

PeopleSoft HCM 9.2: PeopleSoft HCM Portal Pack

January 2026

This software and related documentation are provided under a license agreement containing restrictions on use and disclosure and are protected by intellectual property laws. Except as expressly permitted in your license agreement or allowed by law, you may not use, copy, reproduce, translate, broadcast, modify, license, transmit, distribute, exhibit, perform, publish, or display any part, in any form, or by any means. Reverse engineering, disassembly, or decompilation of this software, unless required by law for interoperability, is prohibited.

The information contained herein is subject to change without notice and is not warranted to be error-free. If you find any errors, please report them to us in writing.

If this is software, software documentation, data (as defined in the Federal Acquisition Regulation), or related documentation that is delivered to the U.S. Government or anyone licensing it on behalf of the U.S. Government, then the following notice is applicable:

U.S. GOVERNMENT END USERS: Oracle programs (including any operating system, integrated software, any programs embedded, installed, or activated on delivered hardware, and modifications of such programs) and Oracle computer documentation or other Oracle data delivered to or accessed by U.S. Government end users are "commercial computer software," "commercial computer software documentation," or "limited rights data" pursuant to the applicable Federal Acquisition Regulation and agency-specific supplemental regulations. As such, the use, reproduction, duplication, release, display, disclosure, modification, preparation of derivative works, and/or adaptation of i) Oracle programs (including any operating system, integrated software, any programs embedded, installed, or activated on delivered hardware, and modifications of such programs), ii) Oracle computer documentation and/or iii) other Oracle data, is subject to the rights and limitations specified in the license contained in the applicable contract. The terms governing the U.S. Government's use of Oracle cloud services are defined by the applicable contract for such services. No other rights are granted to the U.S. Government.

This software or hardware is developed for general use in a variety of information management applications. It is not developed or intended for use in any inherently dangerous applications, including applications that may create a risk of personal injury. If you use this software or hardware in dangerous applications, then you shall be responsible to take all appropriate fail-safe, backup, redundancy, and other measures to ensure its safe use. Oracle Corporation and its affiliates disclaim any liability for any damages caused by use of this software or hardware in dangerous applications.

Oracle®, Java, MySQL, and NetSuite are registered trademarks of Oracle and/or its affiliates. Other names may be trademarks of their respective owners.

Intel and Intel Inside are trademarks or registered trademarks of Intel Corporation. All SPARC trademarks are used under license and are trademarks or registered trademarks of SPARC International, Inc. AMD, Epyc, and the AMD logo are trademarks or registered trademarks of Advanced Micro Devices. UNIX is a registered trademark of The Open Group.

This software or hardware and documentation may provide access to or information about content, products, and services from third parties. Oracle Corporation and its affiliates are not responsible for and expressly disclaim all warranties of any kind with respect to third-party content, products, and services unless otherwise set forth in an applicable agreement between you and Oracle. Oracle Corporation and its affiliates will not be responsible for any loss, costs, or damages incurred due to your access to or use of third-party content, products, or services, except as set forth in an applicable agreement between you and Oracle.

Documentation Accessibility

For information about Oracle's commitment to accessibility, visit the Oracle Accessibility Program website at <https://docs.oracle.com/pls/topic/lookup?ctx=acc&id=docacc>.

Access to Oracle Support

Oracle customers that have purchased support have access to electronic support through My Oracle Support. For information, visit <https://docs.oracle.com/pls/topic/lookup?ctx=acc&id=info> or visit <https://docs.oracle.com/pls/topic/lookup?ctx=acc&id=trs> if you are hearing impaired.

Contents

Preface: Preface.....	v
Understanding the PeopleSoft Online Help and PeopleBooks.....	v
Hosted PeopleSoft Online Help.....	v
Locally Installed PeopleSoft Online Help.....	v
Downloadable PeopleBook PDF Files.....	v
Common Help Documentation.....	v
Field and Control Definitions.....	vi
Typographical Conventions.....	vi
ISO Country and Currency Codes.....	vii
Region and Industry Identifiers.....	vii
Translations and Embedded Help.....	viii
Using and Managing the PeopleSoft Online Help.....	viii
PeopleSoft HCM Related Links.....	viii
Contact Us.....	viii
Follow Us.....	ix
Chapter 1: Getting Started with HCM Portal Pack.....	11
HCM Portal Pack Pagelets.....	11
HCM Portal Pack Integrations.....	12
HCM Portal Pack Implementation.....	13
Chapter 2: Understanding HCM Portal Pack.....	15
HCM Portal Pack Overview.....	15
PeopleSoft Pagelet Activation and Personalization.....	15
HCM Portal Pack Pagelets.....	16
Chapter 3: Setting Up HCM Portal Pack.....	19
Defining Default Settings for the Employee Performance Alerts Pagelet.....	19
Page Used to Define Default Settings for the Employee Performance Alert Pagelet.....	19
Activating the Employee Performance Pagelet.....	19
Employee Performance Alerts Setup Page.....	19
Defining Default Settings for the Open Positions Pagelet.....	22
Page Used to Define Default Settings for the Open Positions Pagelet.....	22
Activating the Open Positions Pagelet.....	23
Setup Open Positions Page.....	23
Chapter 4: Using HCM Portal Pack Pagelets.....	25
Common Elements in HCM Portal Pack Pagelets.....	25
Displaying Portal Pagelets.....	26
Personalizing Pagelets.....	27
Pages Used to Personalize Pagelets.....	27
Personalize Direct Reports Page.....	29
Select Job Title Page.....	29
Personalize Stock Options Page.....	30
Employee Performance Alerts Settings Page.....	32
Personalize Upcoming Training Page.....	34
Personalize Scheduled Training Page.....	35
Personalize Open Positions Page.....	35
Personalize Time Management Alerts Page.....	36
Personalize Workforce Availability Page.....	37

Personalize Phones Page.....	38
Viewing Manager Pagelets.....	39
Birthday Alerts Pagelet.....	40
Anniversary Alerts Pagelet.....	40
Direct Reports Pagelet.....	41
Manager Leave Summary Pagelet.....	42
Employee Performance Pagelet.....	42
Scheduled Training Pagelet.....	43
Manager Expiring Licenses Pagelet.....	44
Open Positions Pagelet.....	44
Time Management Alerts Pagelet.....	45
Workforce Availability Pagelet.....	47
Direct Reports Phones Pagelet.....	48
Viewing Employee Pagelets.....	49
Employee Leave Summary Pagelet.....	50
Stock Options Pagelet.....	50
Paychecks Pagelet.....	51
Organization Directory Pagelet.....	52
Upcoming Training Pagelet.....	52
Employee Expiring Licenses Pagelet.....	53

Preface

Understanding the PeopleSoft Online Help and PeopleBooks

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

Hosted PeopleSoft Online Help

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

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

Locally Installed PeopleSoft Online Help

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

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

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

Downloadable PeopleBook PDF Files

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

Common Help Documentation

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

- Application Fundamentals

- Using PeopleSoft Applications

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

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

Field and Control Definitions

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

Typographical Conventions

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

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

Typographical Convention	Description
⇒	This continuation character has been inserted at the end of a line of code that has been wrapped at the page margin. The code should be viewed or entered as a single, continuous line of code without the continuation character.

ISO Country and Currency Codes

PeopleSoft Online Help topics use International Organization for Standardization (ISO) country and currency codes to identify country-specific information and monetary amounts.

ISO country codes may appear as country identifiers, and ISO currency codes may appear as currency identifiers in your PeopleSoft documentation. Reference to an ISO country code in your documentation does not imply that your application includes every ISO country code. The following example is a country-specific heading: "(FRA) Hiring an Employee."

The PeopleSoft Currency Code table (CURRENCY_CD_TBL) contains sample currency code data. The Currency Code table is based on ISO Standard 4217, "Codes for the representation of currencies," and also relies on ISO country codes in the Country table (COUNTRY_TBL). The navigation to the pages where you maintain currency code and country information depends on which PeopleSoft applications you are using. To access the pages for maintaining the Currency Code and Country tables, consult the online help for your applications for more information.

Region and Industry Identifiers

Information that applies only to a specific region or industry is preceded by a standard identifier in parentheses. This identifier typically appears at the beginning of a section heading, but it may also appear at the beginning of a note or other text.

Example of a region-specific heading: "(Latin America) Setting Up Depreciation"

Region Identifiers

Regions are identified by the region name. The following region identifiers may appear in the PeopleSoft Online Help:

- Asia Pacific
- Europe
- Latin America
- North America

Industry Identifiers

Industries are identified by the industry name or by an abbreviation for that industry. The following industry identifiers may appear in the PeopleSoft Online Help:

- USF (U.S. Federal)

- E&G (Education and Government)

Translations and Embedded Help

PeopleSoft 9.2 software applications include translated embedded help. With the 9.2 release, PeopleSoft aligns with the other Oracle applications by focusing our translation efforts on embedded help. We are not planning to translate our traditional online help and PeopleBooks documentation. Instead we offer very direct translated help at crucial spots within our application through our embedded help widgets. Additionally, we have a one-to-one mapping of application and help translations, meaning that the software and embedded help translation footprint is identical—something we were never able to accomplish in the past.

Using and Managing the PeopleSoft Online Help

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

- Using the PeopleSoft Online Help.
- Managing hosted Online Help.
- Managing locally installed PeopleSoft Online Help.

PeopleSoft HCM Related Links

[Oracle Help Center](#)

[PeopleSoft Online Help Home](#)

[PeopleSoft Information Portal](#)

[My Oracle Support](#)

[PeopleSoft Training from Oracle University](#)

[PeopleSoft Video Feature Overviews on YouTube](#)

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

“HCM Abbreviations” (Application Fundamentals)

[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

<i>Icon</i>	<i>Link</i>
	Watch PeopleSoft on YouTube
	Follow @PeopleSoft_Info on X.
	Read PeopleSoft Blogs
	Connect with PeopleSoft on LinkedIn

Chapter 1

Getting Started with HCM Portal Pack

HCM Portal Pack Pagelets

PeopleSoft HCM pagelets include:

- Birthday Alerts pagelet.
- Anniversary Alerts pagelet.
- Direct Reports pagelet.
- Employee Leave Summary pagelet.
- Manager Leave Summary pagelet.
- Stock Options pagelet.
- Paychecks pagelet.
- Company Directory pagelet.
- Organization Directory pagelet.
- Employee Performance pagelet.
- Upcoming Training pagelet.
- Schedule Training pagelet.
- Employee Expiring Licenses pagelet.
- Manager Expiring Licenses pagelet.
- Open Positions pagelet.
- Time Management Alerts pagelet.
- Workforce Availability pagelet.
- Direct Reports Phones pagelet.

PeopleSoft HCM to ELM On Demand pagelets include:

- Instructor Center pagelet.
- Manager Learning Center pagelet.
- My Learning pagelet.

- My Team Learning pagelet.

PeopleSoft HCM on Demand pagelets include:

- Administer Career Plans pagelet.
- Administer Succession Plans pagelet.
- Employee Profile pagelet.
- Manage Careers & Successions pagelet.
- Manager Profile Management pagelet.
- My Development Documents pagelet.
- My Performance Documents pagelet.
- Profile Administrator Home pagelet.
- Team Development Documents pagelet.
- Team Performance Documents pagelet.
- ePerformance Administration pagelet.
- My Career Plan pagelet.

PeopleSoft TalentLinks pagelets include:

- My Compensation Activities pagelet.
- eCompensation Admin Home pagelet.
- eCompensation Administration pagelet.

Related Links

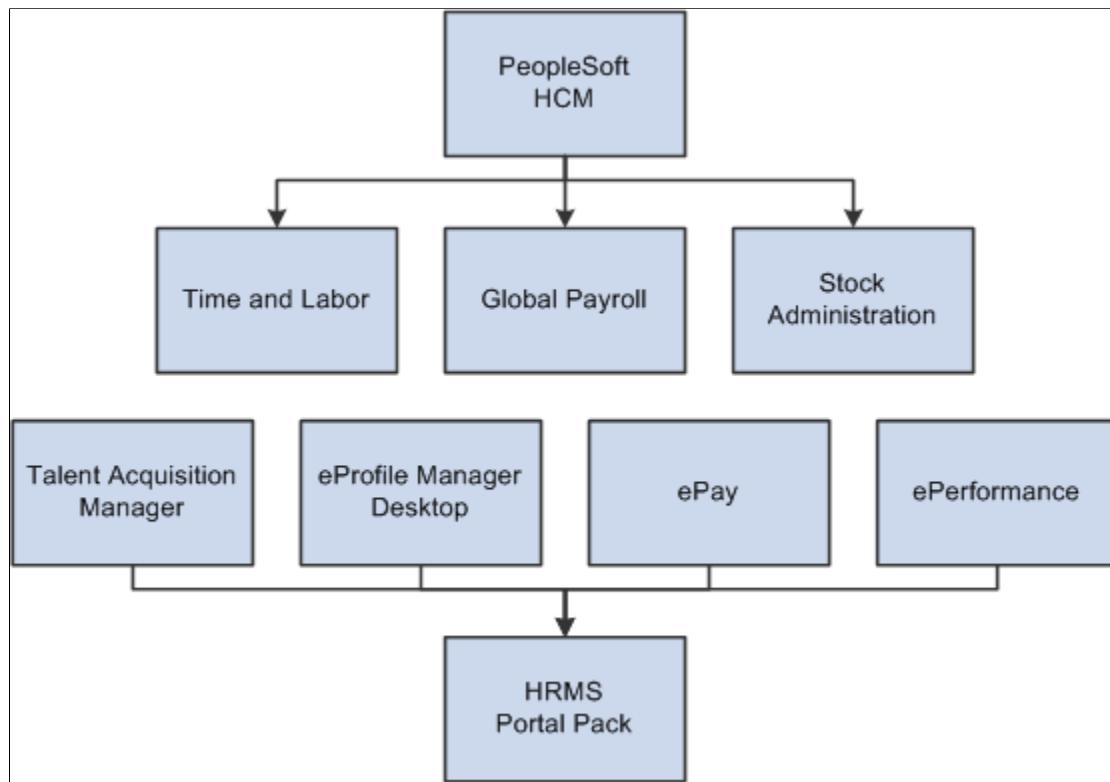
[Viewing Employee Pagelets](#)

[Viewing Manager Pagelets](#)

HCM Portal Pack Integrations

The HCM Portal Pack includes portal pagelets that provide access to key data from your PeopleSoft HCM system. The portal pack is intended to supplement the core business applications with pagelets for your portal's homepage.

This graphic shows the PeopleSoft HCM applications that feed data to the HCM Portal Pack.



This documentation discusses integration considerations in the implementation topics.

HCM Portal Pack Implementation

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

Other Sources of Information

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

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

See the product documentation for *PeopleTools: Setup Manager*

Chapter 2

Understanding HCM Portal Pack

HCM Portal Pack Overview

The PeopleSoft HCM Portal Pack provides a collection of pagelets that you can individually select to appear on a corporate intranet or extranet homepage. The individual pagelets provide information gathered from various PeopleSoft HCM applications.

PeopleSoft Pagelet Activation and Personalization

HCM Portal Pack includes portal pagelets that provide at-a-glance access to essential data from your system. The portal pack supplements other PeopleSoft HCM applications that provide the underlying data.

Home Page Personalization

When you install HCM Portal Pack, users can personalize their portal homepages by adding the pagelets that they need. Standard PeopleSoft role-based security ensures that users can access only the pagelets appropriate to their roles.

Users can configure their portal homepages with three narrow columns or one narrow and one wide column.

See [Displaying Portal Pagelets](#).

Direct Report Access Types for Manager Pagelets

Each pagelet can be configured to use any of the HCM access types. PeopleSoft recommends using the same access type for each pagelet. This ensures consistency when managers of direct reports view the different pagelets to help improve performance. To set up the access type, access the Direct Reports Setup component by selecting **Set Up HCM > Common Definitions > Direct Reports for Managers > Direct Reports Setup**.

Pagelet Personalization

Some pagelets support personalization that enables individual users to configure content displayed in their pagelet.

To access personalization options, users click the Pagelet Settings icon in the pagelet title bar alerts you to this capability. The settings menu includes a Personalize choice if personalizations are available.

Related Links

[Common Elements in HCM Portal Pack Pagelets](#)

Personalizing Pagelets

HCM Portal Pack Pagelets

This section lists the pagelets the make up HCM Portal Pack and identifies:

- The name and object name of the pagelets.
- The audience for the pagelet: employees, customers, or suppliers.
- The functional role of the person who uses the pagelet.

These are business process functional roles not delivered as such by PeopleTools user security roles.

- The pagelet's enabling application.

The enabling application provides the data that appears in the pagelet. If the enabling application has not been licensed, the pagelet won't work.

Employee-Facing Pagelets

This table lists the employee-facing pagelets and their enabling applications:

Pagelet Name and Object Name	Enabling Applications
Employee Expiring Licenses Pagelet CO_PE_EXP_LIC_EMP	PeopleSoft Human Resources
Employee Leave Summary Pagelet HR_PE_EMPL_LEAVE	PeopleSoft Human Resources PeopleSoft Global Payroll or Absence Management
Organization Directory Pagelet EO_PE_CDCOMPDIR	PeopleSoft Human Resources
Paychecks Pagelet PY_PE_PAYCHECK	PeopleSoft Human Resources PeopleSoft Payroll for North America PeopleSoft ePay
Upcoming Training Pagelet CO_PE_EMP_TRAINING	PeopleSoft Human Resources

Pagelet Name and Object Name	Enabling Applications
<u>Stock Options Pagelet</u> ST_PE_OPTION	PeopleSoft Human Resources PeopleSoft Stock Administration

Manager-Facing Pagelets

This table lists the manager-facing pagelets and their enabling applications:

Pagelet Name and Object Name	Enabling Applications
<u>Anniversary Alerts Pagelet</u> CO_PE_MGR_HIREDT	PeopleSoft Human Resources PeopleSoft eProfile Manager Desktop
<u>Birthday Alerts Pagelet</u> CO_PE_MGR_BIRTHDAY	PeopleSoft Human Resources PeopleSoft eProfile Manager Desktop
<u>Direct Reports Pagelet</u> CO_PE_MGRRPTS_COMP	PeopleSoft Human Resources PeopleSoft eProfile Manager Desktop
<u>Direct Reports Phones Pagelet</u> CO_PE_EMPLPHN_COMP	PeopleSoft Human Resources PeopleSoft eProfile Manager Desktop
<u>Employee Performance Pagelet</u> EP_PE_ALERT	PeopleSoft Human Resources PeopleSoft ePerformance
<u>Manager Expiring Licenses Pagelet</u> CO_PE_EXP_LIC	PeopleSoft Human Resources
<u>Manager Leave Summary Pagelet</u> HR_PE_MGR_LEAVE	PeopleSoft Human Resources PeopleSoft Global Payroll or Absence Management
<u>Open Positions Pagelet</u> CO_PE_VACPOS	PeopleSoft Human Resources (optional functionality) PeopleSoft Talent Acquisition Manager

<i>Pagelet Name and Object Name</i>	<i>Enabling Applications</i>
<u>Scheduled Training Pagelet</u> CO_PE_MGR_TRAINING	PeopleSoft Human Resources
<u>Time Management Alerts Pagelet</u> TL_PE_MGR_TMMGT	PeopleSoft Human Resources PeopleSoft Time and Labor (optional) PeopleSoft Absence Management
<u>Workforce Availability Pagelet</u> TL_PE_MGR_WRKFRC	PeopleSoft Human Resources PeopleSoft Time and Labor (optional) PeopleSoft Absence Management

Related Links

[Viewing Employee Pagelets](#)

[Viewing Manager Pagelets](#)

Chapter 3

Setting Up HCM Portal Pack

Defining Default Settings for the Employee Performance Alerts Pagelet

To define default settings for the Employee Performance Alerts Settings page, use the Employee Performance Alerts Setup (EP_ALERT_SETUP) component.

Page Used to Define Default Settings for the Employee Performance Alert Pagelet

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
<u>Employee Performance Alerts Setup Page</u>	EP_ALERT_SETUP	Define settings for the Employee Performance Alerts Setup page.

Related Links

[Employee Performance Pagelet](#)

Activating the Employee Performance Pagelet

The Employee Performance pagelet is a self-service pagelet that managers can use to quickly check the status of the performance documents for which they are responsible. For a given document type, the pagelet lists each employee's name, the due date, and a color-coded button that identifies if the document is complete, on schedule, behind schedule, or cancelled.

To enable managers to use the pagelet, you must:

1. Activate the Employee Performance pagelet.
2. Define the default rules for the pagelet.

Related Links

[PeopleSoft Pagelet Activation and Personalization](#)

Employee Performance Alerts Setup Page

Use the Employee Performance Alerts Setup page (EP_ALERT_SETUP) to define settings for the Employee Performance Alerts Setup page.

Navigation:

Set Up HCM > Product Related > ePerformance > Pagelet Alerts > Employee Performance Alerts Setup

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

Employee Performance Alerts Setup

*Doc Type <input type="text" value="Annual Review"/>																																	
*Period End Date >= <input type="text" value="01/01/2001"/> 																																	
*Employees to display <input type="text" value="5"/>																																	
<table border="1"> <tr> <th colspan="2">Self Service Edits</th> <th colspan="2">Display Alert Levels</th> </tr> <tr> <td><input checked="" type="checkbox"/> Allow changes to Type</td> <td><input checked="" type="checkbox"/> Complete (✓)</td> <td><input checked="" type="checkbox"/> Allow changes to Date Range</td> <td><input checked="" type="checkbox"/> On Schedule (◊)</td> </tr> <tr> <td><input checked="" type="checkbox"/> Allow changes to Alert Levels</td> <td><input checked="" type="checkbox"/> Standard Alert (▽)</td> <td><input checked="" type="checkbox"/> Allow changes to Alert Days</td> <td><input checked="" type="checkbox"/> Critical Alert (■)</td> </tr> <tr> <td><input checked="" type="checkbox"/> Allow changes to Nbr Employees</td> <td><input checked="" type="checkbox"/> Canceled (✖)</td> <td></td> <td></td> </tr> </table>		Self Service Edits		Display Alert Levels		<input checked="" type="checkbox"/> Allow changes to Type	<input checked="" type="checkbox"/> Complete (✓)	<input checked="" type="checkbox"/> Allow changes to Date Range	<input checked="" type="checkbox"/> On Schedule (◊)	<input checked="" type="checkbox"/> Allow changes to Alert Levels	<input checked="" type="checkbox"/> Standard Alert (▽)	<input checked="" type="checkbox"/> Allow changes to Alert Days	<input checked="" type="checkbox"/> Critical Alert (■)	<input checked="" type="checkbox"/> Allow changes to Nbr Employees	<input checked="" type="checkbox"/> Canceled (✖)																		
Self Service Edits		Display Alert Levels																															
<input checked="" type="checkbox"/> Allow changes to Type	<input checked="" type="checkbox"/> Complete (✓)	<input checked="" type="checkbox"/> Allow changes to Date Range	<input checked="" type="checkbox"/> On Schedule (◊)																														
<input checked="" type="checkbox"/> Allow changes to Alert Levels	<input checked="" type="checkbox"/> Standard Alert (▽)	<input checked="" type="checkbox"/> Allow changes to Alert Days	<input checked="" type="checkbox"/> Critical Alert (■)																														
<input checked="" type="checkbox"/> Allow changes to Nbr Employees	<input checked="" type="checkbox"/> Canceled (✖)																																
<table border="1"> <tr> <th colspan="2">Alert Days Before Due Date</th> </tr> <tr> <th>Sequence</th> <th>Document Status</th> <th>Critical Alerts</th> <th>Standard Alerts</th> <th></th> <th></th> </tr> <tr> <td>10</td> <td>Acknowledged</td> <td>5</td> <td>15</td> <td></td> <td></td> </tr> <tr> <td>20</td> <td>Pending Acknowledgement</td> <td>10</td> <td>20</td> <td></td> <td></td> </tr> <tr> <td>30</td> <td>Shared with Employee</td> <td>15</td> <td>25</td> <td></td> <td></td> </tr> <tr> <td>40</td> <td>Evaluation in Progress</td> <td>20</td> <td>60</td> <td></td> <td></td> </tr> </table>		Alert Days Before Due Date		Sequence	Document Status	Critical Alerts	Standard Alerts			10	Acknowledged	5	15			20	Pending Acknowledgement	10	20			30	Shared with Employee	15	25			40	Evaluation in Progress	20	60		
Alert Days Before Due Date																																	
Sequence	Document Status	Critical Alerts	Standard Alerts																														
10	Acknowledged	5	15																														
20	Pending Acknowledgement	10	20																														
30	Shared with Employee	15	25																														
40	Evaluation in Progress	20	60																														
* Required Field																																	
<input type="button" value="Save"/>																																	

Field or Control	Description
Doc Type (document type)	Select the type of document to list on the Employee Performance pagelet. You define document types on the Document Types page. See “Defining Document Types” (PeopleSoft ePerformance).
Period End Date >= (period end greater than or equal to)	Select the end date for the performance period for which documents are to be listed. The system lists documents with the same period end date or later.
Employees to display	Enter the number of employees to list on the pagelet. If the number of employees with documents exceeds this number, the pagelet automatically includes a More link that enables the manager to list all employees with the selected document type.

Self Service Edits

Use this group box to define how much control managers can have over the appearance of their Employee Performance pagelet. If you select any of the check boxes here, the manager can change the selected default settings. To change the settings on the Employee Performance pagelet, click the **Customize** button on the pagelet to access the Employee Performance Alerts Settings page.

See [Defining Default Settings for the Employee Performance Alerts Pagelet](#).

Field or Control	Description
Allow changes to Type	Select to enable managers to pick a document type other than the one you selected in the Type field.
Allow changes to Date Range	Select to enable managers to enter a different date range.
Allow changes to Alert Levels	Select to enable managers to determine which alerts should appear on the pagelet.
Allow changes to Alert Days	Select to enable managers to change the number of days before the due date that triggers the alerts.
Allow changes to Nbr Employees (allow changes to number of employees)	Select to enable managers to change the number of employees that are listed on the pagelet when the pagelet is opened.

Display Alert Levels

Use this group box to select the types of alerts that should appear. Select the corresponding check box for each alert to display.

Alert Days Before Due Date

Use this group box to select the statuses that are to trigger alerts and the number of days prior to the due date that an alert is to be considered standard versus critical.

Field or Control	Description
Sequence	<p>Enter the order in which this document status is to appear on the Employee Performance Alerts Personalization page.</p> <p>See Defining Default Settings for the Employee Performance Alerts Pagelet.</p>

Field or Control	Description
Document Status	<p>Select the status to trigger an alert. Values are: <i>Acknowledged</i>, <i>Available for Review</i>, <i>Cancelled</i>, <i>Completed</i>, <i>In Progress</i>, <i>Not Started</i> and <i>Review Held</i>.</p> <p>See “Understanding Inquiry Pages” (PeopleSoft ePerformance).</p>
Critical Alerts and Standard Alerts	<p>These fields apply only if you select Critical Alert and Standard Alert in the Display Alert Levels group box.</p> <p>Enter the number of days before a document's due date that a critical alert button or a standard alert button is to appear if the document is still in the selected status.</p> <p>For example, suppose that you select the status <i>In Progress</i>, and enter <i>30</i> in the Critical Alerts field and <i>60</i> in the Standard Alerts field. This causes the standard alert button to appear on the pagelet when a document is in progress from 31 to 60 days before its due date. The critical alert button appears if the document is still in progress 30 days or less before the due date.</p>

Related Links

[Defining Default Settings for the Employee Performance Alerts Pagelet](#)

[Employee Performance Alerts Settings Page](#)

Defining Default Settings for the Open Positions Pagelet

To set default settings for the Open Positions pagelet, use the Open Positions Setup (CO_PE_VACPOS_SETUP) component.

Page Used to Define Default Settings for the Open Positions Pagelet

Page Name	Definition Name	Usage
Setup Open Positions Page	CO_PE_VACPOS_SETUP	Define default rules for the Setup Open Positions pagelet personalization options.

Related Links

[Personalize Open Positions Page](#)

Activating the Open Positions Pagelet

The Open Positions pagelet is a self-service pagelet that managers can use to quickly check the status of open positions. The pagelet displays position information and links to other related position pages.

To enable managers to use the pagelet, you must:

1. Activate the Open Positions pagelet.
2. Define the default settings for the pagelet.

Related Links

[PeopleSoft Pagelet Activation and Personalization](#)

Setup Open Positions Page

Use the Setup Open Positions page (CO_PE_VACPOS_SETUP) to define default rules for the Setup Open Positions pagelet personalization options.

Navigation:

Set Up HCM > Product Related > HCM Portal Pack > Setup Open Positions

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

Pagelet Administration

Setup Open Positions

Detailed Position Description	
Display Position Description Link	<input checked="" type="checkbox"/>
Create/View Job Requisitions	
Display/Create Job Req and Review Job Req links	<input checked="" type="checkbox"/>
<input type="button" value="Save"/>	

Field or Control	Description
Display Position Description Link	Select to display the Position Description link. This link provides access to the Position Description page where you can view the position description.
Display/Create Job Req and Review Job Req links (display/create job requisitions and review job requisitions links)	Select to display the job requisition links. This link provides access to the Job Requisition page where you can review existing job requisitions or create a new one.

Related Links

[Personalize Open Positions Page](#)

Using HCM Portal Pack Pagelets

Common Elements in HCM Portal Pack Pagelets

Pagelet Controls

These controls appear in pagelet title bars.

Field or Control	Description
	Click the Refresh icon to refresh data in pagelets that show real-time information.
	Click the Pagelet Settings icon to display a menu of possible actions. <ul style="list-style-type: none">• Personalize: Select this option to access options for configuring the pagelet content. Not all pagelets have personalization options.• Minimize or Expand• Remove

Other Common Elements

Field or Control	Description
Number of Rows (1 to 99)	Enter the number of rows to display on the page.
Days to view in the future	Enter the number of days in the future that the system should use to display upcoming events.
Days to view in the past	Enter the number of days in the past that the system should use to display past events.
Maximum displayed rows	Enter the maximum number of rows that should appear on the page. This only limits the number of rows that appear and does not limit the amount of information that the system retrieves.

Field or Control	Description
More	Click this link to view more information.
!	Indicates that an approaching date is within the defined alert limit.

Displaying Portal Pagelets

You can control the pagelet selection and, optionally the layout, for your users by using the Portal homepage feature in PeopleTools. To make pagelets available for selection and display:

1. Select **PeopleTools** > **Portal** > **Structure and Content**.
2. Select the **Portal Objects** link on the Structure and Content page.
3. Select the **Homepage** link.
4. Select the **Tabs** link.
5. Select the **Edit** link for My Page in the **Content References** grid.
6. Access the Tab Content page (select the Tab Content tab).
7. Use the Tab Content page to select pagelets and define their behavior. Select *Required* or *Req-Fix* to make the pagelets always appear on users' homepages. Using *Req-Fix* also prevents pagelets from being moved on the homepage.
8. Use the Tab Layout page to arrange any required pagelets.

Note: Access to pagelets is also controlled by the standard PeopleTools component security. Even with the pagelet selected using the previous procedure, you cannot see the pagelet as a content choice unless you also have the PeopleTools security to access the component through your role and its permission lists.

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

The next example displays a personalized homepage using PeopleSoft HCM portal pagelets. After defining portal objects in PeopleTools, individual users can click the **Content** link in the upper left-hand corner to define pagelets for their homepage, and click the **Layout** link to arrange their homepage elements. The example uses a three-column layout.

By default, portal pagelets display action bars in the upper right-hand corner that, depending on the pagelet properties, enable you to minimize, personalize, or remove the pagelet from the homepage.

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

Birthday Alerts
No employee birthdays at this time

Stock Options
Global Business Institute

Grant Number	Grant Date	Type	Price
0000000402	12/30/1999	ISO	\$21.750000
0000000372	12/31/1998	ISO	\$27.500000
0000000346	12/31/1997	ISO	\$22.125000
0000000313	12/31/1996	ISO	\$23.125000
0000000289	12/29/1995	ISO	\$19.000000
0000000262	12/31/1994	ISO	\$10.375000

Time Management Alerts

Alerts	Occurrences
Overtime Limit Reached	0
Overtime Approval Required	0
Payable Time Approval Required	9
Exceptions to Review	35
Absence Approval Required	0

Direct Reports Phones

Name	Business	Extension
Adland Chu		
Diane Palmer		
Susan Hoinck	925.555.3654	

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

Personalizing Pagelets

Each individual user can personalize the content for their pagelets by clicking the **Customize** (pencil) button on the pagelet headers.

Pages Used to Personalize Pagelets

Page Name	Definition Name	Usage
Personalize Alerts Page	CO_PE_OPR_BIRTH_PG CO_PE_OPR_ANNIV_PG CO_PEOPRLIC_EMP_PG CO_PE_OPREXPLIC_PG	Define default display preferences. You can define the number of days to view in the future and in the past and the maximum number of rows to display on the Birthday Alerts, Anniversary Alerts, Employee Expiring Licenses, and Manager Expiring Licenses pagelet.
Personalize Direct Reports Page	CO_PE_OPR_DIRPT_PG	Specify the maximum number of rows to display on the Direct Reports pagelet, and specify if you want the business phone, employee ID, job title, or location to also display.

Page Name	Definition Name	Usage
<u>Select Job Title Page</u>	HR_PE_EMPL_LV_EXT	Specify settings to display on the Manager Leave Summary page and the Employee Leave Summary page.
<u>Personalize Stock Options Page</u>	ST_PE_OPTION_PREF	Specify the display preferences and display fields to display on the Stock Options pagelet.
<u>Employee Performance Alerts Settings Page</u>	EP_PE_OPR_ALERT	Specify the display preferences, alert levels, and alert days before due date to display on the Employee Performance pagelet.
<u>Personalize Upcoming Training Page</u>	CO_PE_TRN_MGR_N	Specify the number of rows to display on the Upcoming Training pagelet, and specify the days to view each item the future.
<u>Personalize Scheduled Training Page</u>	CO_PE_TRN_MGR_PG	Specify the number of rows to display on the Scheduled Training pagelet, and specify the days to view each item the future.
<u>Personalize Open Positions Page</u>	CO_PE_VACPOS_CUST	Specify the number of rows to display on the Open Positions pagelet. System administrators define additional default display settings on the Pagelet Administration - Open Positions page.
<u>Personalize Time Management Alerts Page</u>	TL_PE_MGR_TMMGT_P	Select the alerts to display on the Time Management Alerts pagelet.
<u>Personalize Workforce Availability Page</u>	TL_PE_MGR_WRKFRC_P	Select the alerts to display on the Workforce Availability pagelet.
<u>Personalize Phones Page</u>	CO_PE_OPR_PHN_PG	Specify the number of rows to display on the Direct Reports Phones pagelet, and specify the phone types (business, home, campus, mobile and so on) to display.
<u>Personalize My Reports Page</u>	PSRF_PGLT_OPTIONS	Specify the maximum number of reports within a specified number of days or hours that should display on the My Reports pagelet.

Personalize Direct Reports Page

Use the Personalize Direct Reports page (CO_PE_OPR_DIRPT_PG) to specify the maximum number of rows to display on the Direct Reports pagelet, and specify if you want the business phone, employee ID, job title, or location to also display.

Navigation:

Click the **Customize** button and select **Personalize** on the Direct Reports pagelet.

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

Personalize Direct Reports

Display Preferences

*Maximum displayed rows

*Display Additional Information

Field or Control	Description
Display Additional Information	<p>Values include:</p> <ul style="list-style-type: none"> • <i>Display Business Phone</i> • <i>Display Employee Id</i> • <i>Display Job Title</i> • <i>Display Location</i>

Select Job Title Page

Use the Select Job Title page (HR_PE_EMPL_LV_EXT) to specify settings to display on the Manager Leave Summary page and the Employee Leave Summary page.

Navigation:

- Click the **Customize** button and select **Personalize** on the Employee Leave Summary pagelet.
- Click the **Customize** button and select **Personalize** on the Manager Leave Summary pagelet.

This example illustrates the fields and controls on the Select Job Title page for the Manager Leave Summary pagelet. You can find definitions for the fields and controls later on this page.

Select Job Title

Job Information		
Job Title	Department	Supervisor Name
Director-Finance	Corporate Finance	

Absences

View Absences for the last weeks

View Absences for the next weeks

[Return](#)

Field or Control	Description
View Absences for the last and View Absences for the next	<p>Enter the number of weeks in the past and in advance for which you want to display absence information.</p> <p>Note: These fields appear only on the manager version of this pagelet.</p>

Personalize Stock Options Page

Use the Personalize Stock Options page (ST_PE_OPTION_PREF) to specify the display preferences and display fields to display on the Stock Options pagelet.

Navigation:

Click the **Customize** button and select **Personalize** on the Stock Options pagelet.

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

Personalize Stock Options

Use this page to specify the default values used in displaying your stock options.

Display Preferences

Default Company Stock: Global Business Institute

*Max Number of Displayed Rows: 05

Sort By: Grant Number

Display Fields- Select up to 4

Grant Number

Grant Date

Option Type

Grant Price

Shares Granted

Shares Exercisable

-----Or-----

Last Vesting Date

Save [Return Home](#)

Display Preferences

Field or Control	Description
Default Company Stock	Select the company for which you want to display stock option information.
Max Number of Displayed Rows (maximum number of displayed rows)	For multiple stock option grants, select the number of rows to appear on the pagelet. If the number of grants exceeds the number of rows, the system automatically displays the More link.
Sort By	Define how the information is sorted. Values are: <i>Grant Date</i> , <i>Grant Number</i> , <i>Grant Price</i> , and <i>Option Type</i> .

Display Fields - Select up to 4

Each check box that you select appears on the pagelet. You can select up to four fields from this list. Selecting **Last Vesting Date** overrides all of the other display options.

Field or Control	Description
Grant Number	Displays the grant issue number.
Grant Date	Displays the issue date of each grant listed.
Option Type	Displays the type of option for each grant.
Grant Price	Displays the issue price for each grant.
Shares Granted	Displays the number of shares granted for each grant.
Shares Exercisable	Displays the number of shares currently exercisable for each grant listed.
Last Vesting Date	Displays only the last date that options vested and does not display any additional information about the options.

Employee Performance Alerts Settings Page

Use the Employee Performance Alerts Settings page (EP_PE_OPR_ALERT) to specify the display preferences, alert levels, and alert days before due date to display on the Employee Performance pagelet.

Navigation:

Click the **Customize** button on the Employee Performance pagelet.

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

Employee Performance Alerts Setup

*Doc Type: Annual Review

*Period End Date >=: 01/01/2001

*Employees to display: 5

Self Service Edits		Display Alert Levels			
<input checked="" type="checkbox"/> Allow changes to Type <input checked="" type="checkbox"/> Allow changes to Date Range <input checked="" type="checkbox"/> Allow changes to Alert Levels <input checked="" type="checkbox"/> Allow changes to Alert Days <input checked="" type="checkbox"/> Allow changes to Nbr Employees		<input checked="" type="checkbox"/> Complete (✓) <input checked="" type="checkbox"/> On Schedule (◆) <input checked="" type="checkbox"/> Standard Alert (▼) <input checked="" type="checkbox"/> Critical Alert (■) <input checked="" type="checkbox"/> Canceled (✗)			
Alert Days Before Due Date					
Sequence	Document Status	Critical Alerts	Standard Alerts		
10	Acknowledged	5	15	<input style="width: 20px; height: 20px; border: 1px solid #ccc;" type="button" value="+"/>	<input style="width: 20px; height: 20px; border: 1px solid #ccc;" type="button" value="-"/>
20	Pending Acknowledgement	10	20	<input style="width: 20px; height: 20px; border: 1px solid #ccc;" type="button" value="+"/>	<input style="width: 20px; height: 20px; border: 1px solid #ccc;" type="button" value="-"/>
30	Shared with Employee	15	25	<input style="width: 20px; height: 20px; border: 1px solid #ccc;" type="button" value="+"/>	<input style="width: 20px; height: 20px; border: 1px solid #ccc;" type="button" value="-"/>
40	Evaluation in Progress	20	60	<input style="width: 20px; height: 20px; border: 1px solid #ccc;" type="button" value="+"/>	<input style="width: 20px; height: 20px; border: 1px solid #ccc;" type="button" value="-"/>

Field or Control	Description
Document Type	Select the type of document that you want to appear. You define document types on the Document Types page.
Period End Date >=	Select the end date of the performance period for which documents are to be listed. The system lists documents with the same date or later than the date entered here.
Employees to display	Enter the number of employees to list on the pagelet.
Use Default Settings	<p>Click to reset the values on the page to the values that you defined when you last set up this page. Values are defaulted from product level.</p> <hr/> <p>Note: This button does not appear on the Employee Performance Alerts Setup (EP_ALERT_SETUP) page when you are defining the settings. It appears only on the Employee Performance Alerts Setup (EP_PEOPR_ALERT) page, which is accessed when a user clicks Customize from the Employee Performance pagelet.</p>

Note: Fields that display on this page are defined on the Employee Performance Alerts Setup page and may vary depending on the setup defined there.

Alert Levels to Include

Select the desired alert levels to include on the Employee Performance page.

Alert Days Before Due Date

For each document status type (*Acknowledged, Review Held, Available for Review, In Progress, Cancelled* and *Complete*), define the number of days before a document's due date that a critical or standard alert appears.

Related Links

[Defining Default Settings for the Employee Performance Alerts Pagelet](#)

“Defining Document Types” (PeopleSoft ePerformance)

Personalize Upcoming Training Page

Use the Personalize Upcoming Training page (CO_PE_TRN_MGR_N) to specify the number of rows to display on the Upcoming Training pagelet, and specify the days to view each item in the future.

Navigation:

Click the **Customize** button and select **Personalize** on the Upcoming Training pagelet.

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

Personalize Upcoming Training

Indicate the maximum number of courses to display on the home page. Also, specify the number of days in the future you would like to see courses for.

Display Preferences

*Maximum displayed rows

*Days to view in the future

Save **Return**

Field or Control	Description
Maximum displayed rows	Enter the number of rows of training information you want to display on the Upcoming Training pagelet.
Days to view in the future	Enter the number of days into the future for which you want to see upcoming training.

Personalize Scheduled Training Page

Use the Personalize Scheduled Training page (CO_PE_TRN_MGR_PG) to specify the number of rows to display on the Scheduled Training pagelet, and specify the days to view each item in the future.

Navigation:

Click the **Customize** button and select **Personalize** on the Scheduled Training pagelet.

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

Personalize Scheduled Training

Indicate the maximum number of courses to display on the home page. Also, specify the number of days in the future you would like to see courses for.

Display Preferences

*Maximum displayed rows

*Days to view in the future

Save **Return**

Field or Control	Description
Maximum displayed rows	Enter the number of rows of training information you want to display on the Scheduled Training pagelet.
Days to view in the future	Enter the number of days into the future for which you want to see scheduled training.

Personalize Open Positions Page

Use the Personalize Open Positions page (CO_PE_VACPOS_CUST) to specify the number of rows to display on the Open Positions pagelet.

System administrators define additional default display settings on the Pagelet Administration - Open Positions page.

Navigation:

Click the **Customize** button and select **Personalize** on the Open Positions pagelet.

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

Personalize Open Positions

Specify the number of open positions you would like to see on the home page.

Display Preferences

*Number of Rows (1 to 99)

* Required Field

Save **Return**

Enter the number of positions that you want to display on the Open Positions pagelet.

Personalize Time Management Alerts Page

Use the Personalize Time Management Alerts page (TL_PE_MGR_TMMGT_P) to select the alerts to display on the Time Management Alerts pagelet.

Navigation:

Click the **Customize** button and select **Personalize** on the Time Management Alerts pagelet.

This example illustrates the fields and controls on the Personalize Time Management Alerts page. You can find definitions for the fields and controls later on this page.

Personalize Time Management Alerts

Alerts to Display

Overtime Limit Reached
 Overtime Approval Required
 Payable Time Approval Required
 Exceptions to Review
 Absence Approval Required

Save **Return**

Use this page to select which time management alerts you want to make available on the Time Management Alert pagelet.

Field or Control	Description
Overtime Limit Reached	Select to display those employees who have reached the overtime limit.
Overtime Approval Required	Select to display those employees who have requested overtime approval.
Payable Time Approval Required	Select to display those employees who have payable time which requires approval.
Exceptions to Review	Select to display time reporting exceptions that require review.
Absence Approval Required	Select to display requested Global Payroll absences which require approval.

Related Links

“Understanding the Time Reporting Process” (PeopleSoft Time and Labor)

Personalize Workforce Availability Page

Use the Personalize Workforce Availability page (TL_PE_MGR_WRKFRC_P) to select the alerts to display on the Workforce Availability pagelet.

Navigation:

Click the **Customize** button and select **Personalize** on the Workforce Availability pagelet.

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

Personalize Workforce Availability

Alerts to Display

Currently Clocked In
 No Show for Current Shift
 Scheduled for Current Shift
 Reported Absent for Today
 Reported In Training for Today

Use this page to select which workforce availability alerts you want to make available on the Workforce Availability pagelet.

Field or Control	Description
Currently Clocked In	Select to display employees who are currently clocked in for the current punch shift.
No Show for Current Shift	Select to display employees who are scheduled for the current punch shift but have not clocked in.
Scheduled for Current Shift	Select to display employees who are scheduled for the current punch shift.
Reported Absent for Today	<p>Select to display employees who are reported as absent.</p> <p>If PeopleSoft Global Payroll is installed, the system determines if any absences are reported in the absence pages. In addition, the system detects any leave time reporting codes (TRCs) in the PeopleSoft Time and Labor application's reported elapsed time, which is not a Global Payroll absence.</p>
Reported In Training for Today	<p>Select to display employees who have scheduled, approved training for the day.</p> <p>This count will include the attendance statuses from the Training Administration business process of currently attending, completed, enrolled, approved and authorized.</p>

Personalize Phones Page

Use the Personalize Phones page (CO_PE_OPR_PHN_PG) to specify the number of rows to display on the Direct Reports Phones pagelet, and specify the phone types (business, home, campus, mobile and so on) to display.

Navigation:

Click the **Customize** button and select **Personalize** on the Direct Reports Phones pagelet.

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

Personalize Phones

Specify the number of direct reports you would like to see on the pagelet. Select up to three columns to display in addition to employee name.

Display Preferences

Maximum displayed rows

Display Phone Type 1

Display Phone Type 2

Display Phone Type 3

Save **Return**

Field or Control	Description
Display Phone Type 1	Select up to three phone types and in the order in which you want them to appear.

Viewing Manager Pagelets

This topic discusses the:

- [Birthday Alerts Pagelet](#)
- [Anniversary Alerts Pagelet](#)
- [Direct Reports Pagelet](#)
- [Manager Leave Summary Pagelet](#)
- [Employee Performance Pagelet](#)
- [Scheduled Training Pagelet](#)
- [Manager Expiring Licenses Pagelet](#)
- [Open Positions Pagelet](#)
- [Time Management Alerts Pagelet](#)
- [Workforce Availability Pagelet](#)
- [Direct Reports Phones Pagelet](#)

Note: You can personalize many of these pagelets, so their appearance can differ from how they are described in this documentation.

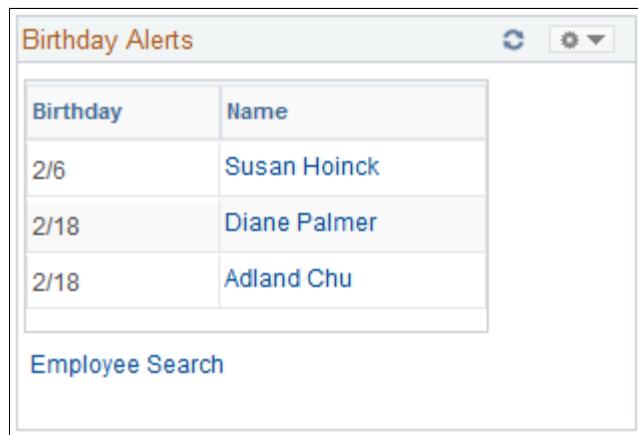
Related Links

[Personalizing Pagelets](#)

Birthday Alerts Pagelet

The Birthday Alerts pagelet displays upcoming employee birthdays.

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



The screenshot shows a window titled "Birthday Alerts". Inside, there is a table with two columns: "Birthday" and "Name". The data in the table is as follows:

Birthday	Name
2/6	Susan Hoinck
2/18	Diane Palmer
2/18	Adland Chu

Below the table, there is a link labeled "Employee Search".

Managers use this pagelet to view the birth dates for their direct reports.

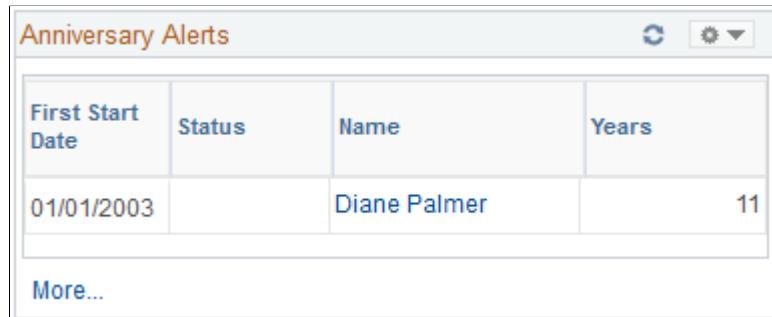
Click an employee name to access the Employee Information page in PeopleSoft eProfile where you can view additional information about a specific employee and access links to pages with more specific employee information.

Click **Employee Search** to access the Employee Search page to look for a specific employee.

Anniversary Alerts Pagelet

The Anniversary Alerts pagelet displays upcoming employee job anniversaries.

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



The screenshot shows a window titled "Anniversary Alerts". Inside, there is a table with four columns: "First Start Date", "Status", "Name", and "Years". The data in the table is as follows:

First Start Date	Status	Name	Years
01/01/2003		Diane Palmer	11

Below the table, there is a link labeled "More...".

Managers use this pagelet to view the hire date for their direct reports.

Click an employee name to access the Employee Information page where you can view additional information about a specific employee and access links to pages with more specific employee information.

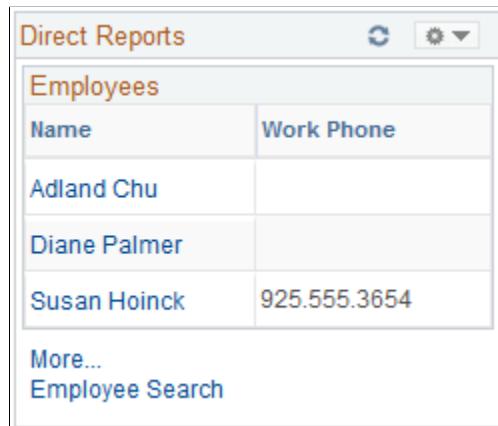
This pagelet uses time and labor group security or defaults to department security to determine the employees reporting to a manager. The reporting structure also depends on the association to the manager's row security permission list.

The date that appears in the **First Start Date** column is the current date, unless the time and labor date is enabled on the Time and Labor Permission List page for the manager's row security permission list.

Direct Reports Pagelet

The Direct Reports pagelet displays information on direct reports.

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



Managers use this pagelet to view a list of their direct reports.

Field or Control	Description
Name	Click a link in the Name column to access the View Employee Personal Information page where you enter data and click Continueto access the Employee Information page in eProfile. On the Employee Information page in eProfile, you can view additional details for a specific employee. The Employee Information page also contains links to related employee data pages.
More	Click to access a wide version of the pagelet with multiple columns showing additional data. The narrow version displays only the data specified in the Display Additional Information field on the Personalize Direct Reports page.

Field or Control	Description
Employee Search	Click to access the Employee Search page where you can define search criteria to find a specific employee.
Skill	<p>Click to access the Current Team Profiles page for profiles to which you have security access, where you can view detailed information regarding the skills of a selected employee.</p> <p>Note: The Skilllink appears only on the wide version of the Direct Reports pagelet.</p>
Training	<p>Click to access the Training Summary page where you can view detailed information regarding training for a specific employee.</p> <p>Note: The Traininglink appears only on the wide version of the Direct Reports pagelet.</p>

Manager Leave Summary Pagelet

The Manager Leave Summary pagelet displays information about absence requests from employees.

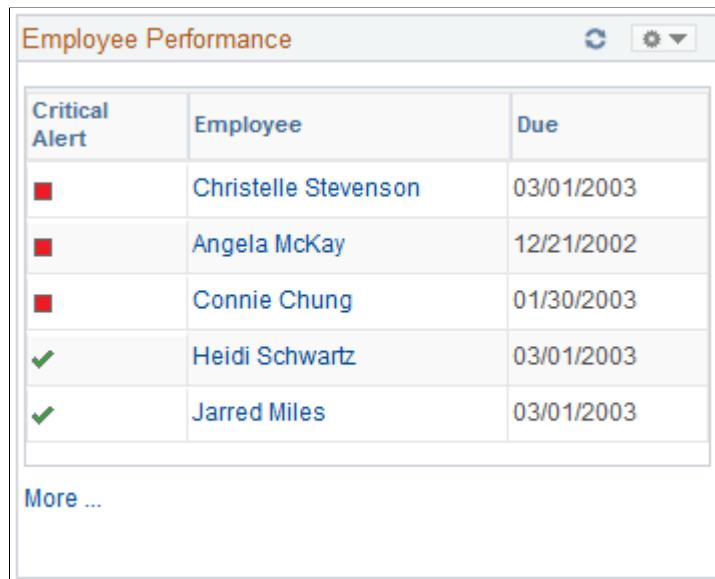
This pagelet displays information for absence requests. Select a value in the **Your Employee's Absence Request** to access Absence Requests page. You use the page to review absence requests by status and to access absence requests details.

Click the **More** link to view additional requests if they exist.

Employee Performance Pagelet

The Employee Performance pagelet displays summarized employee performance information.

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



The screenshot shows a pagelet titled "Employee Performance". The table has three columns: "Critical Alert", "Employee", and "Due". The data is as follows:

Critical Alert	Employee	Due
■	Christelle Stevenson	03/01/2003
■	Angela McKay	12/21/2002
■	Connie Chung	01/30/2003
✓	Heidi Schwartz	03/01/2003
✓	Jarred Miles	03/01/2003

Below the table, there is a link labeled "More ...".

Managers use this pagelet to check the status of the performance document for which they are responsible. The pagelet lists the employees with performance documents, the dues dates, and an indicator that shows whether a document is complete, on schedule, behind schedule, or cancelled.

Field or Control	Description
Employee	Click an employee name link to access the Maintain Performance Document page. The type of document that appears on the Maintain Performance Document page depends on the document types that you set up on the Employee Performance Alerts Settings page.
More	Click this link to access performance information for additional employees.

Related Links

[Defining Default Settings for the Employee Performance Alerts Pagelet](#)

Scheduled Training Pagelet

The Scheduled Training pagelet displays employee training that has been scheduled. The page also displays the course start date and the enrollment status.

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

Employee Name	Course Start Date	Enrollment Status
Susan Hoinck	02/02/2014	Enrolled

[More...](#)

Click an employee name link to access the Training Summary page where you can view details regarding the selected employee's training. The Training Summary page provides detailed information on training including internal and external training and courses that have been completed.

Click the **More** link to access the Scheduled Training page.

Related Links

“Reviewing Training History Information” (PeopleSoft eDevelopment)

“Understanding the Self-Service Training Development Process” (PeopleSoft eDevelopment)

Manager Expiring Licenses Pagelet

The Manager Expiring Licenses pagelet displays employee information on licenses and certificates which employees hold related to their jobs.

This example illustrates the fields and controls on the Manager Expiring Licenses pagelet. You can find definitions for the fields and controls later on this page.

Licenses and Certificates	
Name	License/Certificate
Adland Chu*	Cardio Pulmonary Resuscitation

An asterisk next to the employee name implies that the license is being renewed. Click an employee name link to access the License/Certificate Detail page to view details of a selected employee's license or certificate.

Open Positions Pagelet

The Open Positions pagelet displays information on positions currently open.

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

Open Positions

Position	Position Headcount
Manager-Compensation/Benefits	1
Benefits Specialist	2
HRIS Specialist	2
Manager-Finance	2
Administrative Assistant	2

[More](#)

Field or Control	Description
Position	Displays the position title.

Field or Control	Description
Position Headcount	Displays the number of open positions for the corresponding position.
More	Click to access the complete list of open positions.

Related Links

[Defining Default Settings for the Open Positions Pagelet](#)

Time Management Alerts Pagelet

The Time Management Alerts pagelet displays time related events and occurrences alerts.

This example illustrates the fields and controls on the Time Management Alerts pagelet. You can find definitions for the fields and controls later on this page.

Time Management Alerts	
Alerts	Occurrences
Overtime Limit Reached	0
Overtime Approval Required	0
Payable Time Approval Required	9
Exceptions to Review	35
Absence Approval Required	0

Alert links on this pagelet are active only if there are occurrences to report and action to be taken.

The pagelet uses time and labor group security or defaults to department security to determine employees reporting to a manager, depending on the association to the manager's row security permission list. In addition, the date is determined as the current date, unless the time and labor system date is enabled on the Time and Labor Permission List page for the manager's row security permission list.

Note: This page requires implementation of Time and Labor.

Field or Control	Description
Overtime Limit Reached	<p>Click to access the View Overtime Balances page where you can view detailed information regarding overtime limits reached by employees.</p> <p>Click Get My Employees or Get Employees in Group on the View Overtime Balances page to view the overtime limits and balances.</p> <p>The occurrences equal the count of the employees that are shown to have exceeded their overtime limit when you view overtime balances.</p>
Overtime Approval Required	<p>Click to access the Approve Overtime Requests page where you can view and approve overtime requests for employees.</p> <p>The occurrences indicate the number of requests to be approved. This value equals the count of the employees that appear on the Select an Employee Request page.</p>

Field or Control	Description
Payable Time Approval Required	<p>Click to access the Approve Payable Time page where you can view and approve reported payable time.</p> <p>The occurrences indicate the number of rows of payable time to be approved.</p>
Exceptions to Review	<p>Click to access the Manage Time Exceptions page where you can view time reporting exceptions generated through time reporting.</p> <p>The occurrences indicate the number of exceptions to review.</p>
Absence Approval Required	<p>Click to view and approve Global Payroll absence requests for employees.</p> <p>This link only displays if Global Payroll is installed. The occurrences indicate the number of absence requests to be approved.</p>

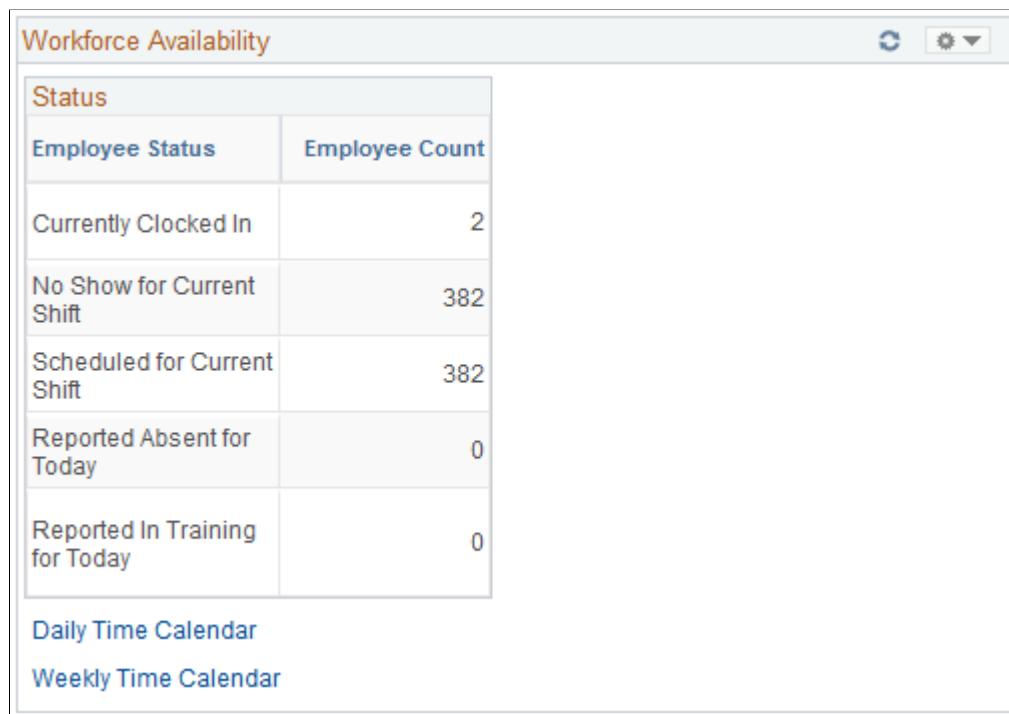
Related Links

“Managing Exceptions” (PeopleSoft Time and Labor)

Workforce Availability Pagelet

The Workforce Availability pagelet displays summarizes current availability and general absence information.

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



The screenshot shows the 'Workforce Availability' pagelet. At the top, there is a 'Status' section with a table:

Employee Status	Employee Count
Currently Clocked In	2
No Show for Current Shift	382
Scheduled for Current Shift	382
Reported Absent for Today	0
Reported In Training for Today	0

Below the table are two links: 'Daily Time Calendar' and 'Weekly Time Calendar'.

Click the **Customize** button in the upper right-hand corner to define which statuses display in the **Employee Status** column.

To populate the **Employee Count** field for the **Reported Absent for Today** status, the system checks for any absences reported in PeopleSoft Absence Management whether they are designated for PeopleSoft Payroll for North America or for Global Payroll.

The system uses data from the PeopleSoft Enterprise Learning Management application to update the **Employee Count** field for the Reported in Training for Today status. However, you must enable the application to retrieve the data. To send the training data, the system uses the Scheduled Time Fullsync and Scheduled Time Sync messages. Training data is stored in the PS_SCH_EXT_DTL record.

Field or Control	Description
Daily Time Calendar and Weekly Time Calendar	Click to access the Daily Time Calendar and Weekly Time Calendar pages to view current time-related information on employees. These time calendars provide more detailed information regarding availability details.

Related Links

[Personalize Workforce Availability Page](#)

Direct Reports Phones Pagelet

The Direct Reports Phones pagelet displays employee phone contact information.

This example illustrates the fields and controls on the Direct Reports Phones pagelet. You can find definitions for the fields and controls later on this page.

Name	Business	Extension
Adland Chu		
Diane Palmer		
Susan Hoinck	925.555.3654	

[More...](#)

To change the phone type displayed, click the **Customize** button in the upper right corner.

Field or Control	Description
Name	Click a value in the Name column to see more details about the direct report.
More	Click to access a wider version of the pagelet with multiple columns showing additional data. The narrow version displays only one phone type using Display Phone Type 1 from the Personalize Phones page.

Viewing Employee Pagelets

This topic discusses the:

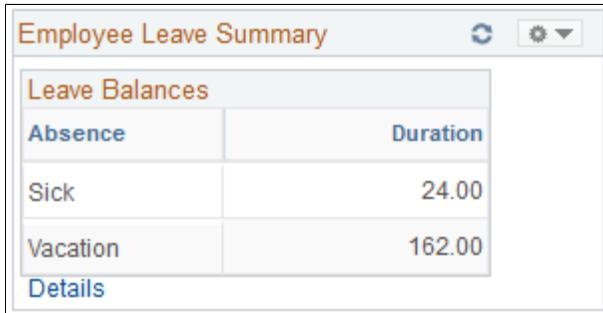
- [Employee Leave Summary Pagelet](#)
- [Stock Options Pagelet](#)
- [Paychecks Pagelet](#)
- [Organization Directory Pagelet](#)
- [Upcoming Training Pagelet](#)
- [Employee Expiring Licenses Pagelet](#)

Note: You can personalize many of these pagelets, so their appearance can differ from how they are described in this documentation.

Employee Leave Summary Pagelet

The Employee Leave Summary pagelet displays absence summary information for the employee.

This example illustrates the fields and controls on the Employee Leave Summary pagelet. You can find definitions for the fields and controls later on this page.



The screenshot shows a window titled "Employee Leave Summary". Inside, there is a table titled "Leave Balances" with two rows: "Sick" and "Vacation". The "Sick" row has a duration of "24.00". The "Vacation" row has a duration of "162.00". At the bottom of the table is a link labeled "Details".

Leave Balances	
Absence	Duration
Sick	24.00
Vacation	162.00

[Details](#)

This pagelet displays absence summary information for an employee.

For Global Payroll users, payees can review absence history, review absence balances, enter requests for absences, and forecast absence balances as of a particular date.

For Payroll for North America users: Payees can view their leave balances.

Field or Control	Description
Details	Click to access detailed information regarding absences.

Stock Options Pagelet

The Stock Options pagelet displays stock option grant information for an employee.

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

Data				
Grant Number	Grant Date	Type	Price	
0000000402	12/30/1999	ISO	\$21.750000	
0000000372	12/31/1998	ISO	\$27.500000	
0000000346	12/31/1997	ISO	\$22.125000	
0000000313	12/31/1996	ISO	\$23.125000	
0000000289	12/29/1995	ISO	\$19.000000	
0000000262	12/31/1994	ISO	\$10.375000	

More...

Employees use this pagelet to review detailed information about their stock options.

Field or Control	Description
Grant Number	Click to access the Stock Option Information page where you can view more details about a selected grant.
Grant Date	Displays when the stock was granted.
Type	Displays the type of stock plan.
Price	Displays the granted stock option price.
More	Click to access the Stock Option Summary (ST_GRANT_SUMM_OPT) page where you can view additional data including the number of shares that have been granted and the number of shares currently exercisable for each grant listed.

Related Links

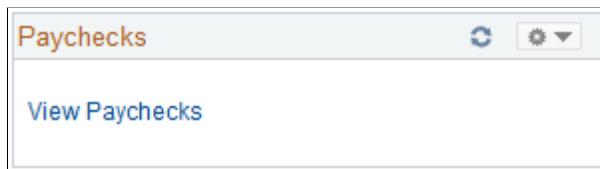
“Understanding Grant Administration” (PeopleSoft Stock Administration)

“Understanding Stock Purchase Plan Enrollment” (PeopleSoft Stock Administration)

Paychecks Pagelet

The Paychecks pagelet displays a link to the View Paycheck page.

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

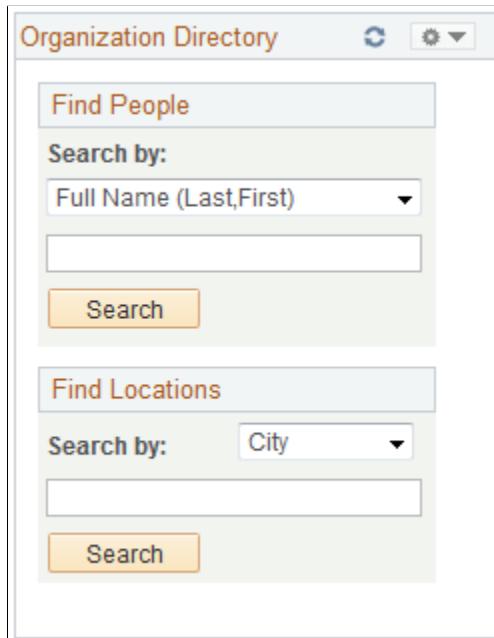


Click the **View Paychecks** link to access the View Paycheck (PY_IC_PI_LIST) page where you can select the check date of the payslip to view.

Organization Directory Pagelet

The Organization Directory pagelet displays search fields to locate employees by name and or location.

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

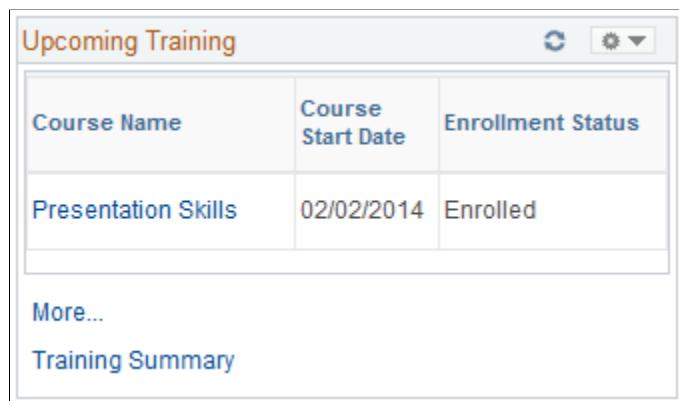


Employees use this pagelet to search for people or locations.

Upcoming Training Pagelet

The Upcoming Training pagelet displays upcoming scheduled training, including the course name, start date, and enrollment status.

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



The Upcoming Training pagelet displays a table with three columns: Course Name, Course Start Date, and Enrollment Status. The table contains one row with the following data: Presentation Skills, 02/02/2014, and Enrolled. Below the table are two links: **More...** and **Training Summary**.

Course Name	Course Start Date	Enrollment Status
Presentation Skills	02/02/2014	Enrolled

Click a course name link to access the Training Summary Course Details page where you can view more details about a specific training course.

Click the **More** link to access the Upcoming Training page.

Click the **Training Summary** link to access the Training Summary page.

Employee Expiring Licenses Pagelet

The Employee Expiring Licenses pagelet displays information on employee licenses that are nearing expiration.

This example illustrates the fields and controls on the Employee Expiring Licenses pagelet. You can find definitions for the fields and controls later on this page.



The Employee Expiring Licenses pagelet displays a table with two columns: License/Certificate and Expiration Date. The table contains one row with the following data: Cardio Pulmonary Resuscitation and 02/15/2014.

License/Certificate	Expiration Date
Cardio Pulmonary Resuscitation	02/15/2014

Click a license or certificate link to access the License/Certificate Detail page to view more details regarding a specific license or certificate that is expiring. If the renewal has been applied for, an asterisk appears at the left of the link.

