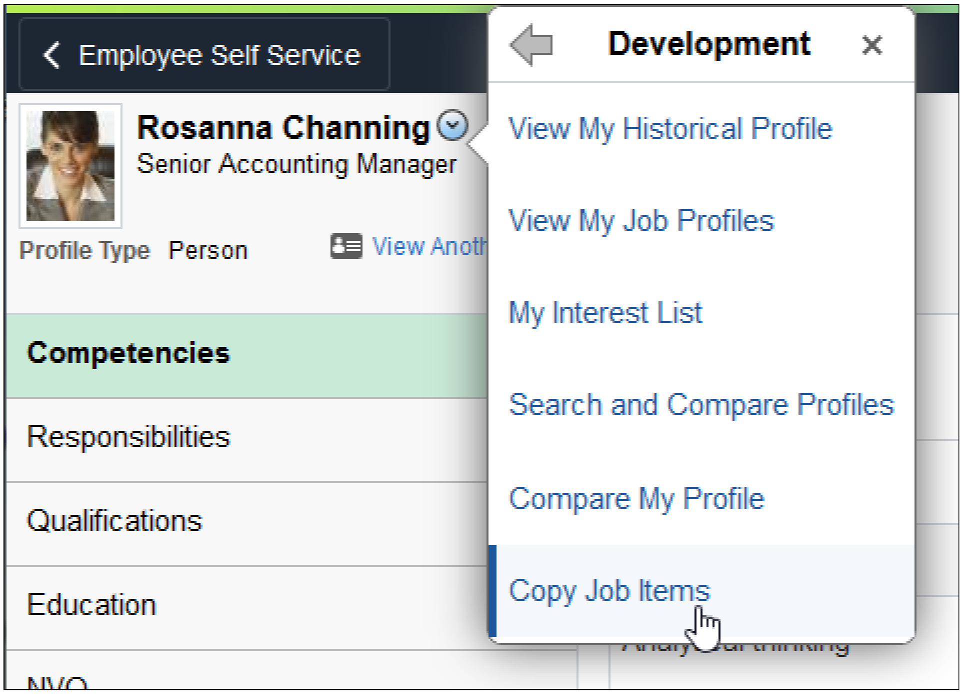
Video: Image Highlights, PeopleSoft HCM Update Image 38: Copy Job Items to a Person Profile

To copy items from a related job profile into a person's profile, do the following:

1. From a person's profile page, select the *Related Actions* drop-down menu icon next to the person's name, select the *Development* menu item, then select the *Copy Job Items* option.

This example illustrates how to select the Copy Job Items option from the Related Actions, Development menu.




2. The system searches for profile content related to the person's job. When the person’s job is related to more than one job profile, the system will display the My Job Profiles Page or Job Profiles for <Employee Name> Page.

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**Note:** If only one job profile is related to this person’s job, the system skips this step and goes immediately to the Copy Job Items Page.

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Select the job profile from which you want to copy items.

3. The Copy Job Items Page displays those items that are part of the job profile, but are not yet part of the employee’s profile.

Select those items you want to add to the person’s profile.

---

**Note:** Some content items may require that you enter additional information before you can add them to a profile. For example, maybe competencies require that you identify the person’s proficiency level for each item before saving. When updates are required, the Copy Status field displays *Update <Content Type>* to indicate that additional data must be entered.

---

4. Update items and related-items, as needed.

---

**Note:** While some items require that you update information, you can update other item details as well. For example, you may want to enter the person’s major under their Bachelor of Arts profile item.

---

a. Click the Update Details (pencil or three dotted menu) icon. This will allow you to update item details.

   b. Update all required and pertinent fields for the item and click **Done**.

   c. Repeat these steps for each item showing a status to update or for those items where you want to include additional information.

5. When all selected items show a **Copy Status** of *Ready to Copy*, click the **Copy Items** button on the Copy Job Items page.

6. Review the items you identified to copy on the Copy Profile Items Page and do one of the following:

   - Click **Cancel** to return to the Copy Job Items page and make edits.

   - Click **Submit** to add the items to the person's profile.

7. The system returns you to the Copy Job Items Page in display only mode where you can view the status of the copy.

   - When an item requires approval to be added to a profile, the status indicates that it has been submitted for approval.

   - For those items that do not need approval, the system automatically adds the profile items to the person's profile with a status of *Saved*.

## Talent Profile Tile

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

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

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Navigation:

The Talent Profile tile is delivered as part of the My Profiles Dashboard, but you can add the tile to any home page through personalizations.

This example illustrates the Talent Profile tile.

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

## Team Talent Profile Tile

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

---

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

---

Navigation:

The Team Talent Profile tile is delivered as part of the Team Profiles Dashboard, but you can add the tile to any home page through personalizations.

This example illustrates the Team Talent Profile tile.


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

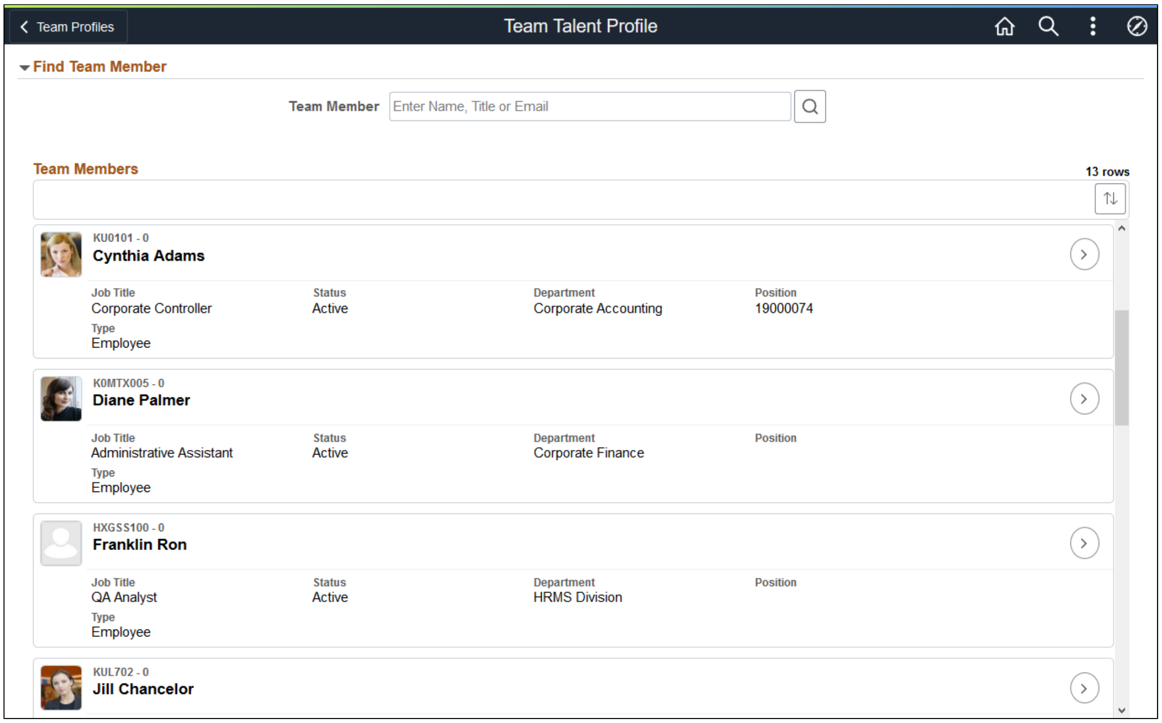
## Team Talent Profile - Find Team Member Page (for Managers)

Use the Team Talent Profile- Find Team Member page (HR_PSEL_FLU) to select one of your direct report team members to view summary information about his or her profile data.

Navigation:

- Click the Team Talent Profile Tile.
- Click the **Select Different Employee** link in the sub-banner of the Team Talent Profile pages.

This example illustrates the Team Talent Profile - Find Team Member for the tablet.




The Team Talent Profile - 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 the "(Fluid) <Transaction Name> - Find Team Member Page" (Application Fundamentals) documentation.

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

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

---

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

---

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

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

Navigation:

As an employee:

- Select the Talent Profile Tile from the homepage you have added it to.
- **Self Service** > **Learning and Development** > **Talent Profile**

- Select the Related Actions button next to your name and select **Development** > **Talent Profile**.
- Select the Talent Profile tab from within the OnBoarding pages.

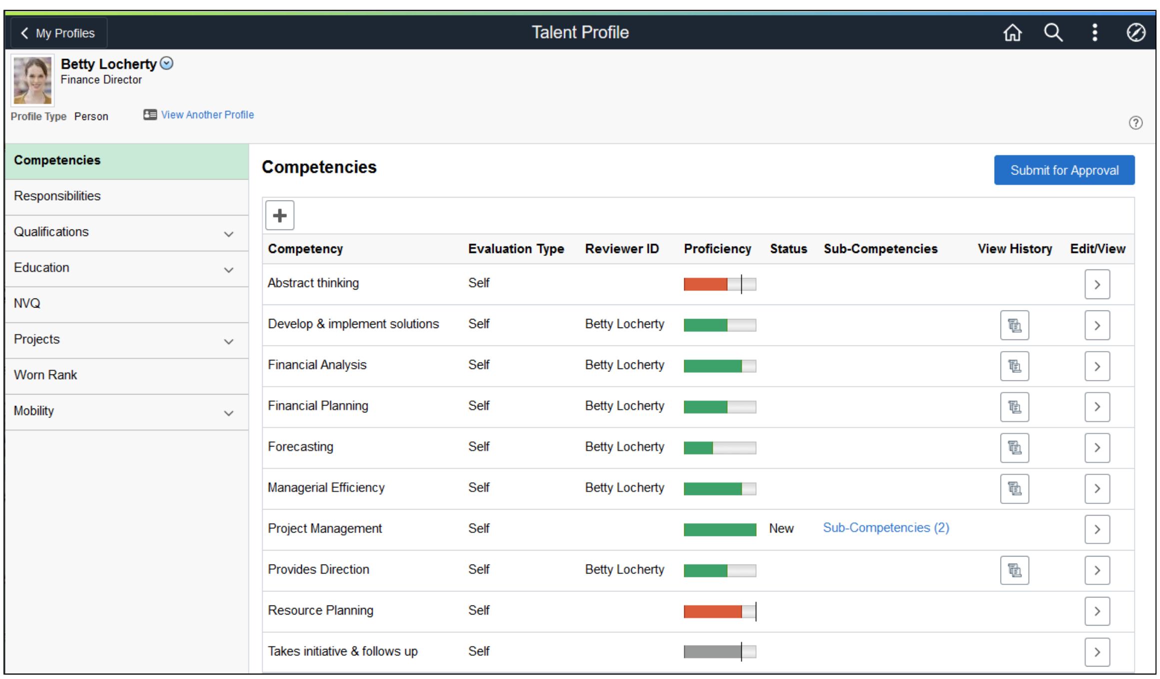
**Note:** This option is available only when the employee has an OnBoarding instance open.

As a manager:

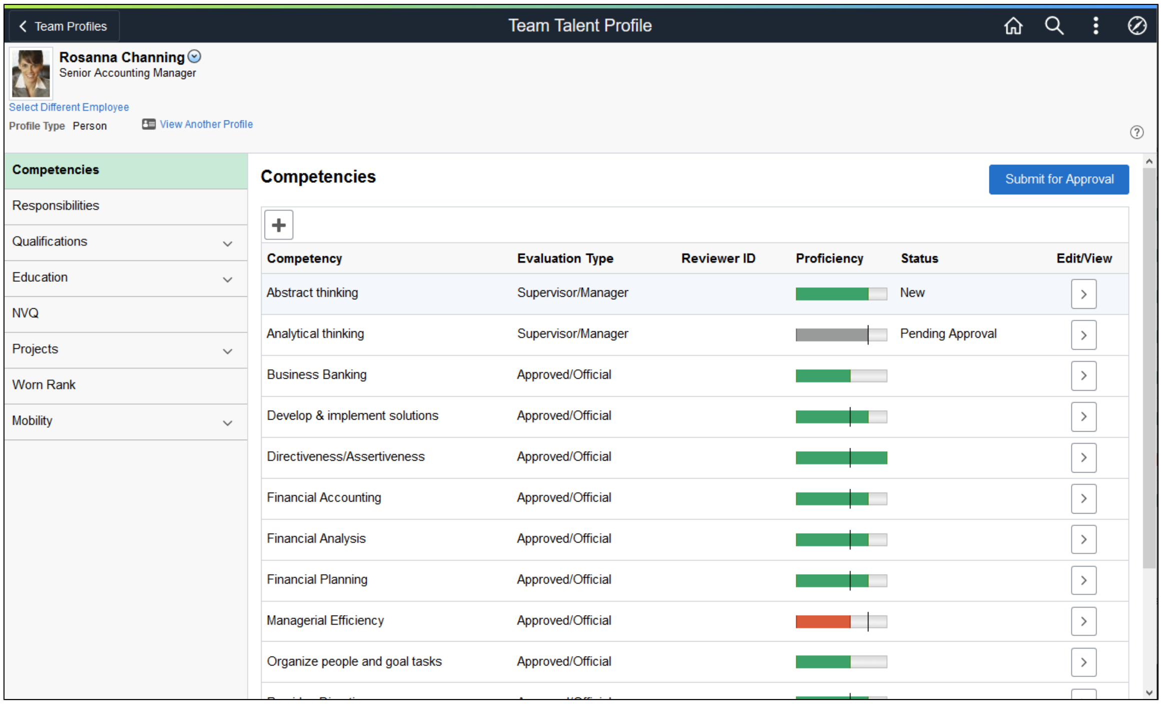
- Click the Team Talent Profile tile, select an employee from the Team Talent Profile - Find Team Member Page (for Managers).
- **Manager Self Service** > **Learning and Development** > **Team Talent Profile**
- Select the Related Actions button next to your employee's name and select **Development** > **Team Talent Profile**.
- Select the Related Actions button next to your employee's name and select the OnBoarding Status item link. Select the Talent Profile tab pages.

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

This example illustrates the Talent Profile page for Competencies for the tablet when approvals are required and an employee makes changes to competencies. Hence, this example shows the **Submit for Approval** button and a *New* status for an item. It also shows the **Sub-Competencies** column, which is a Related Item field.

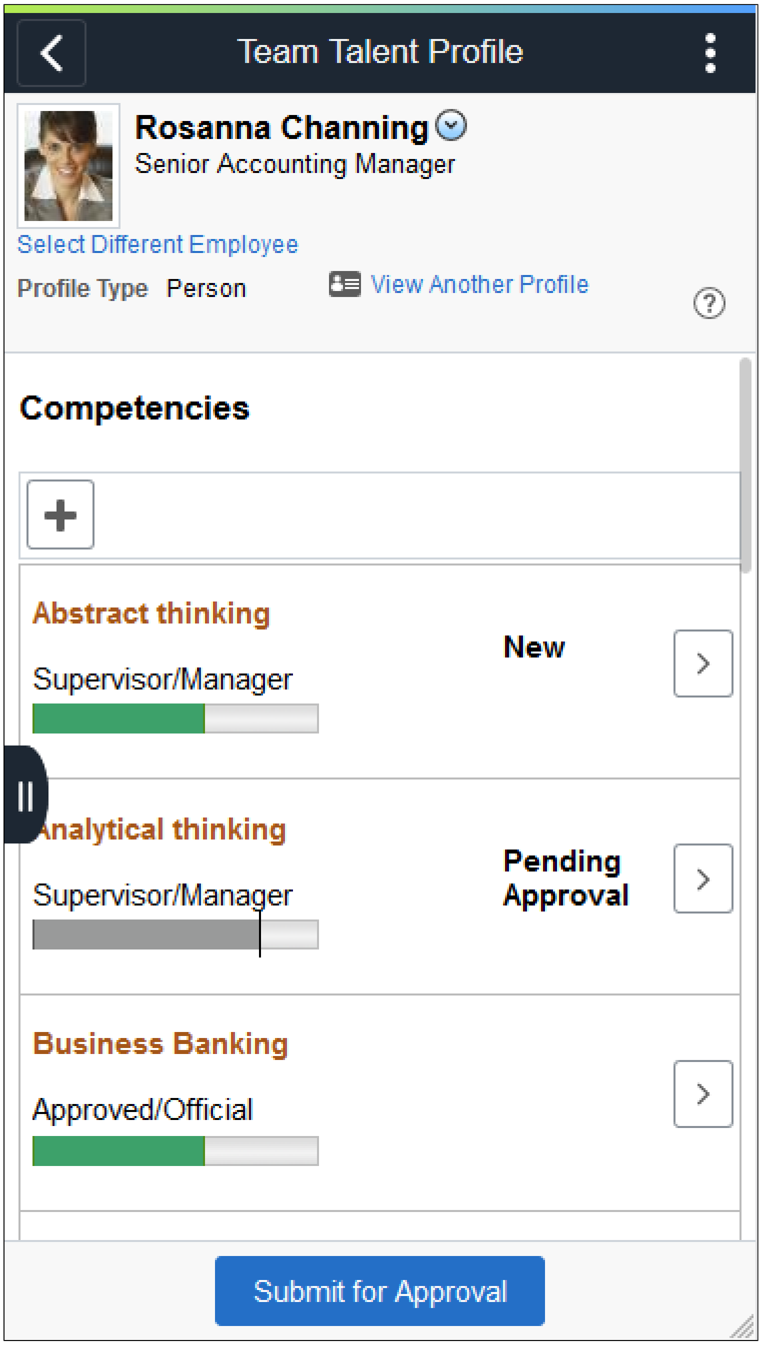


This example illustrates the Team Talent Profile page for Competencies for the tablet when approvals are required and the manager makes changes to competencies. Hence, this example shows the **Submit for Approval** button and a *New* status for an item. Those items that have a *Pending Approval* status have already been submitted for approval.

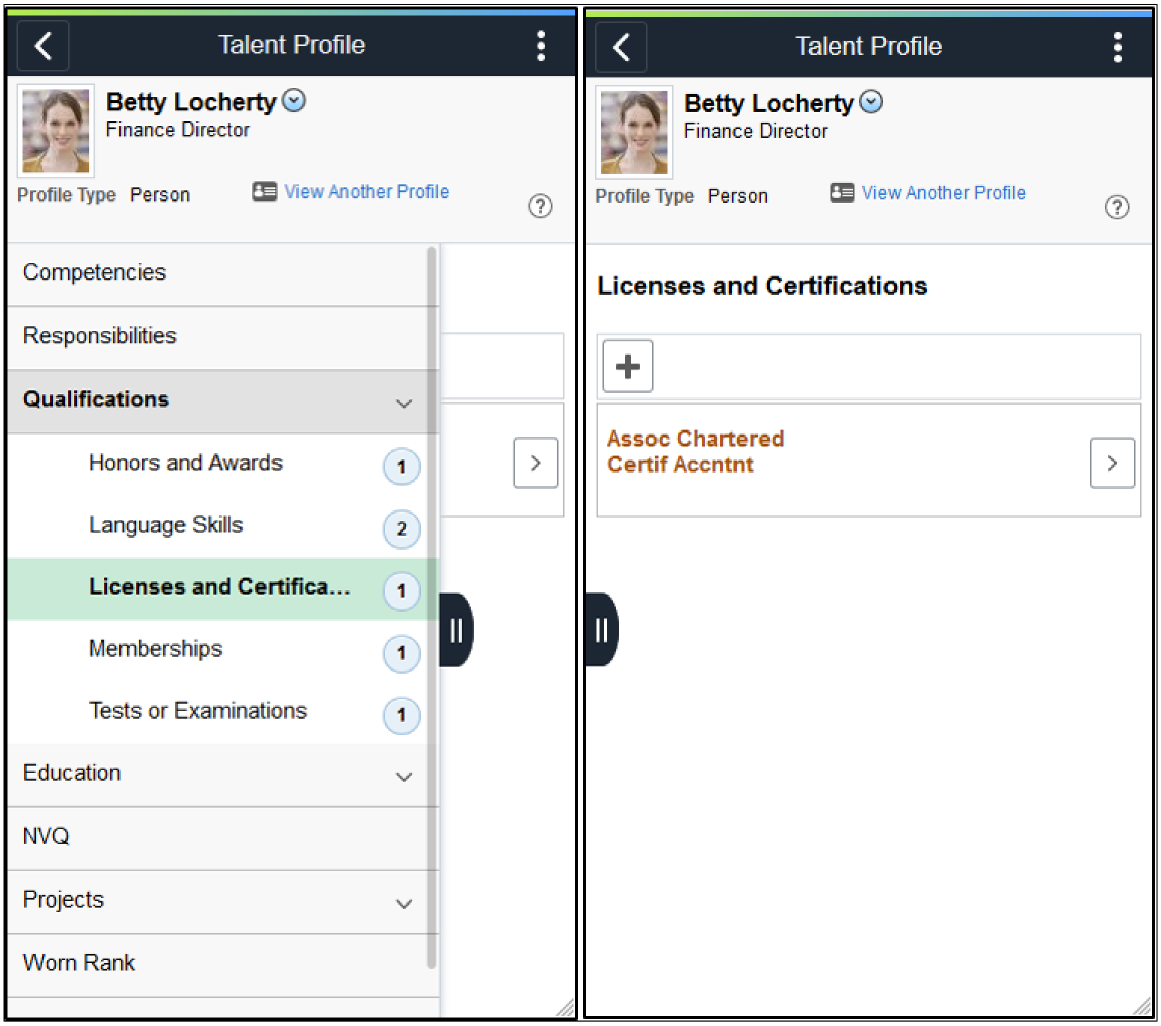


This example illustrates the Team Talent Profile page for Competencies for the smartphone when approvals are required and a manager makes changes to competencies. Hence, this example shows approval–related fields. The employee Talent Profile page works the same.

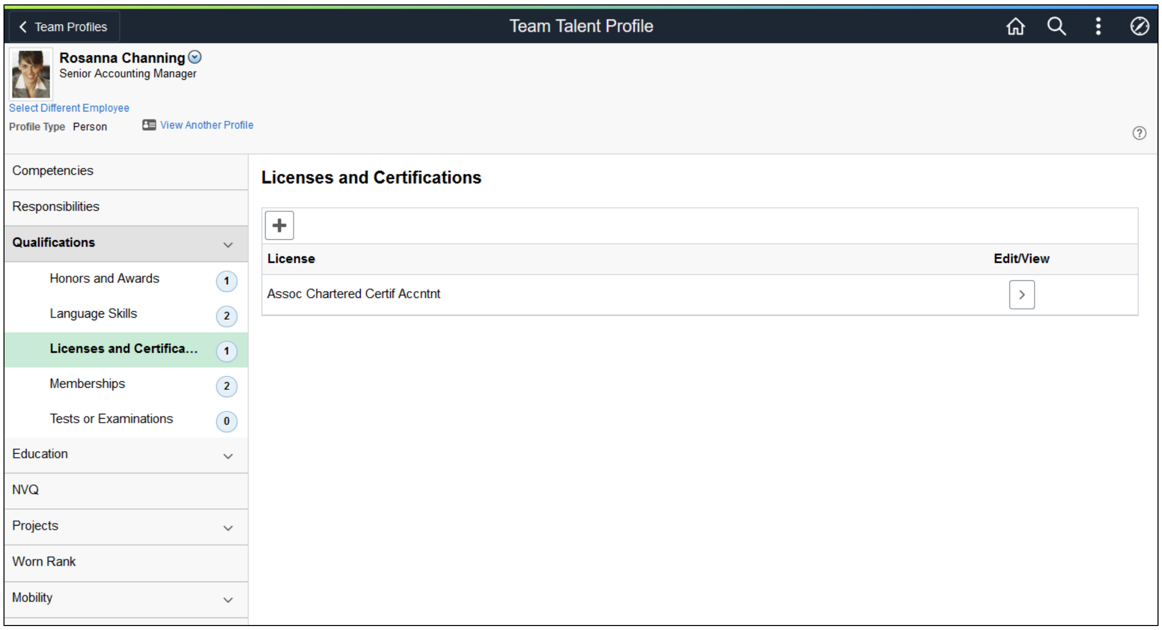


This example illustrates the Talent Profile page for the Qualifications tab and categories for the smartphone when an employee is viewing his or her own profile. The Qualifications tab includes multiple content types, so this example shows the content type panel with the Qualifications tab expanded to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



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

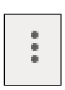



## Headers (Banner and Sub-Banner)

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

See “Common Header for Employee Self-Service Pages” (Application Fundamentals).

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

| ***Field or Control*** | ***Description*** |
|---|---|
|  (More Actions) menu icon button | Select the More Actions icon to print and view approval statuses for profiles.<br><br>See Accessing Additional Profile Actions for more details on the More Actions options for managing profiles. See also Pending Items Page, Denied Items Page, or Approved Items Page for approval statuses. |
|  (Related Action) icon button | Select the related actions icon next to the employee’s name to access additional self-service transactions.<br><br>See the Accessing Additional Profile Actions for more information on Related Action options specific to managing profiles. |

| ***Field or Control*** | ***Description*** |
| --- | --- |
| **Select Different Employee** | (Manager view only) Click the **Select Different Employee** link in the sub-banner of the Team Talent Profile pages to return to the Team Talent Profile - Find Team Member Page (for Managers) a choose another person for viewing profile data. |
| **Profile Type** and **View Another Profile** | The header displays by default the primary person profile type as defined on the “Assign Profile Type Defaults Page” (PeopleSoft Human Resources Manage Profiles). To view or update information for a different profile type for this person, select the **View Another Profile** link to open the Select Profile Type Page.<br><br>This video demonstrates the support for multiple profiles:<br><br>Video: Image Highlights, PeopleSoft HCM Update Image 28: Manage Profiles-Support for Multiple Profiles |
|  (Page Instructions) icon | Select this icon to view information about this page and the different methods to add and maintain profile data.<br><br>In short, you can add or update profile items using the following methods:<br><br>• **Related Actions icon** > **Development** > **Copy Job Items**: Enables you to add items that are related to this person’s job.<br><br>• Add button: Manually add items to the person’s profile.<br><br>• Edit/View button: View, update, or delete an existing item. |

## Tabs and Content Types

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

**Important!** The application delivers the fields that appear as the column headers within the content summary grid and cannot be configured to display through the “Content Section Page” (PeopleSoft Human Resources Manage Profiles), Summary option selection on the Property Attributes tab.

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

See the “Profile Types - Content Page” (PeopleSoft Human Resources Manage Profiles) for more information on adding tabs and content sections.

When you select a tab, the page displays the content section to which you have been granted role security access under the *Employee* (Talent Profile page) or *Manager* (Team Talent Profile page) profile roles (see the Role Security configuration on the “Content Section Page” (PeopleSoft Human Resources Manage Profiles)).

## Content Items

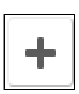
When you select a content type (from the left panel), the main panel will display the content items associated with the content type for this profile. For example, if you select the **Competencies** content type on the left panel, the main panel will list the specific competency content items related to this profile, such *Team Player* or *Analytical Thinking*. These content items appear in alphabetical order.

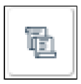
### Hiding Inactive Content Items

The configuration option on the “Profile Types - Attributes Page” (PeopleSoft Human Resources Manage Profiles) to hide inactive items in self service applies to all content types within a profile type. When enabled, the profile pages will not display inactive items when using self service.

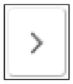
### Adding or Updating Content Items

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

| ***Field or Control*** | ***Description*** |
|---|---|
|  or **Add** button | If self-service updates are not allowed, the list of content items does not include an **Add** button or icon, and selecting an existing content item displays a read-only detail page that does not have a **Delete** button.<br><br>Select this button to access the <Content Type> (Item Details) Page and add item details. |

| ***Field or Control*** | ***Description*** |
| --- | --- |
| **Proficiency** | This column or graph displays for certain content types, such as competencies, where you rate an employee ability.<br><br>Displays a graphical representation of the user's proficiency. In this graph, green indicates that the user's proficiency exceeds the job requirement, gray indicates that the proficiency meets the job requirement, and red indicates that the proficiency is below the job requirement. |
|  **View History** button | A row displays this button when multiple effective dated rows exist for the content item.<br><br>Click this button to access the View Profile Item History Page and select from a list of historical rows to view.<br><br>**Note:** You cannot make changes to an item when you access it from the **View History** button. Select the **Edit/View** button to make changes to a non-historical row.<br><br>This video demonstrates viewing historical data:<br><br>Video: Image Highlights, PeopleSoft HCM Update Image 28: Manage Profiles-Viewing Historical Profile Items in Fluid |
| **Sub-Competencies** or **Elements** (Related Content Type) column | Select this link to manage the related content items (see <Related Content Type> (Summary) Page).<br><br>**Note:** When set up to use related items, the page will display an additional column. Related items (parent/child relationships) must be set up for a content item on the "Content Items - Relationships Page" (PeopleSoft Human Resources Manage Profiles) and added as a sub-section on a person profile type "Profile Types - Content Page" (PeopleSoft Human Resources Manage Profiles) for the content type in order for this column and related item link to appear.<br>The name of the link varies based on the child relationship of the content type. For example, if a profile type is set up to use the *Sub-Competencies* sub-section under the *Competencies* content type, then the column heading will display *Sub-Competencies* when viewing the *Competencies* items, as shown in the previous example.<br><br>This video demonstrates the Manage Profile enhancements for related items:<br><br>Video: Image Highlights, PeopleSoft HCM Update Image 25: Manage Profile Enhancements |

| ***Field or Control*** | ***Description*** |
|---|---|
|  **Edit/View** button | Click this button to view the current row of information for this item.<br><br>If a content type is configured to allow employees or managers to make updates in self-service, the employee or manager can add, update, and delete content items for their corresponding evaluation type. Selecting an individual item opens an editable detail page (<Content Type> (Item Details) Page). However, updates cannot be made to evaluation types that do not match the user's authorized evaluation type or to historical rows.<br><br>To delete an item, use the **Delete** button on the detail page. Content items are effective-dated, so deleting a content item that has historical data causes the most recent historical row to become current.<br><br>When employees or managers have attachments enabled for person profiles, they can also view attachments. To add, update, or delete attachments for a content item, the manager or employee must be assigned the *Update Attachments* value for their role within the profile for this content section.<br><br>For information on setting up role access to update or add attachments to a content item, see the "Content Section Page" (PeopleSoft Human Resources Manage Profiles). |

## Approvals

| ***Field or Control*** | ***Description*** |
| --- | --- |
| **Submit for Approval** | If approvals are required for content item changes, the detail page where the user makes changes has a **Continue** button instead of a **Save** button. When the user clicks the **Continue** button to return to the main Talent Profile or Team Talent Profile page, the list of content items displays a **Submit for Approval** button. The user can continue to update additional content items (for a single content type) without submitting changes. When the user clicks the **Submit for Approval** button, the Request Approval Page appears. The user can add comments on this page and then submit the consolidated approval request.<br><br>After a user modifies a content item that requires approval, the detail page for that content item is read-only, even if the changes have not yet been submitted. The user cannot make further modifications until the original changes are submitted and approved.<br><br>To cancel changes without submitting, the user can navigate to another tab and then click No in the message asking whether to save changes first.<br><br>**Note:** Approving managers review approval requests for *Person Profile* and *Non-Person Profile* fluid transactions using the Pending Approvals - Person Profile Page or Pending Approvals - Non-Person Profile Page. |
| **Status** | This column is visible only if the user has made changes that have not yet been approved.<br><br>Before the changes are submitted for approval, the status indicates the type of change that the user made: *New, Update,* or *Delete.*<br><br>After the changes are submitted, the status is *Pending Approval.* After the changes are approved, the **Status** field is blank. If the **Status** field is blank for all content items, the **Status** column is not visible. |

## Related Links

Understanding Profile Maintenance

"Managing Interest Lists" (PeopleSoft Human Resources Manage Profiles)

## Pending Items Page, Denied Items Page, or Approved Items Page

Use the Pending Items page, Denied Items page, or Approved Items page (JPM_APPR_ITMS_SCF) to view the profile items that are pending approval, have been denied, or have been approved for a profile.

Navigation:

Select the More Actions menu icon (three dots) in the page title banner of the Profile pages and select one of the following:

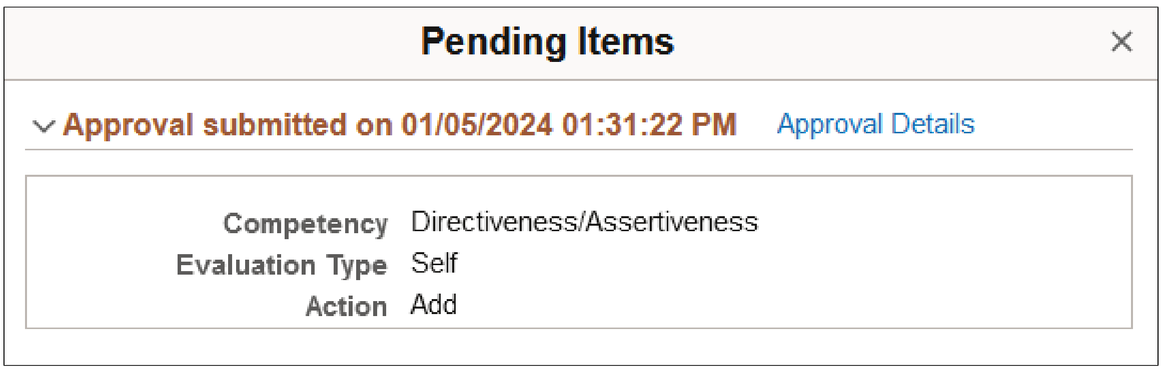
- **Pending Items**
- **Denied Items**
- **Approved Items**

---

**Note:** Menu items display only when approval transactions exist with the corresponding status: Pending, Denied, or Approved. See Accessing Additional Profile Actions for more information.

---

This example illustrates the Pending Items page for a profile. The Denied Items and Approved Items page have a similar format.




This information displays in a modal page where all relevant approval transactions with the profile items are listed.

---

**Note:** Approved and denied transactions display profile items that fall within the **Days of Approval History** threshold defined on the “Profile Management Installation Page” (PeopleSoft Human Resources Manage Profiles).

---

## Select Profile Type Page

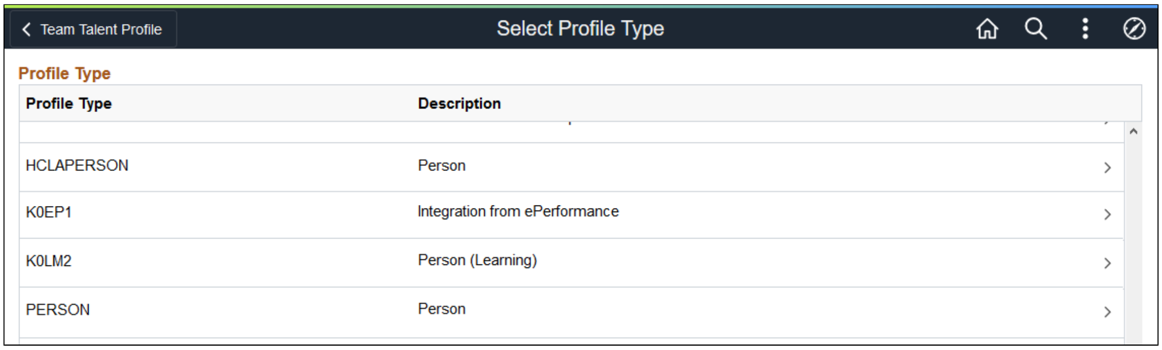
Use the Select Profile Type page (JPM_PROFTYP_SEL_FL) to choose from a list of valid *Person* profile types for which you want to view or update other profile information for yourself (from the Talent Profile pages) or for one of your direct reports (from the Team Talent Profile pages).

Navigation:

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

This example illustrates the Select Profile Type page.




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

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

## <Related Content Type> (Summary) Page

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

---

**Note:** Where <Related Content Type> represents the name of the content type of Elements or Sub-Competencies.

---

Navigation:

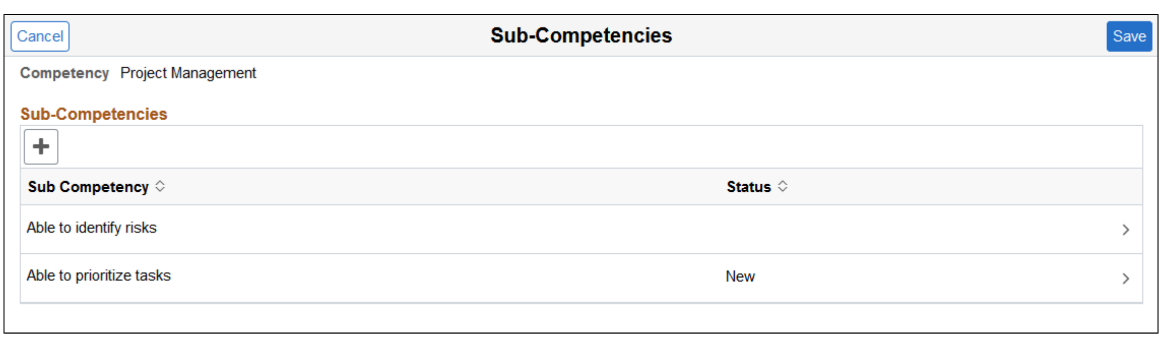
Select the <related content type (#)> link for the content type on the Talent Profile Page (for Employees) or Team Talent Profile Page (for Managers).

---

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

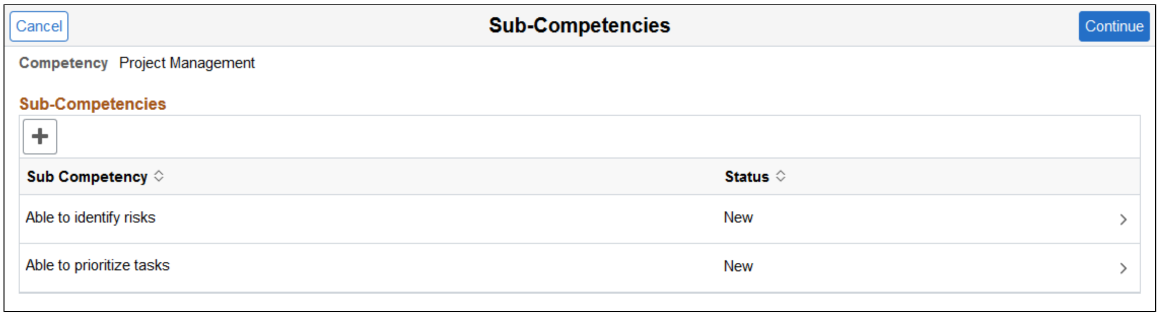
---

This example illustrates the <Related Content Type> (Summary) page, where the related content type *Sub-Competencies* is shown as the page name, and when changes do not require approval.



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




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

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

| ***Field or Control*** | ***Description*** |
|---|---|
| **Cancel** | Click to return to the Talent Profile or Team Talent Profile page without making any changes. |
| **Save** | This button appears when changes do not require approval.<br><br>Click to save changes and return to the Talent Profile or Team Talent Profile page. |
| **Continue** | This button appears when changes require approval.<br><br>When you click this button, the system will return you to the Talent Profile or Team Talent Profile page without submitting changes. You can continue making changes to other content items (within the same content type). To submit the changes, click the **Submit for Approval** button on the Talent Profile or Team Talent Profile page.<br><br>**Note:** You must click the **Submit for Approval** button to save the changes to the profile with a *Pending Approval* status. If you do not select the **Submit for Approval** button prior to navigating away from the content type, you will lose your changes. |

## <Related Content Type> (Details) Page

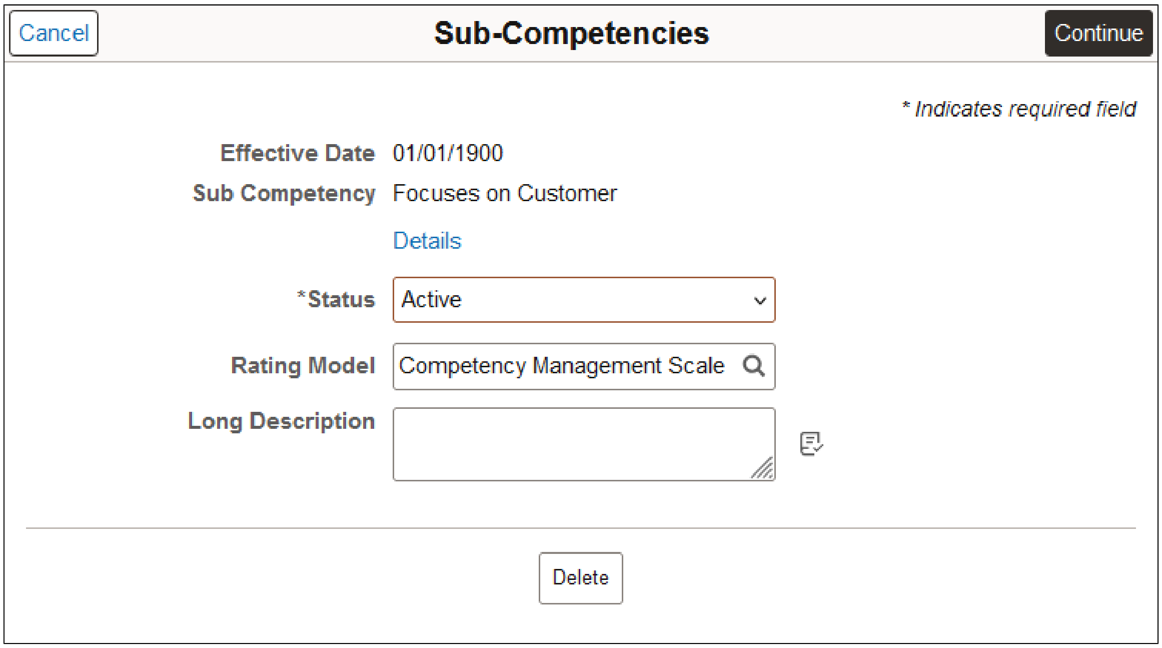
Use the <Related Content Type> (Details) page (JPM_ITM_UPD_FL) to add, view details, or delete related items for a profile content type.

**Note:** Where <Related Content Type> represents the name of the content type of Elements or Sub-Competencies.

Navigation:

Select the **Add** button or click a related item row on the <Related Content Type> (Summary) Page.

This example illustrates the <Related Content Type> (Details) page when you select an existing related item.




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

**Note:** The fields and field labels that appear on this page vary according to the setup configurations.

| ***Field or Control*** | ***Description*** |
|---|---|
| **Cancel** | Click to return to the <Related Content Type> (Summary) Page without making any changes. |

| *Field or Control* | *Description* |
| --- | --- |
| **Continue** | Click this button to keep the changes you have entered. The system will return you to the <Related Content Type> (Summary) Page where:<br>• If the change does not require approval, you will click the **Save** button to make the change in the system.<br>• If the change requires approval, you should click the **Continue** button. You can continue making changes to other content items (within the same content type). To submit the changes, click the **Submit for Approval** button on the Talent Profile Page (for Employees) or Team Talent Profile Page (for Managers).<br>**Note:** You must click the **Save** button from the <Related Content Type> (Summary Page) or the **Submit for Approval** button from the Talent Profile or Team Talent Profile page in order to save your changes. Those changes not requiring approval will be automatically updated in the system upon save, while those requiring approval will be saved with a *Pending Approval* status upon submitting for approval. |
| **Status** | Define if an item is active or inactive.<br>**Note:** When the **Hide Inactive Items in Self Service** is enabled on the “Profile Types - Attributes Page” (PeopleSoft Human Resources Manage Profiles), this field will not appear on the page. |
| **Delete** | When viewing an existing related item, the Delete button is available.<br>Click this button to remove this related item from the person’s profile. |

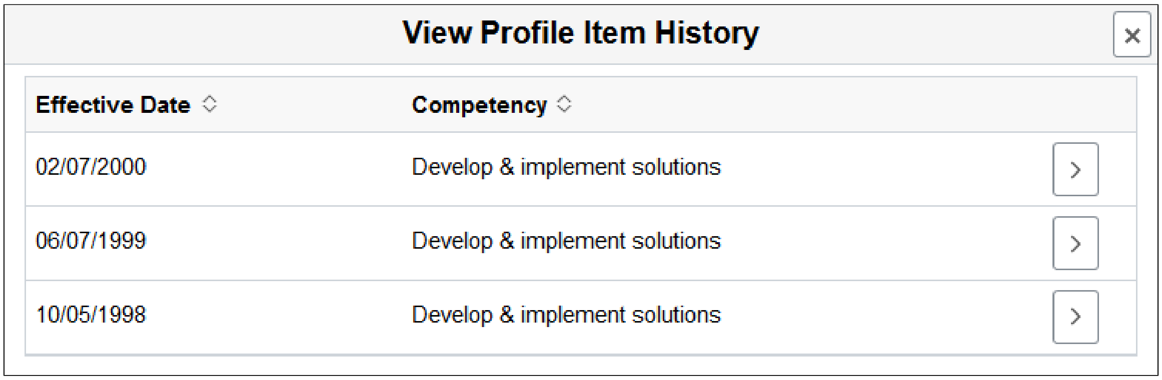
## View Profile Item History Page

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

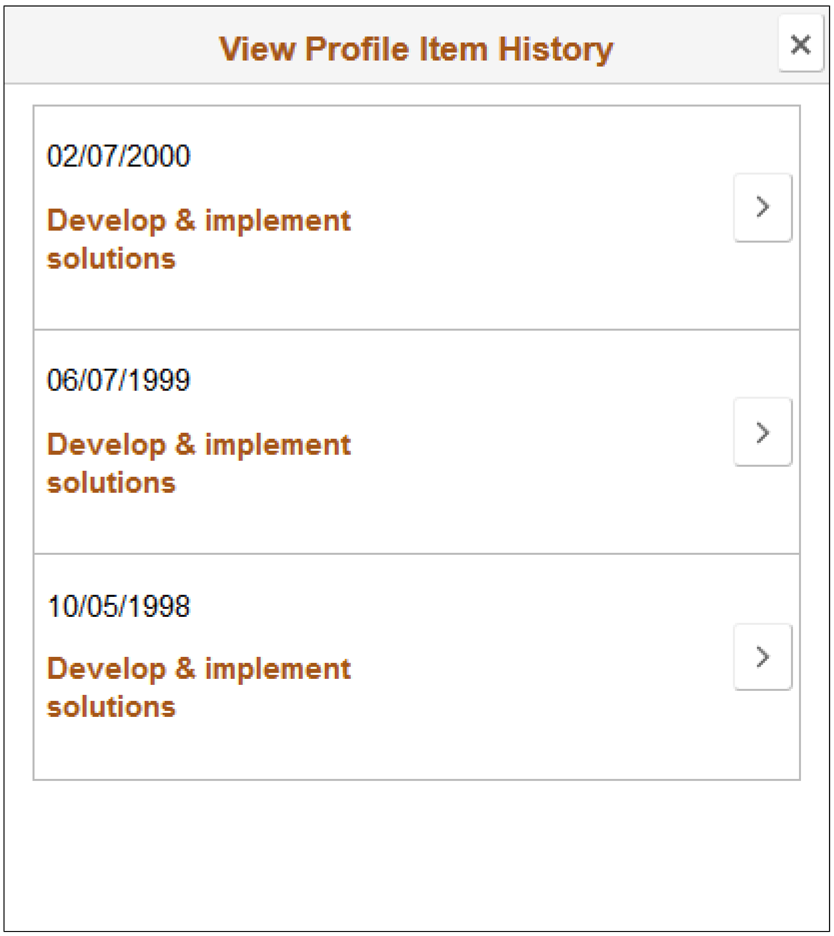
Navigation:

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

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




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




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

---

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

---

## <Content Type> (Item Details) Page

Use the <Content Type> (Item Details) page (JPM_ITM_UPD_FL) to add, update, or delete a content item. When enabled, you can also view or manage attachments related to the item.

---

**Note:** The page title changes based on the content type of the item you are adding or maintaining.

---

Navigation:

- Click the + Add button or click the **Edit/View** button for a content item on the Talent Profile Page (for Employees) or Team Talent Profile Page (for Managers)
- Select a row from the View Profile Item History Page.

---

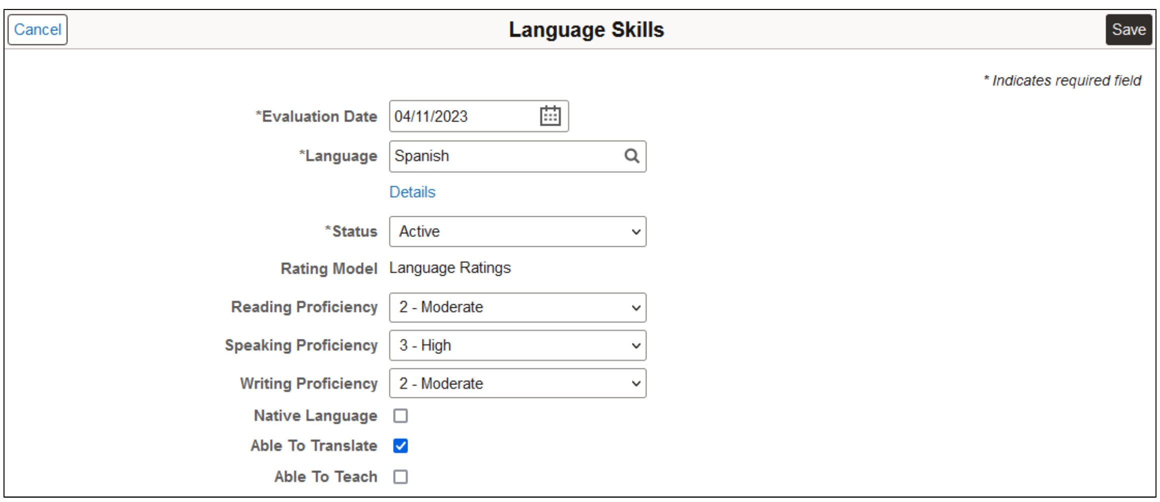
**Note:** Add, update and view options will vary based how you access the item and on your Role Security access (see the Role Security subtopic under the “Content Section Page” (PeopleSoft Human Resources Manage Profiles) topic).

---

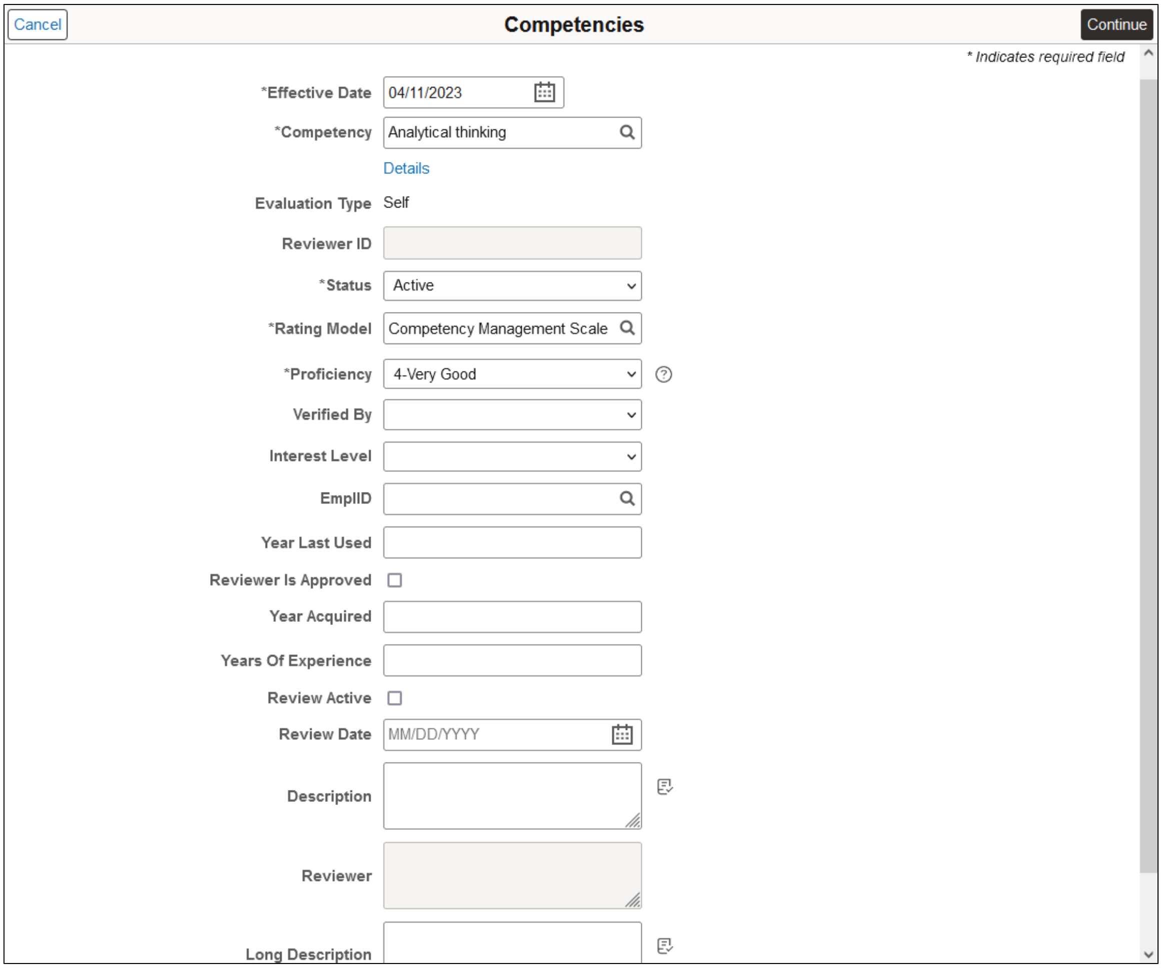
**Note:** This page is display only when you access it through the **View History** button navigation. To make updates to an item, you must use the **Edit/View** button navigation for a non-historical item to which you have been granted update access.

---

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

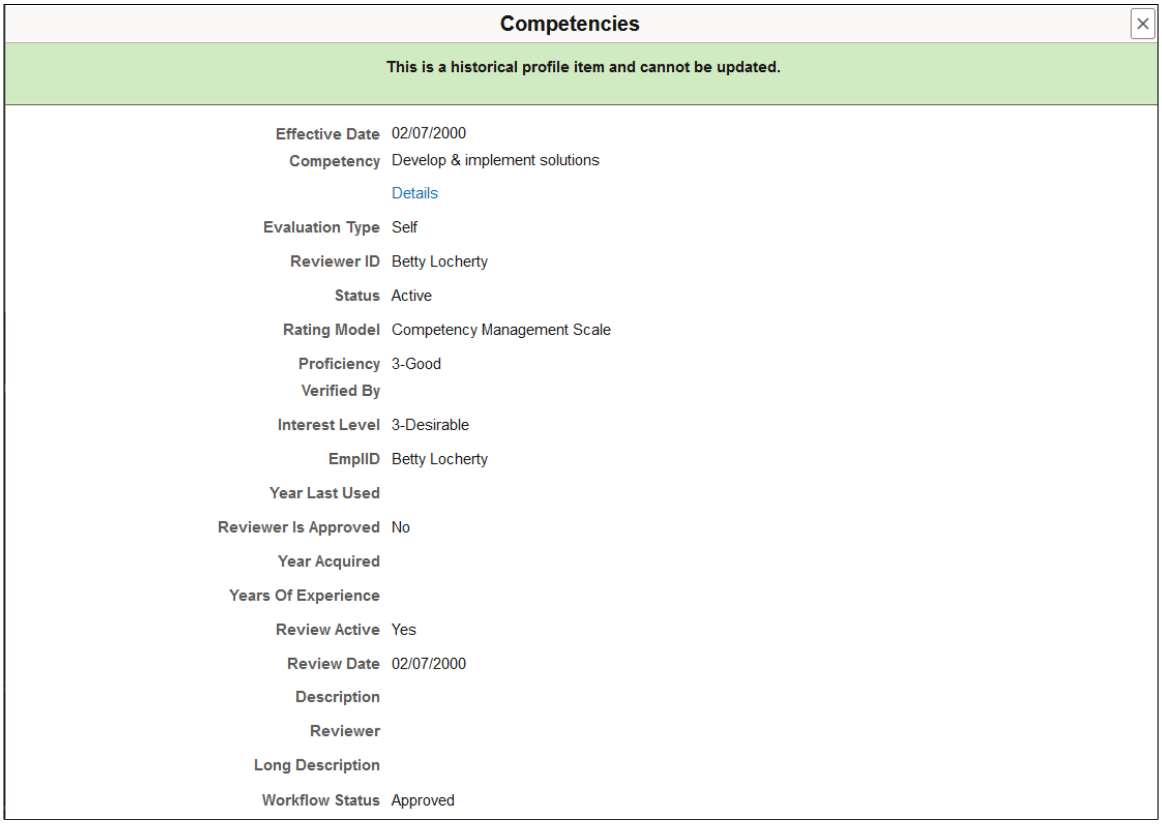


This example illustrates the <Content Type> (Item Details) page when changes require approval. The Delete button at the bottom of the page is not shown here.



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




**Note:** The fields and field labels that appear on this page vary according to the setup configurations.

## Buttons by Role Security

When the user's role security allows them to update the profile content type for the evaluation type, and the row is a non-historical row, the page displays these control buttons:

| ***Field or Control*** | ***Description*** |
| --- | --- |
| **Cancel** | Click to return to the Talent Profile or Team Talent Profile page without making any changes. |
| **Save** | This button appears when changes do not require approval.<br><br>Click to save changes and return to the Talent Profile or Team Talent Profile page. |

| ***Field or Control*** | ***Description*** |
| --- | --- |
| **Continue** | This button appears when changes require approval.<br><br>Click to tentatively save your changes and return to the Talent Profile or Team Talent Profile page. This will not submit the proposed changes. You can continue making changes to other content items (within the same content type category). However, to finalize and submit the changes within a content type category, you will need to click the **Submit for Approval** button on the Talent Profile or Team Talent Profile page.<br><br>**Note:** Changes you do not submit for approval will be discarded if you move to another content type category or when you leave the profile pages. |
| **Effective Date** and **Add New Version** button | (*Updating a Row*)<br><br>Enter updates directly on the current effective dated row without entering a new date to make changes to the existing row.<br><br>(*Adding a Row*)<br><br>Click the **Add New Version** button to enter a new effective dated row. The Talent Profile or Team Talent Profile page will show this newer row instead of the older row.<br><br>**Note:** When updating profile data, you cannot change the effective date to a date earlier than the date of the current record.<br><br>When a new effective-dated row is added and the previous effective-dated row has related content items associated with it, these related content items are automatically copied forward. The **Effective Date** field for the related content item detail cannot be updated since it must match the effective date of the parent item. |
| **Status** | Define if an item is active or inactive.<br><br>**Note:** When the **Hide Inactive Items in Self Service** is enabled on the “Profile Types - Attributes Page” (PeopleSoft Human Resources Manage Profiles), only active profiles are available and this field will not appear on the page. |

| ***Field or Control*** | ***Description*** |
|---|---|
| **Delete** | This button appears for existing rows when accessed through the View/Edit option.<br><br>Click this button to delete the content item from the profile. |

For information on setting up role security access to update a content item, see the “Content Section Page” (PeopleSoft Human Resources Manage Profiles).

## Profile Data

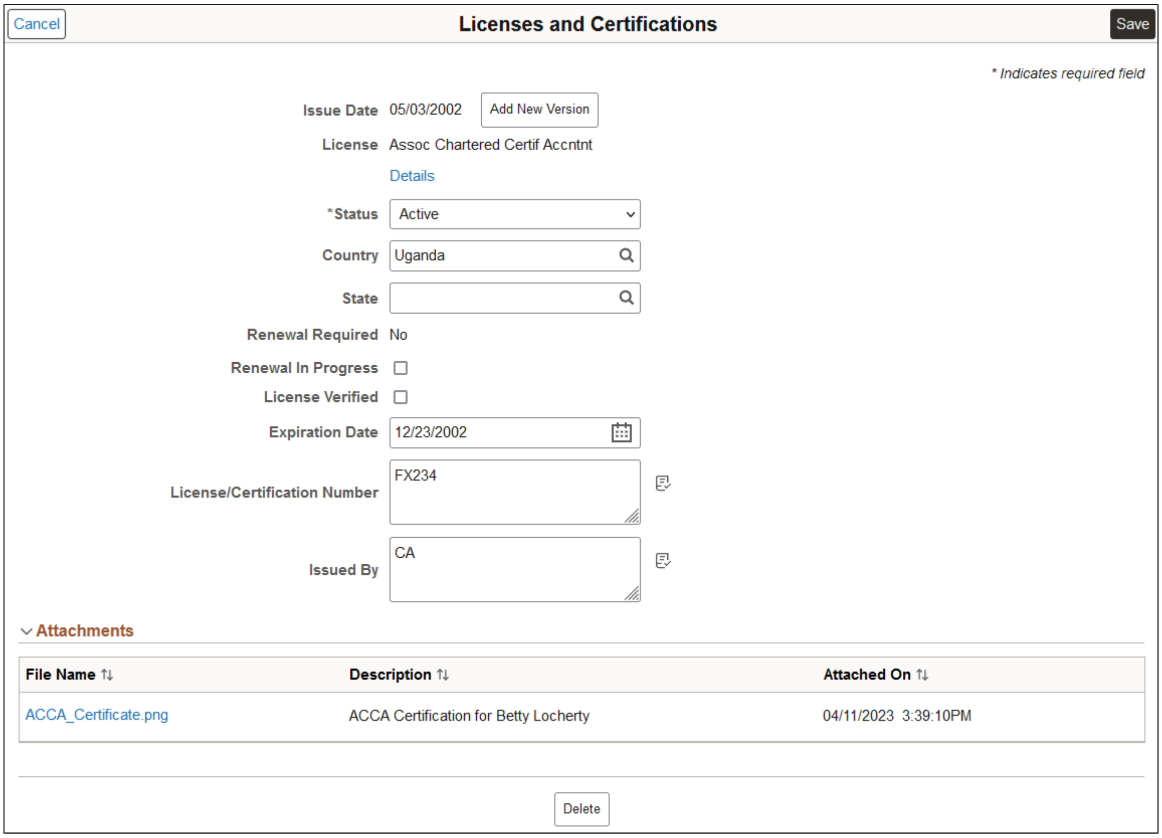
The fields on the page may vary depending on the content type. If a content item has country-specific fields, those fields appear within a collapsible country-specific section at the bottom of the page.

| ***Field or Control*** | ***Description*** |
|---|---|
| **<Content Type>** | **Note:** The field name is the content type of the item you are adding or updating.<br><br>(*Adding an Item*)<br><br>When adding an item, select from a list of content items that fall under the content type shown.<br><br>(Viewing, or Updating an Item)<br><br>When working with an existing item, the field displays the name of the item. |
| **Details** link | This link appears when you have entered a content item in the **<Content Type>** field.<br><br>Select the **Details** link to access the <Content Item> Page and view the item property values, such as descriptions and rating model, as defined in the Content Catalog. |
| (Rating Detail) icon | This icon appears when proficiency descriptions exist on the “Item Rating Descriptions Page” (PeopleSoft Human Resources Manage Profiles) for this content item.<br><br>Click this icon to open the Proficiency Descriptions Page and view the rating descriptions. |

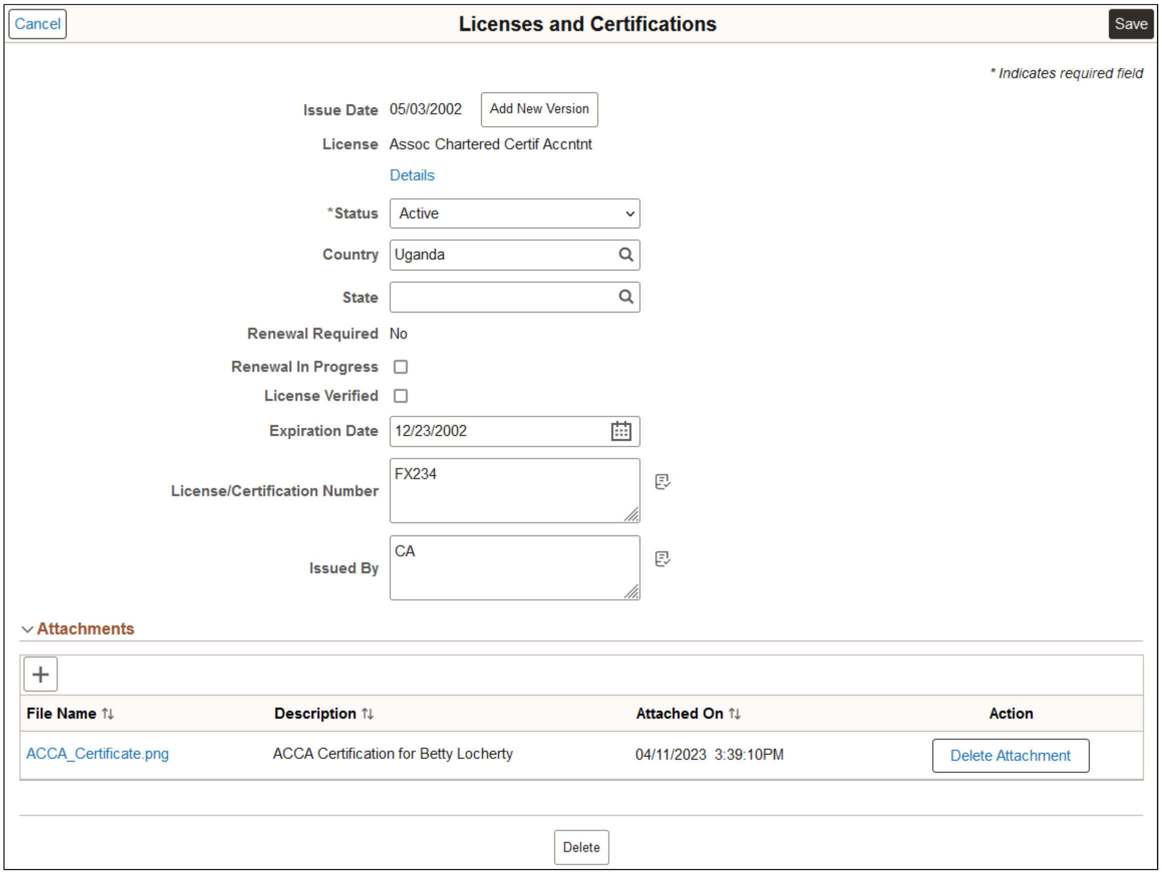
## Attachments

The Attachments section appears for person profiles when attachments have been enabled for the *Employee* role (for Talent Profile page) or the *Manager* role (for the Team Talent Profile page), and you have the role security access as define on the “Content Section Page” (PeopleSoft Human Resources Manage Profiles), Role Security section.

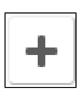
This example illustrates the <Content Type> (Item Details) page when attachments are enabled with the *View Attachments* option for the role of the user.



This example illustrates the <Content Type> (Item Details) page when attachments are enabled with the *Update Attachments* option for the role of the user.




Use this section to manage attachments by uploading, deleting, or updating attachments for a person profile.

| ***Field or Control*** | ***Description*** |
|---|---|
| **Add Attachment** or  | Click this button to access the File Attachment page and upload files. |
| **Attachments** | Displays the file name. Select the file link to download and view the attachment. |
| **Description** | (Optional) Enter a description when you first add the file. This field is not available for edit after you have saved the page. |
| **Delete Attachment** button | Click this button to remove an attachment from this content type item. |

| Field or Control | Description |
| --- | --- |
| **Delete** button | This button is available when you select and existing item.<br><br>Click to remove this item from the profile. |

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

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

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

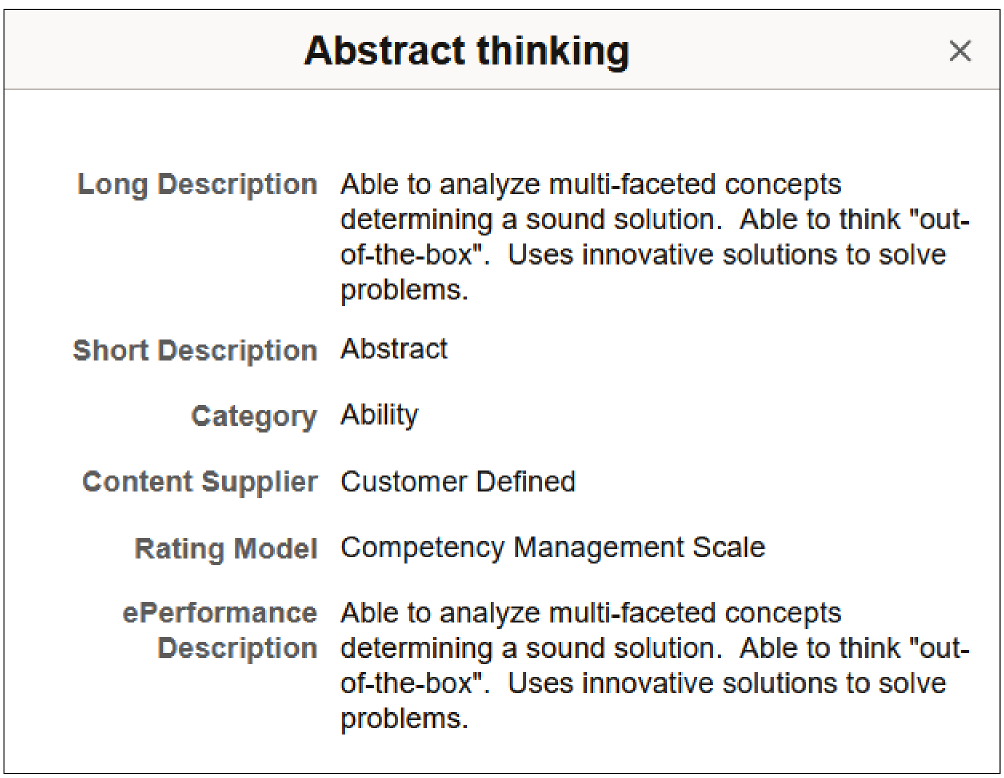
## <Content Item> Page

Use the <Content Item> page (JPM_CAT_ITEM_FL) to view the content item details defined in the Content Catalog setup pages, such as descriptions and rating model for the item.

Navigation:

Select the **Details** link on the <Content Type> (Item Details) Page.

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




Details for a content item are defined on the “Content Items - Item Details Page” (PeopleSoft Human Resources Manage Profiles).

## Proficiency Descriptions Page

Use the Proficiency Descriptions page (JPM_RTMDL_POPUP_FL) to view and select from a list of detailed descriptions for this content item.

Navigation:

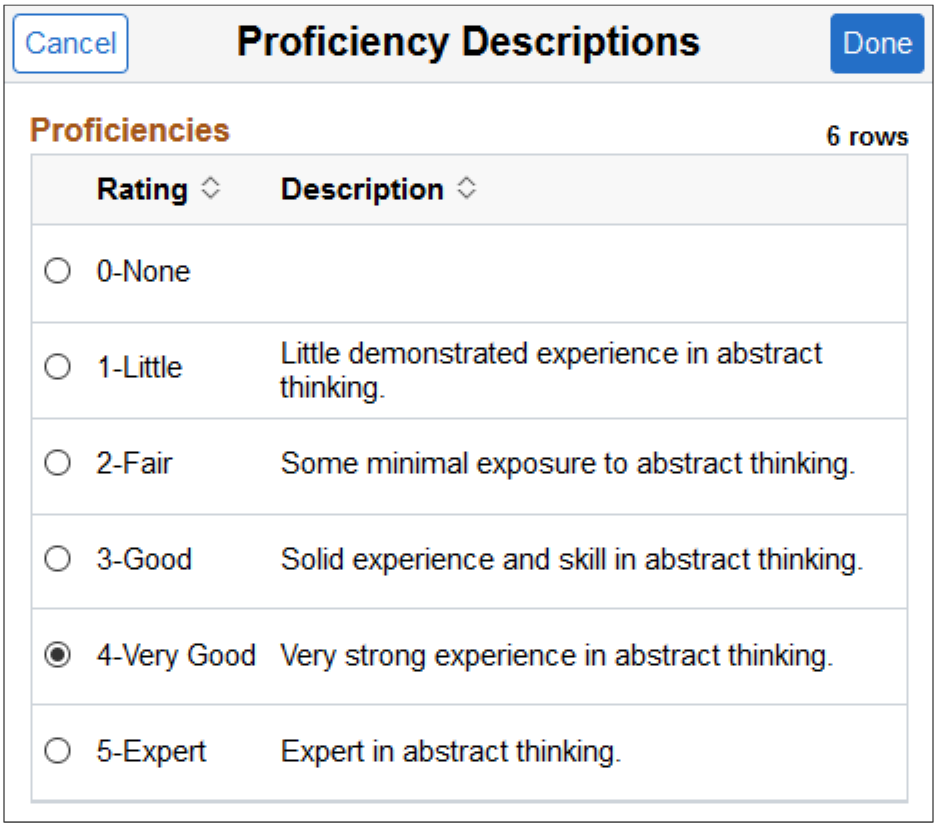
Select the Rating Details (?) icon after the **Proficiency** field on the <Content Type> (Item Details) Page.

---

**Note:** Proficiency descriptions must be set up for a content item on the “Item Rating Descriptions Page” (PeopleSoft Human Resources Manage Profiles) in order for the Related Details (?) icon to appear.

---

This example illustrates the Proficiency Descriptions page.




When adding or updating an item, select the rating that applies.

When accessing this page from a view only page, this page will also be display only.

## Request Approval Page

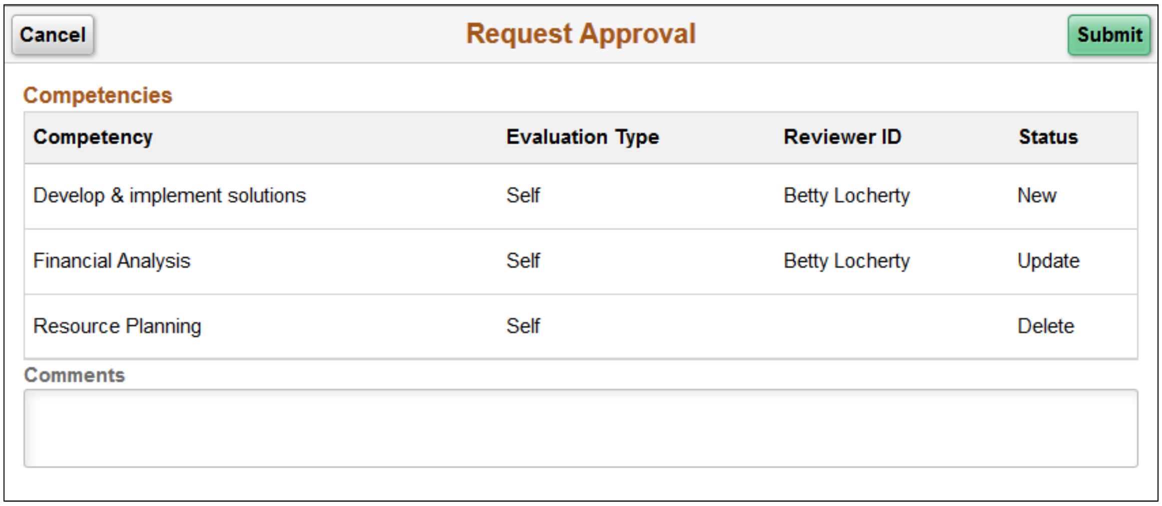
Use the Request Approval page (JPM_APPROVAL_FLU) to submit profile changes for approval.

Navigation:

Click the **Submit for Approval** button on the Talent Profile Page (for Employees) or Team Talent Profile Page (for Managers).

This example illustrates the Request Approval page.




| ***Field or Control*** | ***Description*** |
|---|---|
| **Submit** | Click to submit a consolidated approval request for all the changes listed on the page. |
| **Comments** | Optionally enter comments about the changes you made. |

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

## My Job Profiles Page or Job Profiles for <Employee Name> Page

Use the My Job Profiles page or Job Profiles for <Employee's Name> page (JPM_EMP_RELPROF_FL) to select a job profile from which you want to copy items.

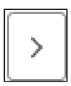
**Note:** This page will not appear if the person’s job is related to only one profile.

Navigation:

From the Talent Profile Page (for Employees) or Team Talent Profile Page (for Managers), select the Related Actions icon next to the employee’s name, select the **Development** menu item, then select **Copy Job Item**.

This example illustrates the My Job Profiles page.


| Field or Control | Description |
| --- | --- |
|  (Select Profile) button | Select this button to access the Copy Job Items Page and view and select from a list of profile items associated with this job that are not part of the employee’s |

### Related Links

Accessing Additional Profile Actions

My Job Profiles - Select Your Job Profile Page (for Employees)

## Copy Job Items Page

Use the Copy Job Items page (JPM_COPY_JOB_FL) to view and select items that are part of the person’s job profile but are not yet part of the employee’s profile.

Navigation:

- From the Talent Profile Page (for Employees) or Team Talent Profile Page (for Managers), select the Related Actions icon next to the employee’s name, select the Development menu item, then select Copy Job Item.

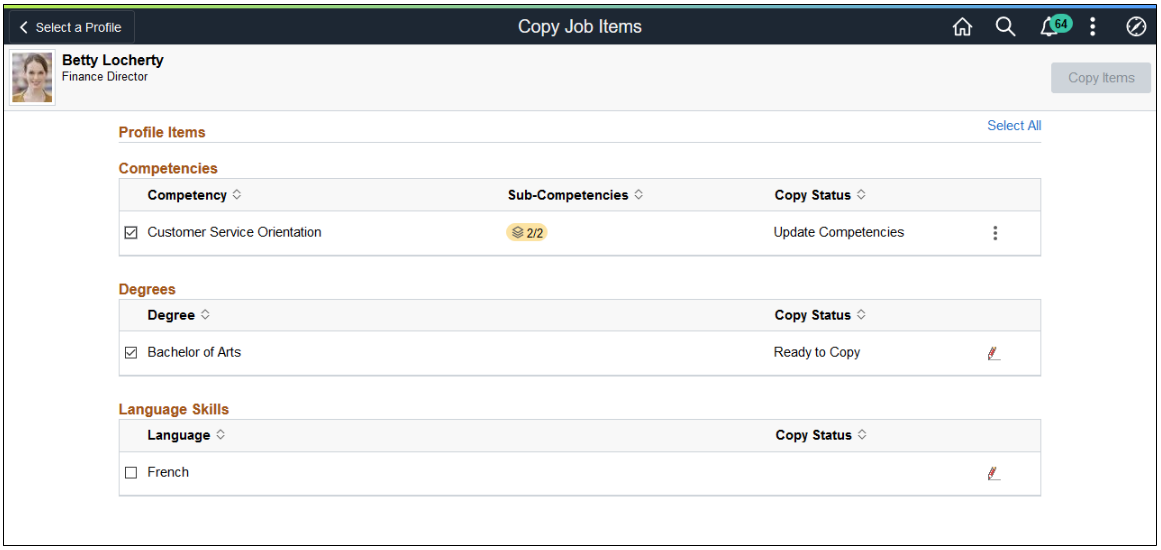
  ---

  **Note:** The Copy Job Items page immediately appears when the person’s job is related to only one profile.

  ---

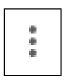
- Select a job profile from the My Job Profiles Page or Job Profiles for <Employee Name> Page.

This example illustrates the Copy Job Items page.

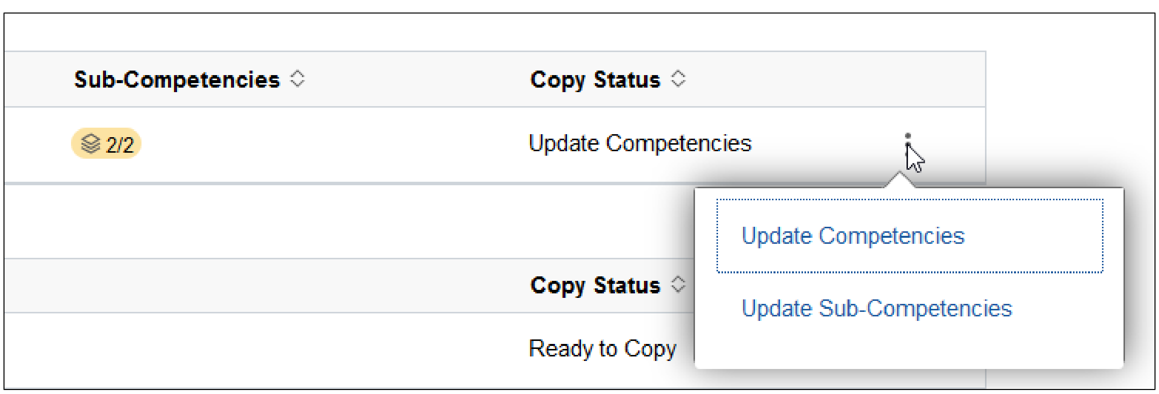



| ***Field or Control*** | ***Description*** |
|---|---|
| **Select All** link | Select this link to select all the content items on this page. |
| (Select) check box | Select this check box to individually select an item to add to the profile.<br><br>When you select an item that has related items, the system will automatically select the related items associated with this item. To review or make changes to the related items, select the Update Details menu and select the *Update <Related Content Type>* link. |
| **Sub-Competencies** or **Elements** (Related Items) column and 0/2 (Related Items) icon | This column and icon displays if related items are associated with a content item.<br><br>When related items are associated with a content item, the icon will first display how many related items have been selected to add to the person's profile, and second, how many related items are associated with the job profile.<br><br>**Note:** The name of the column varies based on the child relationship of the content type. For example, if a profile type is set up to use *Sub-Competencies*, then the column heading will display the same. |

| ***Field or Control*** | ***Description*** |
| --- | --- |
| **Copy Status** column | This value is populated when you select an item to copy and displays if an item is ready to be copied to the person's profile. Statuses include:<br>• *Update <Content Type>*: Indicates that there are required fields that need to be completed for this item before it can be copied to the person's profile. For example, if competencies require that you specify a person's proficiency rating when adding the item to their profile, this value will appear.<br>• *Ready to Copy*: Indicates that the item can be copied to the person's profile without needing to update the item.<br>**Note:** Although it may not be required to update an item, you can still use the Update Details (pencil) icon to make changes. For example, you may want to enter the person's major for their Bachelor of Arts degree. |
|  (Update Details) icon | This icon displays if a related item is associated with a content item.<br>Select this menu icon to access the Update Details pop-up menu page and select the type of item you want to update. Options include:<br>• *Update <Content Type>* link<br>Select this link to access the Profile Item Detail Page and make updates to the item as it pertains to the person.<br>• *Update <Related Content Type>* link<br>Select this link to access the Copy Job Items - <Related Content Type> (Summary) Page to view and select from a list of related items assigned to the job item. |

This example illustrates the Update Details icon and popup menu when related content is associated with an item.



| *Field or Control* | *Description* |
|---|---|
|  (Update Details) icon | Select this icon to access the Profile Item Detail Page and make updates to the item as it pertains to the person. |
|   button | This button becomes available after all selected items have a **Copy Status** of *Ready to Copy*.<br><br>Select this button to be taken to the Copy Profile Items Page to view a summary of the items you are copying to the person's profile. |

### Related Links

"Content Section Page" (PeopleSoft Human Resources Manage Profiles)

"Non-person Profile Page" (PeopleSoft Human Resources Manage Profiles)

Accessing Additional Profile Actions

Copy Profile Items Page

## Copy Job Items - <Related Content Type> (Summary) Page

Use the Copy Job Items - <Related Content Type> (Summary) page (JPM_CPY_RLITM_SCF) to view and select from a list of related items associated with this job content item and add them to the person's profile.

---

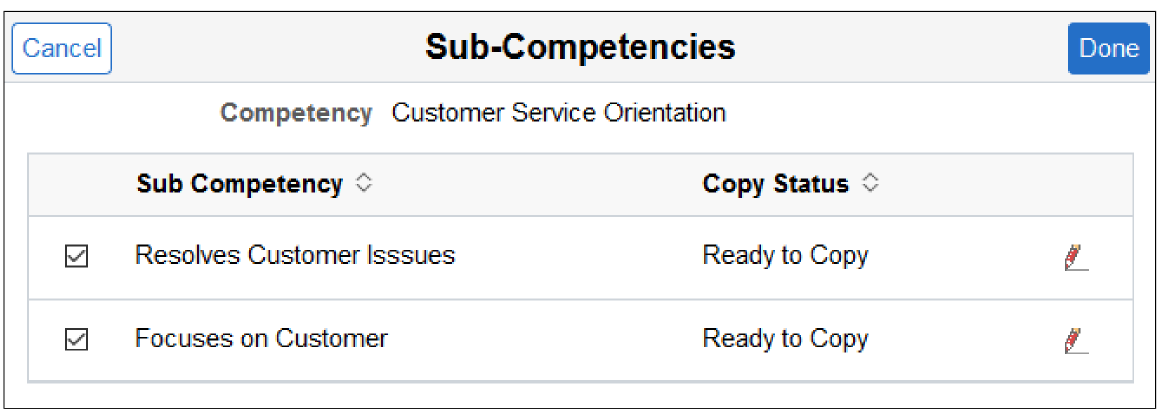
**Note:** Where <Related Content Type> represents the name of the related content type.

---

Navigation:

Click the Updated Details (three dots) menu icon on the Copy Job Items Page and select the *Update <Related Content Type>* link.

This example illustrates the Copy Job Items - <Related Content Type> (Summary) page, where the related content type *Sub-Competencies* is shown as the page header.




This page work similar to the Copy Job Items Page. See this topic for field and page element definitions.

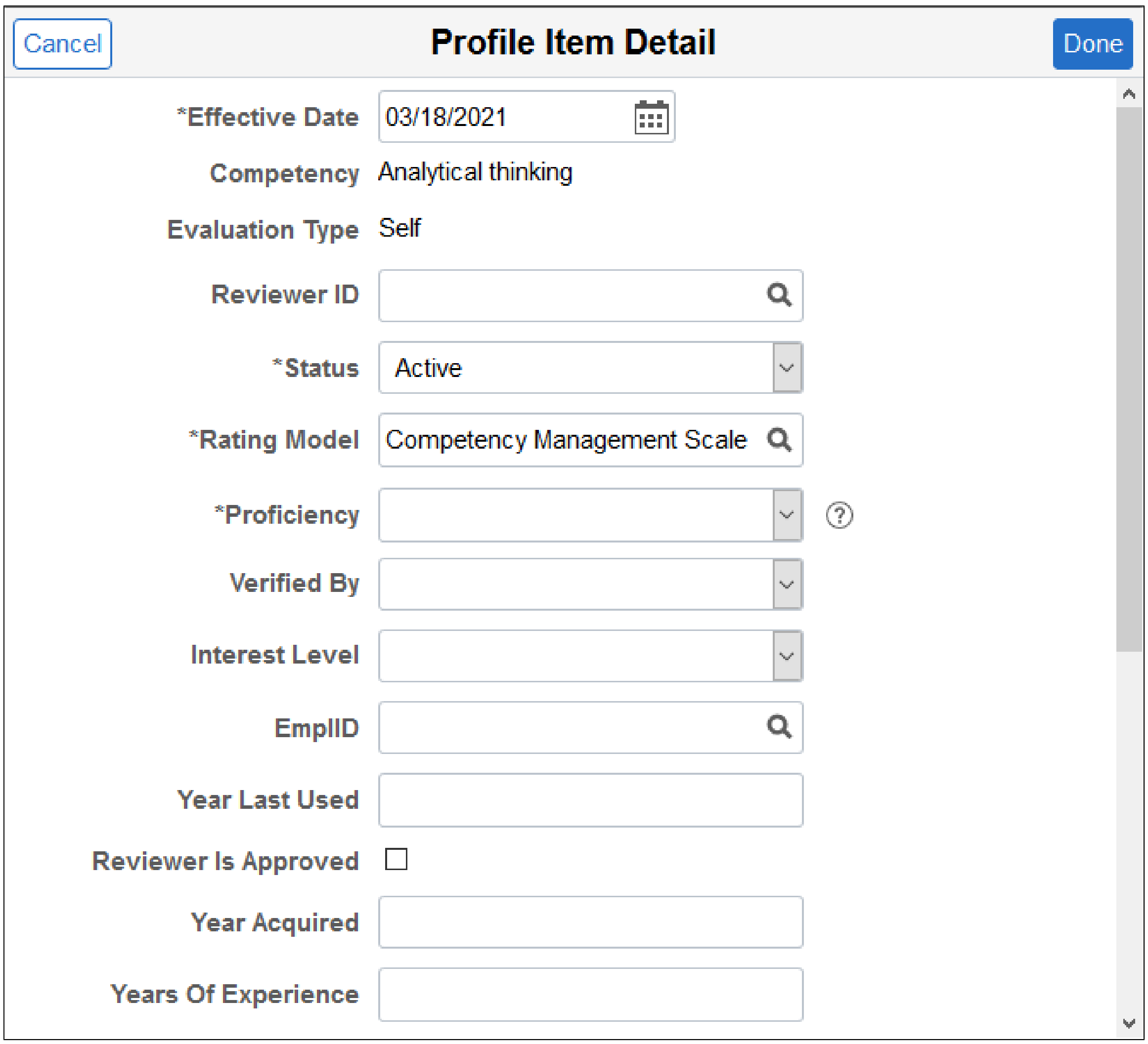
## Profile Item Detail Page

Use the Profile Item Detail page (JPM_ITM_UPD_FL) to make updates to an item to indicate the person's qualifications and capabilities.

Navigation:

- Click the Update Details (pencil) icon on the Copy Job Items Page.
- Click the Updated Details (three dots) menu icon on the Copy Job Items Page and select the *Update <Content Type>* link.

This example illustrates the Profile Item Detail page.




Use this page to enter all required fields and pertinent information for the person.

**Note:** The fields and field labels that appear on this page vary according to the setup configurations.

| ***Field or Control*** | ***Description*** |
|---|---|
| **Status** | Define if an item is active or inactive.<br><br>**Note:** When the **Hide Inactive Items in Self Service** is enabled on the “Profile Types - Attributes Page” (PeopleSoft Human Resources Manage Profiles), this field will not appear on the page. |
|   | Select this button to accept your changes to the item. These property values will be copied to the person’s profile. |

This page works similar to the <Content Type> (Item Details) Page. See this topic for additional field definitions.

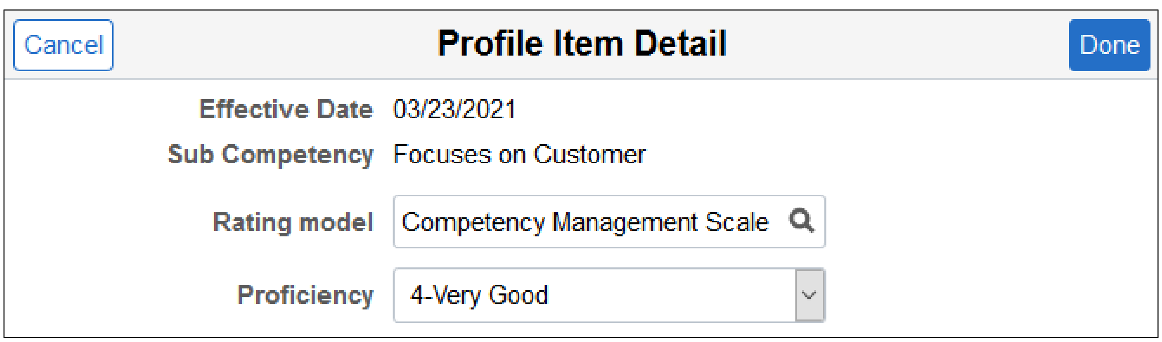
## Profile Item Detail (Related Content Type) Page

Use the Profile Item Detail (Related Content Type) page (JPM_ITM_UPD_FL) to make updates to a related item to indicate the person’s qualifications and capabilities.

Navigation:

Click the Update Details (pencil) icon on the Copy Job Items - <Related Content Type> (Summary) Page.

This example illustrates the Profile Item Detail (Related Content Type) page.




Use this page to enter all required fields and pertinent information for the person.

| ***Field or Control*** | ***Description*** |
|---|---|
|   | Select this button to accept your changes to the item. These property values will be copied to the person’s profile. |

This page works similar to the <Content Type> (Item Details) Page. See this topic for additional field definitions.

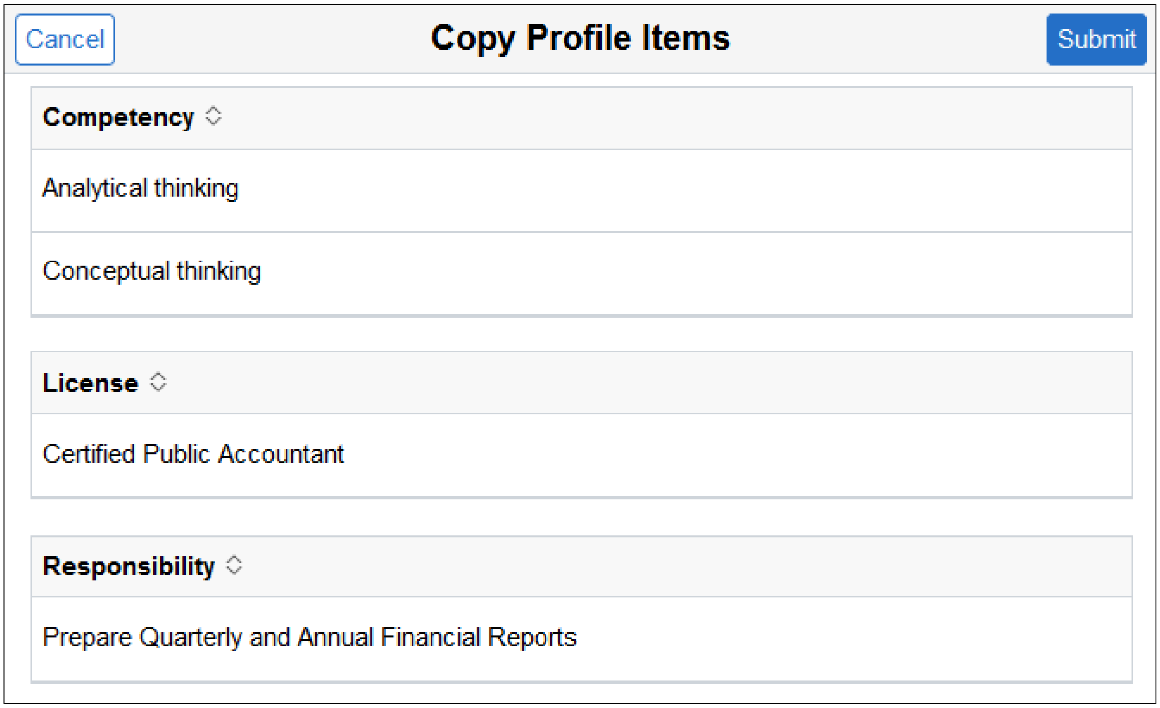
## Copy Profile Items Page

Use the Copy Profile Items page (JPM_CPYJOBSAVE_SCF) to view a summary of and submit the items you are copying to the person's profile.

Navigation:

Select the **Copy Items** button from the Copy Job Items Page.

This example illustrates the Copy Profile Items page.

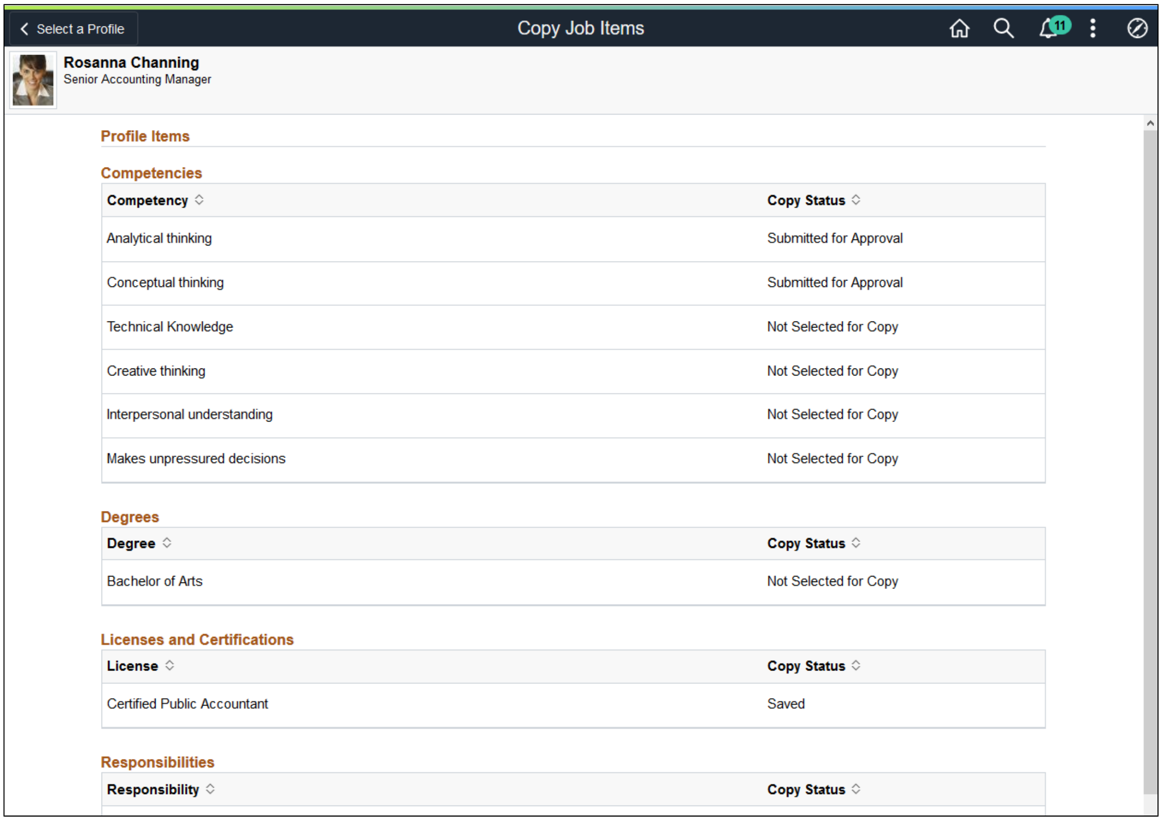



| ***Field or Control*** | ***Description*** |
| --- | --- |
| Cancel button | Select this button to return to the Copy Items page where you can make changes to the items you want to copy to the person's profile. |
| Submit button | Select this button to submit the items to be added to the person's profile. |

### Confirmation of the Copy Job Items Submission

After you submit your items to copy, the system will return you to the Copy Job Items Page in display only mode where you can view the status of the copy.

This example illustrates the Copy Profile Items page after submitting items to be added to the person's profile.




| *Field or Control* | *Description* |
| --- | --- |
| **Copy Status** | This page will display the following statuses:<br>• *Submitted for Approval*: These items require approval to be added to a profile. Once approved, they will be added to the person's profile.<br>• *Saved*: For those items that do not need approval, the system automatically adds the profile items to the person's profile.<br>• *Not Selected for Copy*: Those items were not selected to copy to the person's profile. |

**Note:** Items added to the person's profile will no longer appear in this job's profile item list for this person, since this page only displays those items that are not already part of the person's profile. Items not copied to the profile will remain on the list and are available for later selection.

## Related Links

Accessing Additional Profile Actions

# (Fluid) Approving Profile Items

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

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

## Pages Used to Approve Profile Items Using Fluid Approvals

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

## Understanding Approvals for Person and Non-Person Profiles

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

*Employee Self Service:*

- My Current Profile
- Talent Profile

*Manager Self Service:*

- Current Team Profiles
- Maintain Job Profiles

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

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

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

Video: Image Highlights, PeopleSoft HCM Update Image 25: Manage Profile Enhancements

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

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

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

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

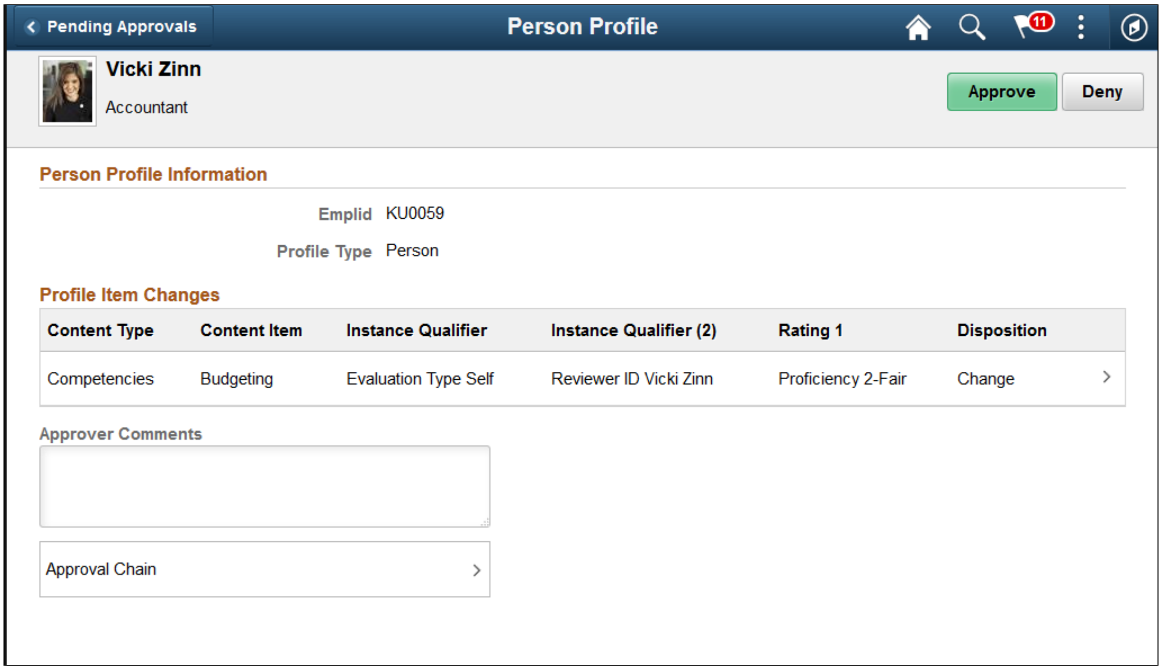
Navigation:

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

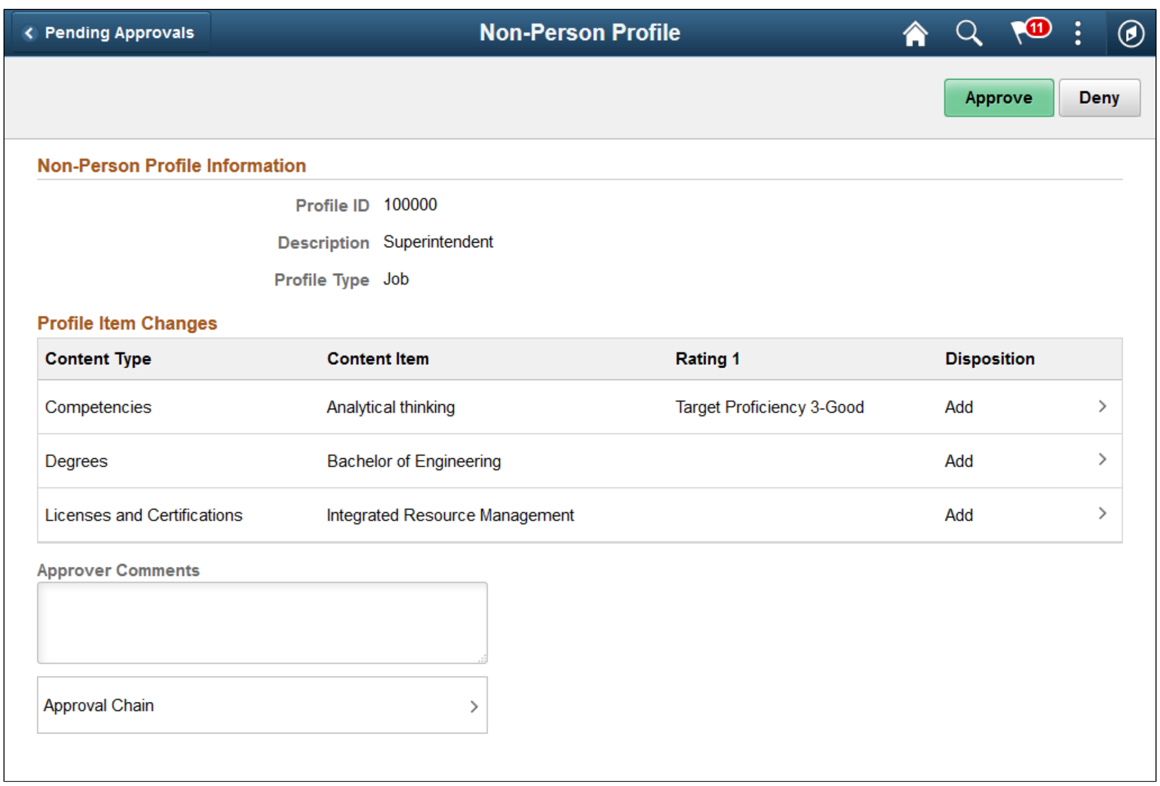
**Note:** Person Profile transaction rows display the Employee name, Profile Type description, and a list of updated profile item counts within content type while the Non-Person Profile displays the job.

This example illustrates the Pending Approvals - Person Profile page.




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




## 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. |

## Person Profile Information or Non-Person Profile Information

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

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

| *Field or Control* | *Description* |
|---|---|
| **Employee ID** | This field appears for a *Person Profile* type request, and displays the ID of the employee being affected by this transaction request. |
| **Profile ID** and **Description** | These fields appears for a *Non-Person Profile* type request, and displays the ID and description of the profile that was updated by this transaction request. |
| **Profile Type** | Displays the profile type of the profile updated by this transaction request, such as *Person* or *Job*. |

## Profile Item Changes

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

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

| *Field or Control* | *Description* |
|---|---|
| **Content Type** | Displays the content type description of the profile item with updates. |
| **Content Item** | Displays the profile item description. |

| ***Field or Control*** | ***Description*** |
|---|---|
| **Instance Qualifier** and **Instance Qualifier (2)** | Displays the configured JPM_CAT_ITEM_QUAL and JPM_CAT_ITEM_QUAL2 label for that content type with its value for that profile item.<br><br>For more information see on instance qualifiers, see “Defining Instance Qualifiers” (PeopleSoft Human Resources Manage Profiles) and the “Content Section Page” (PeopleSoft Human Resources Manage Profiles). |
| **Rating 1**, **Rating 2**, and **Rating 3** | Displays the configured JPM_RATING1, JPM_RATING2, and JPM_RATING3 labels and profile item values for that item when the content type uses a rating model. |
| **Disposition** | Display the type of modification being requested for the profile. Values include *Add*, *Change*, or *Delete*. |

Click a row within this grid to access the Profile Item Details Page, where you can review item details.

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

### Related Links

(Classic) Maintaining Person Profiles as an Employee or Manager
“Maintaining Profiles as an Administrator” (PeopleSoft Human Resources Manage Profiles)

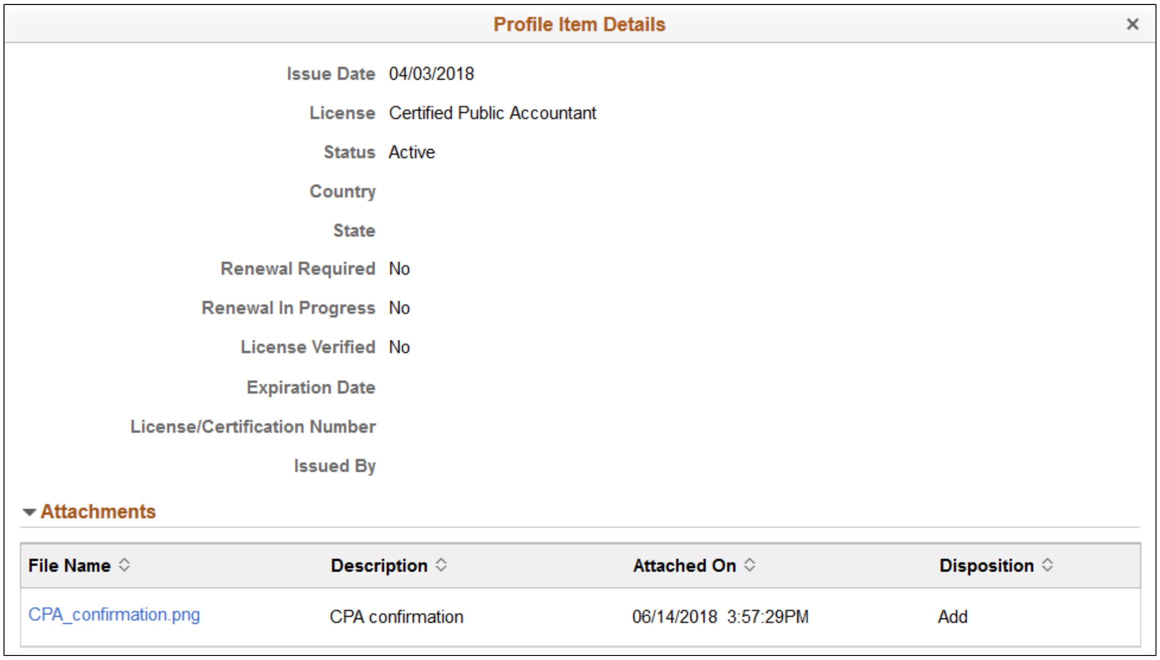
## Profile Item Details Page

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

Navigation:

Click one of the **Profile Item Changes** rows on the Pending Approvals - Person Profile Page or Pending Approvals - Non-Person Profile Page.

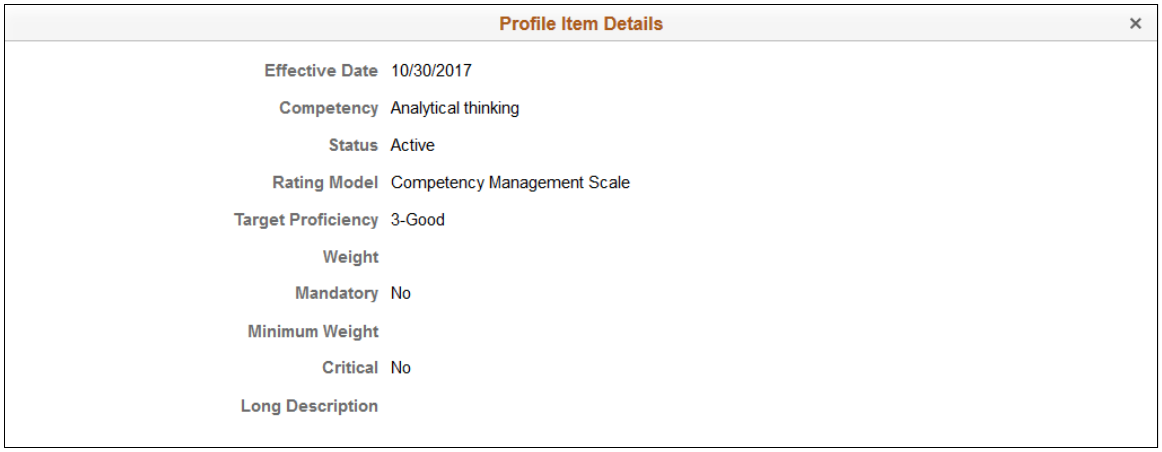
This example illustrates the fields and controls on the Profile Item Details page showing a person profile item.




| Field or Control | Description |
| --- | --- |
| **Attachments** | The page displays the Attachments section and link when the requestor has attached information to the content item and the manager has been granted the ability to view or update attachments for the profile content type.<br><br>Select the link to view the attachment.<br><br>For information on setting up role access to enable attachments for profile content types, see the “Content Section Page” (PeopleSoft Human Resources Manage Profiles).<br><br>The following video provides an overview and demonstration of the Fluid Attachment framework:<br><br>Video: Image Highlights, PeopleSoft HCM Update Image 27: Attachment Capability Added to Profile Management |

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




Fields and information will vary by the item setup.

### Related Links

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

## (Fluid) Viewing and Updating Job Profiles

Employees can view the requirements and attributes of their jobs using the My Job Profiles tile and component. Employees and manager can also view other job profiles within the organization using the View Job Profiles and Maintain Job Profiles tiles and components.

**Note:** To access these self service tiles and components, the user must be assigned these roles:
—Employee: *Profile Mgmt Employee Fluid*
—Manager: *Profile Mgmt Manager Fluid*

This topic discusses viewing and updating job profiles using fluid user interface.

This video provides an overview of the acknowledgement of job profiles:

Video: Image Highlights, PeopleSoft HCM Update Image 41: Employee Acknowledgement of Job Profile

### Related Links

Using the PeopleSoft Fluid User Interface to Manage Profile Data as an Employee and Manager

Understanding Profile Maintenance

Navigating in eDevelopment

## Pages Used to View and Update Job Profiles Using the Fluid User Interface

| ***Page Name*** | ***Definition Name*** | ***Usage*** |
|---|---|---|
| My Job Profiles Tile (for Employees) | HC_JPM_EMP_RELPROF_FL_GBL (this is the cref for this tile) | View your job profile using fluid. |
| My Job Profiles - Select Your Job Profile Page (for Employees) | JPM_EMP_RELPROF_FL | Select to view one of your job profiles. |
| View Job Profiles Tile (for Employees) | HC_JPM_COMPRF_SRCH_FL_GBL1 (this is the cref for this tile) | View job (non-person) profiles using fluid. |
| Maintain Job Profiles Tile (for Managers) | HC_JPM_COMPRF_SRCH_FL_GBL2 (this is the cref for this tile) | View and manage job (non-person) profiles using fluid. |
| View Job Profiles (for Employees) or Maintain Job Profiles (for Managers) - Search Profiles Page | JPM_COMPRF_SRCH_FL | Select a job profile you want to review.<br>• Employees use the View Job Profiles to view job (non-person) profiles.<br>• Managers use the Maintain Job Profiles to view and update job (non-person) profiles. |
| My Job Profiles Page (for Employees), View Job Profiles Page (for Employees), and Maintain Job Profiles Page (for Managers) | JPM_NPERS_PROFL_FL | View non-person profiles, or create and update non-person profiles when granted permission.<br>• Employees use the My Job Profiles to view profiles related to their job and acknowledge them, if required.<br>• Employees use the View Job Profiles to view any job (non-person) profile.<br>• Managers use the Maintain Job Profiles to view and update job (non-person) profiles. They can also submit a request for acknowledgement for a specific profile. |
| Acknowledge Profile Page (for Employees) | JPM_ACKNOWLDGE_SCF<br>JPM_DATE_SEL_SCF | Indicate that you have reviewed and understand the requirements of your job. |
| <Related Content Type> (Summary) Page | JPM_RLITMSUM_SCF | View a list of related items assigned to this content item. |

| *Page Name* | *Definition Name* | *Usage* |
|---|---|---|
| View Profile Item History Page | JPM_ITM_HIST_SCF | Select from a list of effective dated rows for a given profile content item to view historical data. |
| <Content Type> (Item Details) Page | JPM_ITM_UPD_FL | View content item details. Managers may also add, update, or delete a content item when granted permission. |

## My Job Profiles Tile (for Employees)

Use the My Job Profiles tile to view your job profile using fluid.

Navigation:

The My Job Profiles tile is delivered as part of the My Profiles Dashboard, but you can add the tile to any home page through personalizations.

This example illustrates the My Job Profiles tile.


This example illustrates the My Job Profiles tile when you need to acknowledge a profile.


Click the My Job Profiles tile to access the My Job Profiles - Select Your Job Profile Page (for Employees) to select from job profiles associated with your job. If only one profile is associated with your job, you will be taken directly to the My Job Profile page (see My Job Profiles Page (for Employees), View Job Profiles Page (for Employees), and Maintain Job Profiles Page (for Managers)).

When a job profile requires your acknowledgement, the tile will display the **Action Required** notification.

## My Job Profiles - Select Your Job Profile Page (for Employees)

Use the My Job Profiles - Select Your Job Profile page (JPM_EMP_RELPROF_FL) to select to view one of your job profiles.

---

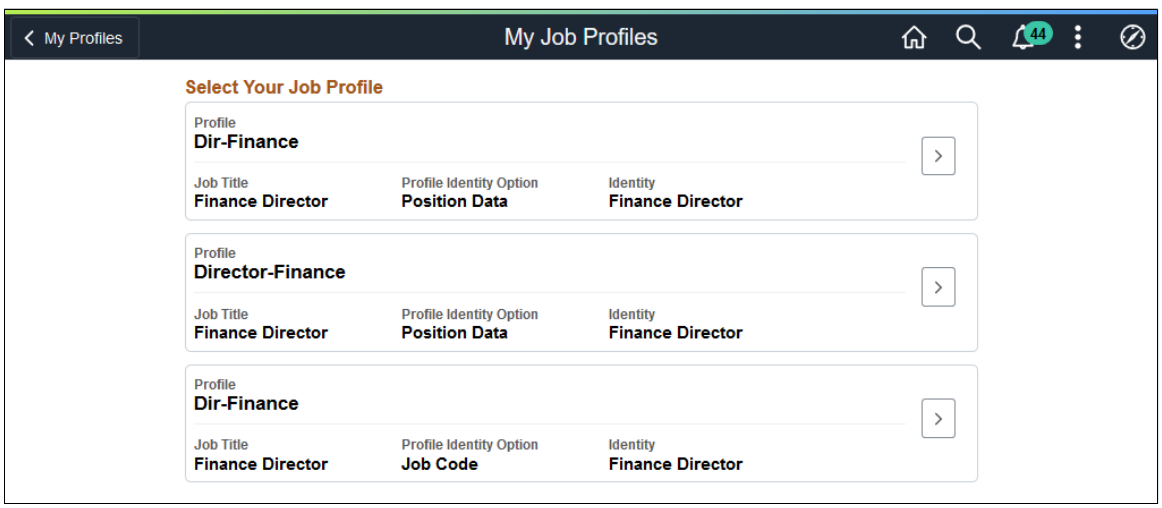
**Note:** This page is available when your job is associated with more than one profile.

---

Navigation:

- Click the My Job Profiles Tile (for Employees) on the My Profiles Dashboard (or any other home page with the tile).
- **Self Service** > **Learning and Development** > **View My Job Profiles**
- Select the Related Actions icon button next to your name and select **Development** > **View My Job Profiles**

This example illustrates the My Job Profiles - Select Your Job Profile page. In this example, this person's position is associated with two profiles and the job code is associated with a profile.



This example illustrates the My Job Profiles - Select Your Job Profile page when an acknowledgement action is required.


This page displays those non-person profiles associated with your job.

When a job profile is participating in the acknowledgement process and you need to review and acknowledge that you understand the requirements of the profile, the row will display an **ACTION REQUIRED** badge above the Select Profile chevron > button. After you acknowledge the profile, the badge will no longer appear.

See also "Understanding Job Profile Acknowledgements" (PeopleSoft Human Resources Manage Profiles).

Select a row to access the My Job Profiles page [see My Job Profiles Page (for Employees), View Job Profiles Page (for Employees), and Maintain Job Profiles Page (for Managers)] and view the details about the profile.

## View Job Profiles Tile (for Employees)

Use the View Job Profiles tile to view any job (non-person) profile using fluid as an employee.

Navigation:

The View Job Profiles Tile (for Employees) is delivered as part of the My Profiles Dashboard, but you can add the tile to any home page through personalizations.

This example illustrates the View Job Profiles tile.


Click this tile to access the View Job Profiles pages (see View Job Profiles (for Employees) or Maintain Job Profiles (for Managers) - Search Profiles Page) and select a job profile.

## Maintain Job Profiles Tile (for Managers)

Use the Maintain Job Profiles tile to view and manage job (non-person) profiles using fluid as a manager.

Navigation:

The Maintain Job Profiles tile is delivered as part of the Team Profiles Dashboard, but you can add the tile to any home page through personalizations.

This example illustrates the Maintain Job Profiles tile.


Click this tile to access the Maintain Job Profiles pages (see View Job Profiles (for Employees) or Maintain Job Profiles (for Managers) - Search Profiles Page) and select a job profile.

## View Job Profiles (for Employees) or Maintain Job Profiles (for Managers) - Search Profiles Page

Use the View Job Profiles or Maintain Job Profiles -- Search Profiles page (JPM_COMPRF_SRCH_FL) to select a job profile you want to review.

---

**Note:** The page title will vary according to how you access the page:

---

Navigation:

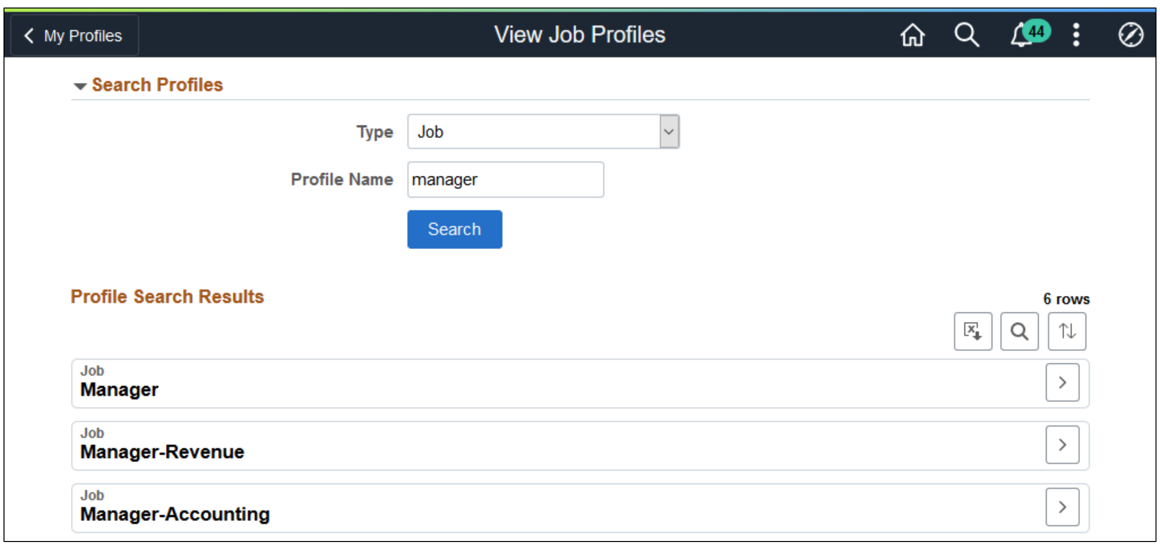
As an employee:

- Click the View Job Profiles Tile (for Employees) on the My Profiles Dashboard (or any other homepage with the tile).
- **Self Service** > **Learning and Development** > **View Job Profiles**

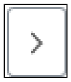
As a manager:

- Click the Maintain Job Profiles Tile (for Managers) from the Team Profiles Dashboard (or any other homepage with the tile).
- **Manager Self Service** > **Learning and Development** > **Maintain Job Profiles**

This example illustrates the fields and controls on the View Job Profiles - Search Profiles page. The Maintain Job Profiles - Search Profiles page works the same, with the exception being in the name of the banner title.




| ***Field or Control*** | ***Description*** |
|---|---|
| **Type** | Select the profile type from which you want to search. Valid values are defined on the “Profile Types - Attributes Page” (PeopleSoft Human Resources Manage Profiles) and display according to the manager or employee security. |
| **Profile Name** | Enter the full or partial name of non-person profiles that you want to have returned in your search. |
|  button | Click this button to have the system retrieve profiles that meet your criteria and display them in the Profile Search Results section of the page. |

| ***Field or Control*** | ***Description*** |
|---|---|
|  (Select Profile) arrow button | Select this button to access the View Job Profiles or Maintain Job Profiles page for this profile [see My Job Profiles Page (for Employees), View Job Profiles Page (for Employees), and Maintain Job Profiles Page (for Managers)]. |

## My Job Profiles Page (for Employees), View Job Profiles Page (for Employees), and Maintain Job Profiles Page (for Managers)

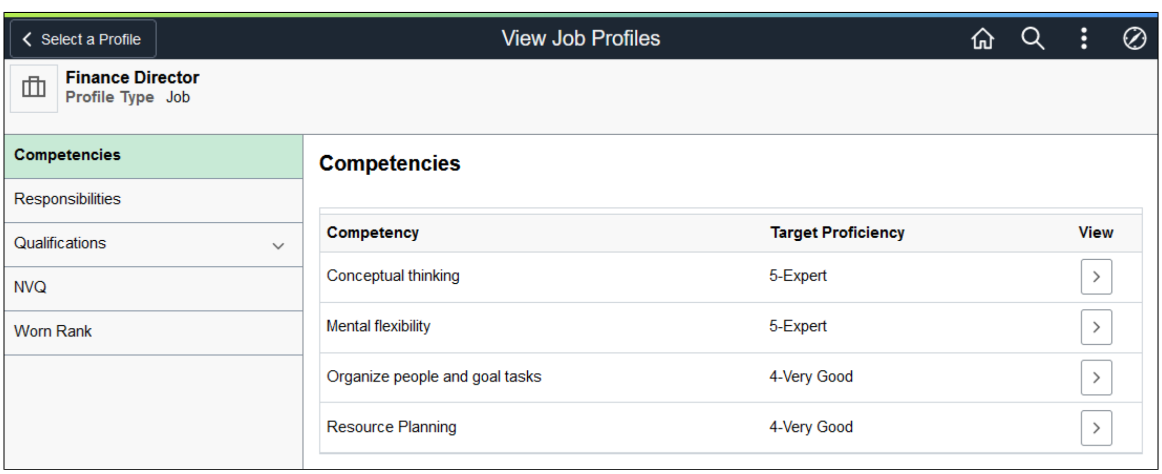
Use the specific Job Profiles pages (JPM_NPERS_PROFL_FL) to view non-person profiles, or create and update non-person profiles when granted permission. Employees can also use My Job Profiles to acknowledge their job profiles, when required. Managers can use Maintain Job Profiles to submit an acknowledgement request for participating profiles.

**Note:** The page title in the banner will vary according to how you access the page:

Navigation:

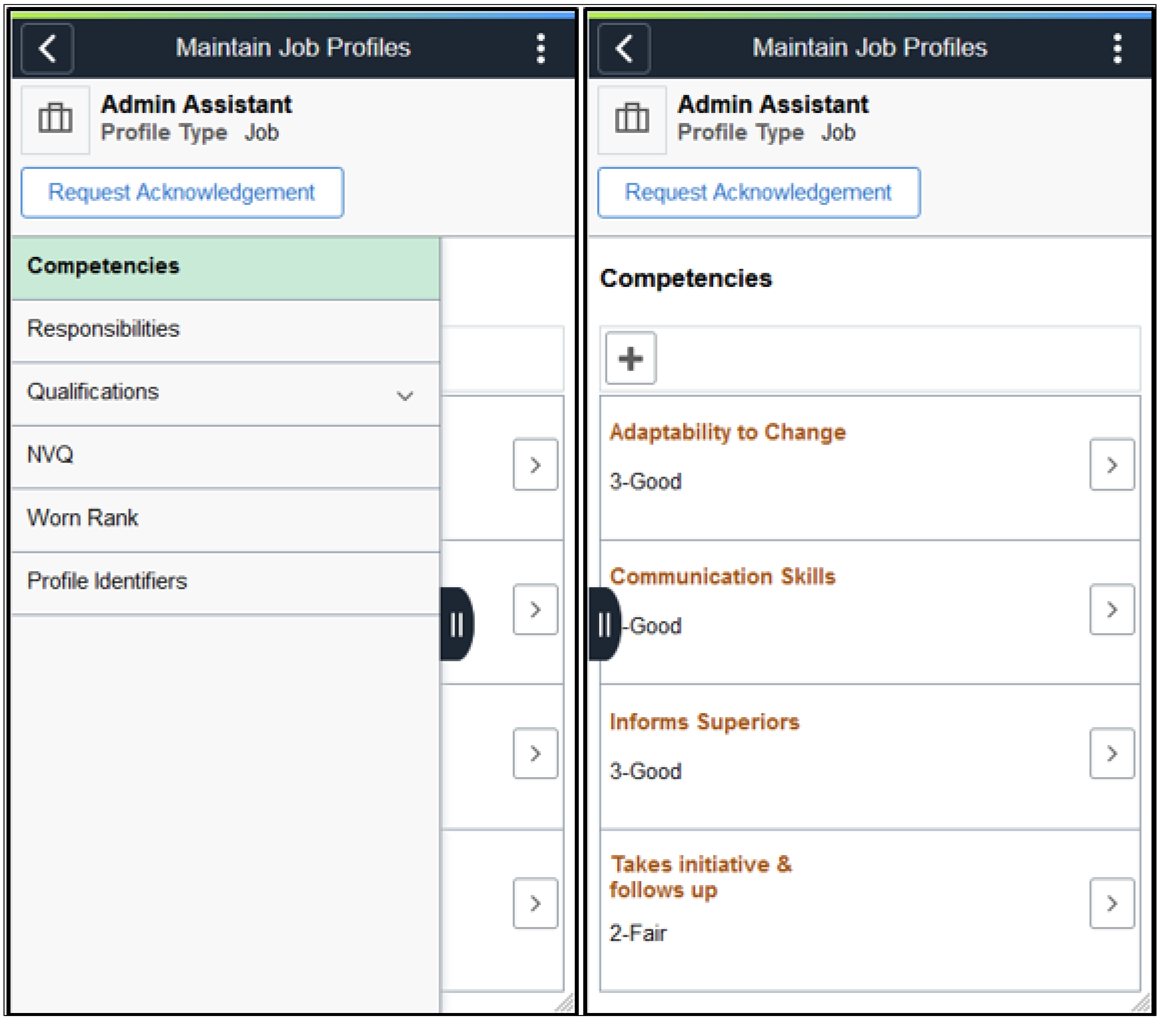
- Select the My Job Profiles Tile (for Employees).
- Select the arrow button for a profile row from one of these pages:
  - My Job Profiles - Select Your Job Profile Page (for Employees)
  - View Job Profiles (for Employees) or Maintain Job Profiles (for Managers) - Search Profiles Page
  - My Interest List Page (for Employees) or Team Interest List Page (for Managers)

(Tablet) This example illustrates the fields and controls on the employee's View Job Profiles page using a medium or large form factor device.



(Smartphone) This example illustrates the manager's Maintain Job Profiles page for the smartphone. This example shows the page when the content type panel is expanded to show the list of included content types on the left, and then the Competencies page with the navigation panel collapsed.




The job profile pages work the same as the person profile pages, using content tabs, content section pages, and a list of content item that are associated with the profile for the various content section pages.

For information on how to use the profile pages, see the Talent Profile Page (for Employees) or Team Talent Profile Page (for Managers) topic.

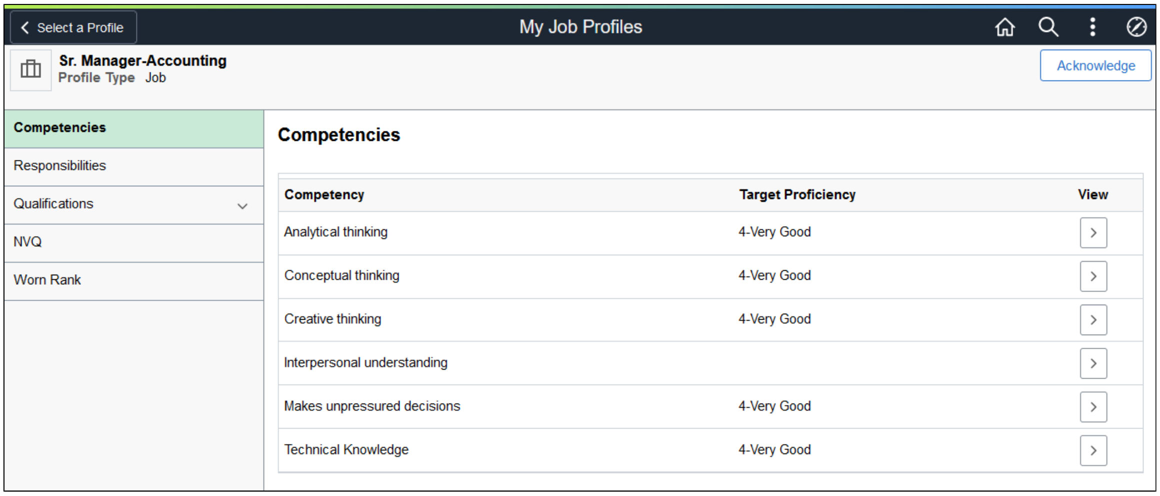
## Working with Acknowledgements

When a profile is configured to participate in the job profile acknowledgement process, additional buttons may appear at the top of the page for the employee or manager.

- (Employee) The **Acknowledge** button appears at the top of the My Job Profiles page for employees when an employee is associated with a profile that is participating in acknowledgements and the system has run the acknowledgement requests process.

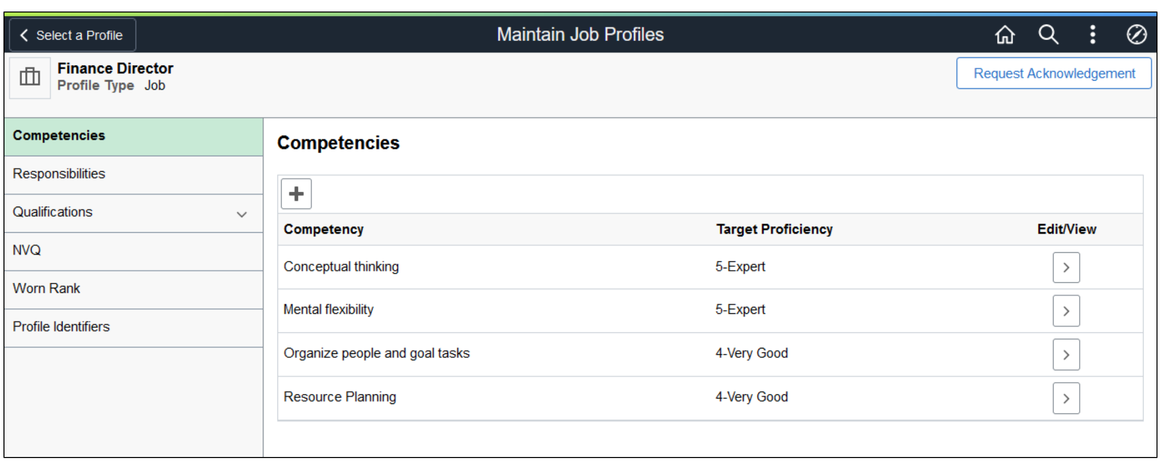
This example illustrates the My Job Profiles page for the employee showing the **Acknowledge** button.




| ***Field or Control*** | ***Description*** |
|---|---|
| **Acknowledge** button | Select this button to indicate that you have reviewed the profile attributes and acknowledge that you understand the requirements of your job. This will then display the Acknowledge Profile Page (for Employees), for you to confirm your acknowledgement. |

- (Managers) The **Request Acknowledgement** button appears for managers on the Maintain Job Profiles page when the profile type and identifier has been configured to participate in the acknowledgement process on the “Profile Types - Identities Page” (PeopleSoft Human Resources Manage Profiles).

  This example illustrates the Maintain Job Profiles page showing the **Request Acknowledgement** button.



| Field or Control | Description |
| --- | --- |
| **Request Acknowledgement** button | Select this button to submit a request that employees acknowledge the attributes of this job profile. This can be done any time but is beneficial when changes have been made to the profile.<br>**Note:** The request is not automatically sent to employees. When you select the **Request Acknowledgement** button, an event is raised in Event Manager. The event handler processes the request and stores it for the next run of the *Run Acknowledgements* process (see the "Run Acknowledgement Request Page" (PeopleSoft Human Resources Manage Profiles)).<br>By running the *Run Acknowledgements* process, all statuses for all employees associated with the profile will be reset to *Not Acknowledged*, and the **Action Required** notices and **Acknowledge** badges with be available from the My Job Profiles pages, even if the employee has acknowledged the profile in the past. |

Managers can view the status of their direct and indirect reports on the Acknowledgement Status Page.

Administrators can view employees that have acknowledged job profiles using the Acknowledgement Framework, "Review Acknowledgements Page" (Enterprise Components) (**Enterprise Components** > **Acknowledgement** > **Review Acknowledgements**).

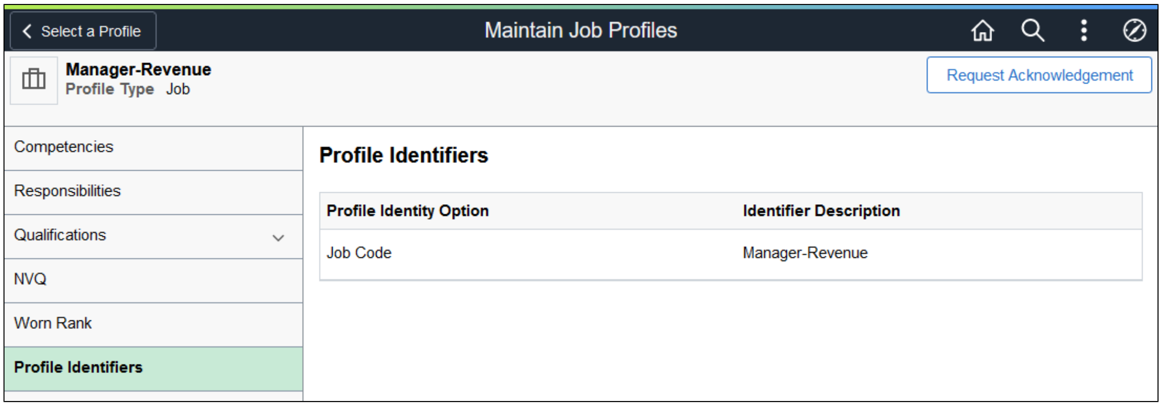
## Profile Identifiers Page Tab

Managers can select the **Profile Identifiers** page tab to view profile identities associated with the profile.

**Note:** This page tab is available for a manager when accessing the Maintain Job Profiles page.

Profile Identifiers allow you to select one or more objects to which the profile type can be linked. For example, administrators can set up a profile type that is linked to job code. Identifiers include job codes, job functions, job families, people, and salary grades. Identifiers for a profile type are defined on the "Profile Types - Identities Page" (PeopleSoft Human Resources Manage Profiles), which is the component that defines the structure of a non-person profile. This is also where the administrator configures profile types and identities (identifiers) for participation in acknowledgements.

This example illustrates the Maintain Job Profiles - Profile Identifiers page.




### Related Links

Understanding Profile Maintenance

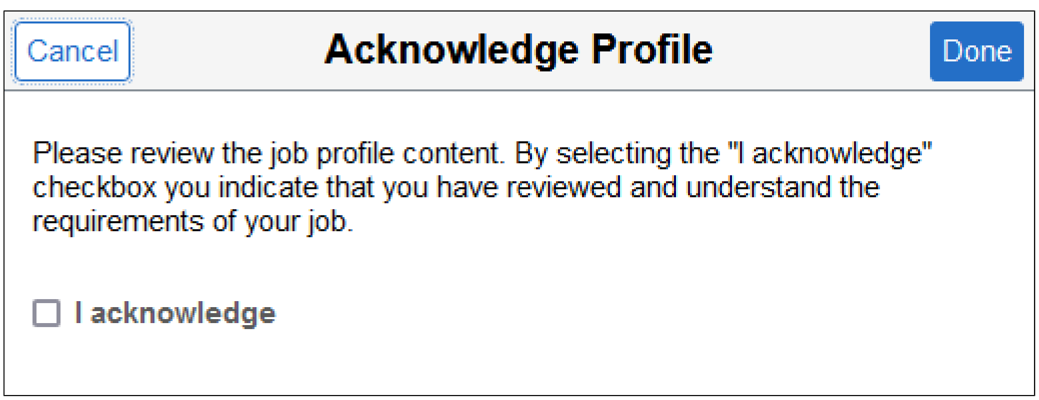
## Acknowledge Profile Page (for Employees)

Use the Acknowledge Profile page (JPM_ACKNOWLDGE_SCF) to indicate that you have reviewed and understand the requirements of your job.

Navigation:

Employees will select the **Acknowledge** button on the My Job Profiles page.

This example illustrates the Acknowledge Profile page.

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**Note:** You can configure this page through the Acknowledgment Framework (see “Understanding the Acknowledgement Framework” (Enterprise Components)) and assign it to the profile on the “Profile Types - Identities Page” (PeopleSoft Human Resources Manage Profiles).

---

Select the **I acknowledge** check box to confirm you have reviewed and understand the requirements of your job, then select **Done**. You will then get a notification that you have successfully acknowledged the job profile.

Managers can review the status of your job profile acknowledgements on the Acknowledgement Status Page.

Administrators can view employees that have acknowledged the job profile using the Acknowledgement Framework, “Review Acknowledgements Page” (Enterprise Components) (**Enterprise Components** > **Acknowledgement** > **Review Acknowledgements**).

# (Fluid) Reviewing Job Profile Acknowledgement Statuses as a Manager

Managers can view which of their employees has or has not acknowledged the profile attributes of a job. The Acknowledgement Status page will also display all job profiles associated with an employee's job and whether or not an acknowledgement request was sent or required.

**Note:** Administrators will use the “Review Acknowledgements Page” (Enterprise Components) from the Acknowledgement Framework to view those employees who have completed their acknowledgement of their job profiles.

This topic discusses how to view job profile acknowledgements for your direct or indirect reports.

### Related Links

“Understanding Job Profile Acknowledgements” (PeopleSoft Human Resources Manage Profiles)

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

“Managing Acknowledgement Requests for Job Profiles” (PeopleSoft Human Resources Manage Profiles)

“Setting Up the Acknowledgement Framework” (Enterprise Components)

## Pages Used to Review Job Profile Acknowledgement Statuses as a Manager

| ***Page Name*** | ***Definition Name*** | ***Usage*** |
|---|---|---|
| Acknowledgement Status Tile | HC_JPM_ACK_STS_FL_GBL (this is the cref for the tile) | Access the pages to select and view your team member’s acknowledgements of their job-related profiles. |
| Acknowledgement Status - Find Team Member Page<br><br>(See also “(Fluid) <Transaction Name> - Find Team Member Page” (Application Fundamentals)) | HR_PSEL_FLU | View a list of your direct reports and select team members to view their job profile acknowledgement statuses using the fluid pages. |
| Acknowledgement Status Page | JPM_ACK_STATUS_FL | View your team member’s acknowledgements of their job-related profiles. |

## Acknowledgement Status Tile

As a manager, use the Acknowledgement Status tile to access the pages to select and view your team member's acknowledgements of their job-related profiles.

---

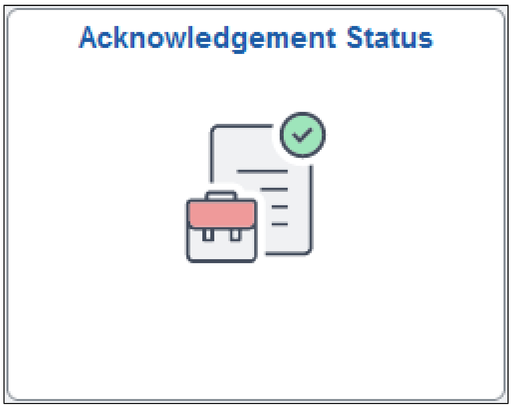
**Note:** You must be assigned the *Profile Mgmt Manager Fluid* role to access this tile and pages.

---

Navigation:

The Acknowledgement Status tile is delivered as part of the Team Profiles Dashboard, but you can add the tile to any home page through personalizations.

This example illustrates the Acknowledgement Status tile.




Click the Acknowledgement Status tile to select team members for whom you want to view their job profile acknowledgement statuses.

## Acknowledgement Status Page

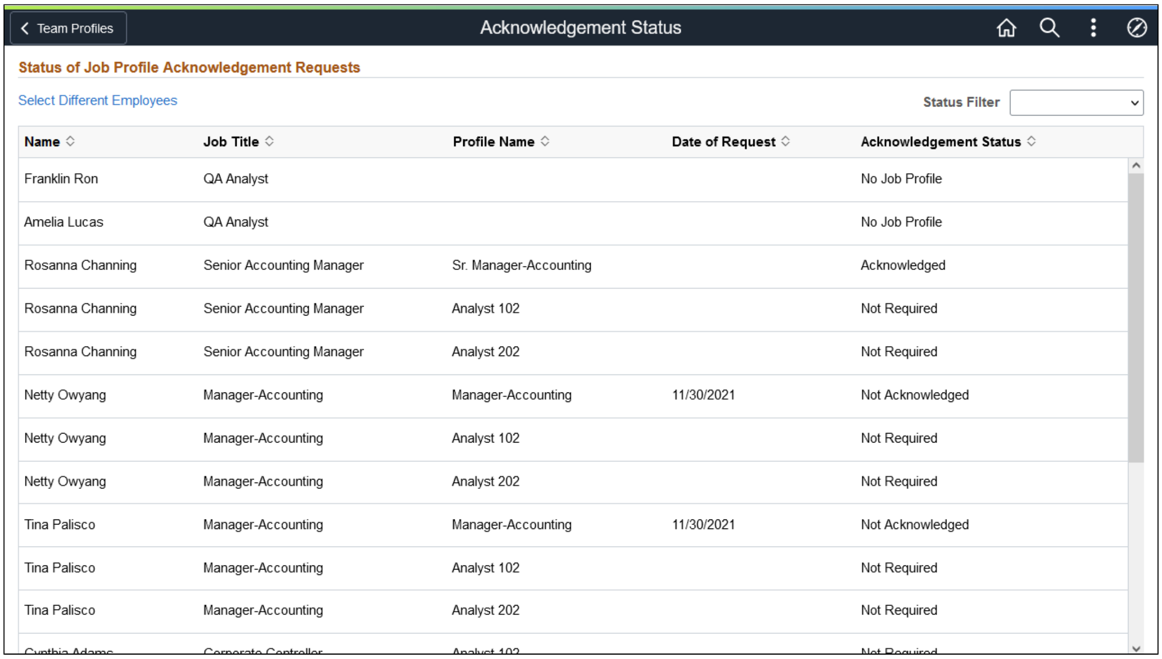
Use the Acknowledgement Status page (JPM_ACK_STATUS_FL) to view your team member's acknowledgements of their job-related profiles.

Navigation:

Click the Acknowledgement Status Tile, select one or multiple team members to view, then click **Continue**.

This example illustrates the fields and controls on the Acknowledgement Status page.




This page displays those employees you selected on the previous page with a row for each non-person profile associated with their job or jobs.

Employees can acknowledge they have reviewed and understand the requirements of their job on the My Job Profiles page.

| ***Field or Control*** | ***Description*** |
|---|---|
| **Select Different Employee** | Select this link to access the Acknowledgement Status - Find Team Member page and choose another person or people to view their acknowledgement statuses. |

| Field or Control | Description |
| --- | --- |
| **Status Filter** and **Acknowledgement Status** | Select a filter item from the list of available acknowledgement status types to display rows with that status only. Options are based on those statuses that appear in the **Acknowledgement Status** column for the selected employees. These values may include:<br>• *Acknowledged*: The employee has reviewed and acknowledged this job profile.<br>• *Not Acknowledged*: The employee has not reviewed and acknowledged this job profile.<br>• *No Job Profile*: This job is not associated with a profile.<br>• *Not Required*: This job is not participating in the job profile acknowledgement process and therefore acknowledgement is not required.<br>• *Request Not Processed*: This job profile is tied to a participating acknowledgement profile, but the batch process has not been run. In this case, the **Date of Request** field is blank. |
| **Profile Name** | Displays the name of the profile associated with this job row.<br>When the job is not associated with a profile, this field will be blank. |
| **Date of Request** | Displays the date a request was sent to the employee for profiles that have not been acknowledged. Acknowledged profiles and those that have not been run will not show a date.<br>**Note:** The date will only appear for those profiles that are participating in the acknowledgement process where the employee has not acknowledged the profile. If a profile is not participating in the Request Acknowledgement process, the date will remain blank and show a status of *Not Required*.<br>This date is generated when the system runs the *Run Acknowledgements* process (see “Run Acknowledgement Request Page” (PeopleSoft Human Resources Manage Profiles)) and will remain until the employee acknowledges the profile, or a new request for acknowledgement has been issued by the manager or administrator. |

**Note:** Administrators will use the “Review Acknowledgements Page” (Enterprise Components) from the Acknowledgement Framework to view those employees who have completed their acknowledgement of their job profiles.

## Related Links

“Understanding Job Profile Acknowledgements” (PeopleSoft Human Resources Manage Profiles)

“Non-person Profile Page” (PeopleSoft Human Resources Manage Profiles)

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

# (Fluid) Maintaining Interest Lists

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

Employees can add profiles to their interest list using the My Interest List tile and pages or from the “(Fluid) Search Results Page” (PeopleSoft Human Resources Manage Profiles). Similarly, managers can view and update their employees' interest lists using the Team Interest Lists tile and page or the Search Results page as well.

**Note:** To access these self service tiles and components, the user must be assigned these roles:
—Employee: *Profile Mgmt Employee Fluid*
—Manager: *Profile Mgmt Manager Fluid*

This topic discusses how to maintain interest lists using the fluid user interface.

### Related Links

Using the PeopleSoft Fluid User Interface to Manage Profile Data as an Employee and Manager

Navigating in eDevelopment

## Pages Used to Maintain Interest Lists Using the Fluid User Interface

| ***Page Name*** | ***Definition Name*** | ***Usage*** |
|---|---|---|
| My Interest List Tile | HC_JPM_INTEREST_FL_E_GBL (this is the cref for this tile) | Access the pages to view and maintain a list of job profiles in which you are interested. |
| Team Interest List Tile | HC_JPM_INTEREST_MGR_FL_GBL (this is the cref for this tile) | Access the pages to view and maintain a list of job profiles in which your employees have interest. |
| Team Talent Profile - Find Team Member Page (for Managers) | HR_PSEL_FLU | Select a direct report to view summary information about an employee’s profile data. |
| My Interest List Page (for Employees) or Team Interest List Page (for Managers) | JPM_INTEREST_FL | View and manage a list of job profiles in your or your employees’ interest list. You can also compare profiles within the list to determine the degree of a fit. |
| Profile Selection Page | JPM_COMPRF_SRCH_FL | Select a job profile you want to add to the interest list. |

| ***Page Name*** | ***Definition Name*** | ***Usage*** |
|---|---|---|
| <Content Type> (Item Details) Page | JPM_ITMDTL_SCF | View the details of a content item.<br><br>**Note:** This page is display only from the interest list pages. |
| "(Fluid) Compare Results Page" (PeopleSoft Human Resources Manage Profiles) | JPM_CSC_COMPARE_FL | View a summary of the comparison of the profiles you selected. |

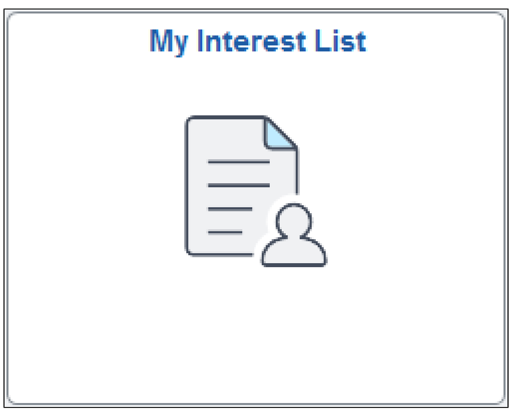
## My Interest List Tile

Use the My Interest List tile to access the pages to view and maintain a list of job profiles in which you are interested.

Navigation:

The My Interest List tile is delivered as part of the My Profiles Dashboard, but you can add the tile to any home page through personalizations.

This example illustrates the My Interest List tile.




Select the My Interest List tile to access your job interest list easily without using traditional menu navigation.

## Team Interest List Tile

Use the Team Interest List tile to access the pages to view and maintain a list of job profiles in which your employees have interest.

Navigation:

The Team Interest List tile is delivered as part of the Team Profiles Dashboard, but you can add the tile to any home page through personalizations.

This example illustrates the Team Interest List tile.


Click the Team Interest List tile to access the job interest list for an employee easily without using traditional menu navigation.

## My Interest List Page (for Employees) or Team Interest List Page (for Managers)

Use the My Interest List or Team Interest List pages (JPM_INTEREST_FL) to view and manage a list of job profiles in your or your employees' interest list. You can also compare profiles within the list to determine the degree of a fit.

---

**Note:** Although employees and managers access the profile pages differently and the header page name varies, the pages are the same.

---

Navigation:

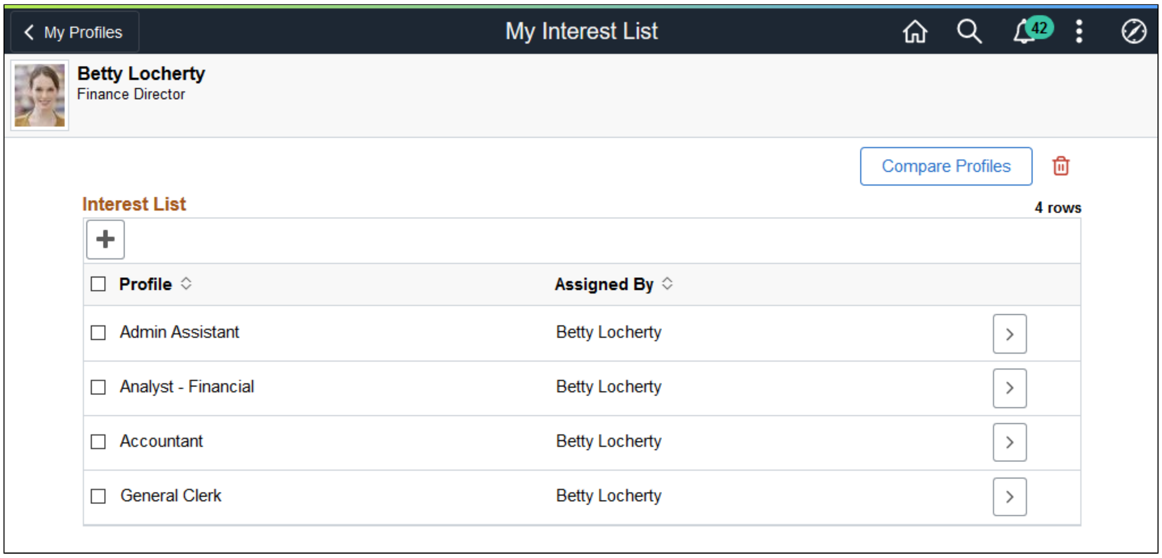
As an employee:

- Click the My Interest List tile on the My Profiles Dashboard (or any other home page with the tile).
- **Self Service** > **Learning and Development** > **My Interest List**
- Select the Related Actions icon button next to your name and select **Development** > **My Interest List**

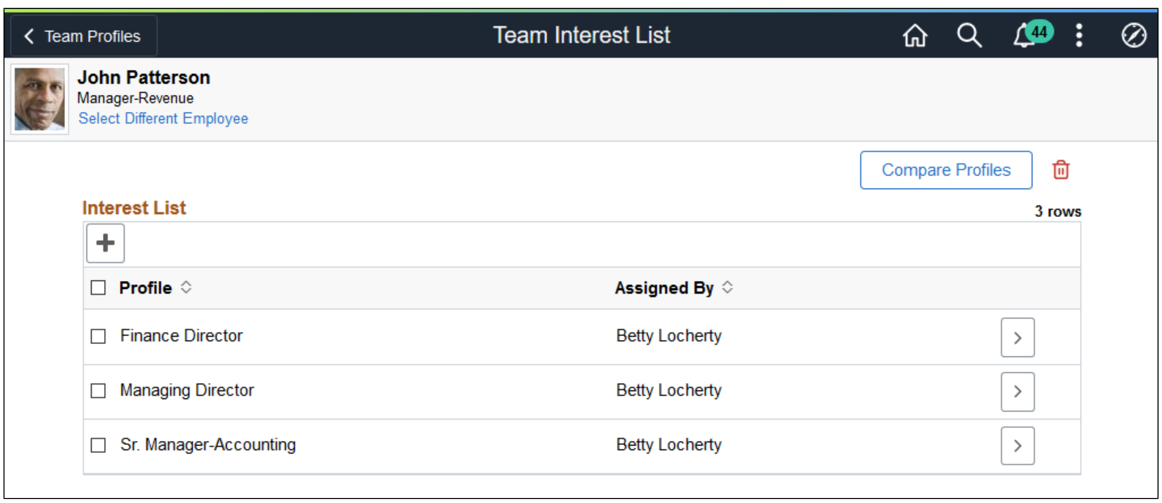
As a manager:

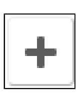
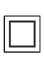
- Click the Team Interest List tile from the Team Profiles Dashboard (or any other home page with the tile).
- **Manager Self Service** > **Learning and Development** > **Team Interest List**
- Select the Related Actions icon button next to your employee's name and select **Development** > **My Interest List** or **Team Interest List**.

This example illustrates the fields and controls on the My Interest List page.




This example illustrates the fields and controls on the Team Interest List page.




| ***Field or Control*** | ***Description*** |
| --- | --- |
|  (Add) button | Click this button to access the and add item details. |
|  (Select all rows) or (Select this row) check box and **Profile** | Select the check box in the header of the grid to select all rows, or select individual check boxes to select specific job profiles. Select profiles you want to compare and click the **Compare Profiles** button above the grid. Or, select the job profiles you want to delete and click the **Delete Selected Profiles** icon above the grid. |

| ***Field or Control*** | ***Description*** |
| --- | --- |
| **Profile Type** | This column appears when the interest list contains profiles of different types.<br><br>**Note:** The compare profiles button will only allow a compare of profiles of the same type. |
| **Assigned By** | Displays the name of the person that added this job profile to the interest list. Employees and managers can only delete a job profile from the interest list if they added the profile to the list. |
| **View/Edit** arrow button | Select this button to access a display only view of the <Content Type> (Item Details) Page for this profile item. |
| Compare Profiles button | Click this button to run the comparison for the profiles you selected. The system displays the "(Fluid) Compare Results Page" (PeopleSoft Human Resources Manage Profiles), which lists the profiles you selected and the match percentages for each of the search criteria items. |
| (Delete Selected Profiles) icon | Click this icon to delete the job profiles you selected. |

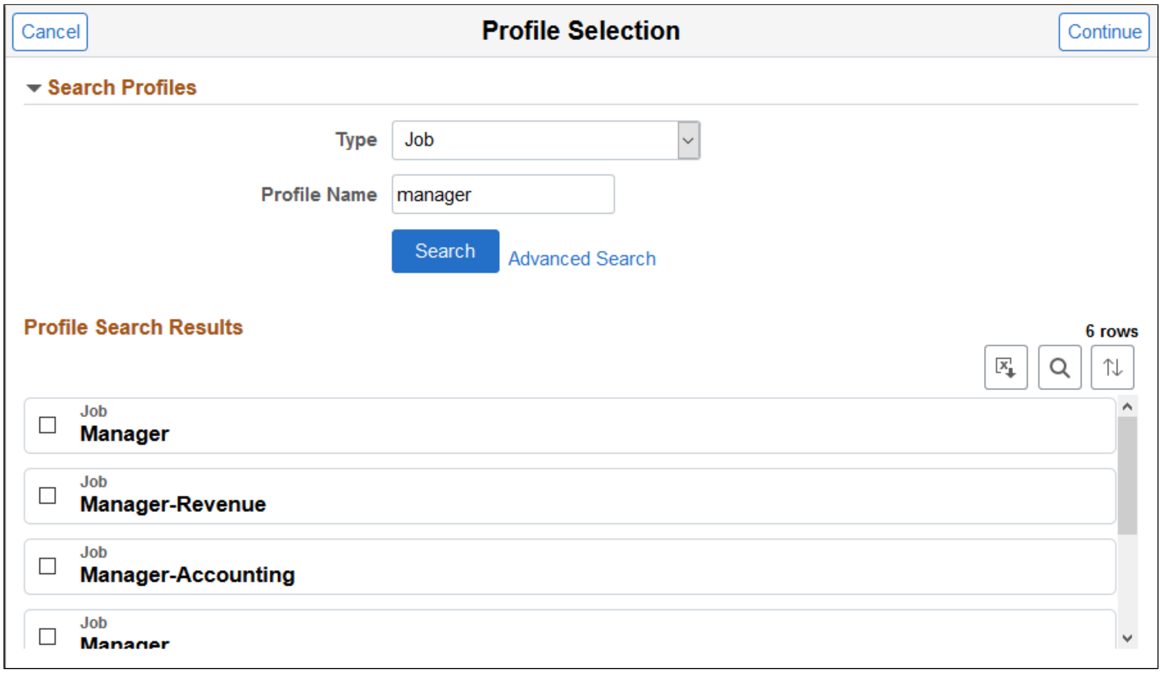
## Profile Selection Page

Use the Profile Selection page (JPM_COMPRF_SRCH_FL) to select a job profile you want to add to the interest list.

Navigation:

Click the Add button at the top of the grid on the My Interest List Page (for Employees) or Team Interest List Page (for Managers).

This example illustrates the fields and controls on the Profile Selection page.




| ***Field or Control*** | ***Description*** |
| --- | --- |
| **Type** | Select the profile type from which you want to search. Valid values are defined on the “Profile Types - Attributes Page” (PeopleSoft Human Resources Manage Profiles) and display according to the manager or employee security. |
| **Profile Name** | Enter the full or partial name of non-person profiles that you want to have returned in your search. |
| Search button | Click this button to have the system retrieve profiles that meet your criteria and display them in the Profile Search Results section of the page. |
| ☐(Select this row) check box | Select the profiles you want to add to the interest list and click the **Continue** button. |
| **Continue** button | Click this button to add the selected job profiles to the person’s interest list. |

# (Fluid) Searching and Comparing Profiles

Fluid Search and Compare provides a robust way of analyzing your profile data. It provides person and non-person pre-delivered sections but allows you the flexibility to configure criteria items as needed. Criteria groups help you find and compare people or jobs using different combinations of criteria in a single search. Search criteria uses boolean logic that creates focused and productive results.

These topics provide an overview of search and compare profiles ranking and discuss how to search for and compare profiles using the fluid user interface.

For an overview of performing a profile search and compare, see “Understanding the Search and Compare Profiles Process” (PeopleSoft Human Resources Manage Profiles).

These videos provide an overview of the Profile Manage Search and Compare modernization feature using the Fluid User Interface:

Video: PeopleSoft Profile Search Match Compare

Video: Image Highlights, PeopleSoft HCM Update Image 36: Profile Management Search, Match Compare Modernization

## Pages Used to Search and Compare Profiles Using the Fluid User Interface

| ***Page Name*** | ***Definition Name*** | ***Usage*** |
| --- | --- | --- |
| “Search / Compare Profiles Tile” (PeopleSoft Human Resources Manage Profiles) | HC_JPM_SRCH_LIST_FL_GBL (this is the cref for this tile) | Access to search for profiles that match selected search criteria and compare those profiles. |
| “(Fluid) Start a New Search Page” (PeopleSoft Human Resources Manage Profiles) | JPM_MGR_SRCH_FL (My Teams Searches page)<br><br>JPM_EMPL_SRCH_FL (My Searches page) | Select from the list of available search queries that are defined for the user. |
| “(Fluid) Search Profiles Page” (PeopleSoft Human Resources Manage Profiles) | JPM_COMPRF_SRCH_FL | Select the profile that you want to use as the source of criteria for the search. The source profile that you select provides the default search criteria. This page is displayed only if the search selected has a criteria rule of *Default, No Display* or *Default and Display* and the source profile type is a non-person profile type. If the criteria rule is *No Default, Display,* you enter the search criteria manually on the Search Criteria page. |
| “(Fluid) Adhoc Search Profiles Page” (PeopleSoft Human Resources Manage Profiles) | JPM_SRCH_ADHOC_FL | Select the profile that you want to use as the source of criteria for the adhoc search. The source profile that you select provides the default search criteria rule of *No Default, Display (Adhoc)*. |
| Select Your Job Profile Page | JPM_EMP_RELPROF_FL | This page appears on the My Searches pages when you have more than one job. |

| Page Name | Definition Name | Usage |
| --- | --- | --- |
| Select Team Member Page | HR_PSEL_FLU | Select the person profile that you want to use as the source for the search criteria.<br><br>This page is displayed only if the search selected has a criteria rule of *Default, Display* and the source profile type is blank. |
| “(Fluid) Search Criteria Page” (PeopleSoft Human Resources Manage Profiles) | JPM_SRCH_CRIT_FL<br><br>JPM_SRCH_GRPFLT_FL | View and modify the search criteria for the search and compare.<br><br>If the search selected on the Search for Profiles page has a criteria rule of *Default and Display* or *No Default, Display,* this page is displayed before you run the search. If the criteria rule is *Default, No Display,* the system runs the search without first displaying the Search Criteria page. |
| “(Fluid) Search Results Page” (PeopleSoft Human Resources Manage Profiles) | JPM_SRCH_RESULT_FL | Displays the results of the search. |
| “(Fluid) Compare Results Page” (PeopleSoft Human Resources Manage Profiles) | JPM_CSC_COMPARE_FL | View a summary of the comparison of the profiles you selected. |

**Note:** This pages are the same as the administrator documentation however, managers and employees may want to add the “Search / Compare Profiles Tile” (PeopleSoft Human Resources Manage Profiles) to a home page of their choice through personalizations.

**Note:** The JPM Person Profile (HC_JPM_PERSON_PROFILE) search index supports real time indexing (RTI) with PeopleTools version 8.59.10 or higher. When enabled, RTI allows real-time updates to the indexed data to provide job search using the latest information.
For more information about Real Time Indexing, refer to PeopleTools Search Technology, “Administering Real Time Indexing."

## Understanding Search and Compare Profiles

Employees and managers use the Search and Compare Profiles component in fluid to search for profiles that match certain search criteria. When employees and managers select this option, the system lists the search criteria types that are defined for their role. Search types are configured on the Define Search Configuration page for the profile types that you have defined. (When using the fluid pages, navigate to the Administer Workforce home page select the **Profile Administration tile** > **Profile Configuration tile** > **Configure Search and Compare tab** > **Define Search Configuration**.) For further information about setting up Search and Compare Profiles, see “Understanding Setting Up Search and Compare Profiles” (PeopleSoft Human Resources Manage Profiles).

Depending on how the search is configured, employees and managers can set up or modify the search criteria before running the search. The system lists matching profiles and indicates how well the profile matches the search criteria. For further information about how the system calculates the ratings, see “Understanding Search and Compare Profile Results Using the Fluid Pages” (PeopleSoft Human Resources Manage Profiles).

The Search Results page lists the matching profiles in descending score order, with the highest scoring profile listed first. Employees and managers can compare profiles listed on the Search Results page with the search criteria by selecting profiles and clicking the Compare Profiles button to compare the profiles.

Chapter 3

# Entering Faculty Member Training and Development Information

## Entering Training Information

### Pages Used to Enter Training Information

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

## Managing Activity Information

### Pages Used to Manage Activity Information

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

## Understanding the Activities Transaction

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

# Setting Up Administrative Post Information

## Pages Used to Set Up Administrative Post Information

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

## Understanding the Administrative Posts Self-Service Transaction

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

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

### Related Links

“Tracking Faculty Events” (PeopleSoft Human Resources Track Faculty Events)

# Manage Committee Information

## Pages Used to Manage Committee Information

| ***Page Name*** | ***Definition Name*** | ***Usage*** |
| --- | --- | --- |
| Maintain Committees Page | EG_SSCOMMIT_MBR_L | Faculty members review their committee membership information. |

| Page Name | Definition Name | Usage |
|---|---|---|
| Faculty Committee Details Page | EG_SSCOMMIT_MBR_D | Faculty members review details about administrative post records already assigned to them. |

## Understanding the Committee Self-Service Transaction

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

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

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

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

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

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

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

### Related Links

“Tracking Faculty Events” (PeopleSoft Human Resources Track Faculty Events)

# Managing Presentation Information

## Pages Used to Manage Presentation Information

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

## Understanding the Presentations Transaction

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

# Reviewing, Updating, and Adding Student Advising Information

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

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

## Understanding the Student Advising Self-Service Transaction

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

# Entering Teaching Responsibility Information

## Pages Used to Enter Teaching Responsibility Information

| ***Page Name*** | ***Definition Name*** | ***Usage*** |
|---|---|---|
| Manage Teaching Responsibility Page | EG_SSTEACH_RESP_L | Faculty members review, add, update, or delete information about their teaching responsibilities. |

| ***Page Name*** | ***Definition Name*** | ***Usage*** |
|---|---|---|
| Change Teaching Responsibility Page<br><br>Add Teaching Responsibility Page<br><br>Teaching Responsibility Detail Page | EG_SSTEACH_RESP_D | Faculty members create new teaching responsibility records, and review and edit details about teaching responsibility records already assigned to them. |

## Understanding the Teaching Responsibilities Self-Service Transaction

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

## Chapter 4

# Requesting Employee Training

## Understanding the Self-Service Training Development Process

### Prerequisites

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

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

#### Related Links

"Configuring Self-Service Transactions" (Application Fundamentals)
"Understanding Group Build" (Application Fundamentals)

### The Self-Service Training Development Process

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

- Request Training Enrollment.

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

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

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

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

- Approve Training Request.

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

- Training Request Status.

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

- Training Summary.

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

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

# Submitting Training Requests

## Pages Used to Submit Training Requests

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

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

# Approving Training Requests

## Pages Used to Approve Training Requests

| Page Name | Definition Name | Usage |
|---|---|---|
| Approve Training Request Page | SS_LIST | Managers view a list of employees that require training approval. |

| ***Page Name*** | ***Definition Name*** | ***Usage*** |
|---|---|---|
| Approve Transaction Page | TRN_REQUEST_MGR | Managers approve or deny each employee's training request and enter comments. |
| Save Confirmation Page | EO_SAVE_CONFIRM | Managers approve or deny the request. |
| Administer Training Request Page | TRN_REQUEST_ADM | Training administrators use this page to approve or deny training requests. In the Administrator Actions group box, the administrator has three options:<br><br>To approve the training request and allow the system to automatically enroll or add the employee to the waiting list for the selected course session.<br><br>To approve the training request, without the automatic update. If the training administrator selects this option, the system does not enroll the employee. The training administrator must do this manually.<br><br>To deny the training request. |

## Understanding Training Request Approval Processing

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

- Manager approval.

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

- Processing by the training administrator.

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

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

The training request self-service transactions are:

- Training Enrollment.
- Training Enrollment by Manager.

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

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

### Related Links

“Configuring Self-Service Transactions” (Application Fundamentals)

# Viewing the Status of Training Requests

## Pages Used To View the Status of Training Requests

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

# Reviewing Training History Information

## Page Used to Review Training History

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

# Reviewing Workflow Information

## Page Used to Review Workflow Information

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

## Chapter 5

# Managing Professional Compliance

## Understanding Professional Compliance

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

With Manage Professional Compliance, you can:

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

   For example, an individual can be classified as compliant or noncompliant with the requirements for certification.
3. Assign regulated individuals to compliance managers/supervisors.
4. Enroll regulated individuals in development plans designed to help individuals obtain a level of competence to attain a specified classification.
5. Monitor individuals in their progress by completing reviews, observations, KPIs, and checks.

### Using Self-Service Transactions with Manage Professional Compliance

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

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

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**Note:** All RI direct reports display on the RI pages regardless of their assignment statuses. The assignment status also displays in the Direct Reports grids on the RI pages.
For Manage Professional Compliance transactions, individuals that a manager/supervisor can view in the Direct Reports grid are their regulated individuals. It is possible for a manager/supervisor to have direct reports who are not RIs in which case the direct report would not display in the grid.
It is also possible for a manager/supervisor to be responsible for an RI, who is not one of their direct reports. In this case, the RI would still display in the grid since it is an RI transaction. Regulated individuals who are not also a direct report of a manager/supervisor will not display in the Direct Reports grid for any self-service transactions other than those for Manage Professional Compliance.

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### Related Links

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

“Understanding Regulated Individual Data” (PeopleSoft Human Resources Manage Professional Compliance)

# Completing Regulated Individual Development Reviews

## Pages Used to Complete Regulated Individual Development Reviews

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

## Understanding RI Development Reviews

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

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

### Related Links

“Understanding Manage Professional Compliance Business Processes” (PeopleSoft Human Resources Manage Professional Compliance)

 

# Completing RI Observations

## Pages Used to Complete RI Observations

| ***Page Name*** | ***Definition Name*** | ***Usage*** |
|---|---|---|
| Complete a Regulated Individual Observation - Select Regulated Individual Page | PCMP_OPRROWS<br><br>PCMP_OPRROWS2 | Displays a list of the compliance manager/supervisor's regulated individuals. Managers/supervisors select a regulated individual for whom they want to complete an observation. |
| RI Observation Page | HR_PCMP_T_RIOBS<br><br>HR_PCMP_T_RIOBS2<br><br>HR_PCMP_T_RIOBS3 | Compliance managers/supervisors enter the observation information, including the observation models, the observation date, the statuses of observation model elements, and optional comments. |

## Understanding RI Observations

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

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

### Related Links

“Observing Regulated Individuals” (PeopleSoft Human Resources Manage Professional Compliance)

# Completing RI Key Performance Indicator Reviews

## Pages Used to Complete RI Key Performance Indicator Reviews

| ***Page Name*** | ***Definition Name*** | ***Usage*** |
|---|---|---|
| Complete a Regulated Individual Key Performance Indicators Review - Select Regulated Individual Page | PCMP_OPRROWS<br><br>PCMP_OPRROWS2 | Displays a list of the compliance manager/supervisor's regulated individuals. Managers/supervisors select a regulated individual for whom they want to complete a KPI review. |

| *Page Name* | *Definition Name* | *Usage* |
| --- | --- | --- |
| RI KPI Review Page | HR_PCMP_T_RIKPI<br>HR_PCMP_T_RIKPI2<br>HR_PCMP_T_RIKPI3 | Compliance managers/supervisors perform a key performance indicator review by completing details for each indicator, entering the date of the review, the frequency, and optional comments about the review. |

## Understanding RI Key Performance Indicator Reviews

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

Before you can complete a review of an individual's progress against KPIs, you must define the specific indicators that you want to use as part of the setup of Manage Professional Compliance in HR. PeopleSoft includes the following broad categories of performance indicators as part of the delivered application; within these categories, however, you must choose (and in some cases set up) the exact indicators that you want to use:

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

---

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

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### Related Links

“(GBR) Monitoring KPIs” (PeopleSoft Human Resources Manage Professional Compliance)

 

# Viewing RI Development Records

## Pages Used to View RI Development Records

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

## Understanding the View RI Development Records Transaction

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

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

### Related Links

“Understanding Manage Professional Compliance Business Processes” (PeopleSoft Human Resources Manage Professional Compliance)

# Viewing RI Development Reviews

## Pages Used to View RI Development Reviews

| ***Page Name*** | ***Definition Name*** | ***Usage*** |
|---|---|---|
| View a Regulated Individual Development Review - Select Regulated Individual Page | PCMP_OPRROWS | Select a regulated individual whose development review you want to view. |

| Page Name | Definition Name | Usage |
|---|---|---|
| Development Review Page | HR_PCMP_DEVREV2 | Compliance managers/supervisors view development review histories of regulated individual. Employees can view details of their own development reviews. |

## Understanding the View RI Development Review Transaction

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

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

### Related Links

“Understanding the Monitoring Process” (PeopleSoft Human Resources Manage Professional Compliance)

# Viewing RI Observation History

## Pages Used to View RI Observation History

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

## Understanding the View RI Observation Transaction

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

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

 

### Related Links

“Understanding the Monitoring Process” (PeopleSoft Human Resources Manage Professional Compliance)

# Viewing Regulated Individual KPI Review History

## Pages Used to View Regulated Individual KPI Review History

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

## Understanding the View RI KPI Review Transaction

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

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

### Related Links

“Understanding the Monitoring Process” (PeopleSoft Human Resources Manage Professional Compliance)

 

Chapter 6

# Delivered Workflow for eDevelopment

## Delivered Workflow for eDevelopment

This topic discusses eDevelopment workflow.

### Understanding Delivered Profile Approval Workflow

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

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

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

**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).

#### Related Links

“Understanding Profile Management” (PeopleSoft Human Resources Manage Profiles)

### Non-Person Profile Approval Workflow

This topic discusses the non-person approval workflow.

#### Description

| ***Information Type*** | ***Description*** |
|---|---|
| Event Description | A manager creates a new job profile or updates an existing job profile using the View Job Profiles self-service option. |

| ***Information Type*** | ***Description*** |
| --- | --- |
| Action Description | When the profile administrator selects the worklist entry or clicks the link in the email, the system links the profile administrator to the Non-person Profile — Approval page. |
| Notification Method | Email and worklist. |

### Approval Workflow Definitions

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

## Person Profile Approval Workflow

This topic discusses the person profile approval workflow.

 

## Description

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

## Approval Workflow Definitions

| ***Information Type*** | ***Description*** |
|---|---|
| Process ID | JPMPersonProfiles |
| Workflow Transaction | JPMPersonProfiles |

 

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

## Professional Training

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

 

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

## Description

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

## Workflow Objects

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

 