PeopleSoft®

PeopleSoft 8.8 Human Resources PeopleBook: Recruit Workforce

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Human Resources PeopleBook:
Recruit Workforce
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Contents

Chapter 8

About This PeopleBook

PeopleBooks provide you with the information that you need to implement and use PeopleSoft applications.

This preface discusses:

- PeopleSoft application prerequisites.
- PeopleSoft application fundamentals.
- Related documentation.
- Typographical elements and visual cues.
- Comments and suggestions.
- Common elements in PeopleBooks.

Note. PeopleBooks document only page elements that require additional explanation. If a page element is not documented with the process or task in which it is used, then either it requires no additional explanation or it is documented with common elements for the section, chapter, PeopleBook, or product line. Elements that are common to all PeopleSoft applications are defined in this preface.

PeopleSoft Application Prerequisites

To benefit fully from the information that is covered in these books, you should have a basic understanding of how to use PeopleSoft applications.

See *Using PeopleSoft Applications.*

You might also want to complete at least one PeopleSoft introductory training course.

You should be familiar with navigating the system and adding, updating, and deleting information by using PeopleSoft windows, menus, and pages. You should also be comfortable using the World Wide Web and the Microsoft Windows or Windows NT graphical user interface.

These books do not review navigation and other basics. They present the information that you need to use the system and implement your PeopleSoft applications most effectively.

PeopleSoft Application Fundamentals

Each application PeopleBook provides implementation and processing information for your PeopleSoft database. However, additional, essential information describing the setup and design of your system appears in a companion volume of documentation called the application fundamentals PeopleBook. Each PeopleSoft product line has its own version of this documentation.

The application fundamentals PeopleBook consists of important topics that apply to many or all PeopleSoft applications across a product line. Whether you are implementing a single application, some combination of applications within the product line, or the entire product line, you should be familiar with the contents of this central PeopleBook. It is the starting point for fundamentals, such as setting up control tables and administering security.

Related Documentation

This section discusses how to:

- Obtain documentation updates.
- Order printed documentation.

Obtaining Documentation Updates

You can find updates and additional documentation for this release, as well as previous releases, on the PeopleSoft Customer Connection Website. Through the Documentation section of PeopleSoft Customer Connection, you can download files to add to your PeopleBook Library. You'll find a variety of useful and timely materials, including updates to the full PeopleSoft documentation that is delivered on your PeopleBooks CD-ROM.

Important! Before you upgrade, you must check PeopleSoft Customer Connection for updates to the upgrade instructions. PeopleSoft continually posts updates as the upgrade process is refined.

See Also

PeopleSoft Customer Connection Website, http://www.peoplesoft.com/corp/en/login.asp

Ordering Printed Documentation

You can order printed, bound volumes of the complete PeopleSoft documentation that is delivered on your PeopleBooks CD-ROM. PeopleSoft makes printed documentation available for each major release shortly after the software is shipped. Customers and partners can order printed PeopleSoft documentation by using any of these methods:

- Web
- Telephone
- Email

Web

From the Documentation section of the PeopleSoft Customer Connection Website, access the PeopleSoft Press Website under the Ordering PeopleBooks topic. The PeopleSoft Press Website is a joint venture between PeopleSoft and Consolidated Publications Incorporated (CPI), the book print vendor. Use a credit card, money order, cashier's check, or purchase order to place your order.

Telephone

Contact CPI at 800 888 3559.

Email

Send email to CPI at psoftpress@cc.larwood.com.

See Also

PeopleSoft Customer Connection Website, http://www.peoplesoft.com/corp/en/login.asp

Typographical Conventions and Visual Cues

This section discusses:

- Typographical conventions.
- Visual cues.

Typographical Conventions

The following table contains the typographical conventions that are used in PeopleBooks:

Typographical Convention or Visual Cue	Description
Bold	Indicates PeopleCode function names, method names, language constructs, and PeopleCode reserved words that must be included literally in the function call.
Italics	Indicates field values, emphasis, and PeopleSoft or other book-length publication titles. In PeopleCode syntax, italic items are placeholders for arguments that your program must supply. We also use italics when we refer to words as words or letters as letters, as in the following: Enter the number 0, not the letter *O*.
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 W.
`Monospace font`	Indicates a PeopleCode program or other code example.
(quotation marks)	Indicate chapter titles in cross-references and words that are used differently from their intended meanings.

Typographical Convention or Visual Cue	Description
. . . (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.
(ISO)	Information that applies to a specific country, to the U.S. federal government, or to the education and government market, is preceded by a three-letter code in parentheses. The code for the U.S. federal government is USF; the code for education and government is E&G, and the country codes from the International Standards Organization are used for specific countries. Here is an example: (DEU) If you're administering German employees, German law requires you to indicate special nationality and citizenship information for German workers using nationality codes established by the German DEUEV Directive.
Cross-references	PeopleBooks provide cross-references either below the heading See Also or on a separate line preceded by the word *See.* Cross-references lead to other documentation that is pertinent to the immediately preceding documentation.

Visual Cues

PeopleBooks contain the following visual cues.

Notes

Notes indicate information that you should pay particular attention to as you work with the PeopleSoft system.

Note. Example of a note.

A note that is preceded by *Important!* is crucial and includes information that concerns what you must do for the system to function properly.

Important! Example of an important note.

Warnings

Warnings indicate crucial configuration considerations. Pay close attention to warning messages.

Warning! Example of a warning.

Comments and Suggestions

Your comments are important to us. We encourage you to tell us what you like, or what you would like to see changed about PeopleBooks and other PeopleSoft reference and training materials. Please send your suggestions to:

PeopleSoft Product Documentation Manager PeopleSoft, Inc. 4460 Hacienda Drive Pleasanton, CA 94588

Or send email comments to doc@peoplesoft.com.

While we cannot guarantee to answer every email message, we will pay careful attention to your comments and suggestions.

Common Elements in These PeopleBooks

As of Date The last date for which a report or process includes data.

Business Unit An ID that represents a high-level organization of business information. You can use a business unit to define regional or departmental units within a larger organization.

Description Enter up to 30 characters of text.

Effective Date The date on which a table row becomes effective; the date that an action begins. For example, to close out a ledger on June 30, the effective date for the ledger closing would be July 1. This date also determines when you can view and change the information. Pages or panels and batch processes that use the information use the current row.

Once, Always, and **Don't Run** Select Once to run the request the next time the batch process runs. After the batch process runs, the process frequency is automatically set to Don't Run.

Select Always to run the request every time the batch process runs.

Select Don't Run to ignore the request when the batch process runs.

Report Manager	Click to access the Report List page, where you can view report content, check the status of a report, and see content detail messages (which show you a description of the report and the distribution list).
Process Monitor	Click to access the Process List page, where you can view the status of submitted process requests.
Run	Click to access the Process Scheduler request page, where you can specify the location where a process or job runs and the process output format.
Request ID	An ID that represents a set of selection criteria for a report or process.
User ID	An ID that represents the person who generates a transaction.
SetID	An ID that represents a set of control table information, or TableSets. TableSets enable you to share control table information and processing options among business units. The goal is to minimize redundant data and system maintenance tasks. When you assign a setID to a record group in a business unit, you indicate that all of the tables in the record group are shared between that business unit and any other business unit that also assigns that setID to that record group. For example, you can define a group of common job codes that are shared between several business units. Each business unit that shares the job codes is assigned the same setID for that record group.
Short Description	Enter up to 15 characters of text.

See Also

Using PeopleSoft Applications

PeopleSoft Process Scheduler

PeopleSoft Human Resources Recruit Workforce Preface

This preface discusses:

- PeopleSoft application fundamentals.
- PeopleBook structure.
- Common elements used in this PeopleBook.

Note. This PeopleBook documents only page elements that require additional explanation. If a page element is not documented with the process or task in which it is used, then either it requires no additional explanation or it is documented with common elements for the section, chapter, PeopleBook, or product line.

PeopleSoft Application Fundamentals

The *PeopleSoft Human Resources PeopleBook: Recruit Workforce* provides you with implementation and processing information for your PeopleSoft Human Resources — Recruit Workforce system. Additionally, essential information describing the setup and design of your system appears in a companion volume of documentation called *PeopleSoft Application Fundamentals for HRMS PeopleBook*. Each PeopleSoft product line has its own version of this documentation.

PeopleSoft Application Fundamentals for HRMS PeopleBook consists of important topics that apply to many or all PeopleSoft applications across the PeopleSoft HRMS product line. No matter which PeopleSoft HRMS products you are implementing, you should be familiar with the contents of this central PeopleBook. It is the starting point for fundamentals, such as setting up control tables and administering security.

See Also

PeopleSoft Application Fundamentals for HRMS PeopleBook

PeopleBook Structure

PeopleSoft PeopleBooks follow a common structure. By understanding this structure, you can use this PeopleBook more efficiently.

Chapters	Description
Preface	This is the chapter you're reading now. It explains: • How to use the Application Fundamentals book. • How PeopleBooks are structured. • Common elements that are used in the PeopleBook. For example, if a data field is used on multiple pages, it might be defined only once in this chapter rather than repeatedly throughout the book.
Getting Started With…	This chapter discusses product implementation guidelines. It explains: • The business processes documented within the book. • Integrations between the product and other products. • A high-level guide to how our documentation maps to the overall implementation process; it doesn't offer step-by-step guidance on how to perform an actual implementation.
Understanding…	This is an introductory chapter that broadly explains the product and the functionality within the product.
Setup and Implementation	This can be one or more chapters. These chapters contain documentation to assist you in setting up and implementing the product. For example, if functionality X is part of a product, this chapter would be devoted to explaining how to set up functionality X, not necessarily how to use functionality X. You would look to the corresponding business process chapter to learn how to use the functionality. **Note.** There may be times when a small amount of business process information is included in a setup chapter if the amount of business process documentation was insufficient to create a separate section in the book.

Chapters	Description
Business Process	This can be one or more chapters. These chapters contain documentation that addresses specific business processes with each chapter generally devoted to a specific functional area. For example, if functionality X is part of a product, this chapter would be devoted to explain how the functionality works, not necessarily how to set up functionality X. You would look to the corresponding setup and implementation chapter to learn how to set up the functionality. **Note.** There may be times when a small amount of setup and implementation information is included in a business process chapter if the amount of setup and implementation documentation was insufficient to create a separate chapter in the book.
Appendixes	(optional) If the book requires it, one or more appendixes might be included in the book. Appendixes contain information considered supplemental to the primary documentation.
Reports Appendix	(optional) This appendix contains an abbreviated list of all of the product's reports. The detailed documentation on the use of these reports is usually included in the related business process chapter.

CHAPTER 1

Getting Started With PeopleSoft Human Resources: Recruit Workforce

This chapter provides an overview of PeopleSoft Human Resources: Recruit Workforce business processes and discusses PeopleSoft Human Resources: Recruit Workforce implementation tasks.

Recruit Workforce Business Processes

Listed below are the processes for PeopleSoft Human Resources: Recruit Workforce:

- Job requisition management.
- Applicant management.
- Interviews.
- Employee referral program management.
- Applicant processing.
- Applicant hiring.
- Expenses tracking.

We cover these business processes in the business process chapters in this PeopleBook.

Implementing PeopleSoft Human Resources: Recruit Workforce

The Recruit Workforce table-loading implementation includes setting up the following:

- PeopleSoft HRMS fundamental tables.
- Recruit Workforce application tables.
- Additional Recruit Workforce application tables.

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

Important! The order in which you set up tables required to implement PeopleSoft Human Resources: Recruit Workforce may vary; each individual application isn't necessarily set up in sequence. For example, you may set up HRMS tables, then tables for the Recruit Workforce core application, then several tables specific to the country or industry you operate in, followed by additional Recruit Workforce core tables. In addition, the order in which you set up tables may also depend on the features you want to use. The information provided in this chapter offers a high-level guide of how our documentation maps to the overall implementation process; it doesn't offer step-by-step guidance on how to perform an actual implementation.

Setting Up PeopleSoft HRMS Fundamental Tables

The Recruit Workforce business process requires the setup of fundamental HRMS tables, common to multiple HRMS applications. The information that you define on these tables lays the foundation for the Recruit Workforce business process setup.

Step	Reference
1. Set up PeopleSoft HRMS fundamental tables.	*PeopleSoft 8.8 Application Fundamentals for HRMS PeopleBook,* "Getting Started With PeopleSoft HRMS"
2. Set up PeopleSoft Human Resources fundamental tables.	

Setting Up Core PeopleSoft Human Resources: Recruit Workforce Tables

The steps discussed in this section suggest an order in which you define the information in your core Recruit Workforce tables. The information that you defined in your fundamental tables lays the foundation for this setup.

Setting up these core tables prepares your system to support these business processes:

- Administer job requisitions.
- Manage and process applicants.
- Organize interviews.
- Hire applicants.
- Track recruitment expenses.

Step	Reference
1. Define parameters for your recruitment applications.	Chapter 3, "Setting Up Recruit Workforce," Setting Up Installation Options, page 11
2. Define recruitment templates.	Chapter 4, "Creating Recruitment Templates," page 43
3. (Optional). Set up recruitment status values and status rules.	Chapter 3, "Setting Up Recruit Workforce," Setting Up Recruitment Status Codes, page 13
4. Set up job offer component types and job offer components.	Chapter 3, "Setting Up Recruit Workforce," Setting Up Job Offer Information, page 37

Step	Reference
5. Set up referral source subcategories to track referral sources.	Chapter 5, "Creating Employee Referral Programs," Defining Employee Referral Programs, page 61
6. (USF) Define information required for job requisition postings and the USA Jobs Feed. Define code supported by USA Jobs.	Chapter 3, "Setting Up Recruit Workforce," (USF) Setting Up USA Jobs Feed, page 28
7. (USF) Set up priority placement and veteran preferences codes.	Chapter 3, "Setting Up Recruit Workforce," (USF) Setting Up Priority Placements, page 34

Setting Up Additional PeopleSoft Human Resources: Recruit Workforce Tables

These steps define information in additional Recruit Workforce tables. The information that you define in your core tables lays the foundation for this Recruit Workforce-specific set up.

Setting up these additional tables prepares your system to support these business processes and tasks:

- Screening questions feature of the job requisition administration process.
- Administer employee referral programs.
- Merge duplicate applicant records.

Step	Reference
1. (Optional). Define screening questions and questionnaires. Screening questions are only available if you have installed PeopleSoft eRecruit.	Chapter 3, "Setting Up Recruit Workforce," Creating Screening Questions, page 30
2. Set up employee referral programs.	Chapter 5, "Creating Employee Referral Programs," page 55
3. (Optional). If you have modified the structure of your applicant records, you may need to update the list of applicant records that are searched and merged in the Process Duplicate Applicant process.	Chapter 7, "Managing Applicants," Merging Duplicate Applicant Records, page 148

CHAPTER 2

Understanding PeopleSoft Human Resources: Recruit Workforce

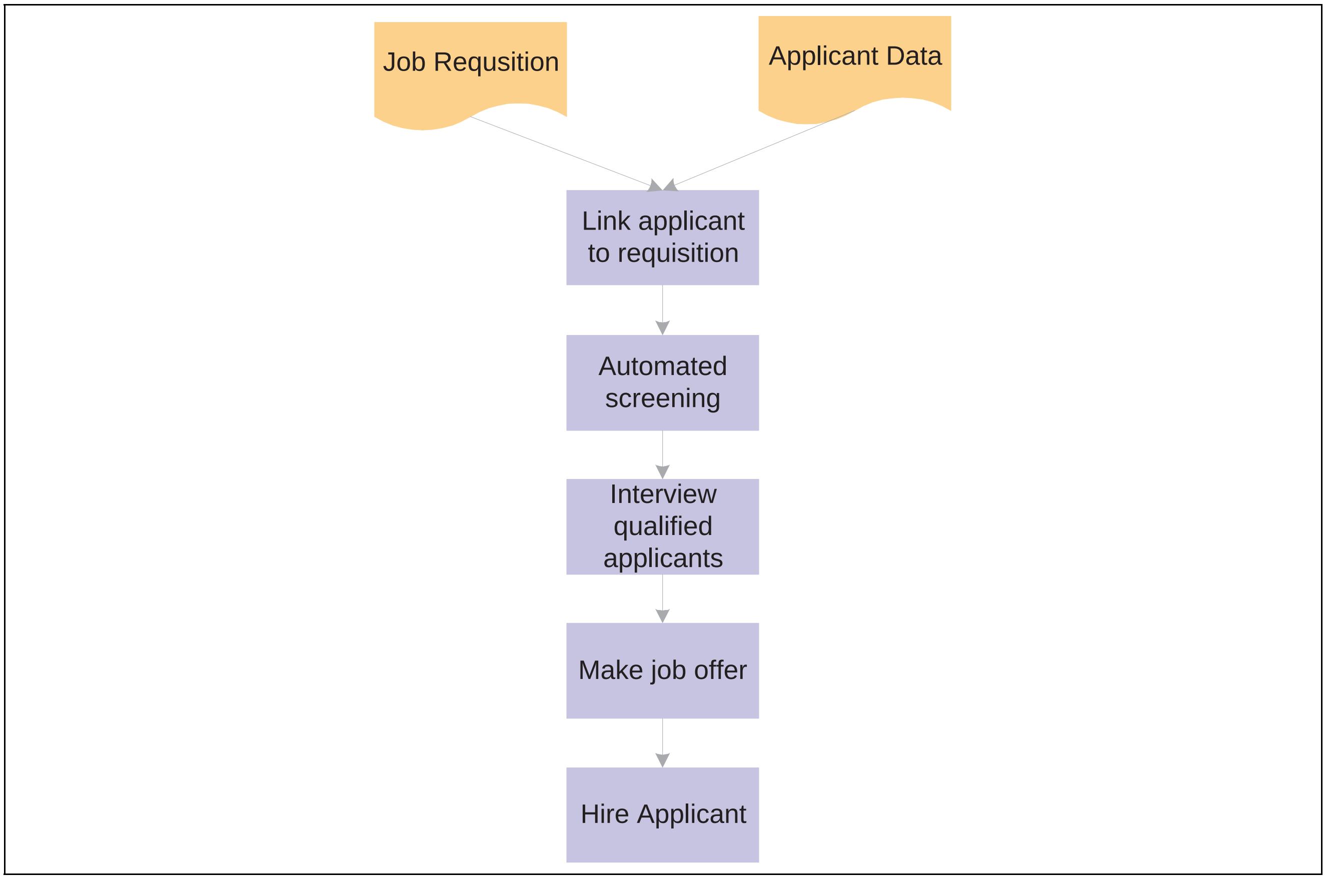
This chapter discusses:

- Human Resources: Recruit Workforce features.
- Human Resources: Recruit Workforce integrations.

PeopleSoft Human Resources: Recruit Workforce

Whether you operate in one country or have a multinational organization, meeting your organization's staffing goals requires effective recruiting and screening methods, whether you're looking for internal or external applicants.

The Recruit Workforce business process helps you process large volumes of applications for open positions. The following diagram outlines the process you will follow during the recruitment process.



Recruitment process

PeopleSoft Human Resources: Recruit Workforce Business Process

PeopleSoft Human Resources: Recruit Workforce supports core business processes as well as business processes specifically for the United Kingdom, the United States, and the U.S. Federal Government.

Core Recruit Workforce Features

With the Human Resources: Recruit Workforce you can:

- Create detailed job requisitions for openings in your organization. A single requisition can cover one or many openings. Apart from the job description, organization, and location information, you can include the competency profile and basic eligibility criteria in the job requisition. Matching applicants with available openings becomes a more simplified and straightforward task with such detailed requisitions in place. In fact, you can let the system do much of the work for you with our automated screening and online inquiries.
- Enter comprehensive applicant data for job candidates, including personal data and preferences such as their willingness to travel or relocate and minimum salary requirements. You can track applicant work experience, education and training, references, skills, and languages. If you want more detailed information, you have the option to track important ethnicity, community (religious) background, and disability information for many different countries.

- Search your applicant pool for suitable candidates. If you find that the applicants who apply for a job are not suitable, you can search your entire applicant pool for people who meet your requirements.
- Screen and rank applicants. No longer will you need to manually search applicant resumes for suitable applicants. With PeopleSoft Human Resources, screening is automated and flexible. The system compares applicants' details against the job requirements and ranks those applicants who meet or exceed your criteria. You can set up two levels of screening to narrow your applicant list further, leaving you with a manageable list of qualified applicants to consider.
- Track the status of your open job requisitions. With our easy-to-use Requisition Activity pages you can see who has applied for an opening, view the interview schedule for the requisition, enter interview results, and enter job offers. Alternatively, you can check on individual applicants to see how their applications have progressed.
- Generate form letters for internal and external use, including job requisition postings and offer letters to job candidates. Merge information automatically from PeopleSoft Human Resources into your Windows-based word processor.
- Use your applicant information when you hire someone. With PeopleSoft Human Resources you don't have to re-enter this information—the system automatically uses applicant data to create employee data.
- Set up interviewers' availability and schedule interviews. Once interviews are completed, interviewers can record interview results and their recommendations.
- Track expenses associated with job requisitions—or with applicants.
- Create and view employment contracts for applicants and workers.
- Generate a variety of recruitment reports, including requisition status, posting date, candidate listings, and more.

United Kingdom Features

With UK-specific Recruit Workforce local functionality you can:

- Indicate workplace accommodations that would need to be made for disabled applicants to help maintain compliance with the Disability and Discrimination Act.
- Track compliance with Fair Employment Act (Northern Ireland) requirements for documenting the presence of a second interviewer during the interview process.

United States Features

With US-specific Recruit Workforce local functionality you can:

- Indicate workplace accommodations that would need to be made for disabled applicants to help maintain compliance with the Americans with Disabilities Act.
- Track applicant ethnicity to help you meet Equal Employment Opportunity Commission/Affirmative Action goals for workforce hiring and composition.

U.S. Federal Government Features

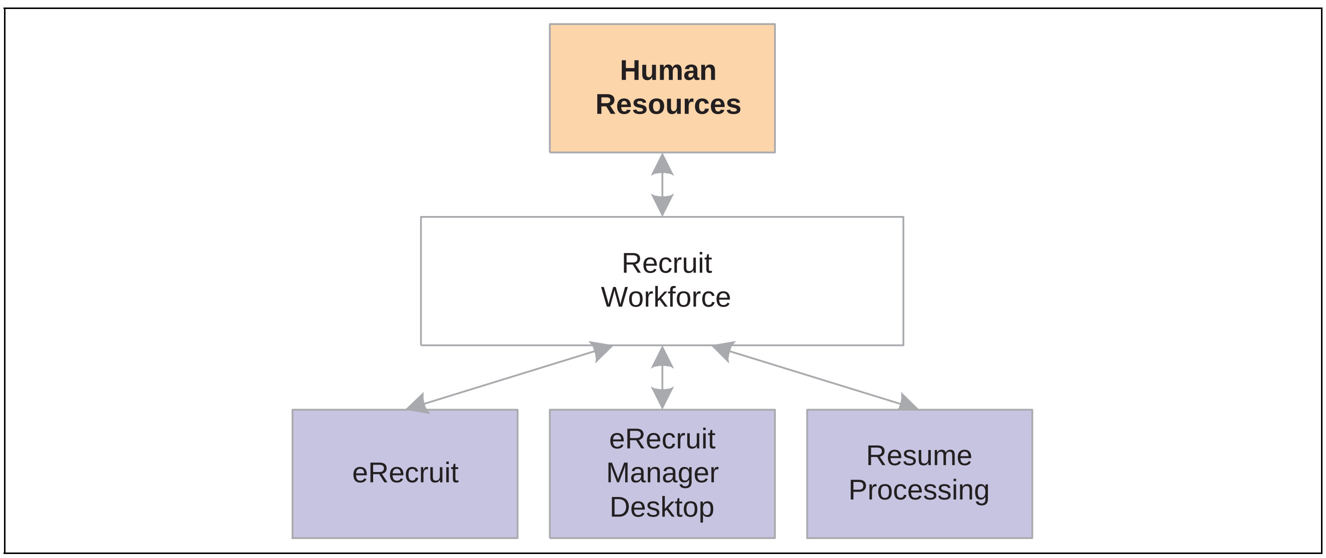
For U.S. Federal Government customers, Recruit Workforce offers features tailored to the way you work. Once applicants have applied online, you then identify the individuals most qualified to fill those openings. In addition to all of the Core functionality, the steps in this process for U.S. Federal Government customers also include:

- Creating the crediting and ranking plans that tie to competencies and the job requisition.
- Creating a full-text vacancy announcement for printing or uploading to your agency's Website.
- Creating a vacancy announcement file for submission to OPM's USA Jobs.
- Running the priority placement process to pre-rank those individuals who have priority placement codes.
- Identifying applicants who meet minimum qualifications.
- Rating and ranking your qualified applicant pool (includes tie-breaking processes) and sorting your competitive or non-competitive applicants according to employee ID (ascending), name (ascending), or score (descending).
- Creating a Certificate of Eligibles and Evaluation of Candidates report as needed.

PeopleSoft Human Resources: Recruit Workforce Integrations

With our integrated system design you won't need to enter redundant information because many of the tables in Recruit Workforce are used elsewhere in the system. Automatically use your applicant information to update personal data in Administer Workforce. Leverage competency and accomplishment information on your employees, contractors, temporary workers, and external candidates, to match a worker's competencies to a job or position's competency profile. You can even use the system with position management enabled.

PeopleSoft Human Resources: Recruit Workforce integrates with the following PeopleSoft applications:



PeopleSoft Human Resources: Recruit Workforce integration flow with other PeopleSoft applications

Setting Up Your Manage Competencies Business Process

The Recruit Workforce business process draws on information that you set up in your Manage Competencies business process. In particular, if you want to assign competencies and accomplishments to your job requisitions and applicants, you must set up:

- Competency codes. You set up two tables for competencies: the Competency Type table and the Competency table.
- Accomplishments. You define accomplishments in several tables, including the Major table, School table, License/Certification table, and Test table.
- Default competency profiles for your job codes or job families. This is optional, but if you define default competencies and accomplishments required for a job code or job family, it is easy to copy the profile to your job requisition.

We recommend that you familiarize yourself with the Manage Competencies functionality in PeopleSoft Human Resources as part of setting up your Recruit Workforce module.

Understanding Applicant Security

Applicant records, like employee records, contain confidential and sensitive information, so it's important to limit user access to that data. This section explains how to use your existing security setup to control access to applicant data. Recruiters usually require wider access to applicant data across your organization. This section discusses how to assign access to applicant records to a permission list. You will then assign the permission list to the appropriate User ID on the Permission Lists component.

Access to applicant data is controlled by the standard department security setup for your PeopleSoft Human Resources system with an additional security page where you can give wider access to applicant data. The security for applicant data contain the following key layers:

Department Security

Users have access to applicant data based on the department ID associated with a job requisition, rather than the applicant's department ID. This means that hiring managers only have access to applicants who have actively applied for a job within their department. If employees in the same department as a hiring manager apply for jobs outside that department, the hiring manager cannot access their applicant data. This is the default access for all users and is controlled by the department security that you have in place.

Recruiter Access

From the Applicant Security page, you can give users additional access to applicant data, including access to all applicants who are not linked to a job requisition. Typically, you assign additional access to recruiters who need access to applicants in different companies, business units, and locations.

Menu Item Security

Using the standard PeopleTools Security Administrator, you can control which options each user can access in the Recruit Workforce menu.

See Also

PeopleSoft 8.8 Application Fundamentals for HRMS PeopleBook, "Working With Self-Service Transactions"

CHAPTER 3

Setting Up Recruit Workforce

This chapter discusses how to set up:

- Requisition and applicant IDs.
- Recruitment status codes.
- Job posting descriptions.
- USA Job Feeds.
- Screening questions.
- USF Priority placement
- USF Veterans codes.
- Referral source subcategories.
- Job offers.
- Attachment Types
- Job requisition approvers.

Setting Up Installation Options

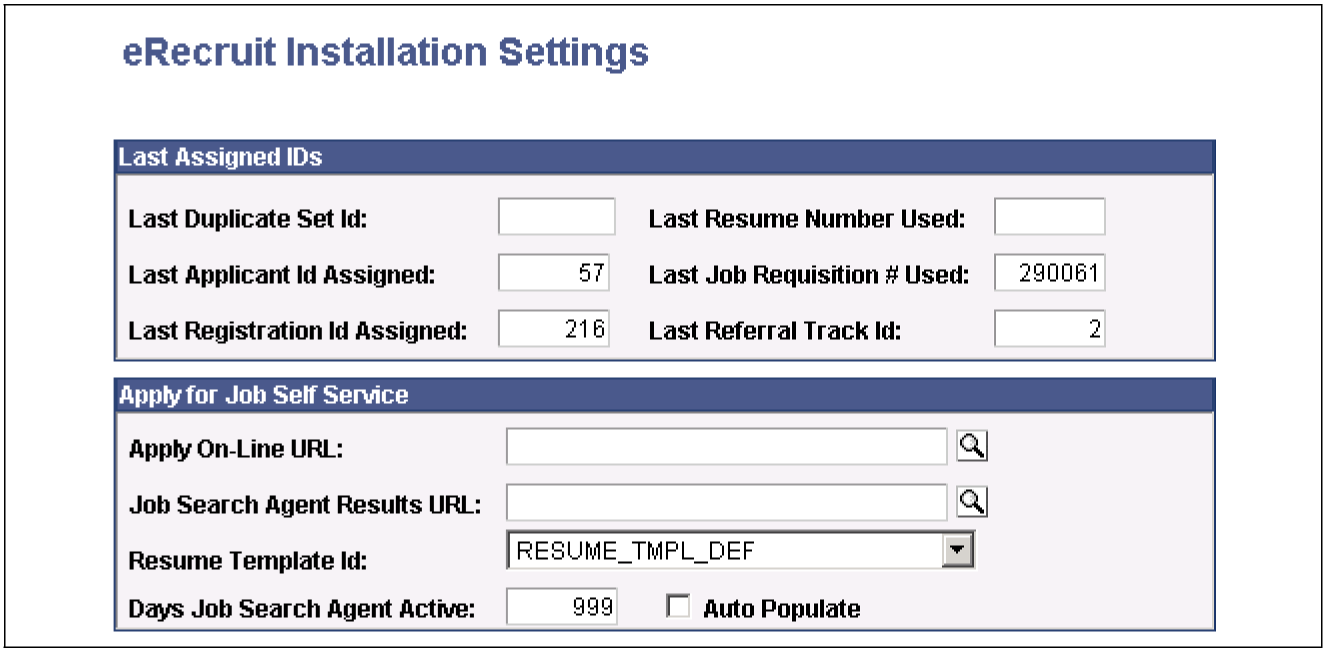
This section discusses the set up for parameters that only apply to Recruit Workforce. This component also contains the set up pages for eRecruit and eRecruit Manager Homepages. Those pages are fully documented in the PeopleSoft eRecruit and eRecruit Manager Desktop PeopleBooks.

Pages Used to Set Up Requisition and Applicant IDs

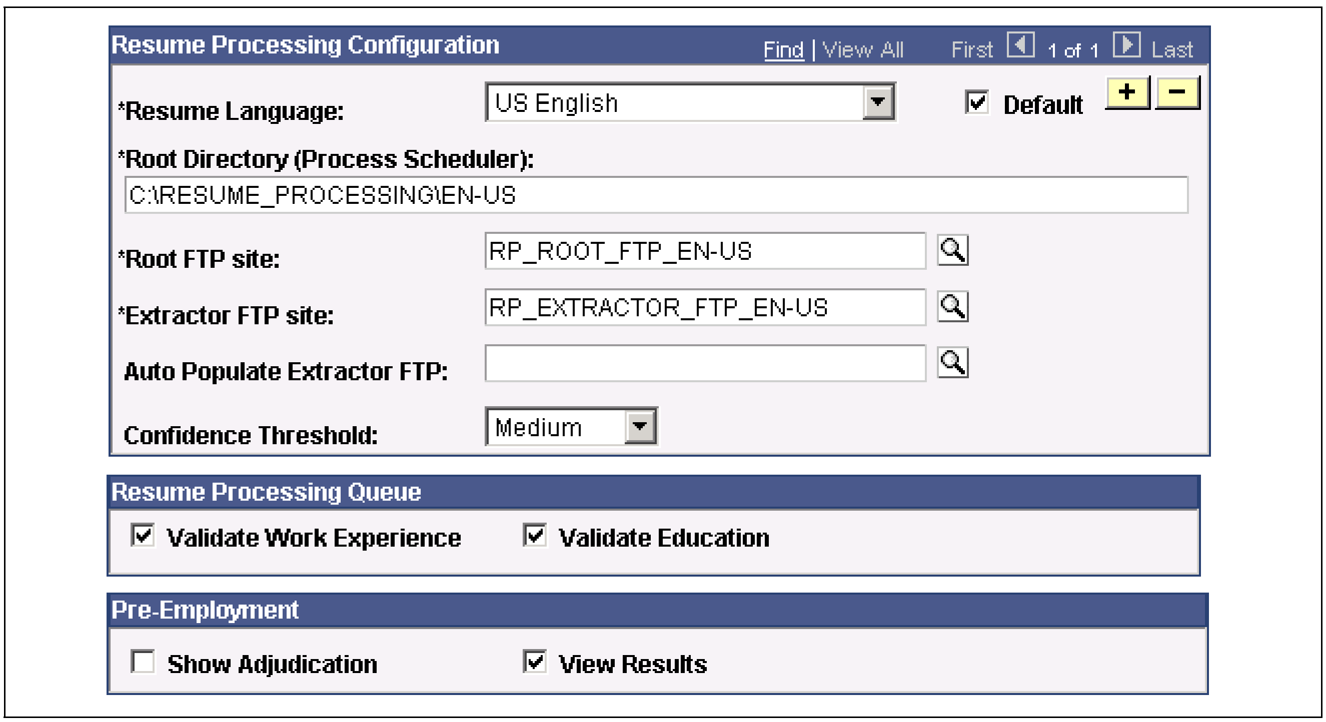
Page Name	Object Name	Navigation	Usage
eRecruit Installation Options	ER_INSTALLATION	Set Up HRMS, Install, Product and Country Specific, eRecruit Installation	Define parameters for your recruitment applications.

Defining Requisition and Applicant IDs

Access the eRecruit Installation Options page.



eRecruit Installation Options page (1 of 2)



eRecruit Installation Options page (2 of 2)

Last Assigned IDs

Use these fields to specify the number that the system uses to start assigning IDs for various recruitment records. The system automatically increases the number by one when it assigns a new number and updates this page with the new number.

Last Duplicate Set ID Duplicate Applicant Search creates duplicate set IDs to group potential duplicate applicant records.

Last Resume Number Used Use this field to specify the number that the system should use to start assigning resumes that are processed through PeopleSoft Resume Processing.

Last Applicant ID Used Enter the number you want the system to begin assigning applicant IDs.

Note. PeopleSoft Resume Processing automatically assigns applicant IDs based on the value in Last Applicant ID Assigned. If you're using Resume Processing but also add applicants manually, we recommend that you let the system assign the applicant ID. This avoids maintaining two different sets of applicant IDs.

Last Job Requisition # Used Specifies the number that the system uses to start assigning Job Requisition numbers.

Last Registration ID Assigned Specifies the number the system uses to start assigning Registration IDs to users who signon to the system.

Last Referral Track ID Specifies the number that the system uses to start assigning employee referrals.

Apply for Job Self Service

This group box is used if you have purchased eRecruit. It defines various parameters necessary for accepting resumes online. This group box is fully documented in the PeopleSoft eRecruit PeopleBook.

Resume Processing Configuration

This group box is used if you have purchased PeopleSoft Resume Processing. It defines various parameters necessary for Resume Processing. This group box is fully documented in the PeopleSoft Resume Processing PeopleBook.

Pre-Employment

This group box is used if you have purchased eRecruit Manager Desktop and are integrating with HireRight. This group box is fully documented in the PeopleSoft eRecruit Manager Desktop PeopleBook.

Setting Up Recruitment Status Codes

This section provides an overview of recruitment status code and discusses how to set them up.

Understanding Recruitment Status Codes

Recruit Workforce has six types of status codes to track different aspects of your recruitment activities. The following table explains how these status codes are used and lists the tables where the statuses are recorded:

Recruitment Area	Purpose	Table
Job Requisition	To track the status of the requisition in the recruitment process. PeopleSoft supplies job requisition statuses that mirror Disposition statuses. For example, a status of *Interview* means that there is at least one applicant at the Interview stage for that job requisition.	JOB_REQUISITION
Applicant	To indicate whether the applicant is actively seeking a job. PeopleSoft supplies applicant statuses of *Active, Inactive,* and *Hired.* The system considers *Inactive* and *Hired* applicants as unavailable for recruitment.	APPLICANT
Disposition	To indicate how far an applicant has progressed in the recruitment process for a particular job requisition. This is shown as Disposition status on the recruitment pages.	POSN_APPLIEDFOR
Route	To track the progress of an application within the routing stage.	APPLICATN_ROUTE
Interview	To track progress within the interview stage and interviewers' recommendations.	ER_INTERVIEW
Offer	To track progress within the offer stage.	OFFER

Warning! Setting up status codes is optional. PeopleSoft supplies a set of codes and associated rules for status changes. We strongly recommend you use the delivered statuses and rules.

To set up recruitment status codes and rules:

1. Define status values and associated reasons on the Status/Reason Table page.
2. Define the rules that govern how the statuses are processed using the Status Recruitment Area Rules page.
3. Define the status codes that are assigned following requisition screening or by the basic eligibility process.

Understanding the Type of Status Rules

The Status Recruitment Area Rules page lists the status codes defined for a selected recruitment area. For each status code, you can define:

- Successors to a given status.
- The effect of applying a given status on the status of other records.
- The workflow associated with a status (optional).

Successors

Use the Status Successors page to define the progression from one status to another. Here is an example of how the Disposition status for a successful application typically changes:

Applied

Screened − Preliminary

Screened − Final

Routing

Interview

Offer

Ready to Hire

Hired

Note. The status values shown are for example only. PeopleSoft deliver different status values for U.S. Federal government installations and additional values to meet local country requirements.

The system uses the successor information to determine if a status change is valid. When a user updates the status of an applicant, application, or job requisition, the system checks whether the new status is a valid successor and issues warning or error messages if it isn't in the successor list.

For extra flexibility you may want to allow applicants to skip certain phases of the recruitment process, for example to go from *Routing* to *Offer.* Therefore, the Routing status is set up with successors of *Interview, Offer, Ready to Hire,* and *Hired.*

Workflow

If you want emails to be triggered based on a status change, use the Status Workflow page. We deliver a generic workflow specifically for notifying managers and recruiters of the status change. The definition for this workflow is Recruit Employees, ER_STATUS, Status Change.

See Chapter 3, "Setting Up Recruit Workforce," Defining Status Workflow, page 25.

Effect of Status Change

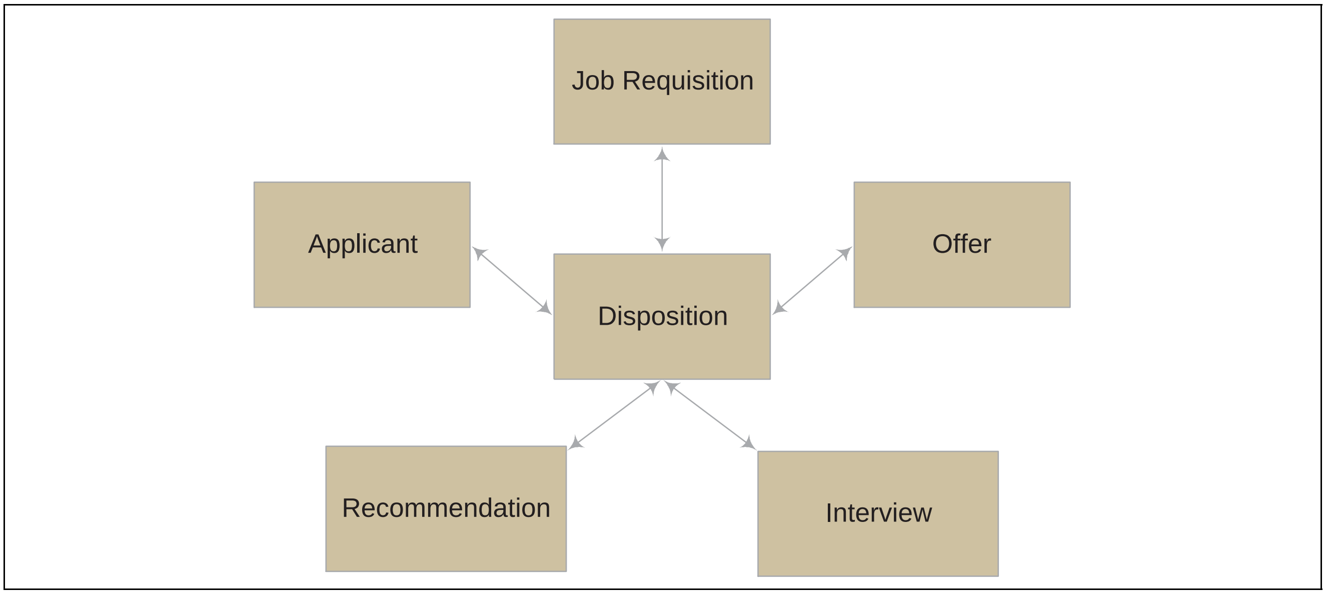
When the status of an applicant, job requisition, or application changes this may affect the status of other records.

For example, when a recruiter decides to hire an applicant, this affects the Disposition status of multiple applicants, and affects the job requisition status. The following table explains the rules that PeopleSoft supplies for the Hire status.

Recruitment Area	Records Affected	Impact
Disposition	Hired applicant	Set status to *Hired* for the selected job requisition.
Disposition	Hired applicant's other applications	If the hired applicant is linked to other job requisitions, set the Disposition status for those applications to *Reject* and reason code to *Selected for Another Position.*
Disposition	Other applications for the requisition	If all the openings for the requisition are filled, set the Disposition status to *Reject* and reason code to *Another Applicant was Hired.*
Job Requisition	Job Requisition	If all the openings are filled, set the Job Requisition Status to *Filled/Closed.*

Note. This table shows the PeopleSoft-delivered rules. However, you can adjust the status codes and rules to suit your organization.

Some status codes don't affect other statuses and there are restrictions on the changes allowed. Changing an applicant's status to *Inactive,* for example, doesn't have an impact on the status of a job requisition. However, it does have an impact on the status of the applicant's open applications, which could in turn affect the job requisition status. The following illustrates how status values in each recruitment area impact statuses in other recruitment areas.



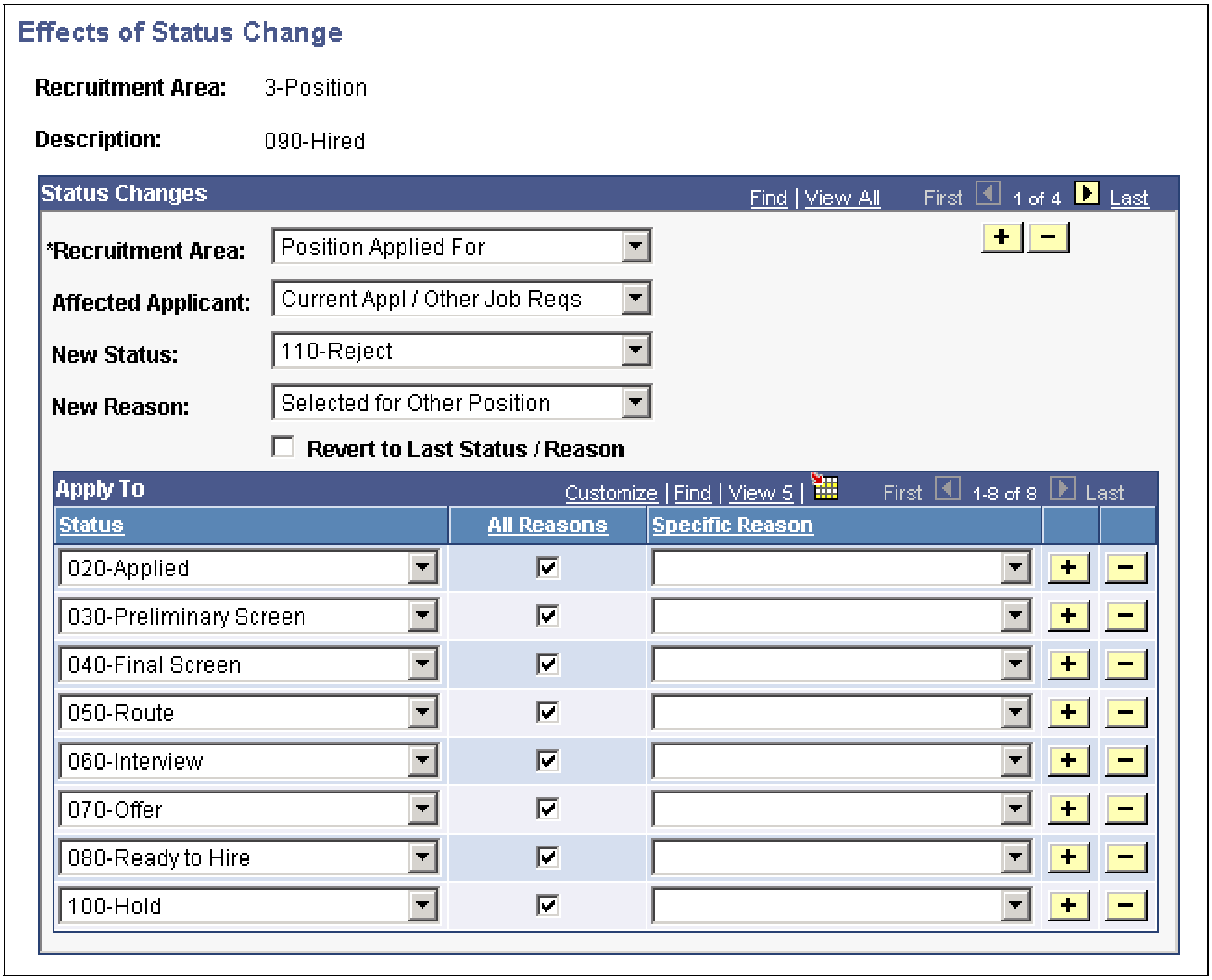
Impact of Status Changes Between Recruitment Areas

You define the rules for changing status values on the Effects of Status Change page.

For each rule you define:

- Recruitment area affected.
- The records within the recruitment area that are affected by the status change.
- New status and reason code that the system applies to those affected records.

Here is an example of the Effects of Status Change page for the Disposition status of Hired.



Effects of Status Change Example page

In this example, when an applicant's application is set to *090-Hired,* the following rule is applied:

- The recruitment area affected is Disposition.
- Within the Disposition table, the records affected are defined by the Affected Applicant field and the Apply To group box. In this example, the records affected are the Hired applicant's other applications that have one of the statuses listed in the Apply To group box.
- The new status that the system applies is *110-Filled/Closed*.

Note. This example shows only one of the PeopleSoft-delivered rules for the Hired status. The Hired status has other rules that you access by clicking the navigation buttons.

Understanding the Affected Applicant Field

To help you understand how the Affected Applicant field defines which records are affected in the Disposition table, consider the example of a Disposition table with the following five rows:

Row	Applicant	Job Requisition	Disposition Status
1	Smith, Pete	HR Administrator	Route
2	Smith, Pete	Administrator	Applied
3	Smith, Pete	Marketing Assistant	Offer
4	Wilson, Charles	Marketing Assistant	Hold
5	Parkes, Linda	Marketing Assistant	Hold

Suppose Pete Smith accepts the Offer for the position of Marketing Assistant. When the recruiting administrator hires Pete Smith, the status of row 3 is set to 090-Hired.

Now if you compare this with the example Effects of Status Change page shown previously:

- Current Applicant is Smith, Pete.
- Current Job Requisition is Marketing Assistant.

The Affected Applicant field defines the rows that are affected by the rule as explained in the table below:

Field Value	Rows Affected
Current Appl / Other Job Reqs (Current Applicant/Other Job Requisitions)	1 and 2. This represents the Hired applicant's other applications.
Other Appl /Current Req (Other applicants/Current Job requisition)	4 and 5. This represents the other applications for the requisition that the Hired status applies to. This rule is triggered only if there are no more openings for the job requisition.

Cascading Rules

If a status change results in a new status which also has rules associated with it, the system automatically applies the rules for the new status after processing the first set of rules. Rules that trigger other rules are known as cascading rules.

Using the Hired status as an example, if you define rules for the Reject status, the system automatically processes the Reject rules on completion of the Hired rules. Similarly, if the Reject rules triggered other rules, the system processes those rules in turn.

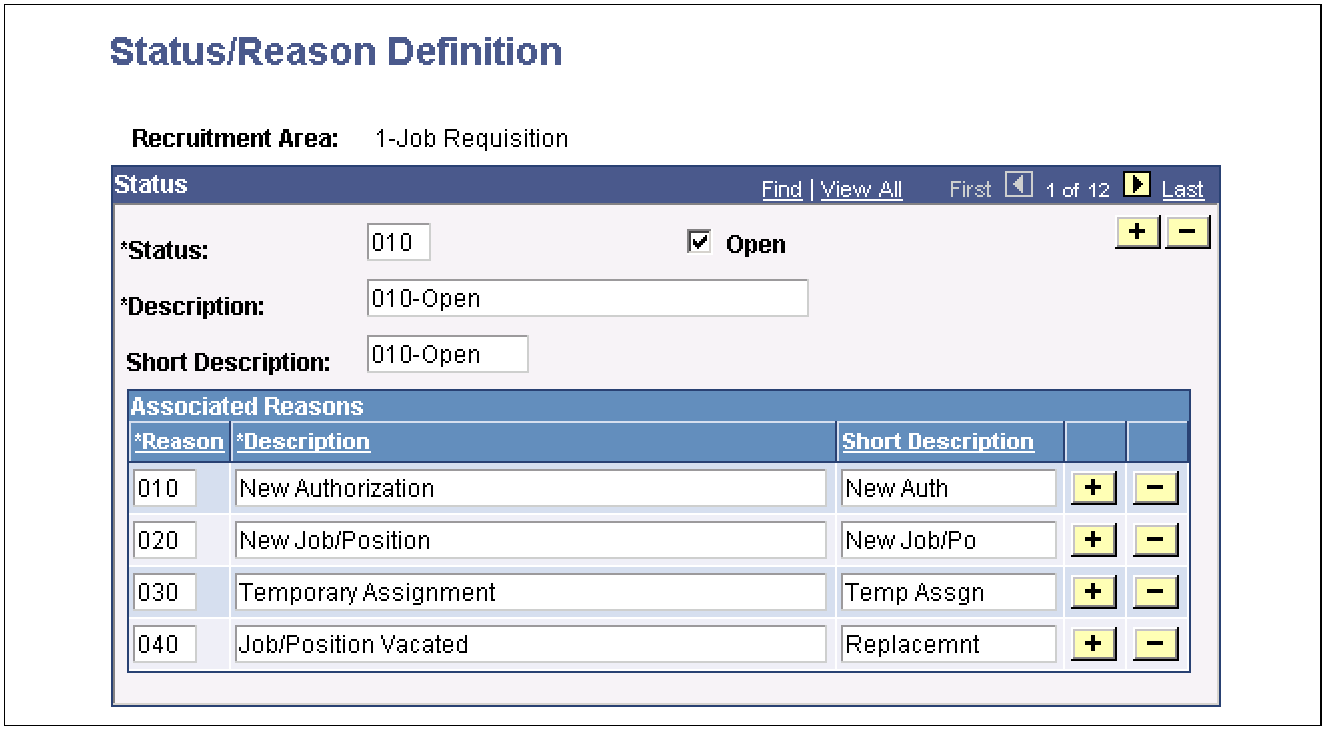
The system processes cascading rules until there are no rules associated with the new statuses.

Pages Used to Set Up Status Codes and Rules

Page Name	Object Name	Navigation	Usage
Status/Reasons Definition	ER_STATUS_TBL	Set Up HRMS, Product Related, Recruiting, Status Effects, Status/Reasons	Set up status values for your recruitment activities. You can also associate reason codes with a status.
Status Recruitment Area Rules	ER_STATUS_AREA_TBL	Set Up HRMS, Product Related, Recruiting, Status Effects, Status Recruitment Area Rules	Define the rules for status values you've previously set up on the Status/Reason Table page.
Status Successors	ER_STATUS_SUCC_TBL	Click the Successors link on the Status Recruitment Area Rules page.	Define the status values that succeed a given status. The system uses the information on this page to determine if a status change is valid. If a user updates the status of an application or job requisition and the new status isn't listed as a successor, the system issues a warning or error message.
Effects of Status Change	ER_STATUS_EFF_TBL	Click the Effects of Status Change link on the Status Recruitment Area Rules page.	Define how applying a given status impacts the status of other records. When a status changes this can affect the status of records in the same recruitment area or in other recruitment areas. Leave this page blank if a status has no impact on other statuses.
Status Workflow	ER_STATUS_WF_TBL	Click Workflow link on the Status Recruitment Area Rules page.	Define the business process, activity, and event that the system executes for a given status.
Status Screening Process Table	ER_SCREEN_STS_TBL	Set Up HRMS, Product Related, Recruiting, Status Effects, Status Screening Process Table	Define the disposition status change that occurs following requisition screening. For U.S. Federal Government users, this page defines the statuses applied by the basic eligibility process.

Setting Up Statuses and Reasons

Access the Status/Reasons Table page.



Status/Reason Definition page

Recruitment Area

Select the recruitment area to which the status applies.

Status

Enter a three character status code.

Open

Select this check box if the status indicates an applicant, job requisition, or application that is active or in progress. For example, the job requisition status *Applied* is an open status because it indicates that you have started recruiting, but not completed the recruitment process. Similarly, the applicant status Active is an open status whereas Hired and Inactive are not open statuses.

It is vital that this check box is set up correctly because it affects processing throughout the system. For example, the system only allows you to link applicants to job requisitions that have an open status.

Recruitment Phase

The system displays this field if the Recruitment Area is *Position Applied For.* Use it to map your new Disposition statuses to the default recruitment phase. For example, if you set up a code to replace the Interview status that PeopleSoft provides, select *4-Interview* in this field.

The system requires this information to determine which stage an application has reached in the recruitment process.

Only one row for this applicant can have this status

Select this check box if an applicant can't have multiple rows in the Disposition, Route, Interview, or Offer table with this status.

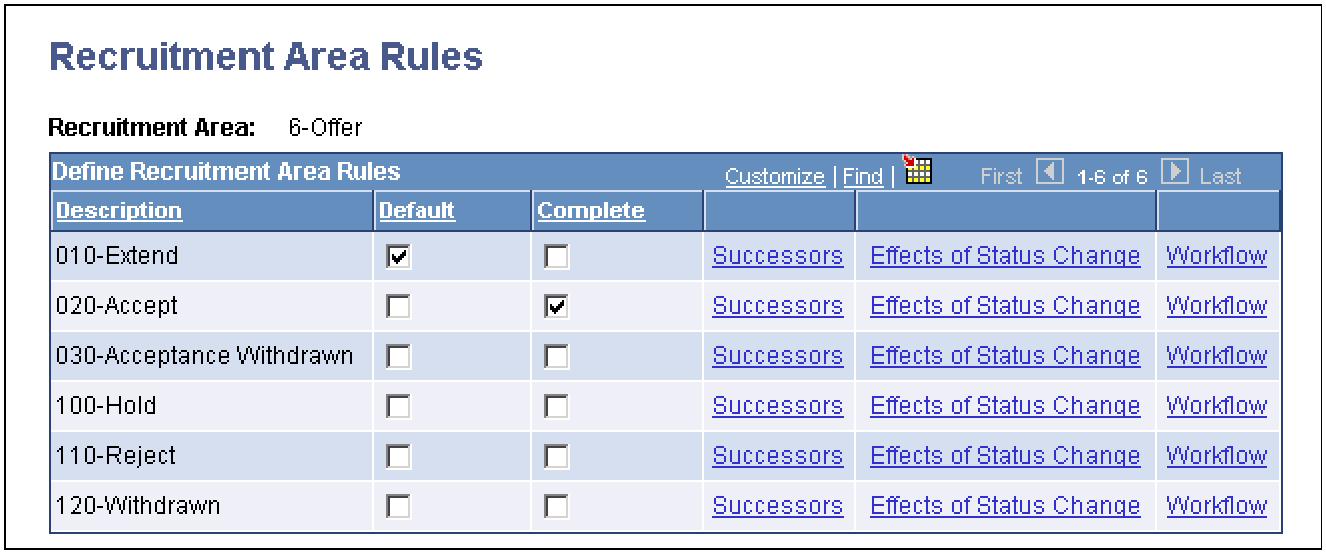
For example, if you don't want applicants to receive more than one job offer, select this check box for the *Offer* status in Disposition. The system issues a warning if a user attempts to apply a status that already exists for that applicant.

Associated Reasons

Reason Enter the reason codes and descriptions for the status code.

Defining Status Rules

Access the Status Recruitment Area Rules page.



Recruitment Area Rules

Description The system displays the status values you defined on the Status/Reason Table page for the selected Recruitment Area.

Default Select if the status is the first status used in the recruitment area. You can select one status only as the default. The system uses this check box to determine which status to apply initially.

Complete Select if the status indicates the successful completion of the recruitment process. The system uses this check box to determine when an application is ready to move to the next stage in the recruitment process. You can select one status only as the complete status.

It is important this check box is set up correctly as it affects processing throughout the system.

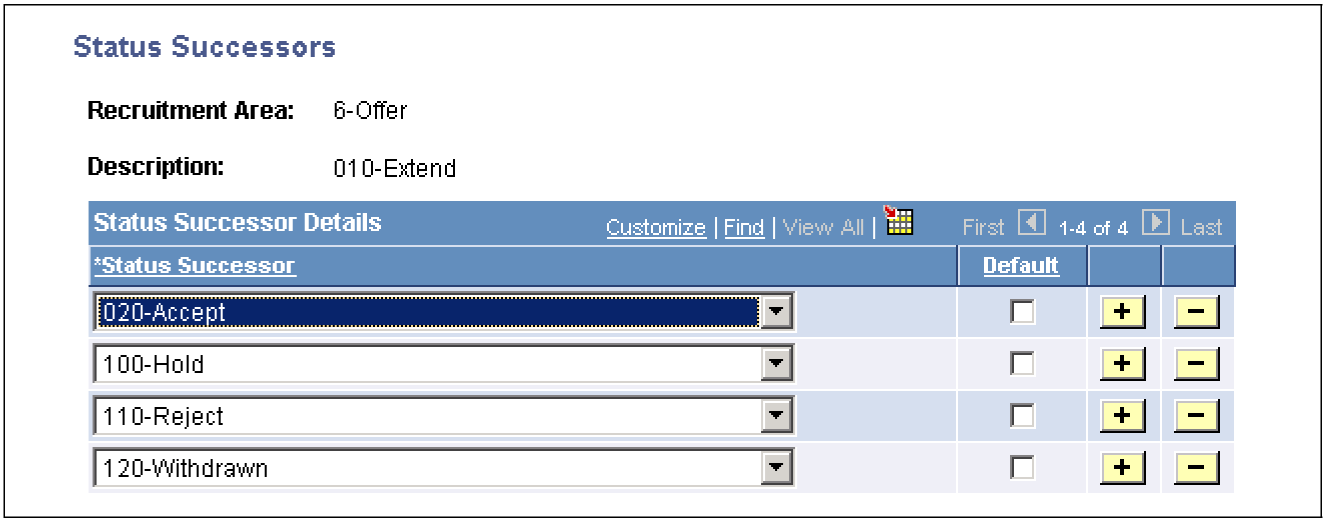
Successors Click to display the Status Successors page where you define the next statuses that can follow on from the selected status.

Effects of Status Change Click to display the Effects of Status Change page where you define the rules that apply when an applicant, application, or job requisition, is assigned the status.

Workflow Click to display the Status Workflow page where you define the workflow executed for the status.

Defining Status Successors

Access the Status Successors page.



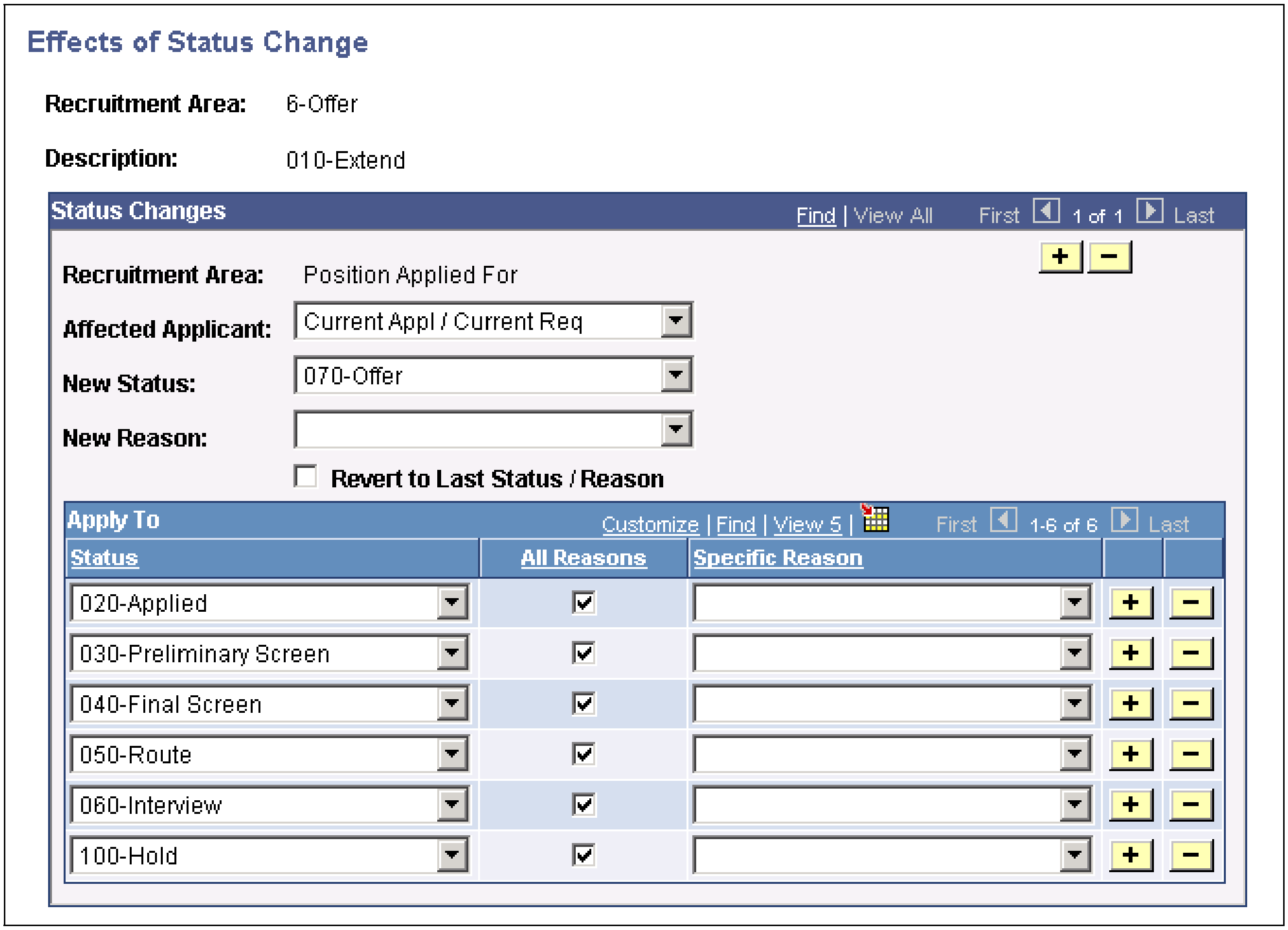
Status Successors page

Status Successor Add the status codes that are valid successors to the status shown in Description.

Default Select this check box for the status that is the most likely successor.

Defining the Effects of Status Change

Access the Effects of Status Change page.



Effects of Status Change page

Warning! Changes to this page must be made by technical personnel with an in-depth understanding of the structure of your PeopleSoft Human Resources database. If your status change rules aren't set up correctly, this can lead to incorrect updates to recruitment records

Status Changes

Recruitment Area

Use this field to identify the table that is affected by the status shown in Description. If the Description status is in Disposition recruitment area, you can select other recruitment areas that are affected by the status change.

Otherwise, the system automatically selects *Position Applied For.*

Affected Applicant

Use this field to identify which rows in the Disposition table are affected by the status change. Select one of these options:

Current Appl /Current Req (current applicant/current job requisition) if the New Status is applied to the application with the Description status.

Current Appl / Other Job Reqs (current applicant/other job requisitions) if the status change affects other requisitions to which the current applicant is linked.

Other Appl / Current Req (other applicants/current job requisition) if the status change affects other applicants linked to the current job requisition. The system applies this status change only if there are no more openings for the job requisition.

New Status Select the status that is applied to the records affected.

New Reason Select the reason that is applied to the records affected.

Revert to Last Status/Reason Select if the status reverts to the previous status and reason code assigned. Leave the New Status and New Reason fields blank if you select this check box.

Apply To

Use this group box to define which records within the Recruitment Area selected in Status Change are changed to the New Status and New Reason.

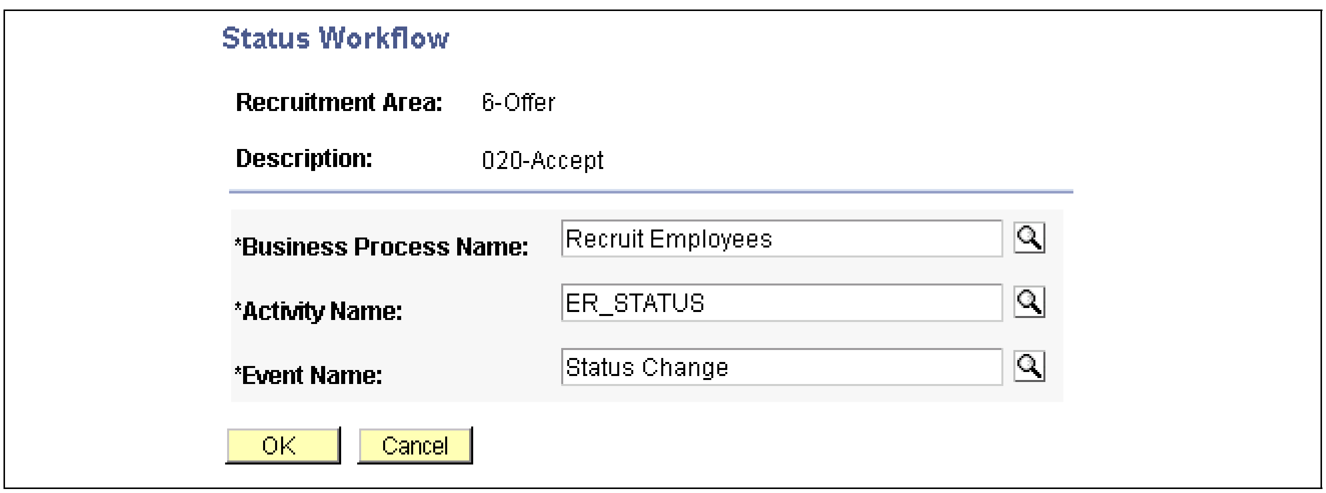
Status Select the statuses affected by the status change. You can choose from the status values defined for the recruitment area you selected in the Status Changes group box.

If the status change should be applied to all reason codes associated with the Status, select the All Reasons check box. Otherwise, select one reason code in Specific Reason.

Note. If you select Job Requisition in Status Changes, and the New Status is also a complete status, such as Hired, the system only applies the new status if all the target openings are filled.

Defining Status Workflow

Access the Status Workflow page.



Status Workflow page

Business Process Name Select from the business processes you previously defined in Application Designer.

Activity Name Select the activity that runs when the status shown in Description is applied to a record in the table represented by Recruitment Area.

Event Name Select the event from those defined for the activity.

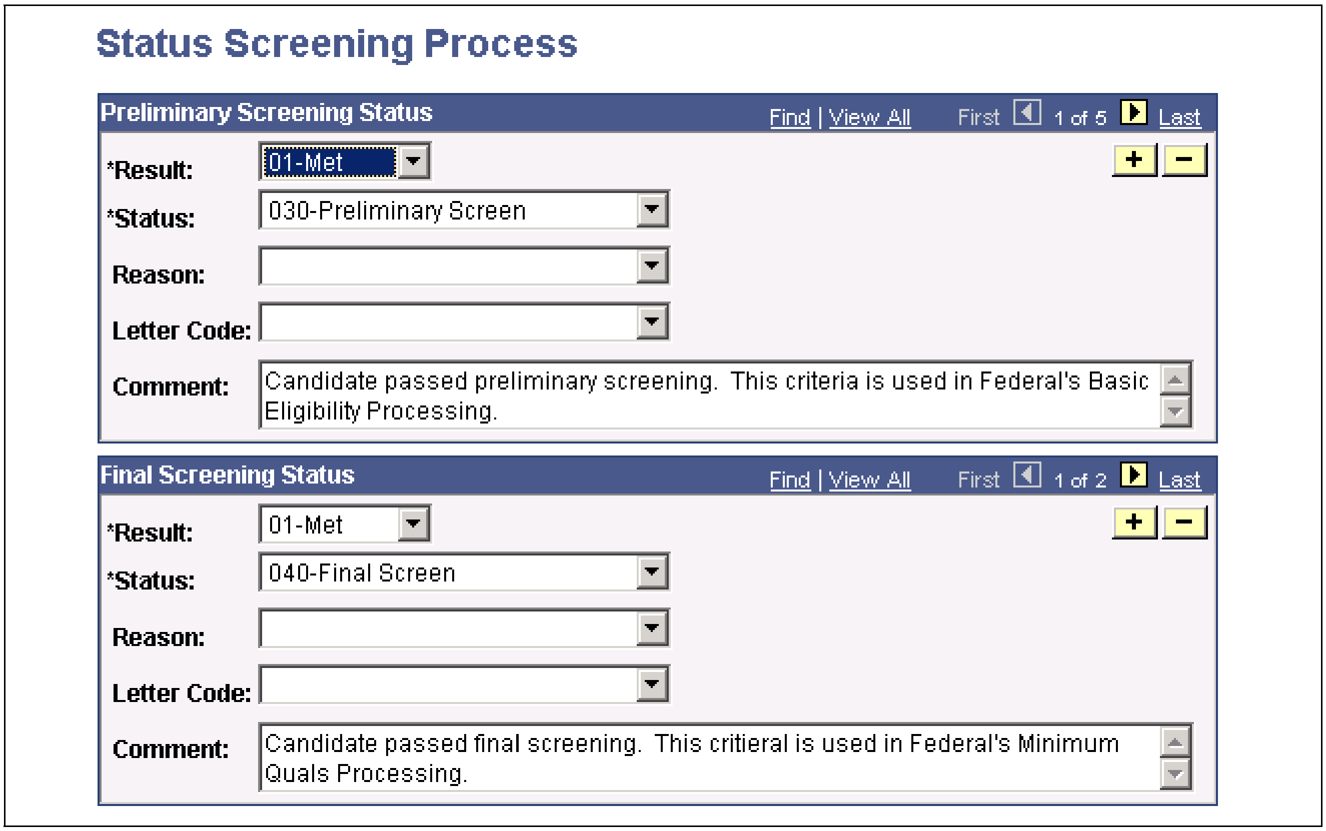
Note. Do not use this page to define workflow for the Create Job Requisition, Prepare Job Offer, and Approve Job Offer self-service transactions.

See Also

PeopleTools PeopleBook: PeopleSoft Workflow

Defining Screening Process Status Changes

Access the Status Screening Process Table page.



Status Screening Process Table page

Note. We recommend that you use the settings supplied by PeopleSoft, unless your organization requires specific status values for screening.

Result Select the outcome of requisition screening or basic eligibility process from *01-Met* or *02-Not Met.*

Status Select the Disposition status that the system applies for the outcome you selected in Result.

For users of the commercial product, the system applies this status when you click the Save button on the requisition screening pages.

For U.S. Federal Government users, when the result of the basic eligibility process is *02-Not Met*, Status is *110-Reject.* A status of 110-Reject may be a result of the following reasons, Ineligible - *EmplCond,* Ineligible - *InBasicEl,* or Ineligible - *Min Gr/Sal.*

Reason If there is a specific reason, select the reason that the system applies.

Letter Code If you want to generate a form letter following screening or basic eligibility processing, select the letter type.

See Also

Chapter 8, "(USF) Searching For Qualified Applicants," page 163

Chapter 9, "Processing Applicants," Generating Recruitment Letters, page 182

Creating Job Posting Descriptions

This section discusses job posting descriptions and discusses how to create a library of job posting descriptions.

Understanding Posting Description Definitions

A job description is made up of a set of statements identified by a description type. For example, marketing statement, qualifications, and how to apply. The posting template identifies which of the descripton types can be used and in which order they will be displayed. The posting template is tied to the recruitment template that you choose when creating job requisitions.

The posting description library may be used to create a set of standard statements that is associated to a description type. Using these standardized statement is optional when creating a job posting, but can help your organization provide some standardization between similar job postings.

Creating Default Job Posting Descriptions

To create a library of job posting descriptions, you will:

1. Determine what information you want internal and external applicants to see when they look at a job posting.
2. Determine whether the 15 description types provided by PeopleSoft meet your needs.
3. If you need to create new description types, create them using the Requisition Description Type page.
4. Create your posting descriptions using the Posting Description Definition page.

See Also

Chapter 4, "Creating Recruitment Templates," Creating Description Types, page 52

Prerequisites

Complete these tasks before you create a job requisition:

- Set up the Manage Competencies business process.

- Set up applicant security.
- Set up your recruitment templates.

Pages Used to Create Job Posting Descriptions

Page Name	Object Name	Navigation	Usage
Posting Description Definition	GVT_RECRUIT_DESCR	Set Up HRMS, Product Related, Recruiting,Posting Description Library	Creates a job posting description.

Creating Posting Description Definitions

Access the Posting Description Definition page.

Posting Description Library page

Description Label Enter text that displays as an option when creating a posting.

Description Enter text that describes this Description Type. This text will display in the job posting.

(USF) Setting Up USA Jobs Feed

The USA Jobs Feed uses information that you set up in related Recruit Workforce tables. This section explains how to:

1. Set up distribution lists.
2. Identify recruiting sources.
3. Enter additional recruiting source information.
4. Define recruiting offices.

5. Enter recruiting office phone information.
6. Create occupational series title suffixes.
7. Create remark codes.
8. Create location codes.
9. Create or modify job posting descriptions.

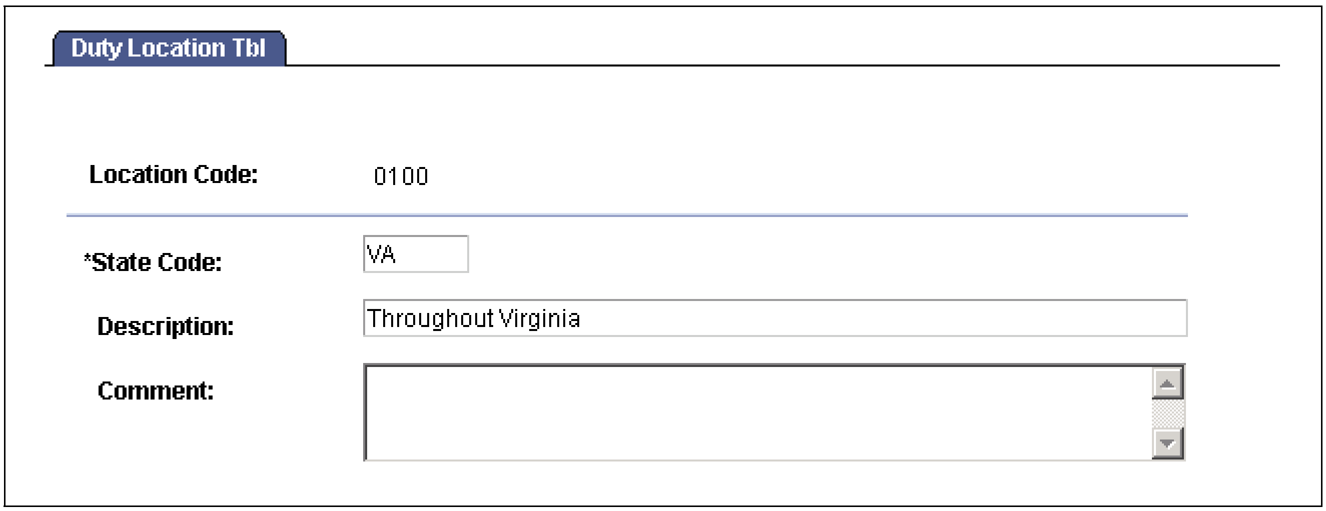
Pages Used to Set Up Job Requisition Postings and the USA Jobs Feed

Page Name	Object Name	Navigation	Usage
Distribution List	GVT_RECR_DIST_LIST	Set Up HRMS, Product Related, Recruiting, Distribution List USF	Create lists for distributing vacancy announcements to different recruiting sources. Recruiting sources appear here once you identify them as being included in the specified distribution list. When adding a new distribution list, no recruiting sources appear because no sources have been assigned yet.
Recruiting Source1	GVT_RECRUIT_SRC1	Set Up HRMS, Product Related, Recruiting, Recruiting Source USF, Recruiting Source 1	Enter a description, contact name, and address information for a recruiting source.
Recruiting Source2	GVT_RECRUIT_SRC2	Set Up HRMS, Product Related, Recruiting, Recruiting Source USF, Recruiting Source 2	Enter all your contact persons' phone numbers and indicate whether to include them in distribution lists.
Recruiting Office	GVT_RECRUIT_OFFICE	Set Up HRMS, Product Related, Recruiting, Recruiting Office, Recruiting Office	Define the offices authorized to perform recruiting and staffing functions. Use the personnel office identifier (POI) codes, set up new codes to complement your agency's requirements, or set up shared service centers for specific types of recruiting.
Recruiting Office Phones	GVT_REC_OFF_PH_SEC	Click the Phone Numbers link on the Recruiting Office page.	Enter phone information for a recruiting office.
Gvt Occ Suffix Tbl (government occupational suffix table)	GVT_OCC_SUFFIX_TBL	Set Up HRMS, Product Related, Recruiting, USA Jobs USF, Occupational Suffix	Create and maintain occupational series title suffixes supported by USA Jobs.

Page Name	Object Name	Navigation	Usage
USA Jobs Remarks	GVT_VA_REMARKS	Set Up HRMS, Product Related, Recruiting, USA Jobs USF, Vacancy Announcement Remarks	Create and maintain the remark codes and descriptions supported by USA Jobs. Remark codes are categorized by remark type for easy identification of remarks.
Duty Location Tbl (table)	GVT_VA_DUTY_LOC	Set Up HRMS, Product Related, Recruiting, USA Jobs USF, Duty Location Table	Create and maintain the location codes supported by USA Jobs. Location codes are used to identify a specific location or region where there are job vacancies.

Creating Location Codes

Access the Duty Location Tbl page.



Duty Location Tbl page

State Code Enter the state code associated with the Location Code.

Comments Enter additional information regarding the Location Code. For example, if the location code represents a large area, you could enter the counties or cities that are included in that area.

Creating Screening Questions

Many organizations use standard questionnaires as part of the screening process. You can incorporate questions into your screening criteria for requisition screening as follows:

- Define standard questions and link them to two or more possible answers. If you want to create a standard template for different job types, create a question set. If the questions are related to a particular skill or ability, you can link the question set to a competency in your Competency Table.

- When hiring managers or recruiters create a job requisition, they select the question set or individual screening questions that they want to link to the requisition. For each answer, they assign a points score.
- When applicants apply online, using the Apply For Job self-service transaction, the system presents them with questions linked to all the job requisitions being applied for. Questions that are assigned to more than one requisition are included only once in the online questionnaire. Applicants who aren't applying for a specific requisition are not presented with screening questions.
- For all users except U.S. Federal, requisition screening calculates applicants' scores using the points that were assigned and adds these to the points for the other screening criteria. The system then ranks applicants according to their total score.

To set up screening questions:

1. Define answers on the Answer Definition page.
2. Create questions and link to the predefined answers using the Question Definition page.
3. (Optional) Create standard questionnaires using the Question Set Definition page.

See Also

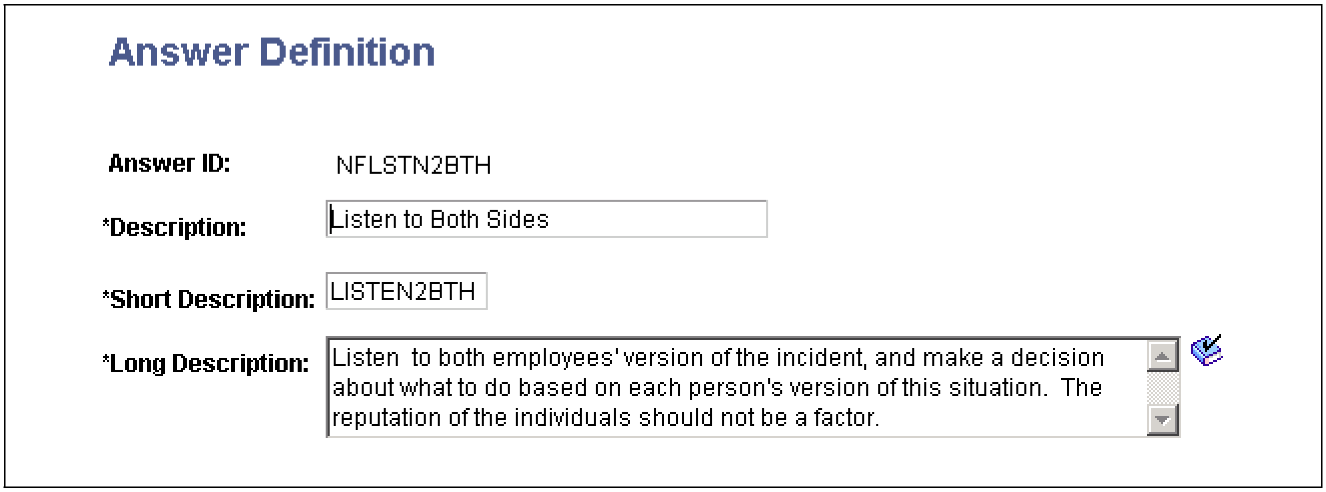
Chapter 9, "Processing Applicants," Screening Applicants, page 183

Pages Used to Set Up Screening Questions

Page Name	Object Name	Navigation	Usage
Answer Definition	ER_ANSWER_DEF	Set Up HRMS, Product Related, Recruiting, Question/Answer, Answer Definition	Define standard answers to screening questions.
Question Definition	ER_QUESTION_DEF	Set Up HRMS, Product Related, Recruiting, Question/Answer, Question Definition	Define standard questions for screening applicants.
Question Set Definition	ER_QSTN_SET_DEF	Set Up HRMS, Product Related, Recruiting, Question/Answer, Question Set Definition	Create a questionnaire based on questions you've previous set up.
Question Set Answers	ER_QSTN_SET_ANS	Click the View Answers link on the Define Question Set page.	View the answers linked to questions in a question set.

Defining Answers

Access the Answer Definition page.



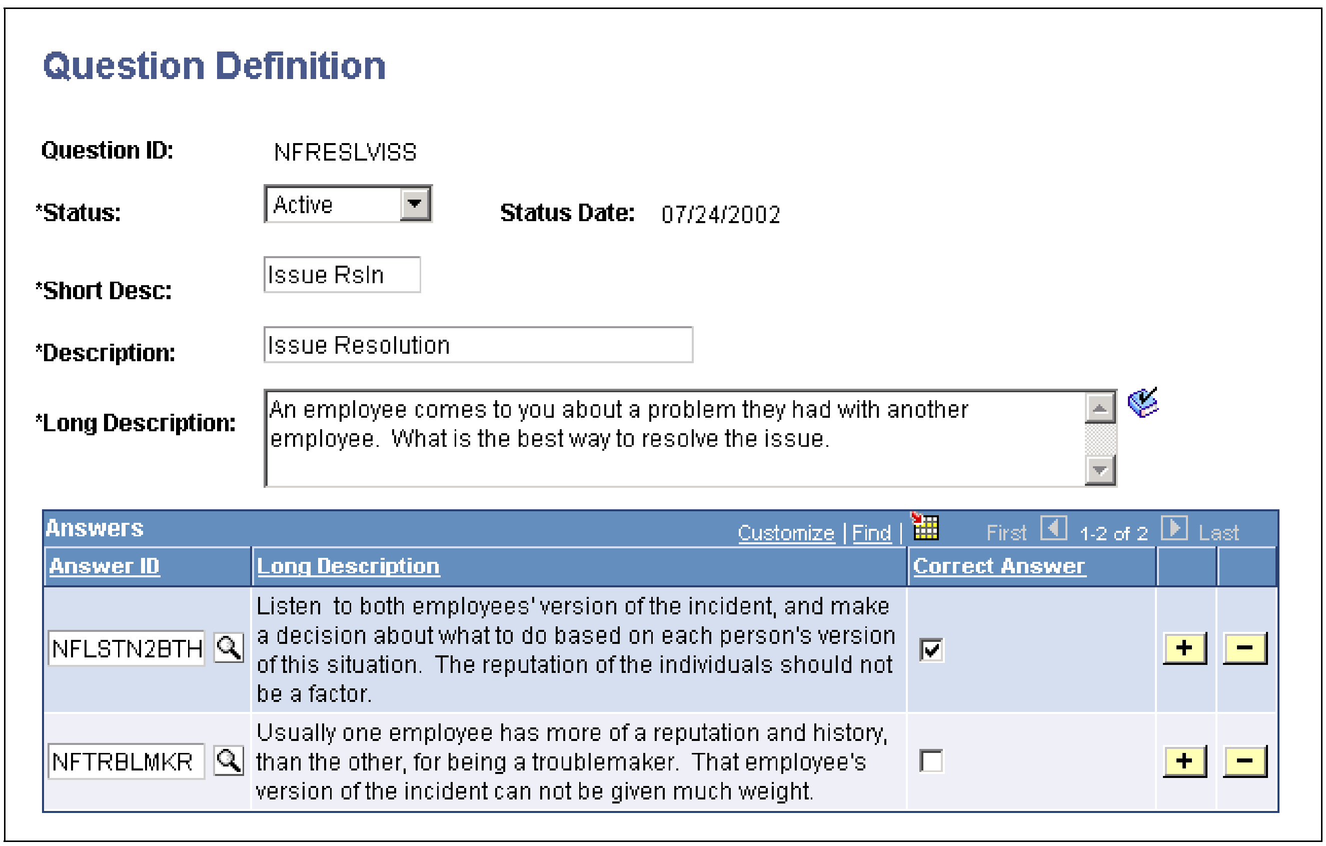
Answer Definition page

Answer ID Enter a code for the answer.

Long Description Enter the answer text.

Defining Questions

Access the Question Definition page.



Question Definition page

Question ID Enter a code for the question.

Status

Select a status of *Active* or *Inactive.* You can add only *Active* questions to a question set or a job requisition.

If you change the status to *Inactive,* the system displays a warning message if there are active question sets that include the question.

When you change the status, the system automatically updates Status Date.

Long Description

Enter the text of the question.

Answers

Answer ID

Select the answers you want to associate with the question, from the answers you set up on the Answer Definition page. The system displays the answer text in Long Description.

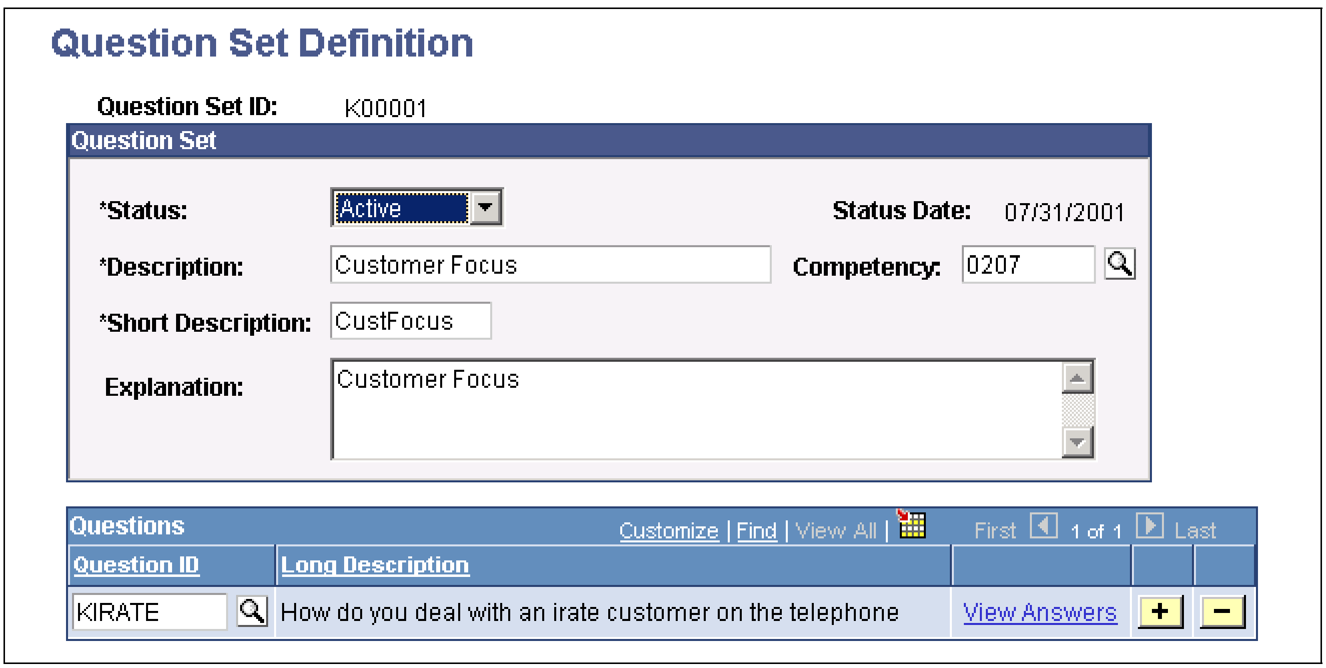
You must have at least two, and a maximum of five, possible answers.

Correct Answer

Select this check box if the question has one correct answer only.

Defining Question Sets

Access the Question Set Definition page.



Question Set Definition page

Competency

If the questions relate to a particular competency, select the competency from your Competency Table.

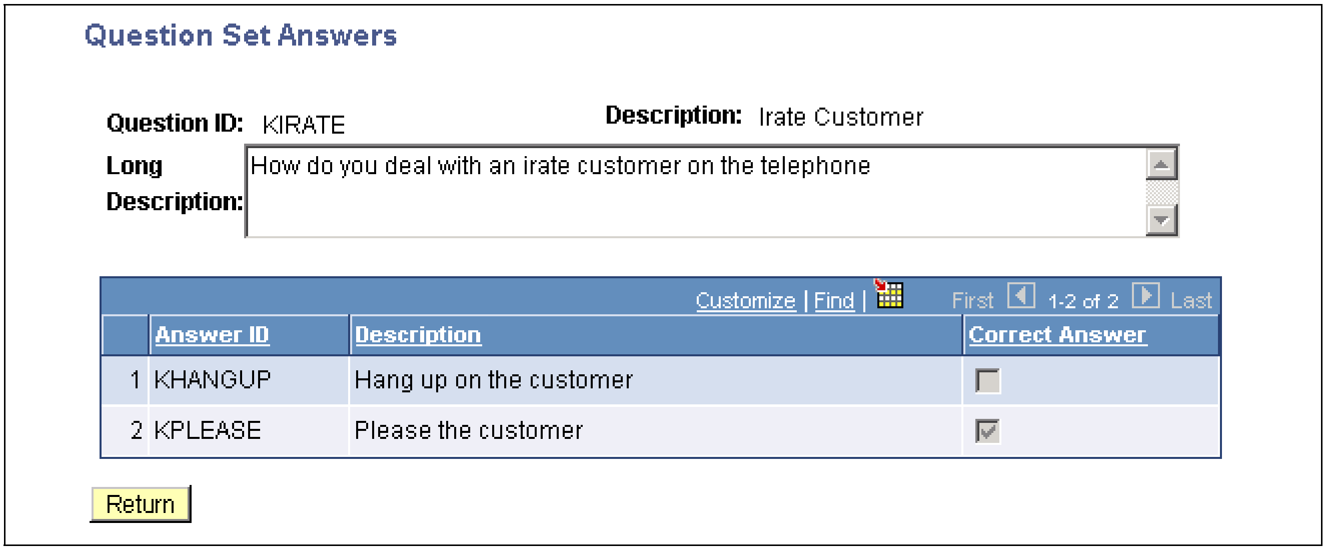
View Answers

Question ID Select a question from the list of questions you have set up on the Question Definition page. The system displays the text of the question in Long Description.

View Answers Click to display the View Answers page where you can view the possible answers linked to the question.

Viewing Answers

Access the Question Set Answers page.



Question Set Answers page

The system displays the answers that are linked to the Question you selected. If you want to change the answers linked to a question, use the Question Definition page.

If the question has one correct answer, the system selects the appropriate Correct Answer check box.

(USF) Setting Up Priority Placements

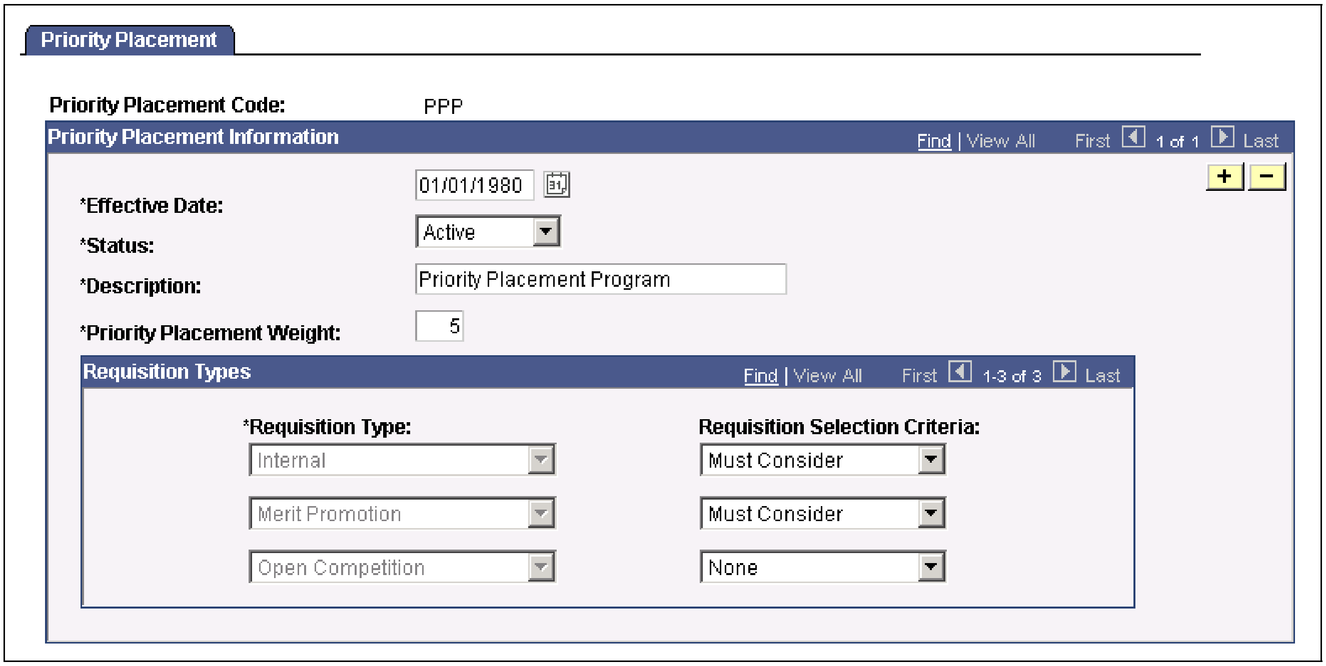
Priority placement is used to track candidates who should get special consideration in the selection process for some reason, such as a reduction in force (RIF) or an involuntary change in position.

Pages Used to Set Up Priority Placement

Page Name	Object Name	Navigation	Usage
Priority Placement	GVT_PRIO_TBL	Set Up HRMS, Product Related, Recruiting, Priority Placement USF	Create and edit priority placement codes.

Defining Priority Placement Codes

Access the Priority Placement page.



Priority Placement page

Priority Placement Weight Enter a weighting for the priority placement code.

Note. Lower numbers assigned to the Priority Placement Weight correspond to *higher* weights. The Priority Placement Weight has a direct impact on the Applicant Ranking process.

Requisition Type The system displays the requisition type and corresponding Requisition Selection Criteria that applies.

(USF) Setting Up Veterans Preference Codes

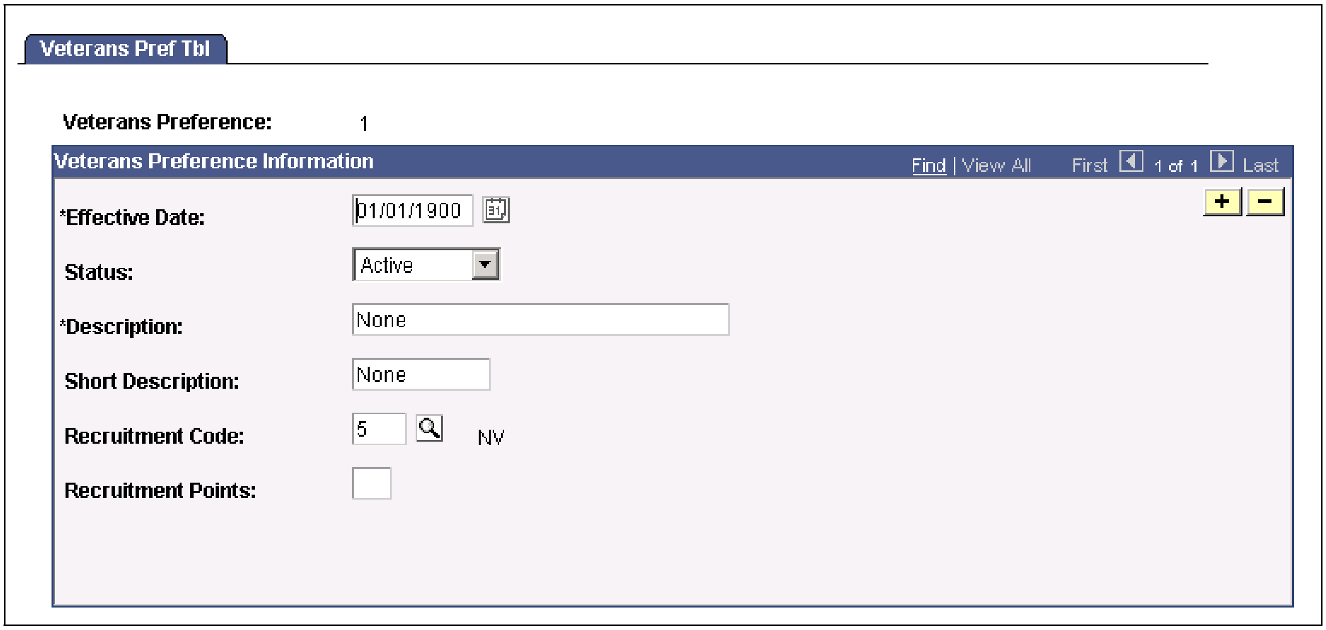
Veterans preference codes are for special considerations for military service performed. These codes, and their associated values, are added to veterans' existing scoring to enhance their rating and ranking.

Pages Used to Set Up Veterans Preference Codes

Page Name	Object Name	Navigation	Usage
Veterans Pref Tbl (veterans preference table)	GVT_VET_PREF_TBL	Set Up HRMS, Product Related, Recruiting, Veterans Preference USF	Create or edit veterans preference codes.

Defining Veterans Preference Codes

Access the Veterans Pref Tbl page.



Veterans Pref Tbl page

Recruitment Points Enter the points associated with the preference. This value is used on the Applicant Rating page.

If the Ranking Plan requires you to consider veterans preference, then the Veterans Preference for Appointment Recruitment Code that you select is used as a tie-breaker when more than one applicant has the same Priority Placement Weight and Final Rating Score. The codes are defined as follows:

Code	Tie-Break Rank	Description	Short Description	Recruitment Code	Recruitment Points
1	5	None	None	NV	0
2	4	5 Point	5 Point	TP	5
3	3	10 Point/ Disability	10 Pt Dis	XP	10
4	2	10 Point/ Compensable	10 Pt Comp	CP	10

Code	Tie-Break Rank	Description	Short Description	Recruitment Code	Recruitment Points
5	3	10 Point/Other	10 Pt Other	XP	10
6	1	10 Point/ Compensable /30%	10 Pt 30%	CPS	10

Note. The values entered in this table are used in the Veterans Preference field on the Applicant Eligibility/Identity page.

Setting Up Job Offer Information

Often job offers comprise multiple elements, of which the base salary is just one component. You may offer applicants a bonus, stock options, or car allowances in addition to a salary. To track all elements of job offers, you need to set up job offer components and job offer component types for your organization.

Use job offer component types to group together similar offer components. For example, you might have a type for the salary job offer components.

Hiring managers, recruiters, and recruiting administrators select from the predefined components when entering applicant job offers.

To set up job offer components:

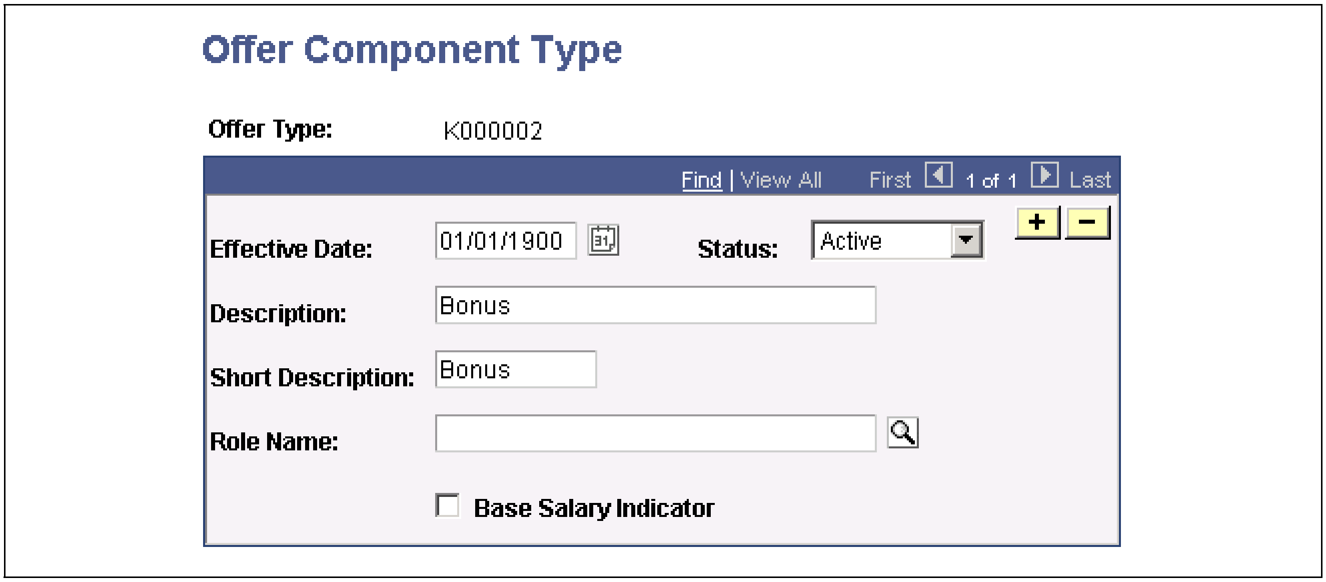
1. Define job offer component types.
2. Define the job offer components.

Pages Used to Set Up Job Offer Components

Page Name	Object Name	Navigation	Usage
Define Offer Component Types	OFFER_TYPE_TBL	Set Up HRMS, Product Specific, Recruiting, Offers, Offer Component Type Table	Set up the job offer component types that you use to group offer components.
Define Offer Components	OFFER_CMPNT_TBL	Set Up HRMS, Product Specific, Recruiting, Offers, Offer Component Table	Set up job offer components and link them to component types.

Defining Job Offer Component Types

Access the Define Offer Component Types page.



Offer Component Type page

Offer Type

Enter the name of the offer component type.

Role Name

Select the role that is responsible for administering the offer component type. For example, if you create a component type for stock options, you would link this to the stock administrator role.

Set up roles using the PeopleTools Roles security component.

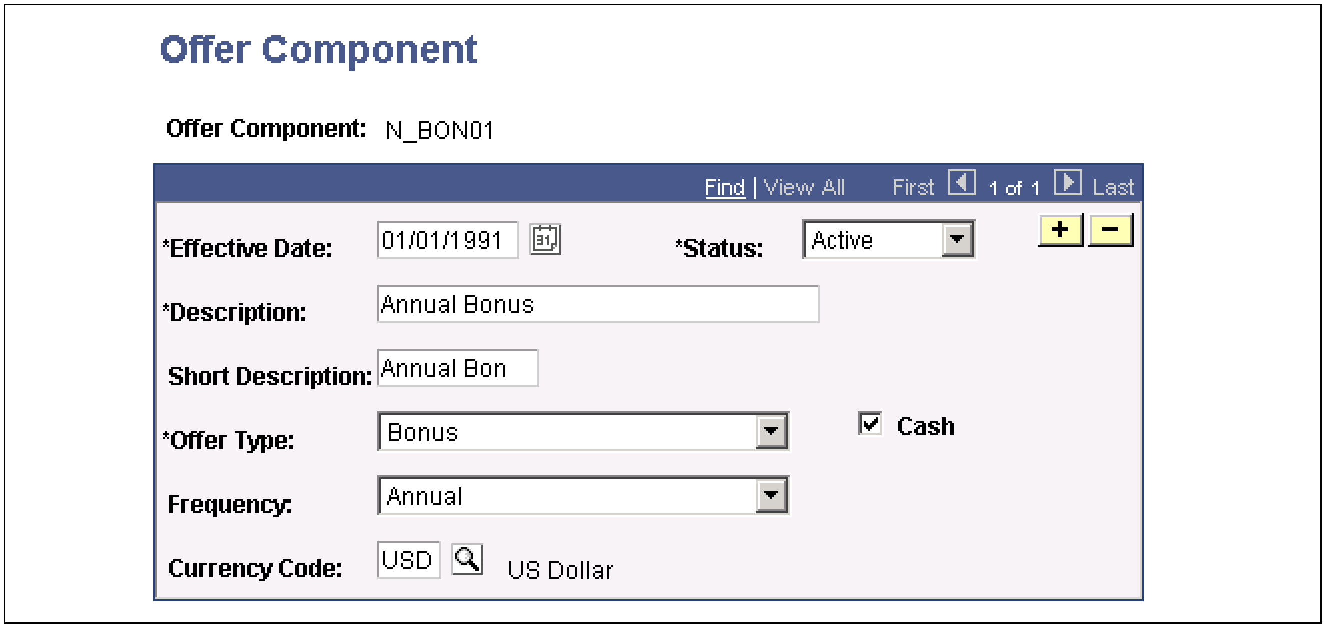
If you set up email workflow, the system sends an email to the person with the selected role to notify them of new hires.

Base Salary Indicator

Select this check box if the component type forms part of the base salary. The system uses this check box to calculate the total base salary. When users enter a job offer, the system checks whether the base salary exceeds the maximum salary grade range for the job. You define the salary grades for a requisition on the Job Requisition Information page.

Defining Job Offer Components

Access the Define Offer Components page.



Offer Component page

Offer Component Enter the name of the job offer component.

Offer Type Select the component type from the options available. Set up component types on the Define Offer Component Types page.

Cash Select this check box if the offer component is received as cash. For example, base salary is a cash component but for stock options you'd leave the check box cleared.

When users enter job offers, the system checks that the frequency and currency code are defined for offer components with this check box selected.

Frequency Enter the default Frequency and Currency Code for the offer component

Defining Attachment Types

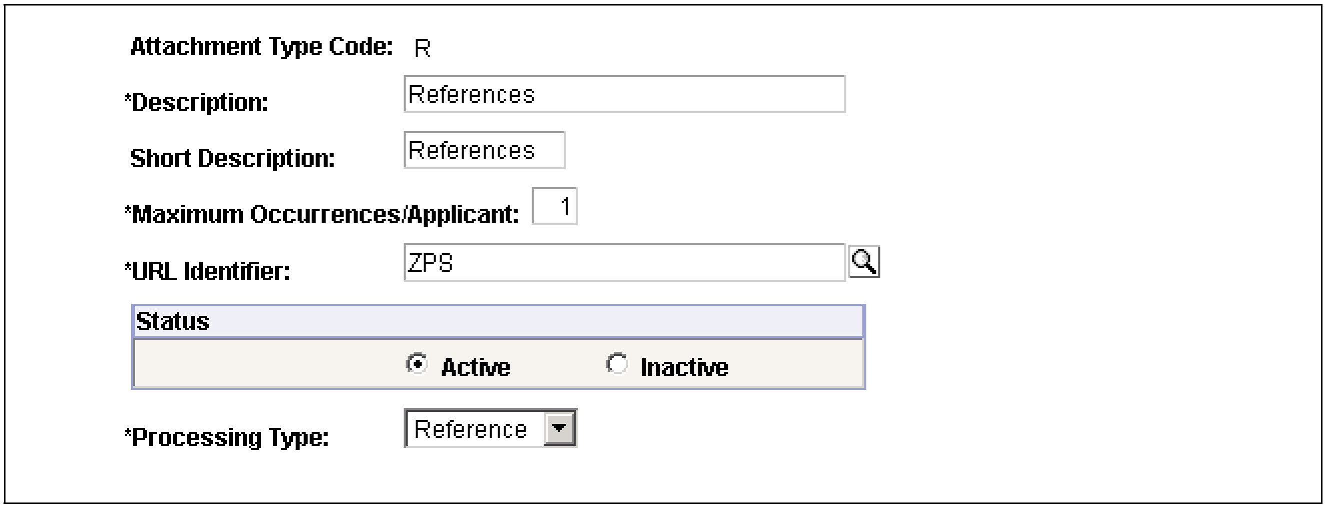
Not only do applicants applying for jobs need to submit resumes, they may want to include cover letters or references. This table enable you to identify the types of documents you will accept from applicants, as well as setting limits on the number of documents an applicant can submit and identifying directory where those documents will be stored.

Pages Used to Set Up Attachment Types

Page Name	Object Name	Navigation	Usage
Attachment Type Setup	ER_ATTACH_TYPE_TABLE	Set Up HRMS, Product Related, Recruiting, Attachment Types	Defines the types of permissible attachments.

Creating an Attachment Type

Access the Attachment Type page.



Attachment Types page

Attachment Type 3-digit code for this attachment type.

Maximum Occurrences/Applicant Identifies the number of this specific attachment type that can be submitted by an applicant.

URL Identifier Select the URL address that will house the documents for this attachment type. The URL must be set up on the URL Maintenance table.

Attachments can be stored on a file server or in the database tables. If the file is stored on a file server the format for the URL is *ftp://<URL>*. If the file is stored in the database, the format for the URL is *record://ER_ATTACHMENTS*.

Processing Type Identifies the type of attachment. This is used when the applicant applies for a job online, submits additional attachments, or you are requested references from the applicant.

Your options are: *Other*, *Reference*, and *Resume*.

Setting Up Authorization Rules and Recruiter Roles

When job requisitions are created using the Create Job Requisition self-service transaction, the manager must:

- Select someone to approve the job requisition.
- Assign a recruiter to the job requisition.

Rather than seeing a complete list of all employees, you can specify who you want to appear in the list of approvers and recruiters.

Pages Used to Set Up Authorization Rules and Recruiter Roles

Page Name	Object Name	Navigation	Usage
Setup Requisition Authorizers	ER_JOBREQ_SETUP	Set Up HRMS, Product Related, Recruiting, Job Requisition Authorizers	Defines who can be assigned to approve a job requisition and who can be the recruiter assigned to the job requisition on the Job Requisition Information page.

Defining the Authorizer Rule and Recruiter Roles

Access the Setup Requisition Authorizers page.

Setup Requisition Authorizers page

Access Type

Select the option that defines the access type on the Create Job Requisition page. Options are as follows:

By Department Manager ID which allows managers to choose the entry in the Manager ID field on the Department Profile page.

By Dept Security Tree which allows managers to choose from themselves and on up the security tree.

By Reports To Position which allows managers to choose from entry in the Report To field on the Work Location page.

By Supervisor ID which allows managers to choose from entry in the Supervisor ID field on the Work Location page.

None which allows managers to choose from all active employees.

Role Name

Defines the valid assigned recruiter roles for a job requisition.

CHAPTER 4

Creating Recruitment Templates

This chapter explains what recruitment templates are and discusses how to create a:

- Resume template.
- Requisition template.
- Interview Evaluation template.
- Job Posting template.
- Recruitment template.

Understanding Recruitment Templates

When information is displayed on various self-service and HRMS - Recruit Workforce pages, a template is controlling the layout of the page and the information displayed. You create these various templates and ultimately link them to a recruitment template. The recruitment template is then linked to a job requisition.

The system uses the recruitment template to identify how a job requisition should be processed. Recruitment templates are used by HRMS - Recruit Workforce, eRecruit, and eRecruit Manager Desktop.

To create a recruitment template, you:

1. Create a resume template using the Resume Options page.
2. Create a requisition template using the Requisition Options page.
3. If you offer employee referral programs, set up your employee referral program.

   Setting up an employee referral program is fully documented in the Managing Employee Referral Programs chapter.
4. If you purchased eRecruit, create an interview evaluation template.

   The Interview Evaluation template defines the information interviewers will complete when they enter interview evaluations in eRecruit. Setting up interview evaluation templates is fully documented in the Applying for Jobs Online chapter of PeopleSoft eRecruit PeopleBook.
5. Create a Posting template using the Posting Description Definition page.
6. Link the above templates to the recruiting template using the Recruitment Options page.

Creating Resume Templates

This section explains what a resume template is and how to create one.

Understanding Resume Templates

Resume templates are used by the Apply for Job self-service transaction. It defines the pages and the order in which the pages appear to an employee or external applicant who is applying for a job online.

Resume templates need to work with requisition templates. Otherwise, there can be a mismatch between the information applicants enter through Apply for Job. For example, if a resume template includes the Online Questionnaire page, the requisition template should include screening questions.

See Also

PeopleSoft 8.8 eRecruit PeopleBook, "Applying for Jobs"

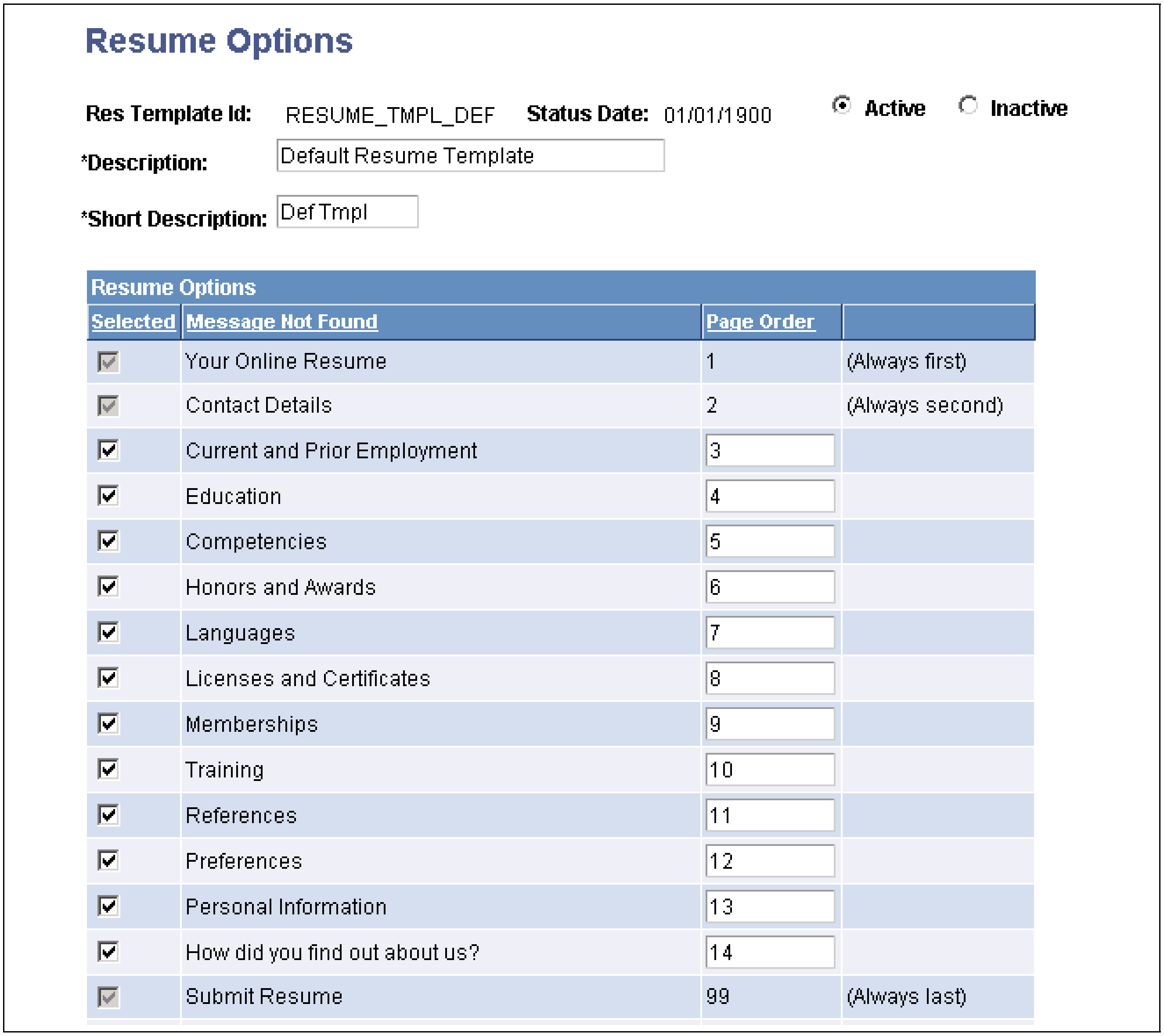
Chapter 6, "Creating and Posting Job Requisitions," page 67

Page Used to Create Resume Templates

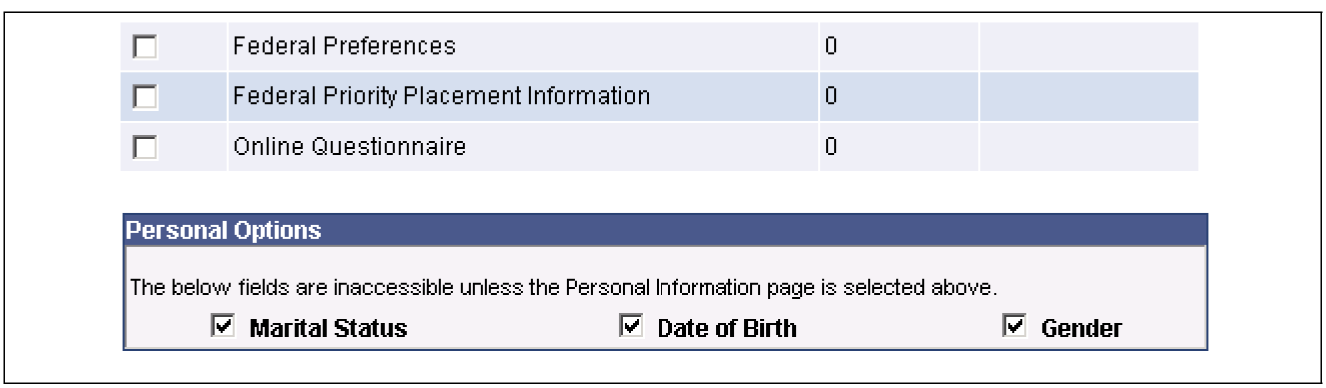
Page Name	Object Name	Navigation	Usage
Resume Options	HR_RESUME_OPTIONS	Set Up HRMS, Product Specific, Recruiting, Templates, Resume Options	Defines the pages that will be used and the order in which they will appear in the Apply On Line transaction in eRecruit. Also defines the information required on the Applicant Data pages.

Creating a Resume Template

Access the Resume Options page.



Resume Options page (1 of 2)



Resume Options page (2 of 2)

Res Template ID (resume template ID)

Identifies the name of this resume template.

Resume Options

This group box is used to define the pages and the order in which they appear on the Apply for Job transaction and the information required in the Job Requisition - Screen Criteria page.

Select the check box for each page you want to include. Next, enter a number to indicate the order in which you want it displayed.

The Your Online Resume, Contact Details, and Submit Resume pages are required and you cannot change these check boxes, nor can you change the sequence numbers.

Personal Options

If you selected the Personal Information page, the system makes personal options available for entry. Select the fields you want to appear on the Personal Information page. Regulations in your region may determine what should be selected for display.

Creating Requisition Templates

This section explains what a requisition template is and how to create one.

Understanding Requisition Templates

Requisition templates are used by the Create Job Requisition self-service transaction and the Job Requisition Information pages. It defines the pages, sequence, and information necessary for a recruitment administrator, recruiter, or manager to create a job requisition.

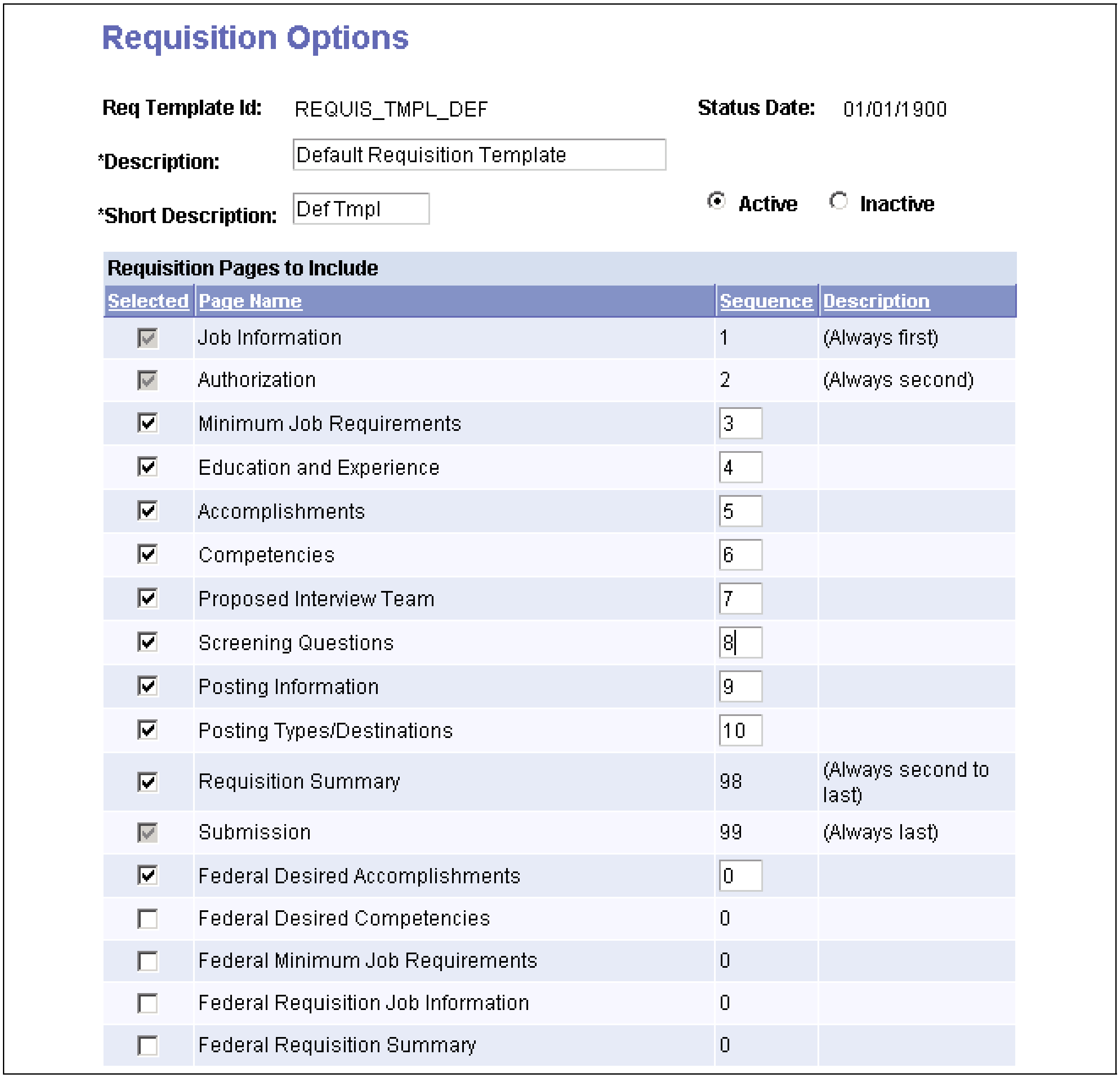
Requisition templates need to coordinate with resume templates. Otherwise, there could be a mismatch between job requirements and the information applicants supply through Apply for Job. For example, if you want to screen applicant based on their competencies, then you much select the Competencies check boxes on the Requisition Options and Resume Options pages.

Page Used to Create Requisition Templates

Page Name	Object Name	Navigation	Usage
Requisition Options	HR_REQUIS_OPTIONS	Set Up HRMS, Product Specific, Recruiting, Templates, Requisition Options	Defines the pages that will be used and the order in which they will appear in the Create Job Requisition transaction in eRecruit Manager Desktop.

Creating a Requisition Template

Access the Requisition Options page.



Requisition Options page

Req Template ID (requisition template ID)

Identifies the name of this requisition template.

Requisition Options

This group box is used to define the pages and the order in which they appear on the Create Job Requisitions transaction and the information required in the Job Requisition information pages.

Select the check box for each page you want to include. Next, enter a number to indicate the order in which you want it displayed.

The Job Information, Authorization, and Submission pages are required and you cannot change these check boxes, nor can you change the sequence numbers.

Creating Interview Evaluation Templates

An interview evaluation template defines which form interviewers use to evaluate applicants for the requisition.

Pages Used to Create Interview Evaluation Templates

Page Name	Object Name	Navigation	Usage
Interview Evaluation Definition	ER_INTVW_EVAL_DEFN	Setup HRMS, Product Related, Recruiting, Templates, Interview Evaluations	Create evaluation forms that your interviewers complete to evaluate applicants.
Recommendation Reasons	ER_INT_EVL_RSN_SEC	Click the Reason link on the Interview Evaluation Definition page.	Select the reasons you want interviewers to use on the interview evaluation form.

Creating Interview Evaluation Forms

Access the Interview Evaluation Definition page.

Interview Evaluation Definition

Evaluation ID: DFLT

Description: Default Interview Evaluation **Short Description:** Default

Status: Active **Status Date:** 09/20/2002

Evaluation Items

Use	Description
☑	Communication Skills
☑	Education/Training
☑	Work Experience
☑	Technical Skills
☐	
☐	
☐	
☐	
☐	
☐	

Interview Evaluation Definition page (1 of 2)

Recommendation

Use	Description		Reason Required
☑	020-Make Offer	Reasons	☐
☑	030-Interview Further	Reasons	☐
☑	100-Hold	Reasons	☐
☑	110-Reject	Reasons	☑
☐	120-Withdrawn	Reasons	☐

Rating Scale

Use	Description	Rating
☑	Excellent	5
☑	Average	4
☑	Not Qualified	3
☐		0
☐		0

Interview Evaluation Definition page (2 of 2)

Evaluation ID	The code for the evaluation form. Typically the areas you want to evaluate vary according to the job applied for, so you can create a different form for each job type.
Use	Select if you want to include the item, recommendation, reason, or rating value in the template.

Evaluation Items

Define the areas in which interviewers evaluate applicants. For each evaluation item you include on the form, interviewers rate the applicant using the scale you define in Rating Scale.

Recommendation

Description	The system automatically lists the status values defined for the interview recruitment area. If you have changed the default statuses supplied by PeopleSoft, the system displays your own statuses here. Select the statuses you want to include in the template.
Reasons	Click this link to access the Recommendation Reasons page where you can view the reasons associated with the status values in Description. Select the reasons you want to include on the evaluation form. Interviewers select a reason that explains their recommendation.
Reason Required	Select if you want interviewers to select a reason when they select the status value on the evaluation form.

Rating Scale

Description	Define the scale that interviewers use to rate applicants in the areas specified in Evaluation Items. The system creates a radio button on the interview evaluation form for each rating you enter here.
Rating	Enter the number of points associated with the rating you enter in Description. The system uses this value to determine the overall score of applicants.

Note. Once an interviewer has completed and saved an evaluation using an interview evaluation form, you can't make changes to this Interview Evaluation Definition.

See Also

Chapter 3, "Setting Up Recruit Workforce," Setting Up Recruitment Status Codes, page 13

PeopleSoft 8.8 eRecruit Manager Desktop PeopleBook, "Organizing Interviews"

Creating Job Posting Templates

This section explains what a job posting template is and how to:

- Create description types.

- Create posting templates.

Understanding Job Posting Templates

Job Posting information is made up of description types. Description types are just categories of information you want to make up the entire job posting. In your job posting, you may want to include statements about your company, the job responsibilities, and required qualifications.

PeopleSoft provides 15 different description types. However, you can add more.

Description Type	Description Name
B	Basis of Rating
C	Closing Statement
D	Department Marketing Statement
E	Equal Employment Opportunity
H	How To Apply
I	Other Information
L	Conditions of Employment
M	Major Duties
O	Org Marketing Statement
P	Pay, Benefits, & Work Schedule
Q	Qualifications
R	Responsibilities
T	How CTAP &/or ICTAP May Apply
V	How to Claim Vet Preference
W	Who May Apply

Posting templates enable you to define the description types you want associated with a job requisition. Job posting templates are used by the following pages:

- Job Posting of HRMS Recruit Workforce.
- (USF) Job Posting for Federal users of HRMS Recruit Workforce.
- Create Job Requisition - Requisition Posting Information for eRecruit Manager Desktop.
- Preview External Posting Description.

Note. If you use RecruitUSA, your want your job posting template to have job posting types with a description types of O, D, Q, R, and C. These are the only description types posted to RecruitUSA. If you use the keyword search feature of Applicant Search, you want the job posting template to include description types Q and R. These are the description types the system searches when comparing keywords to resumes.

Pages Used to Create Description Types and Posting Templates

Page Name	Object Name	Navigation	Usage
Requisition Description Type	ER_REQ_DESCR_TP	Set Up HRMS, Product Specific, Recruiting, Requisition Description Types	Identifies the different job description categories.
Posting Description Template	GVT_VACANCY_OPTION	Set Up HRMS, Product Specific, Recruiting, Templates,	Identifies the job posting template and defines which description types will be used and the order in which they will appear.

Creating Description Types

Access the Requisition Description Type page.

Requisition Description Type page

Comment

Enter text that describes this requisition description type. This informational only. Description Types *O, D, Q, R, and C* are used by the Search for Applicants process and RecruitUSA and you cannot change anything except the Comment field.

Creating a Posting Template

Access the Posting Description Template page.

Posting Description Template

Posting Template ID: STND

Status Date: 06/14/2002

*Description: Standard Template

Short Description: Standard

Active Inactive

Requisition Pages to Include

Selected	Description	Sequence
☑	Org Marketing Statement	1
☑	Department Marketing Statement	2
☑	Responsibilities	3
☑	Qualifications	4
☑	Closing Statement	5
☐	Basis of Rating	
☐	Conditions of Employment	
☐	Other Information	
☐	Pay,Benefits, & Work Schedule	
☐	Equal Employment Opportunity	
☐	How To Apply	
☐	How CTAP &/or ICTAP May Apply	
☐	How to Claim Vet Preference	
☐	Who May Apply	

Posting Description Template page

Requisition Pages to Include

Use this group box to select the description types you want included in the job posting. The description types that are displayed come from the ones entered on the Requisition Description Type page with an *Active* status.

Select the check box next to the description type you want to include and then assign a sequence number that determines the order in which it will display in the job posting.

Creating Recruitment Templates

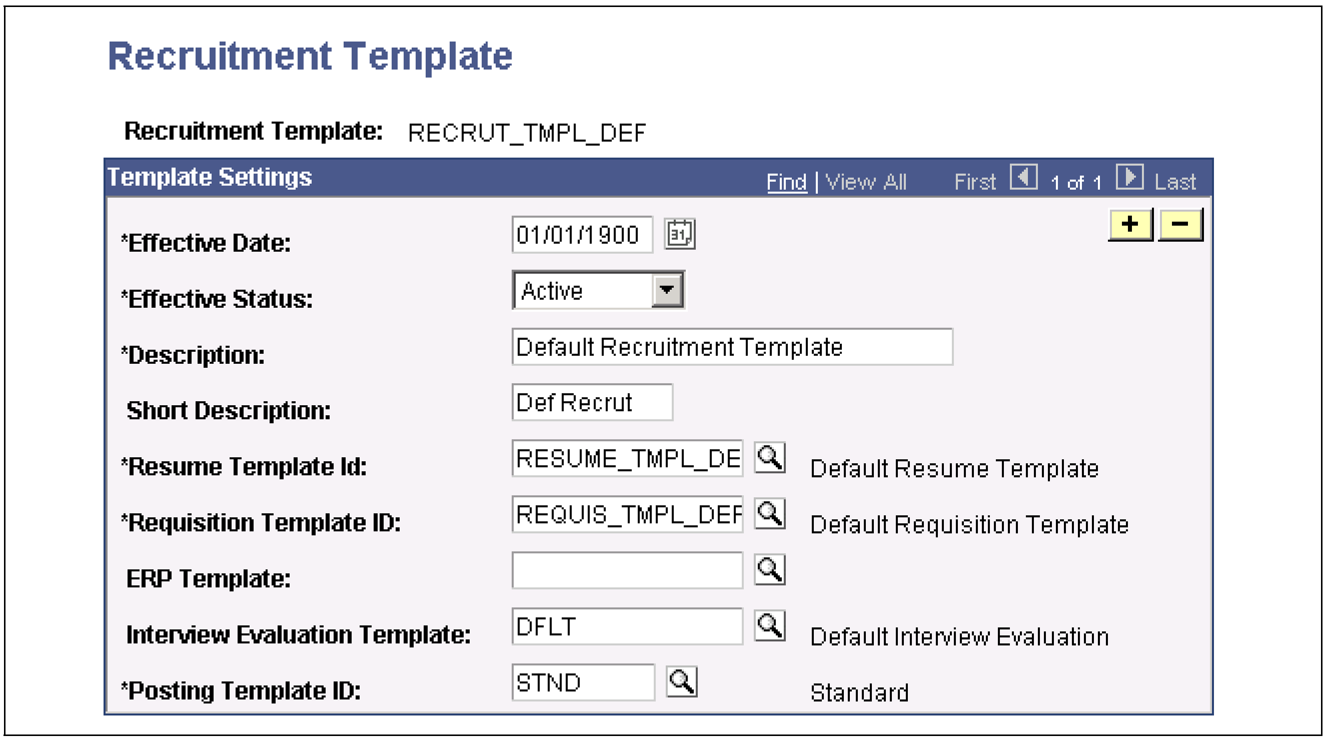
This section discusses how to link the various templates created previously to the recruitment template.

Page Used to Create Recruitment Templates

Page Name	Object Name	Navigation	Usage
Recruiting Template Settings	ER_RCRT_TMPL	Set Up HRMS, Product Specific, Recruiting, Templates, Recruitment Template, Recruiting Template Settings	Defines the templates used for a job requisition.

Creating a Recruitment Template

Access the Recruiting Templates Settings page.



Recruiting Template Settings page

Job Requisition Defaults

This group box is used to link various templates to this one recruiting template.

This recruitment template is then used when you create a job requisition using the Job Requisition page or the Create Job Requisition transaction.

CHAPTER 5

Creating Employee Referral Programs

This chapter provides an overview of setting up employee referral programs (ERP) and discusses how to:

- Set up employee eligibility rules.
- Set up award rules.
- Create employee referral programs.

Understanding How to Set Up ERPs

Here are the steps for setting up ERPs:

1. Set up employee eligibility rules.
2. Set up award category rules and schedules.
3. Create the employee referral program.
4. Associate job requisitions with an employee referral program on the Recruitment Template page.

See Also

Chapter 4, "Creating Recruitment Templates," page 43

Common Terms and Elements Used in This Chapter

Applicant — The applicant who has been referred by an employee. In this chapter, the term also applies when the applicant has been hired and is now an employee.

Award date — The date awards are scheduled to be paid.

Employee — The employee who refers the applicant.

Hot job — A job requisition that falls into a hot job category. Typically hot jobs are critical positions for which the organization pays a higher referral award.

Hot job ID — The identifier of a category of hot jobs. Define awards for the hot job ID that supercedes the award schedule defined for the ERP award category into which the job requisition falls.

Hot Job ID refers to the hot job category, not to any individual hot job.

Job requisition — The job requisition for which the applicant is referred or into which the applicant is hired.

Referral Program ID The identification code that you assign when you define a particular employee referral program. It is a key field for many of the pages addressed in this chapter.

Setting Up Employee Eligibility Rules

Eligibility rules define the conditions under which an employee is eligible for award payment under the ERP. For example, you might want to limit eligibility to employees who work in a particular geographic area or type of job. You might want to exclude employees in certain departments or locations. You can create a rule that combines a number of criteria to determine employee eligibility.

To define employee eligibility rules:

1. Assign a code to the rule.
2. Create the SQL for the rule.

Understanding SQL for Eligibility Rules

To construct a rule on the Rule SQL page:

1. Select open parentheses.

   You can select from zero to five open parentheses to group lines together as needed.
2. Select a record.
3. Select a field from the selected record.

   The system limits the valid fields for the record.
4. Complete the Setid field, if SetID is a key for the record and field that you selected.

   The Setid field is unavailable if SetID is not a key.
5. Select an operand.

   The following are valid operands:

   - *Equal To*
   - *Greater Than*
   - *Greater Than or Equal to*
   - *LIKE*
   - *Less Than*
   - *Less Than or Equal To*
   - *Less Than or Equal To*
   - *Not Equal To*
6. Enter a value that corresponds with the record, field, and operand that you selected.

   You can enter either a static string or select a value from a list of valid values for the field.
7. Select from zero to five close parentheses.

8. (Optional) Add a row to continue the rule definition.

   When you add a row, select the operand *AND* or *OR* in the first field in the new row.

9. Click the View SQL link to view the SQL generated by the values that you entered for this rule definition.

Note. You do not have to create a rule stating that the applicant must have active employee status on the award date. This rule is already built into the system.

Pages Used to Create Employee Eligibility Rules

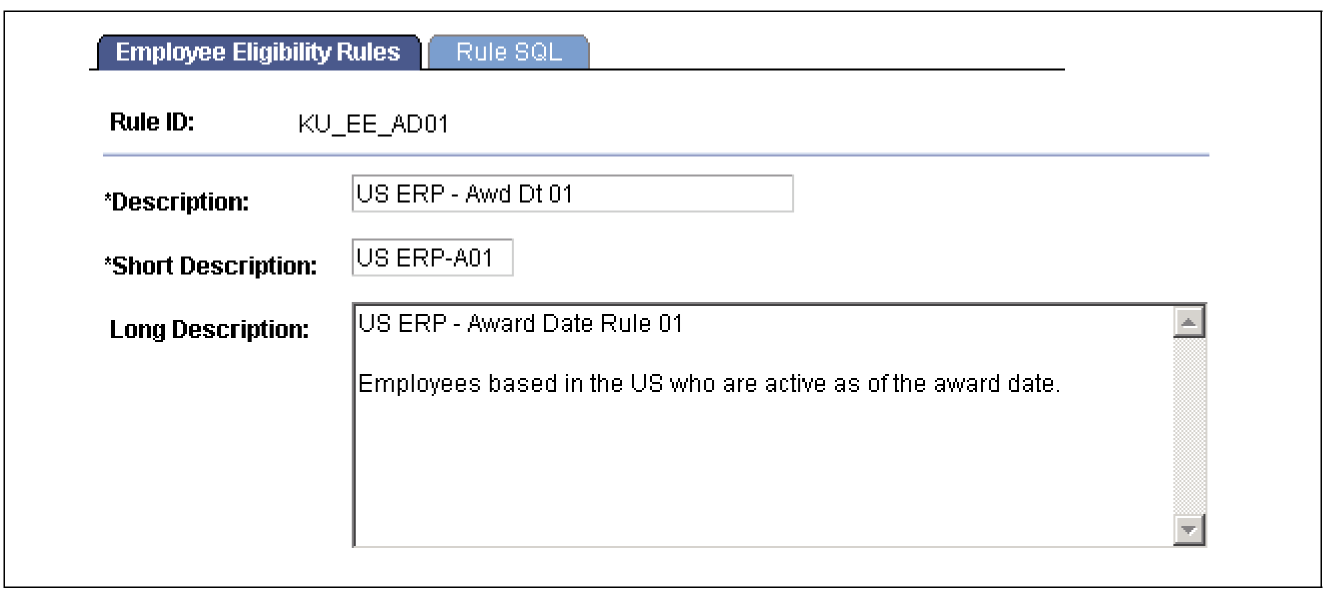
Page Name	Object Name	Navigation	Usage
Employee Eligibility Rules	ER_RULE_DEFN	Set Up HRMS, Product Related, Recruiting, Referrals, Employee Eligibility Rules	Name and describe rules used in administering employee referral programs and hot jobs.
Rule SQL	ER_RULE_SQL	Set Up HRMS, Product Related, Recruiting, Referrals, Employee Eligibility Rules, Rule SQL	Build the SQL select statements of rules used in administering employee referral programs and hot jobs.

See Also

Chapter 5, "Creating Employee Referral Programs," Setting Up Employee Eligibility Rules, page 56

Identifying Employee Eligibility Rules

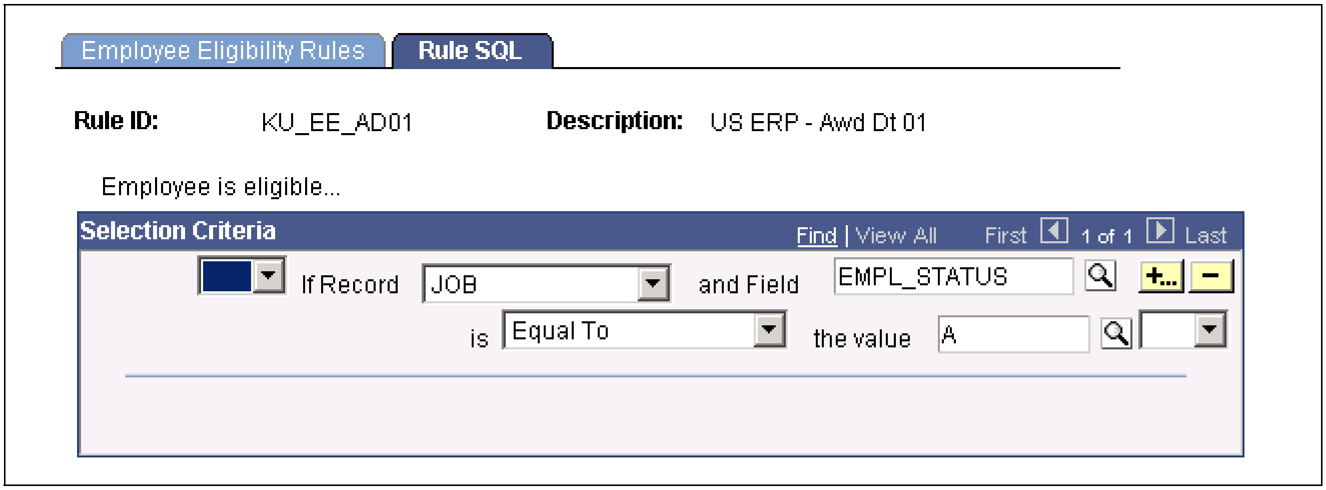
Access the Employee Eligibility Rules page.



Employee Eligibility Rules page

Creating the SQL

Access the Rule SQL page.



Rule SQL page

Note. For employee eligibility rules, the records are JOB and EMPLOYMENT.

See Also

Chapter 5, "Creating Employee Referral Programs," Understanding SQL for Eligibility Rules, page 56

Setting Up Award Category Rules and Schedules

When you define the award category rules, you're defining the job requisitions that qualify for awards in the category and the amounts and timing of awards for the category. You can create any number of award categories, each with an award schedule. The job requisition that the applicant is hired into determines the award category for the referring employee's award.

We recommend that you set up your categories so that each requisition (for which you want to have an ERP award) falls into only one category. Requisitions that do not fall into any category cannot be processed for employee referrals.

Use the Award Category Rules component to define award categories:

1. Access the Award Category Rules page.

   Name and describe the rule.

2. Advance to the Rule SQL page.

   Create the SQL for the rule.

3. Advance to the Award Schedule page.

   Define the amounts, timing and earnings code for the rule.

See Also

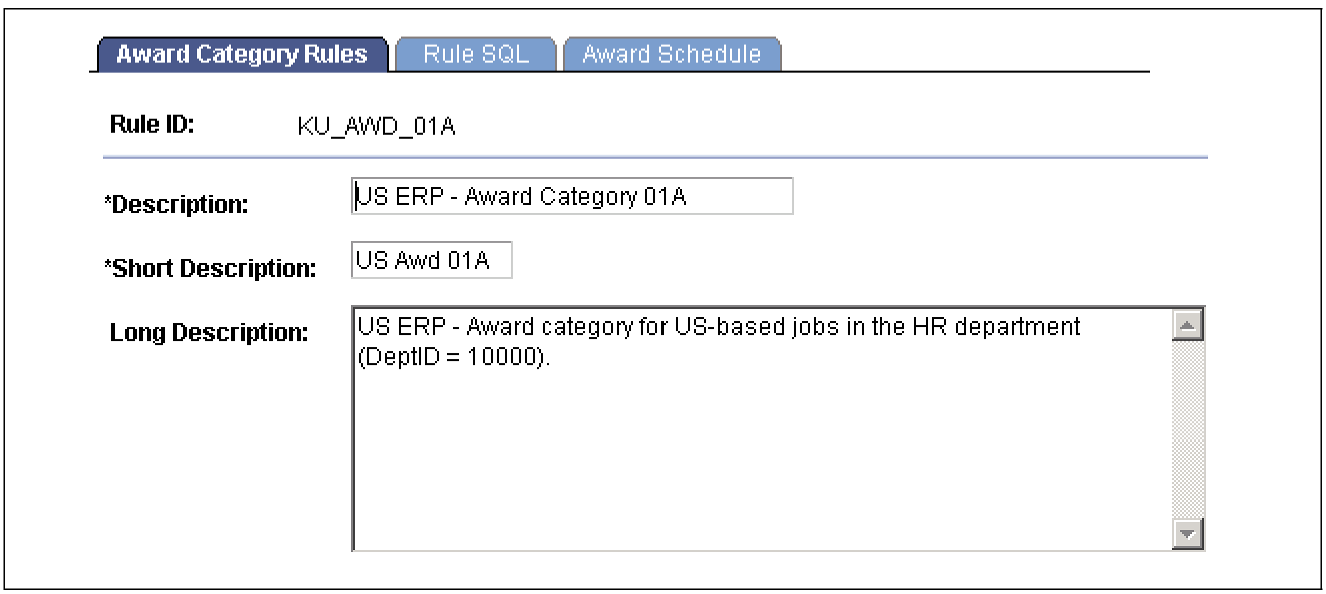
Chapter 5, "Creating Employee Referral Programs," Understanding SQL for Eligibility Rules, page 56

Pages Used to Set Up Award Rules and Schedules

Page Name	Object Name	Navigation	Usage
Award Schedule	ER_RULE_AWD_SCH	Set Up HRMS, Product Related, Recruiting, Referrals, Award Category Rules, Award Schedule	Set up the amounts and timing of awards in the category. This page is also used to set up the amount and timing of awards in the hot job category.
Rule SQL	ER_RULE_SQL	Set Up HRMS, Product Related, Recruiting, Referrals, Award Category Rules, Rule SQL	Build the SQL select statements of rules used in administering employee referral programs and hot jobs.
Award Schedule	ER_RULE_AWD_SCH	Set Up HRMS, Product Related, Recruiting, Referrals, Award Category Rules, Award Schedule	Defines the amounts, timing, and earnings code for the rule.

Setting Up the Award Category Rules

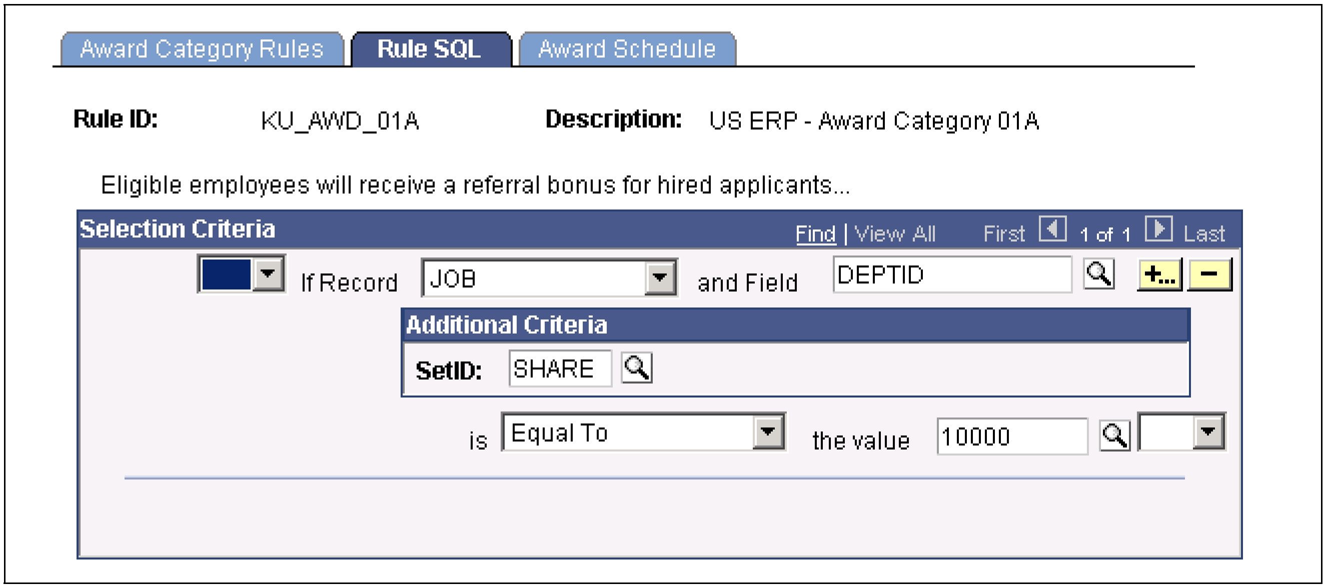
Access the Award Category Rules page.



Award Category Rules page

Creating the SQL

Access the Rule SQL page.



Rule SQL page

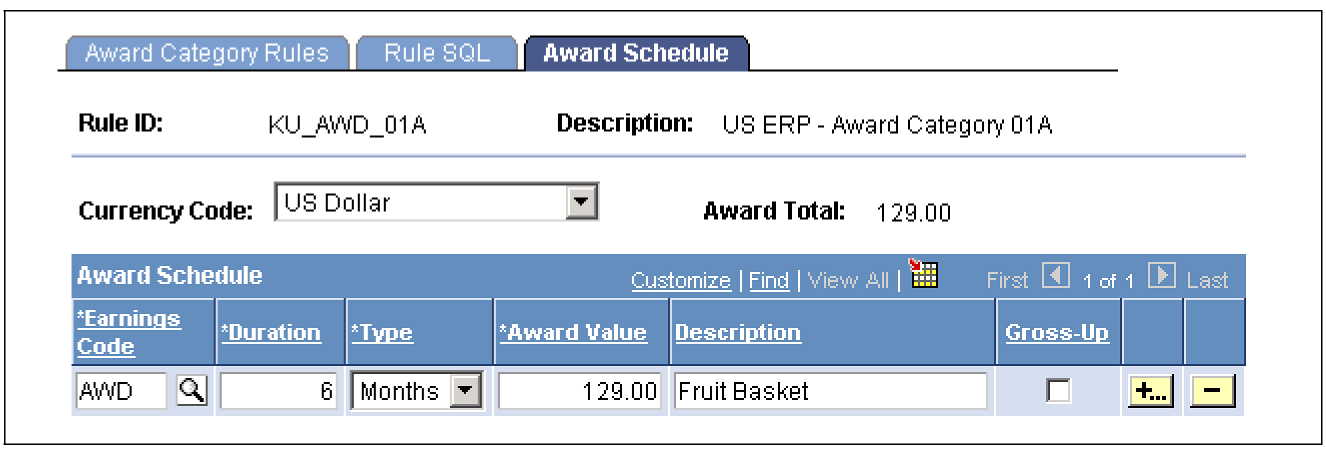
Note. For award category rules, the records are EMPLOYMENT, JOB, JOB_REQUISITION, and JOB_REQUIS_TYP.

See Also

Chapter 5, "Creating Employee Referral Programs," Understanding SQL for Eligibility Rules, page 56

Setting Up Award Schedules

Access the Award Schedule page.



Award Schedule page

Currency Code

Select the currency used to define awards in this category. Valid values are *Canadian Dollar* and *US Dollar.* You can override the currency on the Referral Award Details page or the Edit Awards page if the employee is paid in the other currency.

Award Total

The total of all awards in the schedule. Click the refresh button to update the award total.

Earnings Code This field is visible only if PeopleSoft Payroll for North America is installed. Select the earnings code associated with the award. Valid values are the earnings codes that you set up on the Earnings Table.

Duration Defines the time period that the referring employee must wait until the award is payable. This can be *Days, Months,* or *Years*.

To calculate the date on which the reward is payable begin with the date the applicant is hired and add the duration time period.

This date is the date on which the duration requirement is fulfilled; it is not necessarily the date on which the award is paid.

Award Value Enter the amount of a cash award or the value of a noncash award.

Gross-Up Select this if the award should be grossed up.

Defining Employee Referral Programs

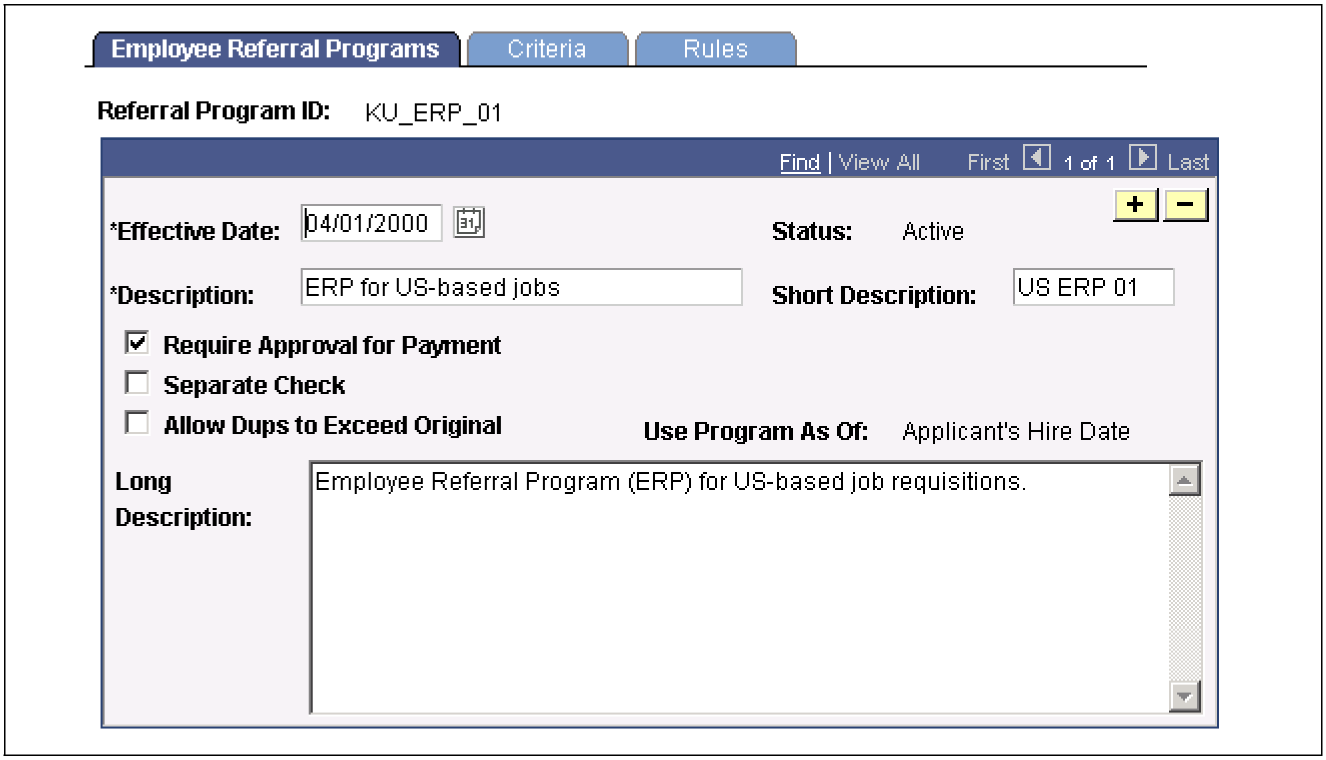
With the employee eligibility rules and award category rules in place, you can build your employee referral program.

Pages Used to Define Employee Referral Programs

Page Name	Object Name	Navigation	Usage
Employee Referral Programs	ER_REF_PGM_PG	Set Up HRMS, Product Related, Recruiting, Referrals, Employee Referral Program	Add or update a referral program ID, description, effective-date, and some business rules.
Employee Referral Program – Criteria	ER_REF_PGM_CRT	Set Up HRMS, Product Related, Recruiting, Referrals, Employee Referral Program, Criteria	Specify additional program criteria.
Employee Referral Programs- Rules	ER_REF_PGM_RUL	Set Up HRMS, Product Related, Recruiting, Referrals, Employee Referral Program, Rules	Select the employee eligibility and award category rules that are in effect for the program.

Defining Employee Referral Programs

Access the Employee Referral Programs page.



Employee Referral Programs page

Effective Date

Effective date works together with the Use Program As Of field in determining the rules in effect for a particular referral.

Require Approval for Payment

If you do not select this check box, awards are automatically given *Approved* status when they are created.

If you select this check box, awards are automatically given *Needs Approval* status when they are created and must be manually approved on the Referral Award Approval page.

Only awards that have *Approved* status can be submitted for payment.

Separate Check

Select this check box if you want the award paid separately from the employee's regular paycheck.

If you're paying awards through PeopleSoft Payroll for North America, all grossed up awards are paid by separate check.

Allow Dups to Exceed Original (allow duplicates to exceed original)

Select this check box if you allow the total of awards to exceed the original award amount when split among several referring employees.

Use Program As Of

Select which effective-dated program rules apply to the referral. Valid values are *Referral Date* and *Applicant's Hire Date.* The system applies *all* program rules that are in the effective-dated row that is active as of the Use Program As Of date.

This field is available only when you add a new program. After you define a program, you cannot change this value in subsequent effective-dated rows.

Setting Up Employee Referral Program Criteria

Access the Employee Referral Program - Criteria page.

Employee Referral Program - Criteria page

General Criteria

Limit Referral Life Span To

The system uses the value that you enter here to determine whether the employee's referral is active at the time the applicant is hired. Each time the employee refers the same applicant, the life span begins again.

The system calculates life span in calendar days.

Enter *0* to continue the life span of referrals indefinitely.

Disqualify if applicant reports to the referring employee

The PeopleSoft Human Resources Department Tree structure must be set up if you use this rule. If you select this check box, the system disqualifies employees if the applicant reports to them directly or indirectly based on the tree structure as of the applicant's hire date.

Disqualify employee if their Manager Level is greater than or equal to

The PeopleSoft Human Resources department tree structure must be set up if you use this rule. Select the lowest level of manager that is disqualified from the employee referral program.

To make all managers ineligible, select *All Other Positions.*

The system evaluates employee levels as of the applicant's hire date.

Applicant Criteria

Allow Previous Employees

Select this check box if you allow employee referrals of applicants who are previous employees. Complete the other fields defining how long the applicant must have been away from your organization. Enter *0* to allow all previous employees to be referred.

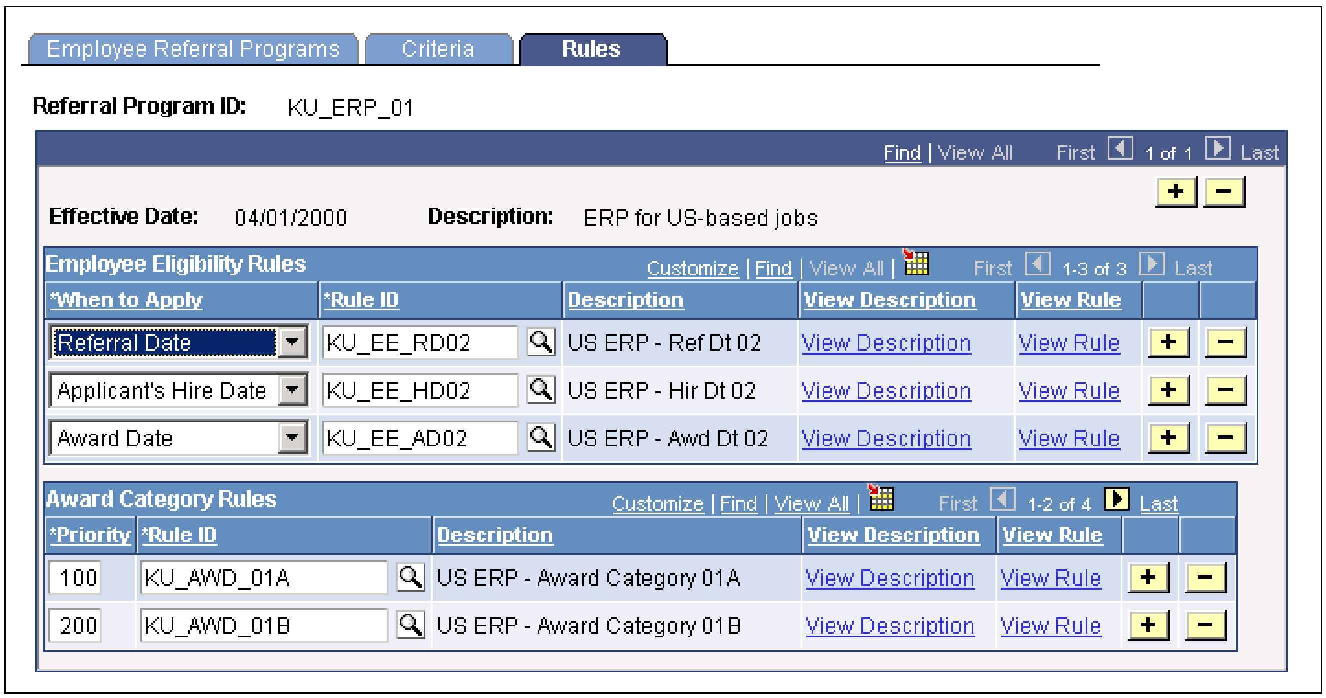
The system evaluates this criteria based on information provided in the Refer a Friend or Apply for Job self-service transactions or the information entered in the Applicant Data component by the administrator. It does not check the organization’s historical records.

Allow Family Member Referrals

Select this check box if you allow employees to refer members of their family.

Selecting Employee Eligibility and Award Category Rules

Access the Employee Referral Program - Rules page.



Employee Referral Program - Rules page

View Description

Click this link to view a long description of the rule.

View Rule

Click this link to access the component where you defined the rule. Use your browser’s back button to return to the ERP Rules page.

Employee Eligibility Rules

When to Apply

This field allows you to apply different employee eligibility rules at different points in the referral process. For example, you might want to apply strict employee eligibility rules at the time the applicant is hired, but on the award date, you might only require that the employee have active status.

Select when to apply each employee eligibility rule that you associate with this program. You can select each of the three values only once for a maximum of three rows. Valid values are *Referral Date, Applicant's Hire Date,* and *Award Date.* The system uses the rule that you associate with the award date to check eligibility before paying any award in the award category award schedule or in a hot job award schedule.

Rule ID Select the rule that you want to apply. Valid values are the rules you set up in the Employee Eligibility Rules component.

Award Category Rules

Priority Enter an integer in this field to tell the system in what order to process the award category rules. The system checks the requisition that the applicant is hired into against the category rules in the priority order. As soon as it finds the requisition in a category, it stops processing that requisition and applies the award schedule for that category.

We recommend that you make the award category rules mutually exclusive so that a job requisition does not fall into multiple categories.

The system does contain safeguards against paying an employee in multiple award categories for the same applicant.

If a requisition does not fall into any award category, no awards will be scheduled or paid.

Rule ID Select the rule you want to apply. Valid values are the rules you set up in the Award Category Rules component. You can assign as many rules to the program as you want, each with a unique priority number. Do not select the same rule more than once.

See Also

Chapter 5, "Creating Employee Referral Programs," Identifying Employee Eligibility Rules, page 57

Chapter 12, "Managing Employee Referral Programs," Understanding Eligibility Processing, page 221

Chapter 12, "Managing Employee Referral Programs," Understanding Awards Processing, page 223

Chapter 6, "Creating and Posting Job Requisitions," Creating and Reviewing Hot Jobs, page 107

CHAPTER 6

Creating and Posting Job Requisitions

This chapter discusses the components of a job requisition and discusses how to:

- Create job requisitions.
- Create job requisition for Federal users.
- Clone existing job requisitions.
- Generate recruitment job postings.
- Track job requisitions.
- Creating hot jobs.
- Extract job posting information.
- Post jobs to USA Jobs Feed.
- Track requisition activity

Understanding Job Requisitions

The first step in the Recruit Workforce process is to create requisitions for job openings in your company using the Job Requisition Data pages. This includes:

- Assigning a number to each requisition.
- Entering details about the open job or position, such as the job code and the department where the job opening is located.
- Entering a general job description for job postings, which you can distribute internally before you look to outside sources for new employees.

Prerequisites

Complete these tasks before you create a job requisition:

- Set up the Manage Competencies business process.
- Set up applicant security.
- Create posting description definitions.
- Enter information for USA Job Feeds.
- Create screening questions.

• Set up your recruitment templates.

See Also

PeopleSoft 8.8 Human Resources PeopleBook: Manage Competencies, “Setting Up Competencies and Accomplishments”

Chapter 3, “Setting Up Recruit Workforce,” page 11

Chapter 4, “Creating Recruitment Templates,” page 43

Creating Job Requisitions

This section explain how to create a job requisition.

Understanding the Process for Creating Job Requisitions

To create a job requisition:

1. Enter basic job information on the Job Requisition Information page.
2. Enter job posting information on the Job Posting page.
3. Define the requirements used in requisition screening on the Screening Criteria page.

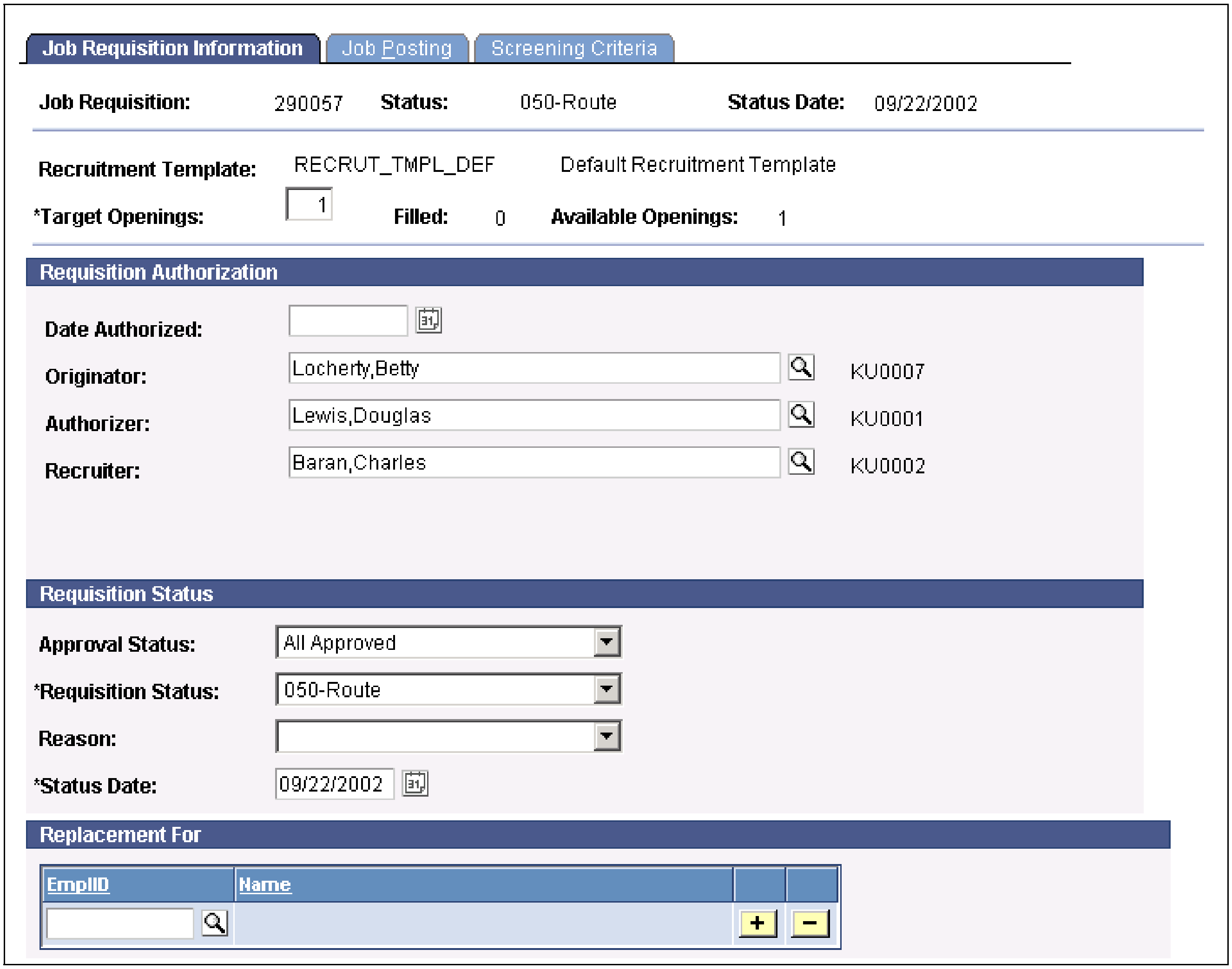
   Assign weights to possible answers to question on the Assign Weight page.

Pages Used to Create Job Requisitions

Page Name	Object Name	Navigation	Usage
Job Requisition Information	ER_JOB_REQ_INFO	Recruiting, Job Requisitions/Posting, Create Job Requisition, Job Requisition Information	Set up the administrative information for the requisition and record any change to the requisition status.
Job Posting	JOB_REQUISITION3	Recruiting, Job Requisitions/Posting, Create Job Requisition, Job Posting	Record information posted about the job requisition and the types of job postings.
Screening Criteria	ER_JOB_REQ_SCREEN	Recruiting, Job Requisitions/Posting, Create Job Requisition, Screening Criteria	Set up the screening criteria used during requisition screening to match applicants to a job requisition.
Competency Transfer – Default Competencies	HR_REQ_SELECT_COMP	Click Select from Default Competencies on the Screening Criteria page.	View competencies set up for the selected position or job code. Select some or all the competencies to copy to the job requisition.
Accomplishment Transfer – Default Accomplishments	HR_REQ_SELECT_ACCM	Click Select from Default Accomplishments on the Screening Criteria page.	View accomplishments set up for the selected position or job code. Select some or all the accomplishments to copy to the job requisition.
Assign Weights	ER_REQ_ANS_WEIGHTS	Click Assign Weights on the Screening Criteria page.	Assign point values to the possible answers to a question.

Entering Basic Job Information

Access the Job Requisition Information page.



Job Requisition Information | Job Posting | Screening Criteria

Job Requisition: 290057 **Status:** 050-Route **Status Date:** 09/22/2002

Recruitment Template: RECRUT_TMPL_DEF Default Recruitment Template

***Target Openings:** 1 **Filled:** 0 **Available Openings:** 1

Requisition Authorization

Date Authorized:

Originator: Locherty,Betty KU0007

Authorizer: Lewis,Douglas KU0001

Recruiter: Baran,Charles KU0002

Requisition Status

Approval Status: All Approved

***Requisition Status:** 050-Route

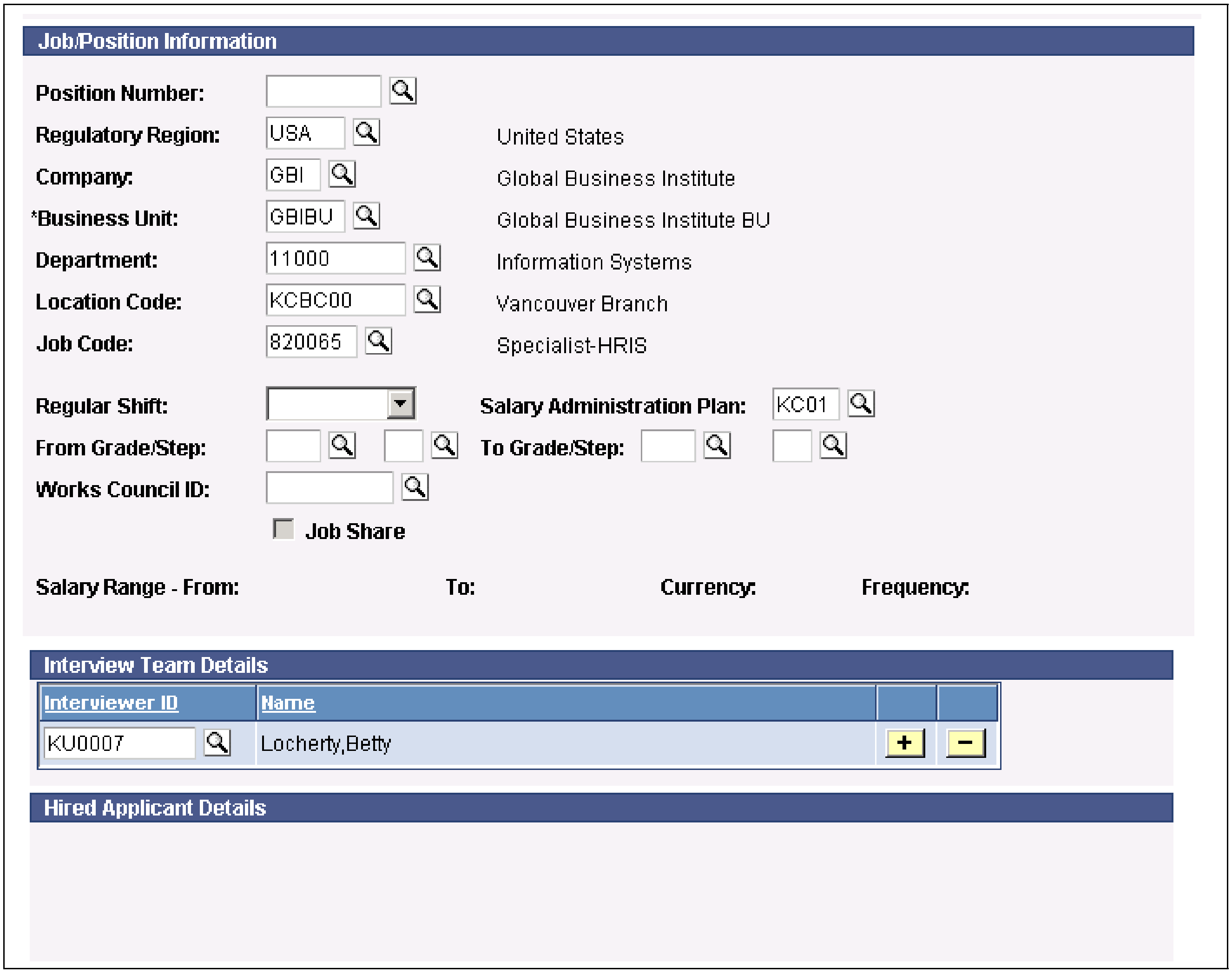
Reason:

***Status Date:** 09/22/2002

Replacement For

EmplID	Name		
		+	−

Job Requisition Information page (1 of 2)



Job Requisition Information page (2 of 2)

Job Requisition # (job requisition number)

Enter a job requisition number.

If the system automatically assigns a new job requisition number, it first appears as *000000.* The actual number assigned to the requisition appears after you save the information that you enter in the Job Requisition Data pages.

Important! To avoid maintaining two different sets of job requisition numbers, we recommend that you either always assign numbers manually or always let the system do it; do not do both.

Recruitment Template

Select the template to use for the job requisition. Set up templates using the Recruitment Template Settings page.

Referral Program ID

Select a Referral Program ID.

This field defaults to the referral program linked to the template. If this is a Hot Job, the field is display only.

Target Openings

Enter the maximum number of applicants that you can hire for the requisition.

Encumbrance Date Indicator If your organization uses Commitment Accounting for budgeting, indicate how the system will budget for the unfilled position. Select one of these options:

Authorization Date: Use this option to start budgeting for the position from the date that it is authorized, as indicated in the Date Authorized field.

Project Fill Date: Use this option to start budgeting for the position from the date that you expect to fill the position as indicated in Projected Fill Date.

If you're not using Commitment Accounting, leave this field blank. This field is not displayed for U.S. Federal government users.

Projected Fill Date If you selected Project Fill Date in the Encumbrance Date Indicator field, enter the date that you expect to fill the requisition.

Requisition Authorization

The authorization information entered here is used in PeopleSoft eRecruit Manager Desktop self-service transactions to determine which requisitions a manager or recruiter can access. This information is also used by the workflow in the self-service transactions for approving job requisitions and approving job offers.

Date Authorized The date that the requisition was approved.

Originator ID The person who requested the requisition. Usually this is the manager who needs to hire new staff.

Authorization ID The person who approves the job requisition.

Recruiter ID The person responsible for managing the recruitment process. Typically, this is someone from your Human Resources department.

Recruiting Office Information This link appears for U.S. Federal government users only. Click the Recruiting Office Information link to enter recruiting office and personnel information.

Requisition Status

Use this group box to track the progress of the job requisition.

Approval Status This field is used in PeopleSoft eRecruit Manager Desktop self-service transactions for approving job requisitions. Recruiting administrator can override the value from this page. Select from the available options:

All Approved: Select if the requisition is approved by both the recruiter and authorizer.

Needs Approval: Select if the requisition is not approved.

In Approval Process: Select if the requisition has been approved by either the authorizer or recruiter.

Denied: Select if approval for the requisition has been denied.

The system automatically updates this status when managers and recruiters use the Create Job Requisition self-service transaction. Requisitions can't be viewed in View Job Postings unless approval status is *All Approved.*

Requisition Status Select the status for the requisition. This defaults to the value defined in the Job Requisition Recruitment Area on the Status/Reasons page and is updated as applicants move through the recruiting process.

Reason Select the reason for the selected requisition status. For the *Open* status, PeopleSoft delivers the following reasons: *Job/Position Vacated, New Authorization, New Job/Position,* and *Temporary Assignment.*

If you use Position Management, drive part or all of the system by position, and use the budgeting feature, you can generate a report listing all vacant budgeted positions. You can also generate job requisitions automatically for all active, vacant, and approved budgeted positions.

Replacement For

If the requisition is to replace existing employees, select the employee names.

Job/Position Information

This group box is not displayed for U.S. Federal Government installations. For such users, job/position information is entered in the U.S. Federal group box.

Position Number If your organization uses Position Management, select the position number to which the job requisition applies. When you navigate out of this field, the system completes the fields with the default data from Position Data and makes most of the fields unavailable for entry. The only fields you can update are Salary Administration Plan, From Grade/Step, and To Grade/Step.

If you are not using Position Management, or if you are using partial Position Management and the requisition does not relate to a position, leave this field blank.

Define positions in Position Data.

Job Share This check box is for information only. The system automatically selects it if the position permits job sharing.

Job Code Select from the list of valid values. When you navigate out of this field, the system populates the Salary Administration Plan from the Job Code Table.

Set up job codes in the Job Code table.

Regular Shift If the job involves working shifts, select the appropriate shift. Otherwise, leave this field blank or select *N/A* (not applicable).

Salary Administration Plan Select the plan for the job from the list of valid values.

From Grade/Step, To Grade/Step Use these fields to define a range of salary grades for the requisition. Select the lower salary grade and step in the From Grade/Step fields and the higher salary grade and step in the To Grade/Step fields.

Works Council ID For German employees, select the Works Council ID for your requisition (required).

Interview Team Details

Use this group box to list the expected interviewers for the job requisition. The system uses the interviewers listed here as a default when you schedule interviews for the requisition.

Hired Applicant Details

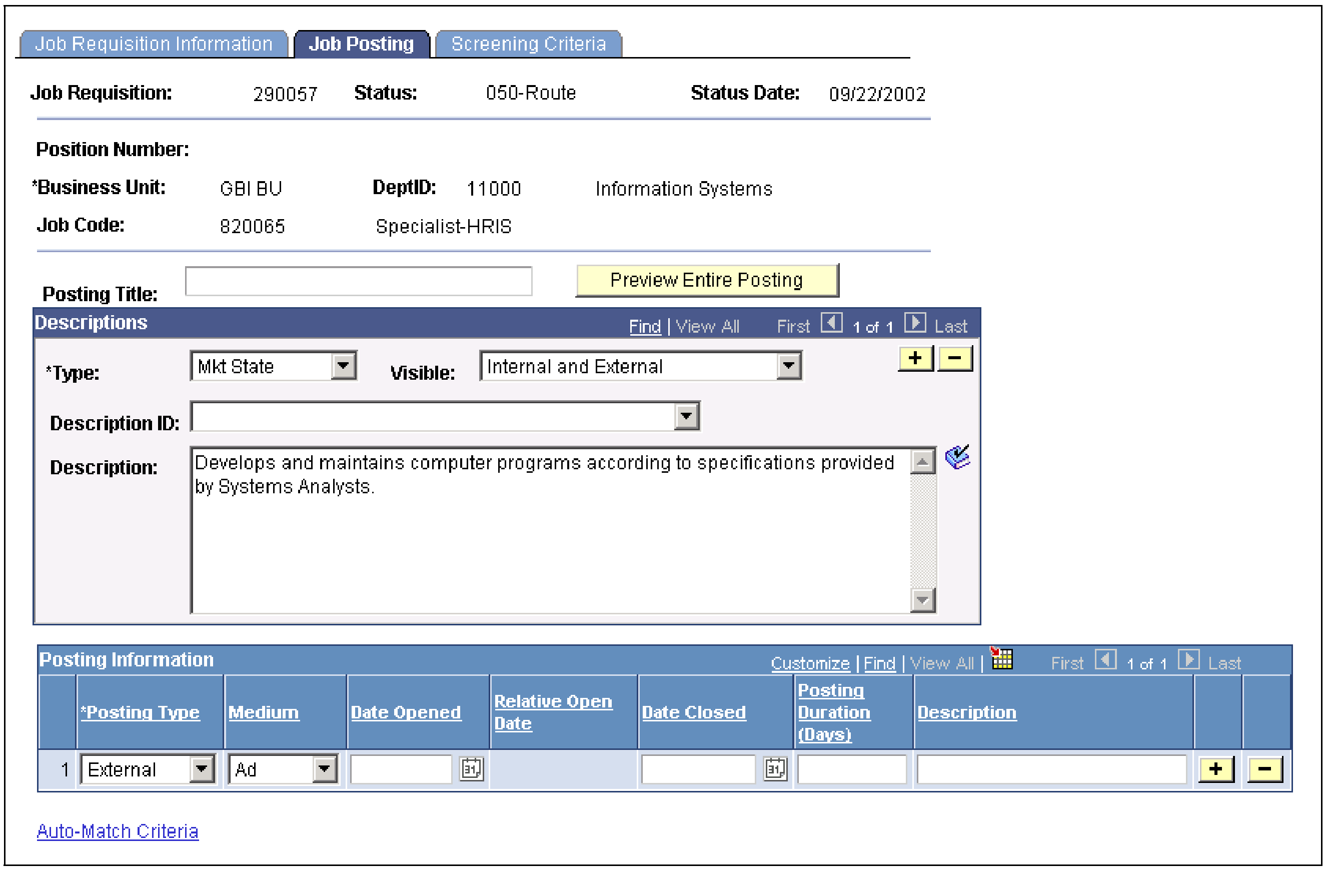
The system lists the applicants that have been hired for the requisition.

See Also

Chapter 3, "Setting Up Recruit Workforce," Setting Up Recruitment Status Codes, page 13

Entering Job Posting Information

Access the Job Posting Information page.



Job Posting page

Note. (USF) The Job Posting page isn't displayed for U.S. Federal government users. Creating job requisition postings for U.S. Federal government users is discussed in "(USF) Creating Job Requisition Postings and USA Jobs Feed" in this PeopleBook.

Posting Title	Enter the job or position title. The posting title appears in online job postings and should help applicants decide if the opening is of interest to them.

Hot Job button

The system automatically display this button if the job has been designated a Hot Job by an Employee Referral Program administrator.

Descriptions

Type

Select the description type. The options available are determined by the Posting template. Possible options are:

Mkt State (marketing statement): Use to enter company information that appears in the job posting to attract job seekers.

Dep Mrkt (department marketing): Use to enter a description of the department with the requisition.

Resp (responsibilities): Use to enter a description of the main responsibilities of the job.

Quals (qualifications): Use to list the qualifications, experience, and skills that are required for the job.

Closing: Use to enter the information that appears at the end of the job posting. This description normally includes an explanation of how to apply for the job, non-discriminatory declarations, and company tagline or slogan.

Basis Rtg (basis of rating): This type is used by U.S. Federal government users to specify the criteria that will be used to rate applicants.

EEO (equal employment opportunity): Use to enter the EEO statement to appear on the job posting.

How to App (how to apply): Use to enter information that explains how to apply for the job.

Other: Use to enter other descriptions for the job posting.

Conds Empl (conditions of employment): Use to enter the conditions of employment that apply to the job.

Pay, Benef (pay, benefits, and work schedule): Use to enter the special pay, benefits, and work schedule that apply to the job.

CTAP/ICTAP (CTAP and/or ICTAP applicants): This type is for U.S. Federal government users to enter application instructions for the CTAP and/or ICTAP candidates, including required proof of eligibility.

Vet Pref (veteran preference): This type is for U.S. Federal government users to enter instructions for claiming veterans preference.

Who May Ap (who may apply): Use to enter information about the applicants that your organization will accept applications from.

Description ID

Select the type of description you want included in the job posting. Descriptions are created using the Posting Description Library page.

Description

Enter text for the posting description or except the posting library text.

If you have PeopleSoft eRecruit installed and post jobs to online job boards, the descriptions are displayed in online job postings. Applicants viewing your job postings might find it helpful if you include information about job expectations, including the skills and accomplishments that are required.

Important! RecruitUSA imposes a limit of 1600 characters for job descriptions and only allows description types O, D, Q, R, and C.

Visible Select whether you want the job posting to display to:

Internal Only − description is visible to employees only.

External Only − description is visible to external applicants only.

Internal and External − description is visible to both employees and external applicants.

Posting Information

Use this group box to record the job postings you have made for the requisition.

Posting Type Select a posting type from the available options:

Internal: The information is not visible to the public and only employees can view details of the job requisition.

External: The information is made public so external applicants and employees can view details of the job requisition.

Medium Select the medium through which you plan to post this requisition.

If you have PeopleSoft eRecruit Manager Desktop installed and you plan to post the requisition to online job boards, you must have an entry for *Job Board* and a posting type of *External*.

If you want the posting to display on the self-service transaction View Postings, you must have an entry with the Medium set to *Internet* and Posting Type set to *Internal* and another one set to *External*.

Relative Open Date If this is a new posting, select a value to indicate how the system should calculate the start date of the posting. The default value is *Approval Date.* Additional values cover the period from one day after approval through 10 days after approval in increments of one day.

When the requisition is approved, the system calculates the posting start date and displays it in the Date Opened field. You can also enter a date in the Date Opened field and leave the Relative Open Date field blank.

Date Opened Enter a date here to indicate the start date of the posting, or use the Relative Open Date field and allow the system to calculate the date opened. You can't enter data in both fields.

Date Closed You can enter the date that the posting should close, or you can enter a number in the Posting Duration field and allow the system to calculate the

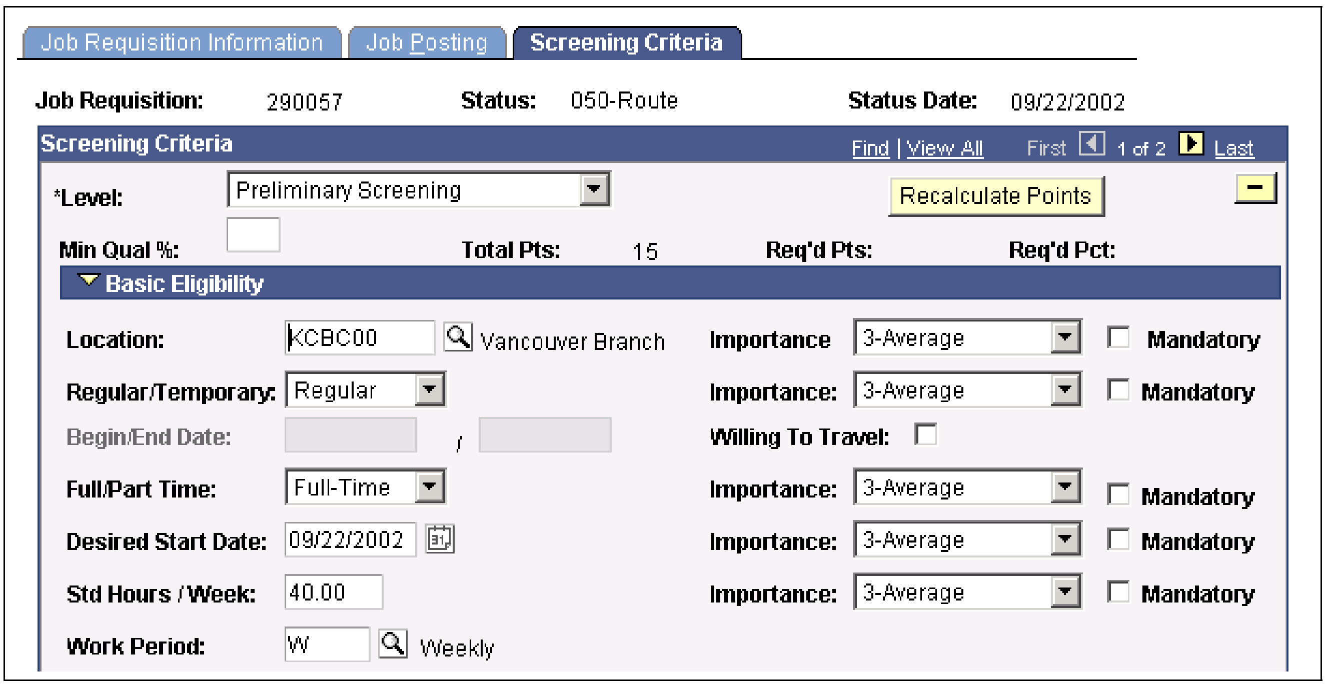
	date closed. You may enter either a posting duration or a date closed or leave both fields blank. You may not enter data in both fields.
Posting Duration	You can enter the number of calendar days that the posting should remain active. The system calculates the posting end date and enters it in the Date Closed field.
Description	Enter information about the posting.
Auto-Match Criteria	Auto-Match available if you have purchased eRecruit Manager Desktop. See PeopleSoft eRecruit Manager Desktop PeopleBook.

See Also

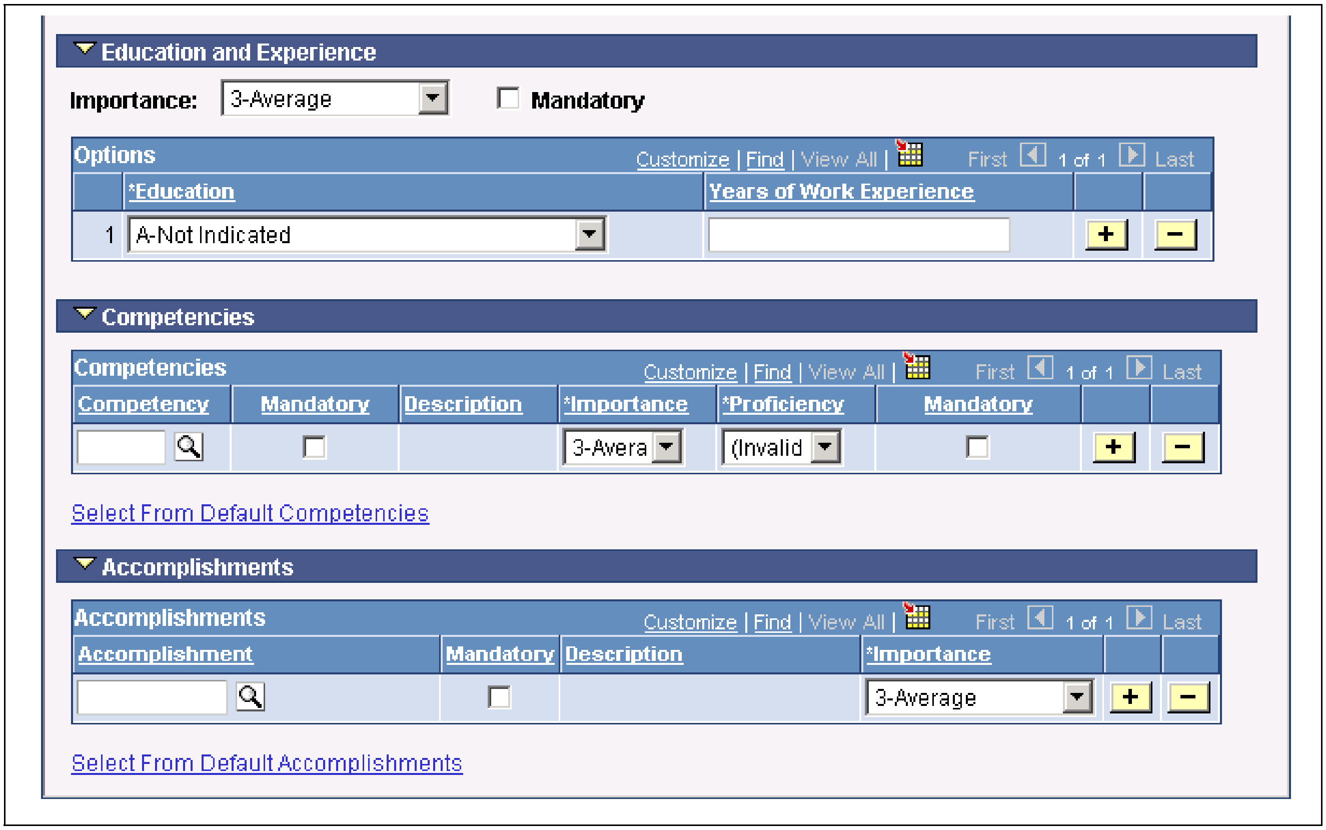
Chapter 12, "Managing Employee Referral Programs," page 221

Defining Screening Criteria

Access the Screening Criteria page.



Screening Criteria page (1 of 2)



Screening Criteria page (2 of 2)

Note. This page isn't displayed for U.S. Federal government users. Instead, the system displays the Federal Screening Criteria page for defining requisition requirements.

Understanding Screening Criteria

One of the first tasks in the recruitment process is to remove applicants who do not meet your basic job requirements. The Requisition Screening pages automate this task so you can quickly find out which applicants match your requirements. Automated screening depends on the requirements that you set up on the Screening Criteria page. The system compares applicants against the requirements set up on this page and ranks the applicants according to how well they match the criteria.

You can define two levels of screening: preliminary and final screening. Typically, you use final screening to narrow down the applicant pool until you have a manageable number of applicants to review more closely. Therefore, the requirements for final screening tend to be more demanding than those for preliminary screening. For example, you might include additional competencies and accomplishments or set higher proficiency levels for final screening.

Note. In some countries, discrimination laws require organizations to show that applicant screening is based on published job descriptions. If this applies to your requisitions, set up the preliminary screening criteria to match the advertised job description and do not make changes to the criteria. However, you can adjust the final screening criteria, as necessary, to narrow down the applicant list once applicants have passed the preliminary screening stage.

Using the Mandatory Check Box

The Mand (mandatory) check box appears next to each of the requirements used for screening. If you select this check box, the system immediately excludes applicants who do not meet this requirement at the first level of screening.

If you clear this check box, the system does not screen out any applicants. In both cases, the system ranks applicants according to how closely they met all the job requirements.

Consider carefully how you use this check box to avoid screening out applicants unnecessarily.

Ranking Applicants

For each screening criterion, you can specify a weight that indicates the importance of that requirement for the particular requisition. Depending on the weight assigned, the system awards an applicant points for each requirement met. Using these scores, the system ranks applicants according to their total point score.

For most screening criteria, the Importance field is used to assign a weight for a requirement. There are five options, with an associated point value of 1 to 5:

Importance	Points
Low	1
Below Average	2
Average (the default value)	3
Above Average	4
High	5

For screening questions, you assign points directly. For each possible answer to a screening question, define the points awarded to applicants. This allows for extra flexibility, but you must consider carefully the range of points that you assign to screening questions in comparison with other screening criteria. For example, if you award 10 points for correct answers, twice the points awarded for other criteria, this favors applicants who score well on the screening questions even if they don't meet any other criteria.

Level	Select the screening level: *Preliminary Screening* or *Final Screening.*
Min Qual % (minimum qualification percentage)	The percentage that you specify must be greater than or equal to the required percentage. For example, if a job has a required percentage of 85%, the minimum qualification percentage must be between 85% and 100%. If it is less, when you save your entries, the system issues an error message.
Recalculate Points	Click to update the Total Pts, Req'd Pts, and Req'd Pct fields. The system recalculates the points fields based on the values assigned to the Importance fields and Mandatory check boxes.

Total Pts (total points) The sum of the points associated with all the Importance fields (and the weights assigned to screening questions) on this page.

Req'd Pts (required points) The sum of all the screening criteria specified as mandatory. Wherever you select the Mandatory check box, the points associated with that requirement are included in the required points total.

Req'd Pct (required percentage) The percentage of total points that are required.

Basic Eligibility

Use this group box to define the basic requirements of the job.

Location The system populates the location of the job opening from the Job Requisition Information page. To change it, select a location from the list of valid values. The system automatically updates the Job Requisition Information page.

If you selected a position on the Job Requisition Information page, the system populates the location from Position Data and makes the field unavailable for entry.

Regular/Temporary Select *Regular* if the requisition is for a permanent job or *Temporary* if the requisition is for a fixed-length contract.

Begin/End Date If the requisition is temporary, enter the begin and end dates. If the requisition is regular, the system makes these fields unavailable for entry.

Std Hours/Week (standard hours per week) Enter the normal number of hours worked in a week.

Work Period The period in which the employee must complete the standard hours. This field is for informational purposes and you should not change the default value of *W* (weekly).

Willing to Travel Select if the job regularly involves travelling. When you select the check box the system displays the Percent (percentage) field, which you use to indicate the amount of time spent travelling.

Education and Experience

This group box lists the education level and years of work experience that are required for the requisition. Often, the amount of work experience required varies according to the education level. To account for this, you can set up several combinations of education and work experience. For example, you might accept an applicant with any one of these combinations:

- No degree and four years of work experience.
- A degree and two years of work experience.
- A master's degree and one year of work experience.

In this case, you create three rows, one for each combination. During requisition screening, the system checks applicant details against each combination. Applicants who match any of the combinations pass the screening.

Years of Work Experience The number of years of work experience required for the requisition. Applicants who match or exceed this value pass the screening.

Competencies

Competency Select the competency required for the job requisition from the list of valid values. Set up competency codes in the Competency table.

Proficiency For each competency, select the proficiency level that is required for the job. Set up proficiency levels in the Rating Model table.

Select From Default Competencies Click to display the Competency Transfer - Default Competencies page which lists the competencies that you have set up for the position or job code.

Select some or all the competencies to transfer to the job requisition.

Accomplishments

Accomplishment Select the accomplishment required for the job requisition.

Select From Default Accomplishments Click to display the Accomplishment Transfer - Default Accomplishments page which lists the accomplishments that you have set up for the position or job code.

Select some or all the accomplishments to transfer to the job requisition.

Screening Questions

Use this group box to define the questions that you want applicants to answer as part of their application. These questions appear in the Apply for Job transaction if you have installed PeopleSoft eRecruit.

Before you can include questions in a requisition, set up the questions and answers. If you want to use standard sets of questions across your organization, you also need to set up question sets.

Question Set ID If you have set up a suitable question set, select the question set to link to this job requisition and click the Load From Set button.

Question ID If you select a question set, the system populates the questions. You can update the default questions from the question set.

The system doesn't limit the number of questions that you can add. However, it is a good idea to keep questionnaires short to encourage applicants to complete the application. Remember that applicants applying for multiple jobs are presented with a questionnaire that includes all the questions from each job requisition.

Assign Weights Click to access the Assign Weights page where you assign points to the possible answers.

Load From Set Click this link to load a defined set of question and add or removed questions as necessary. You can load more than one question set. It will just add to the list.

Load From Competencies Click this link to load any active question set that are tied to the competencies you have linked to this job requisition.

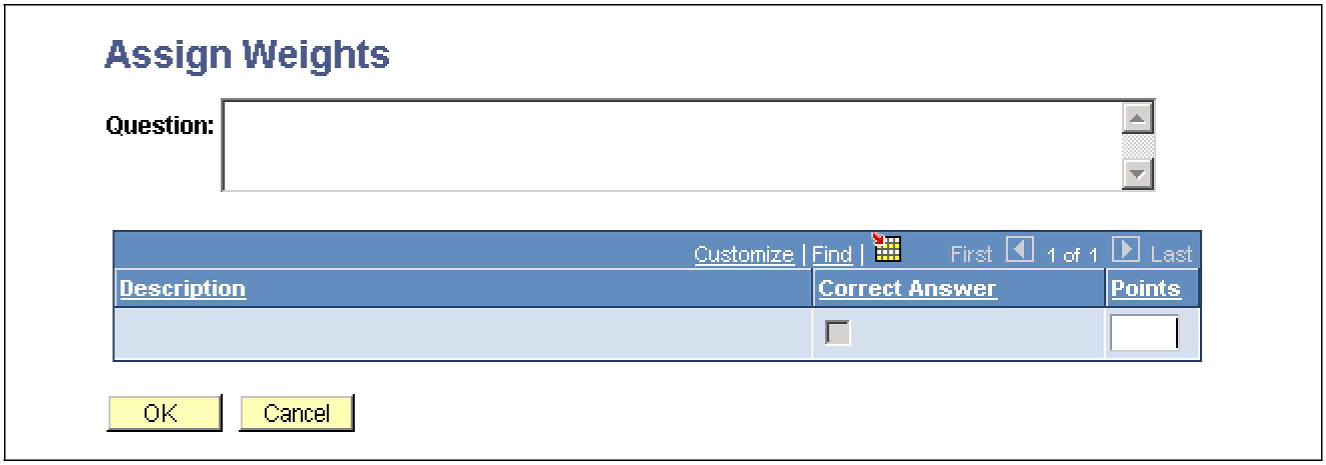
Note. Screening questions are available only if you have PeopleSoft eRecruit installed.

See Also

Chapter 9, "Processing Applicants," Screening Applicants, page 183

Assigning Weights to Answers

Access the Assign Weights page.



Assign Weights page

Description	The system displays the answers linked to the question.
Correct Answer	This field is display only. If the question has one correct answer, the system selects this check box. Correct answers are defined when you create the question.
Points	Enter the number of points awarded to applicants for this answer. Requisition screening uses applicants' scores to rank applicants.

(USF) Creating Job Requisitions

This section provides an overview of the process to create a job requisition and discusses how to enter job requisition information.

Understanding the Process

U.S. Federal government installations use the Job Requisition Data component to create job requisitions, but the pages are different. Here's how you create a job requisition:

1. Enter basic job information on the Job Requisition Information page.

   The first page of the Job Requisition Data component includes administrative information, position number or job code information, recruiting office details, and conditions of employment.

2. Define the job requirements used to select and rank applicants on the Federal Screening Criteria page.
3. On the Federal Scoring Criteria page specify the minimum educational level required and define scoring parameters for minimum qualifications, quality ranking scores, and augmenting factor scoring.

Note. U.S. Federal government users create postings using the Job Requisition Posting component.

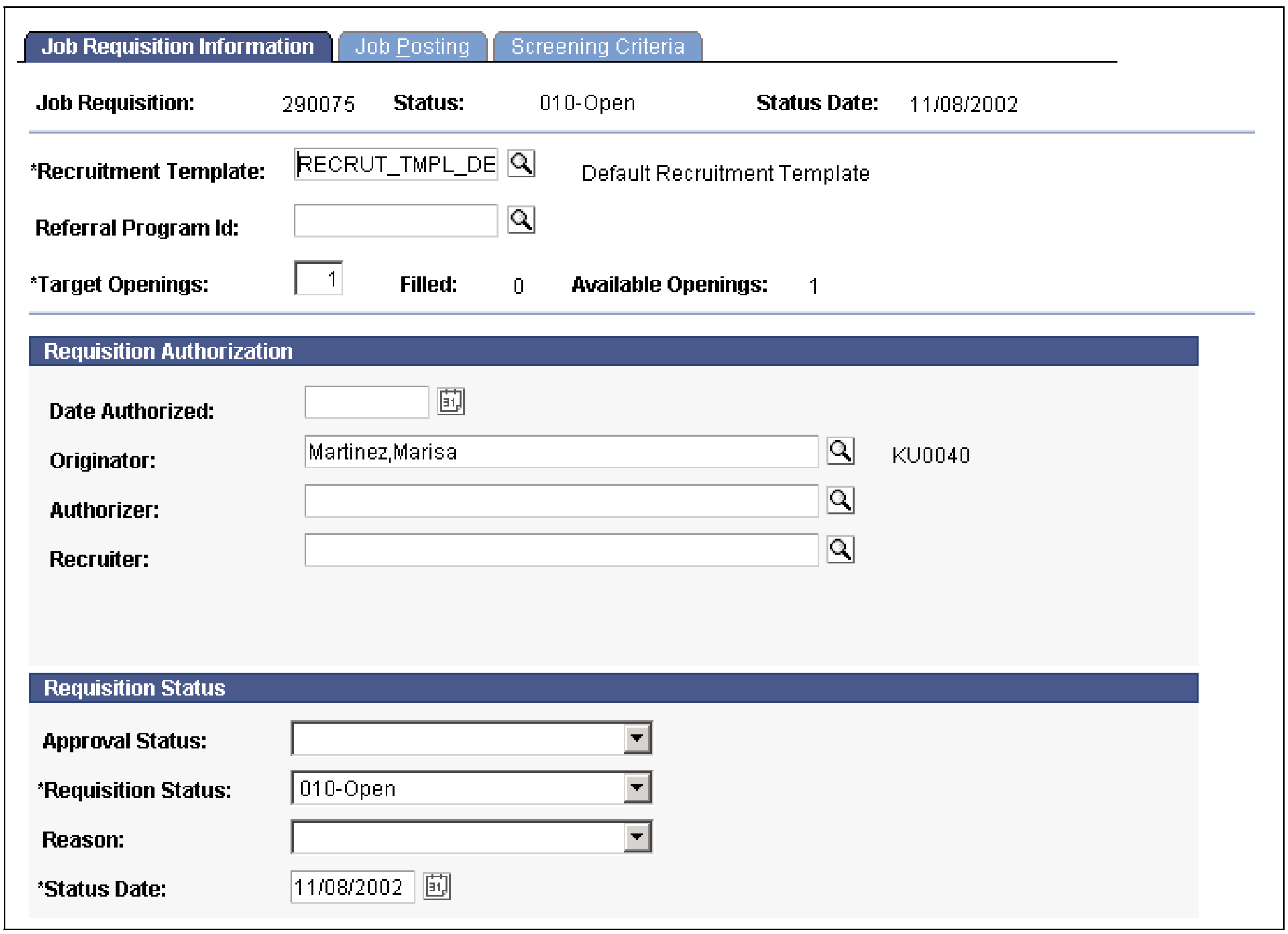
Pages Used to Create Job Requisitions

Page Name	Object Name	Navigation	Usage
Job Requisition Information	ER_JOB_REQ_INFO	Recruiting, Job Requisitions/Posting, Create Job Requisition, Job Requisition Information	Set up the administrative information for the requisition and record any change to the requisition status.
Candidate Name Request	GVT_NAME_REQ_SEC	Click Candidate Name Request on the Job Requisition Information page	For U.S. Federal government installations only. Enter name of referrals for candidates
Employment Conditions	GVT_RQSN_COND_SEC	Click Employment Conditions on the Job Requisition Information page	For U.S. Federal government installations only. View information about a selected job code. Fields are populated from the Job Code Table. Change the information on this page to meet the requirements of the specific job requisition that you are creating. This information is used to determine basic eligibility in screening applicants.
Job Posting	JOB_REQUISITION3	Recruiting, Job Requisitions/Posting, Create Job Requisition, Job Posting	Record information posted about the job requisition and the types of job postings.
Screening Criteria	ER_JOB_REQ_SCREEN	Recruiting, Job Requisitions/Posting, Create Job Requisition, Screening Criteria	Set up the screening criteria used during requisition screening to match applicants to a job requisition.
Competency Transfer – Default Competencies	HR_REQ_SELECT_COMP	Click Select from Default Competencies on the Screening Criteria page.	View competencies set up for the selected position or job code. Select some or all the competencies to copy to the job requisition.
Accomplishment Transfer – Default Accomplishments	HR_REQ_SELECT_ACCM	Click Select from Default Accomplishments on the Screening Criteria page.	View accomplishments set up for the selected position or job code. Select some or all the accomplishments to copy to the job requisition.

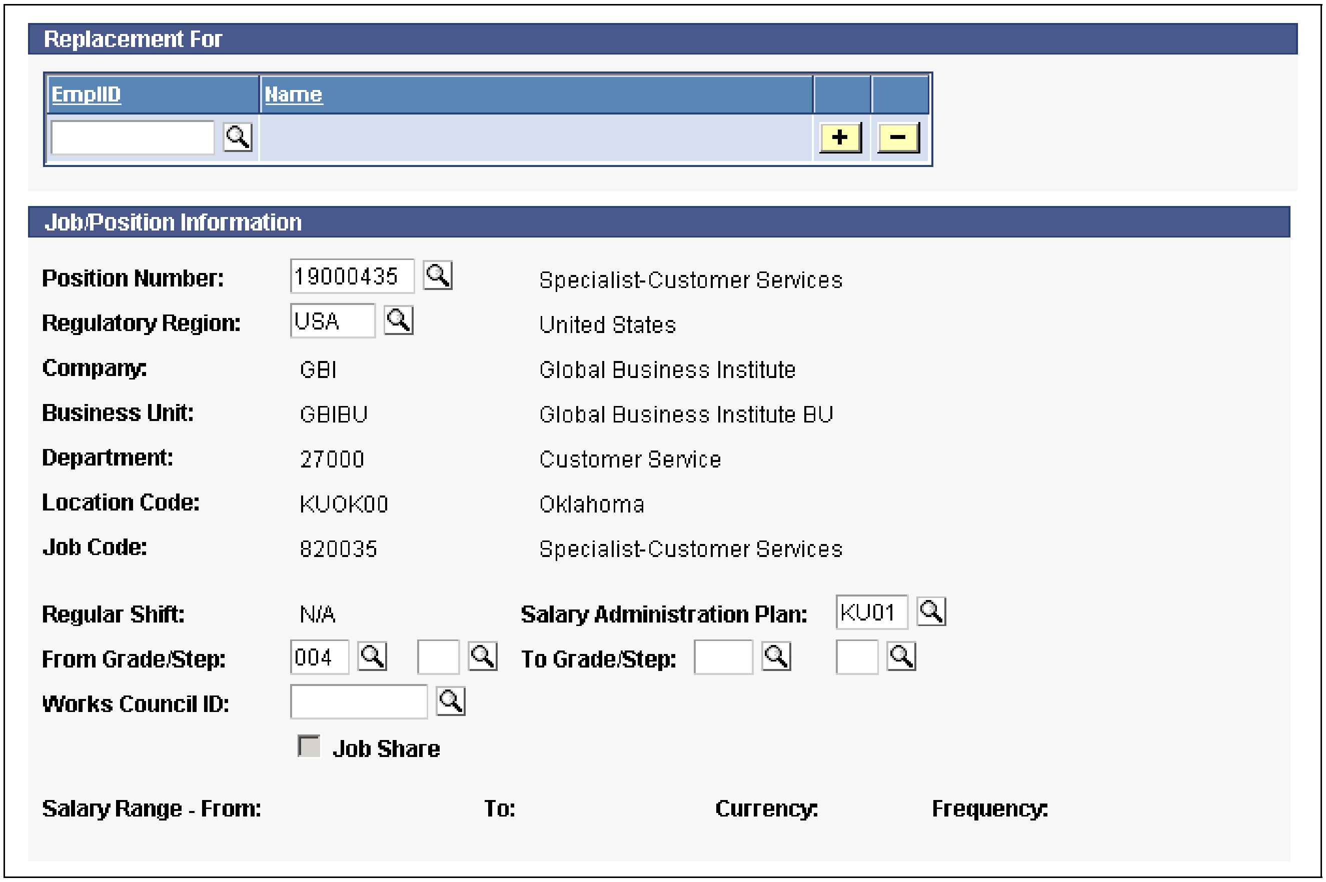
Page Name	Object Name	Navigation	Usage
Assign Weights	ER_REQ_ANS_WEIGHTS	Click Assign Weights on the Screening Criteria page.	Assign point values to the possible answers to a question.
Federal Screening Criteria	GVT_ER_JOB_RQ_SCR2	Recruiting, Job Requisitions/Postings, Create Job Requisition, Federal Screening Criteria	For U.S. Federal government installations only. Set up additional screening criteria that is used during basic eligibility process. Define qualifications required, assign a crediting plan, competencies, and accomplishments.
Federal Scoring Criteria	GVT_ER_JOB_RQ_SCOR	Recruiting, Job Requisitions/Postings, Create Job Requisition, Federal Scoring Criteria	Define the scoring limits for minimum qualifications, quality ranking scores, and augmenting factor scoring.

Entering Basic Job Information

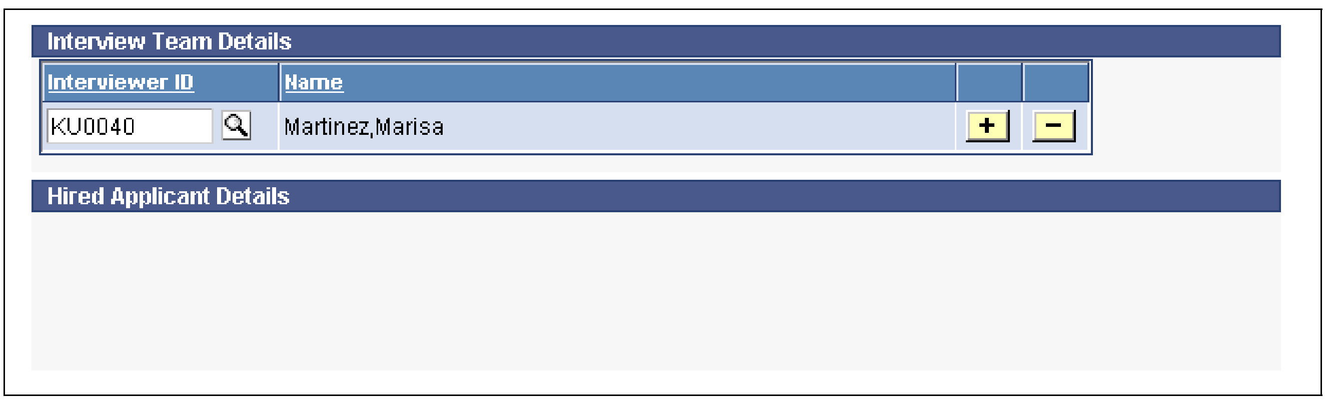
Access the Job Requisition Information page.



Job Requisition Information page (1 of 3)



Job Requisition Information page (2 of 3)



Job Requisition Information page (3 of 3)

Job Requisition # (job requisition number)	Enter a job requisition number. If the system automatically assigns a new job requisition number, it first appears as *000000.* The actual number assigned to the requisition appears after you save the information that you enter in the Job Requisition Data pages. Important! To avoid maintaining two different sets of job requisition numbers, we recommend that you either always assign numbers manually or always let the system do it; do not do both.

Recruitment Template Select the template to use for the job requisition. Set up templates using the Recruitment Template Settings page.

Requisition Authorization

The authorization information entered here is used in PeopleSoft eRecruit Manager Desktop self-service transactions to determine which requisitions a manager or recruiter can access. This information is also used by the workflow in the self-service transactions for approving job requisitions and approving job offers.

Date Authorized The date that the requisition was approved.

Originator The person who requested the requisition. Usually this is the manager who needs to hire new staff.

Authorization The person who approves the job requisition.

Recruiter The person responsible for managing the recruitment process. Typically, this is someone from your Human Resources department.

Recruiting Office Information This link appears for U.S. Federal government users only. Click the Recruiting Office Information link to enter recruiting office and personnel information.

Requisition Status

Use this group box to track the progress of the job requisition.

Approval Status This field is used in PeopleSoft eRecruit Manager Desktop self-service transactions for approving job requisitions. Recruiting administrator can override the value from this page. Select from the available options:

All Approved: Select if the requisition is approved by both the recruiter and authorizer.

Needs Approval: Select if the requisition is not approved.

In Approval Process: Select if the requisition has been approved by either the authorizer or recruiter.

Denied: Select if approval for the requisition has been denied.

The system automatically updates this status when managers and recruiters use the Create Job Requisition self-service transaction. Requisitions can’t be viewed in View Job Postings unless approval status is *All Approved.*

Requisition Status Select the status for the requisition. This defaults to the value defined in the Job Requisition Recruitment Area on the Status/Reasons page and is updated as applicants move through the recruiting process.

Reason Select the reason for the selected requisition status. For the *Open* status, PeopleSoft delivers the following reasons: *Job/Position Vacated, New Authorization, New Job/Position,* and *Temporary Assignment.*

If you use Position Management, drive part or all of the system by position, and use the budgeting feature, you can generate a report listing all vacant budgeted positions. You can also generate job requisitions automatically for all active, vacant, and approved budgeted positions.

Replacement For

If the requisition is to replace existing employees, select the employee names.

Interview Team Details

Use this group box to list the expected interviewers for the job requisition. The system uses the interviewers listed here as a default when you schedule interviews for the requisition.

Hired Applicant Details

The system lists the applicants that have been hired for the requisition.

(USF) U.S. Federal

Requisition Type

Select from the following available options:

Internal: Only current agency employees are considered.

Merit Promotion: Only current and previous federal employees are considered.

Open Competition: All internal and external applicants and federal employees are considered.

Area of Consideration

Select the area that covers the job requisition.

Job Code

Select the code applicable for the requisition from the available options and indicate the Primary job code. The system displays the PP-SERIES-GR (pay plan-series-grade) associated with the job code.

You can create job requisitions by specifying a job code to target more generic jobs.

Employment Conditions

Click to open the Conditions of Employment page, where you can review specific information regarding the position.

Position Number

If you're using the Manage Positions Business Process and the requisition applies to a specific position within the job code you entered, select a Position Number, which you define in the Position Data pages. The system automatically displays the position's Organization, Title, Location, Job Code, and PP-SERIES-GR.

Location

Automatically appears if you selected a Position Number.

Use the code for a single duty location when there is one that identifies the city or county. When there are several vacancies within a specific state or small geographic area, use the code identifying that state or area. If there are a number of vacancies in different locations, use a duty location that represents a general geographic site. (For example, there could be a need for 10 agriculture inspectors in Eastern Nebraska and Southern Iowa or in a more general area: "Nebraska and Kansas"). When there are multiple vacancies within a specific region of the country (Mid Western, New England, Southeastern states, etc.) use the code identifying that specific region. The listings identify what states are included in that region. Nationwide and continental United States (duty location codes 806 and 1000) are used *only* when one or more vacancies are being announced in each of the 50 states or almost every state, with a minimum of 15 vacancies. When providing a duty location for overseas vacancies, be specific, using the new codes for cities, countries, or continents.

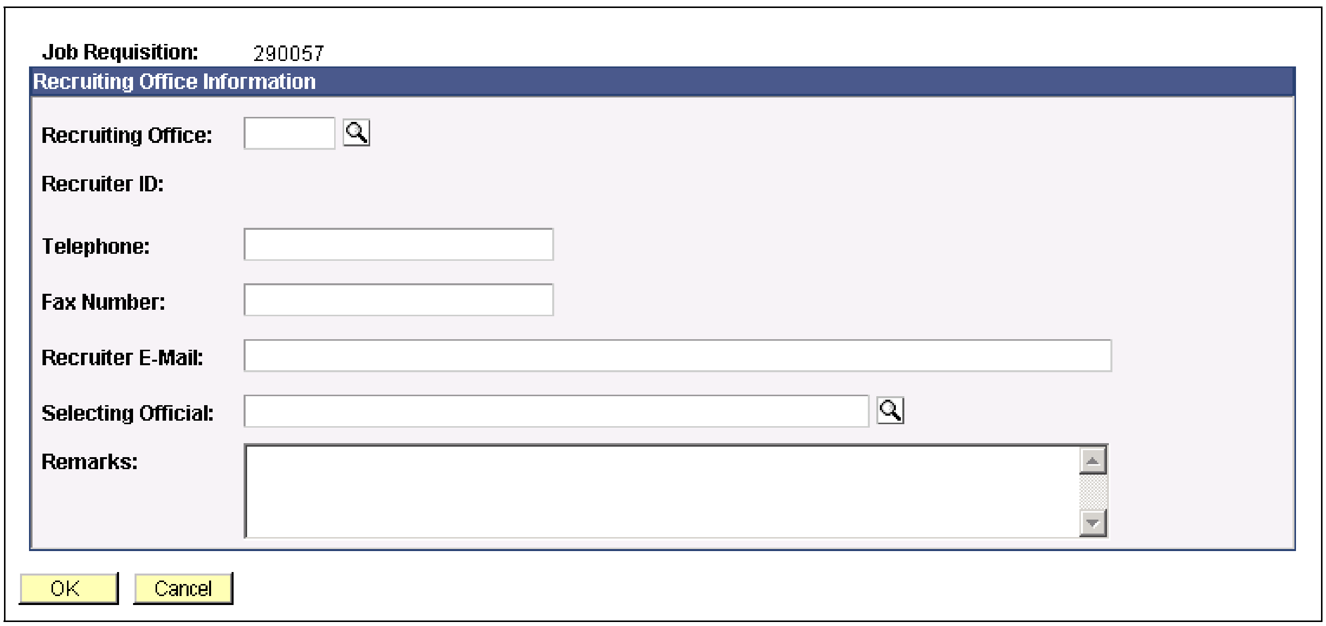
Openings The number of openings for the specific location.

See Also

Chapter 3, "Setting Up Recruit Workforce," Setting Up Recruitment Status Codes, page 13

(USF) Entering Recruiting Office Information

Access the Recruiting Office Information page.



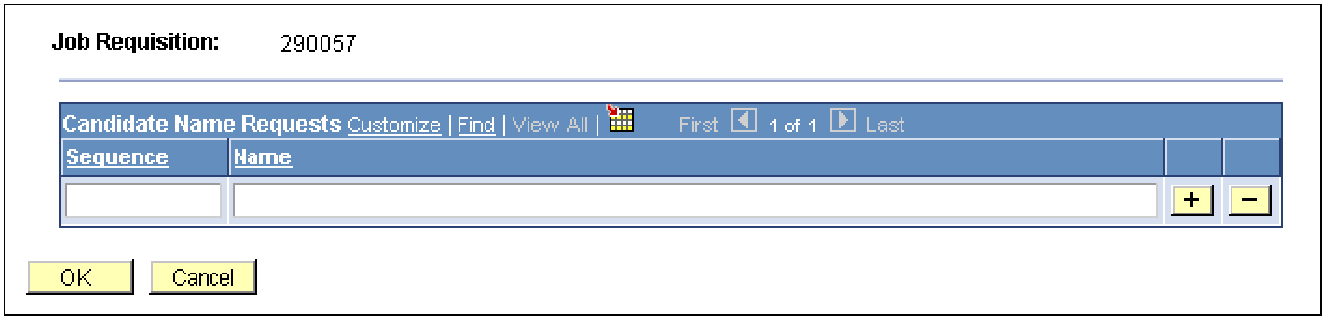
Recruiting Office Information page

Recruiting Office Select the office responsible for the job requisition. Define recruiting offices in the Recruiting Office Table.

Remarks Comments pertinent to the office, specialist, and Selecting Official.

(USF) Entering Candidate Name Requests

Access the Candidate Name Requests page.



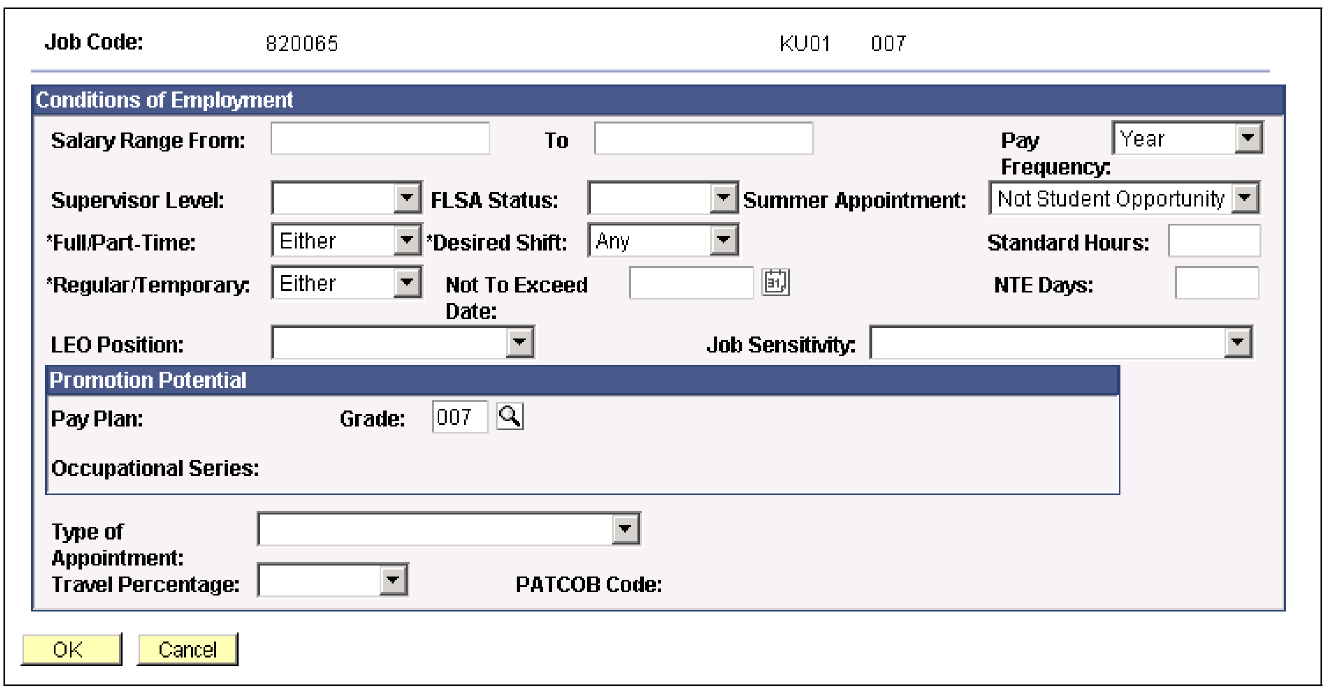
Candidate Name Request page

Enter candidates that you highly recommend for the open job requisition. This information is used in resolving ties in the Applicant Ranking Process.

Sequence If you have more than one candidate, enter the Sequence and Name for each.

(USF) Entering Conditions of Employment

Access the Conditions of Employment page.



Conditions of Employment page

Salary Range From, To Populated with information from the Job Code Table; you can override these values.

FLSA Status The system displays a status of *Exempt, Non-Exempt,* or *(none).*

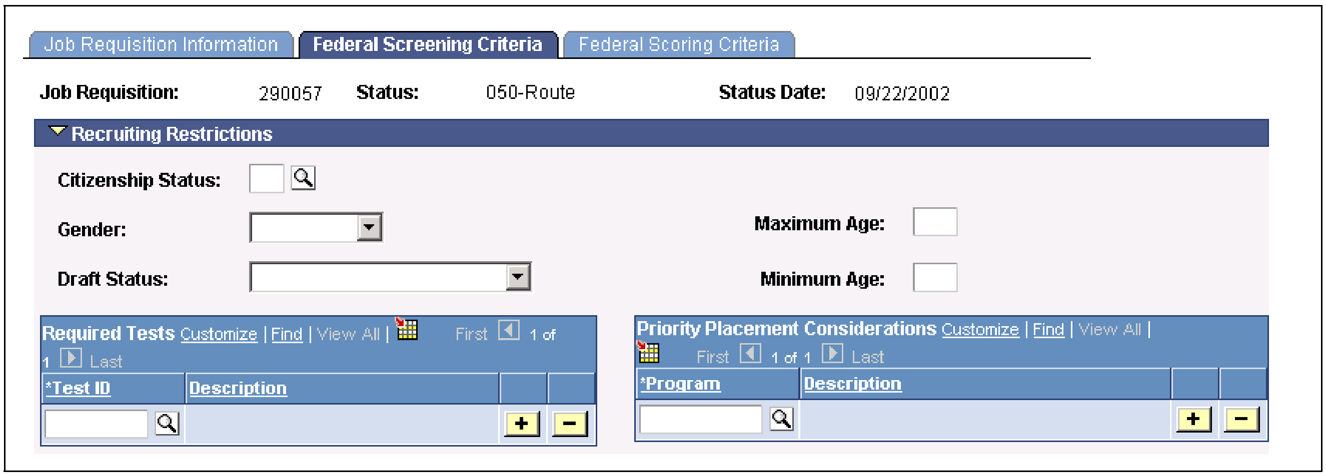
Summer Appointment Select if this position is a summer appointment. This information is sent as part of the vacancy information for the USA Jobs program. When there are multiple job codes, the primary job code value for summer appointment is used.

Not To Exceed Date, NTE Days (not to exceed days) Enter values in these fields if the position is *Temporary.*

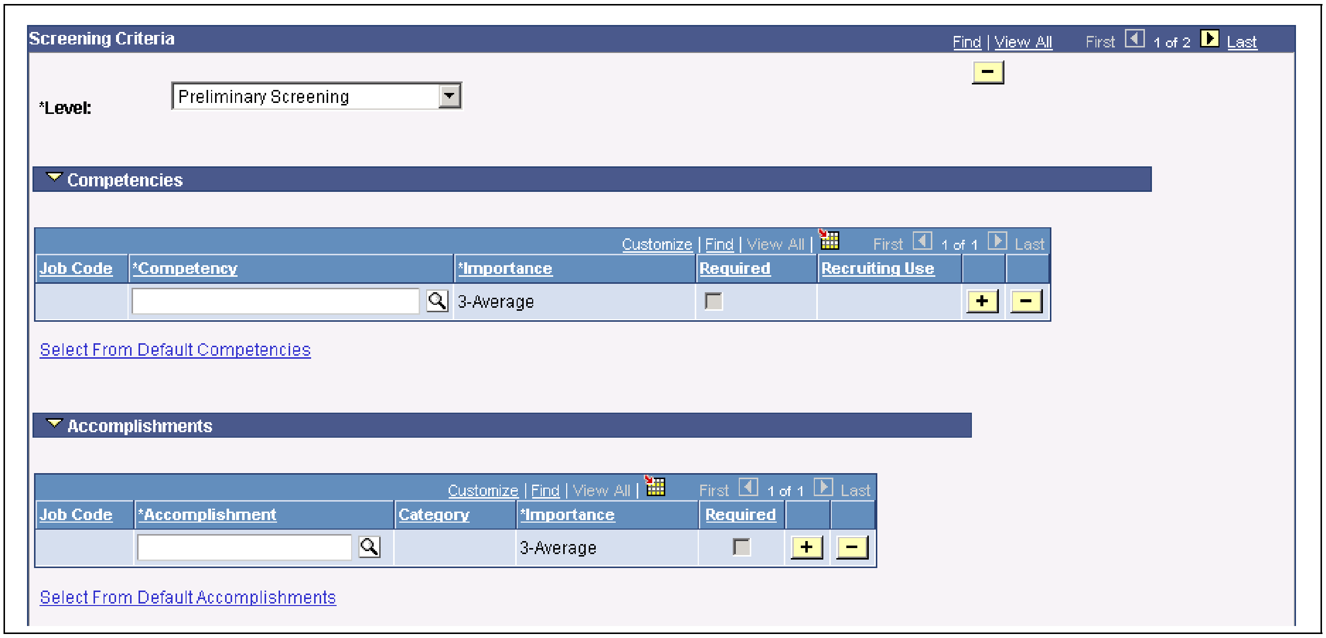
LEO Position (law enforcement officer position)	Populated with information from the Job Code Table.
Job Sensitivity	Populated with information from the Job Code Table.
Grade	The grade for the position; you can modify this information.
Type of Appointment	If applicable, select from the available options: as *Executive (Except Svc Perm), Limited Term (Senior Exec Perm),* or *Other (Except NonPerm).*
Travel Percentage	Indicate the percentage required: *(none), < 25%, 25-50%, 50-75%,* or *75-100%.*
PATCOB Code	Populated with information from the Job Code Table.

(USF) Entering Federal Screening Criteria

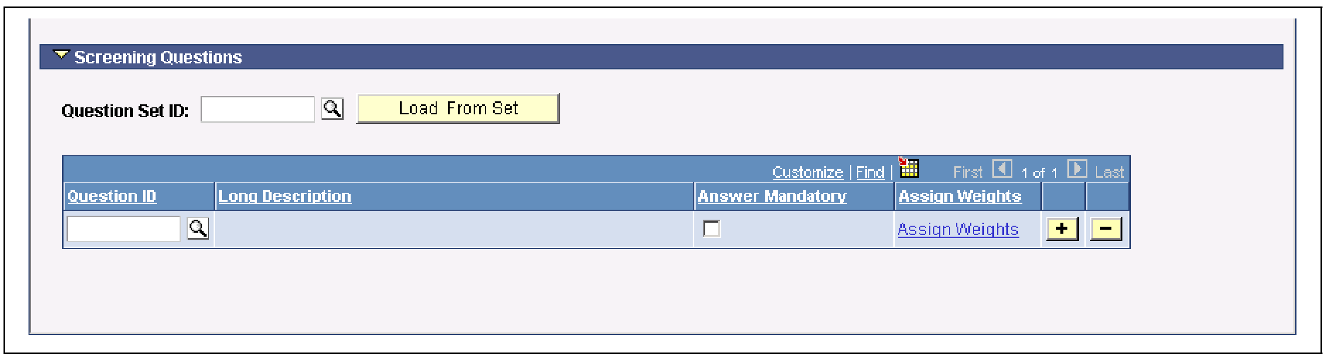
Access the Federal Screening Criteria page.



Federal Screening Criteria page (1 of 3)



Federal Screening Criteria page (2 of 3)



Federal Screening Criteria page (3 of 3)

Understanding U.S. Federal Screening Criteria

For U.S. Federal government users, applicants are evaluated against screening criteria that can include:

- Recruiting restrictions that impact the basic eligibility process
- Competencies and accomplishments
- Screening questions.

  These provide additional information in determining which applicants meet your basic job requirements.

Here is a summary of the Federal requisition screening process:

1. Run the priority placement and basic eligibility processes.
2. Determine minimum qualifications.
3. Apply the crediting plan to all eligible applicants.

These screening processes depend on the requirements that you set up on the Federal Screening Criteria page.

You can define two levels of screening: preliminary and final screening. For U.S. Federal Government users, screening criteria are used as follows:

- Preliminary screening criteria are used to display competencies, accomplishments, and screening questions to applicants applying online using the PeopleSoft eRecruit Apply for Job self-service transaction.
- Final screening criteria are used to apply the crediting plan against eligible applicants to narrow down the applicant pool to review more closely.

It is important that the competencies, accomplishments, and screening questions are identical for both the preliminary and final screening.

For final screening you must also define the crediting plan scoring using the Crediting Plan Scoring component.

Recruiting Restrictions Identify any restrictions that must be considered in the recruitment and selection process. These are optional fields, and may be used individually or in combinations. This information is applied when screening applicants during the basic eligibility process.

Required Tests Select tests that are required for candidates applying for the job requisition in the Test ID field. Set up tests in the Test Table.

Priority Placement Considerations Indicate any special considerations for priority status in the Program field. Set up priority placement values in the Priority Placement Table.

Screening Criteria

The competencies and accomplishments that you add here form the basis of the Crediting Plan. The Crediting Plan is used to rate those applicants who pass two preliminary qualification phases; basic eligibility and minimum qualifications.

Important! If you modify any of the criteria that you set up in screening criteria after an applicant has been rated, the system automatically deletes the applicant rating scores after issuing a warning informing you that the rating is invalid because of the change.

Level Select the screening level: *Preliminary Screening* or *Final Screening.*

Job Code If the requisition has multiple job codes, the system displays the primary job code once the competency is assigned.

When you save the component, the system automatically assigns the competencies to all other job codes in the job requisition. When you display the page again, it shows all competencies with every job code in the job requisition. However, only the competencies for the primary job code are changeable.

Competency Select the competency from the competency table and select an Importance level for the competency.

Note. For U.S. Federal government installations, the Importance field is for information only. It does not have any weighting in the rating process for Federal.

Select from Default Competencies Click to display the Competency Transfer − Default Competencies page which lists the competencies that you have set up for the position or job code from the Manage Competencies business process.

	Select some or all the competencies to transfer to the job requisition.
Accomplishment	Enter a value and select the level of Importance of the accomplishment.
Reqd (required)	Select for each accomplishment associated with the job requisition.
Select From Default Accomplishments	Click to display the Accomplishment Transfer − Default Accomplishments page which lists the accomplishments that you have set up for the position or job code from the Manage Competencies business process. Select some or all the accomplishments to transfer to the job requisition.

Screening Questions

Screening questions are available only if you have installed PeopleSoft eRecruit.

Use this group box to define the questions that you want applicants to answer as part of their application. These questions appear in the Apply for Job self-service transaction.

The points awarded for screening questions are not included in the U.S. Federal government rating and ranking process.

See Also

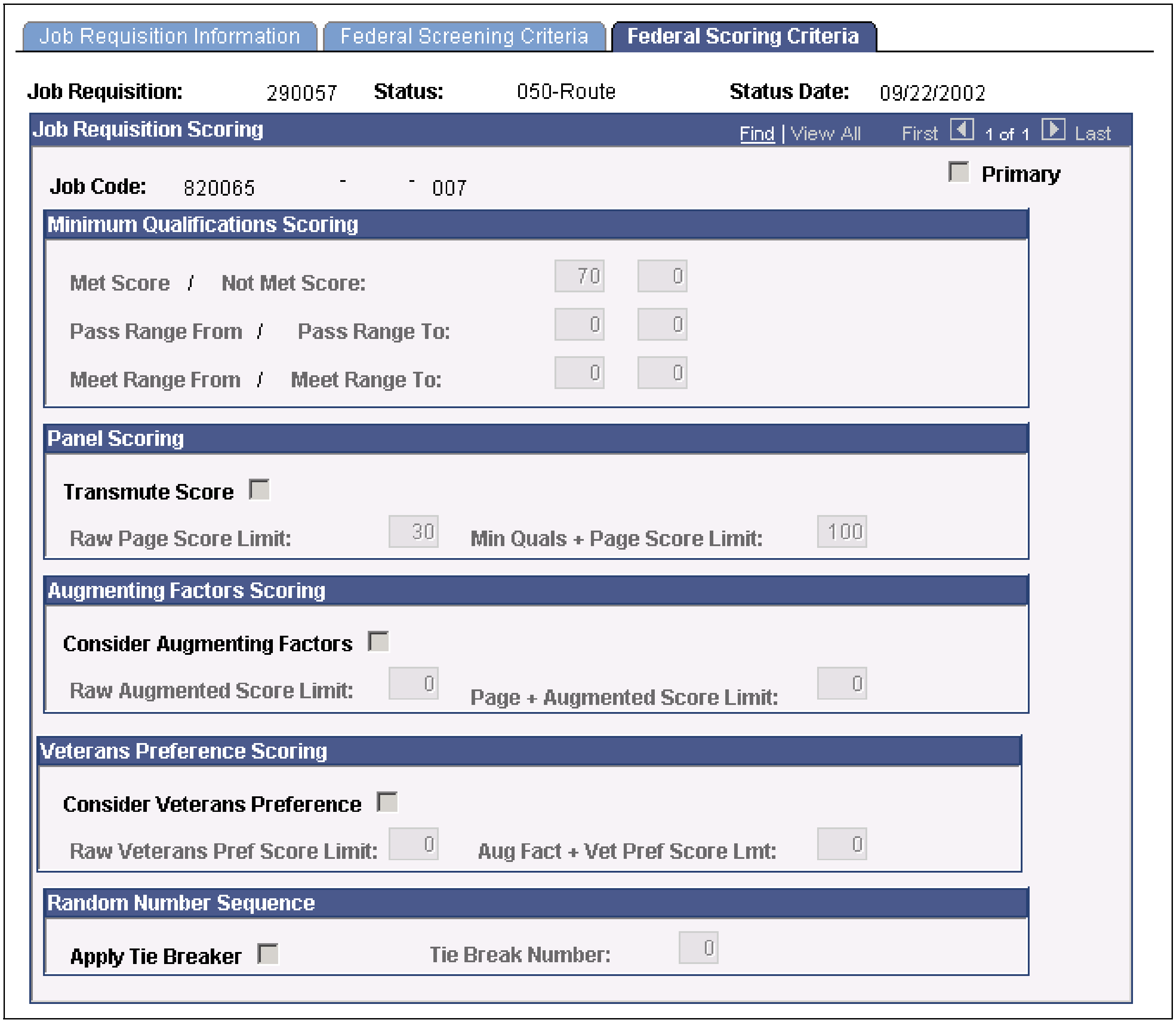
Chapter 6, “Creating and Posting Job Requisitions,” Defining Screening Criteria, page 77

Chapter 8, “(USF) Searching For Qualified Applicants,” page 163

Chapter 6, “Creating and Posting Job Requisitions,” Assigning Weights to Answers, page 82

(USF) Defining Federal Scoring Criteria

Access the Federal Scoring Criteria page.



Federal Scoring Criteria page

The fields are editable and can be tailored to meet your agency's recruitment requirements. This is especially critical if the scoring limits prevent applicants from qualifying or allow too many applicants to qualify.

Met Score / Not Met Score Entering values in this field makes the Passing Range From and Did Not Meet Range From fields unavailable.

Transmute Score Select to tally minimum qualifications and quality ranking factors.

Transmute score means to base the scoring on a scale of 100. It is possible to have scores totaling more than 100 in the rating and ranking process. If you do not select Transmute Score, then the pages score the lesser of the sum of their total points or the Raw Panel Score Limit *or* the difference between the Min Quals + Panel Score Limit (minimum qualifications scoring plus panel score limit) and the Minimum Qualifications Met score. If you do not enter a Raw Panel Score Limit, the comparison with the Raw Panel Score Limit is not made.

	If you do select Transmute Score, the crediting plan must also have a Minimum Qualifications Met score and a Min Quals + Panel Score Limit.
Min Quals + Panel Score Limit (minimum qualifications scoring plus panel score limit)	Calculated automatically based on what you entered in Met Scores /Not Met Scores and Raw Panel Score Limit.
Consider Augmenting Factors	Select if augmenting factors are to be considered. Selecting this makes the Raw Augmented Score Limit and Panel + Augmented Score Limit fields unavailable.
Raw Augmented Score Limit	Total number of points enabled for augmentation. The recruiting specialist may award augmentation points for certain competencies or accomplishments that are not required for the position but may be given consideration in the selection process. For example, a selective factor might be skill with Microsoft Word. An augmenting factor might be skill with Word art. Suppose the following are augmenting factors: • 5 points: Word art • 5 points: Visio • 5 points: Corel Draw If the Raw Augmented Score Limit is *10,* an applicant can get credit for only two of these augmenting factors in the selection process.
Panel + Augmented Score Limit	Calculated automatically by adding the Min Quals + Panel Score Limit to the Raw Augmented Score Limit.
Veterans Preference Scoring	Available when the Consider Veterans Preference check box is selected.
Aug Fact + Vet Pref Score Limit (augmenting factor plus veterans preference score limit)	Calculated automatically by adding the Raw Veterans Pref Score Limit (raw veterans preference score limit) to the Panel + Augmented Score Limit.
Apply Tie Break	Select this check box if you want to apply the tie break. This occurs when two or more eligible competitors have the same ratings in the same preference category. When this happens and you have exhausted all other tie breaking methods, the final procedure to break ties is to do it randomly. This method of tie-breaking must be consistently applied to all certification.
Tie Break Number	Enter the agency's random number that is used to find the starting point for the number sequence used to break ties on a certain day.

(USF) Defining Crediting Plan Scoring

After you create a job requisition, define a Crediting Plan for it. The Crediting Plan is used to rate those applicants who pass two preliminary qualification phases; basic eligibility and minimum qualifications.

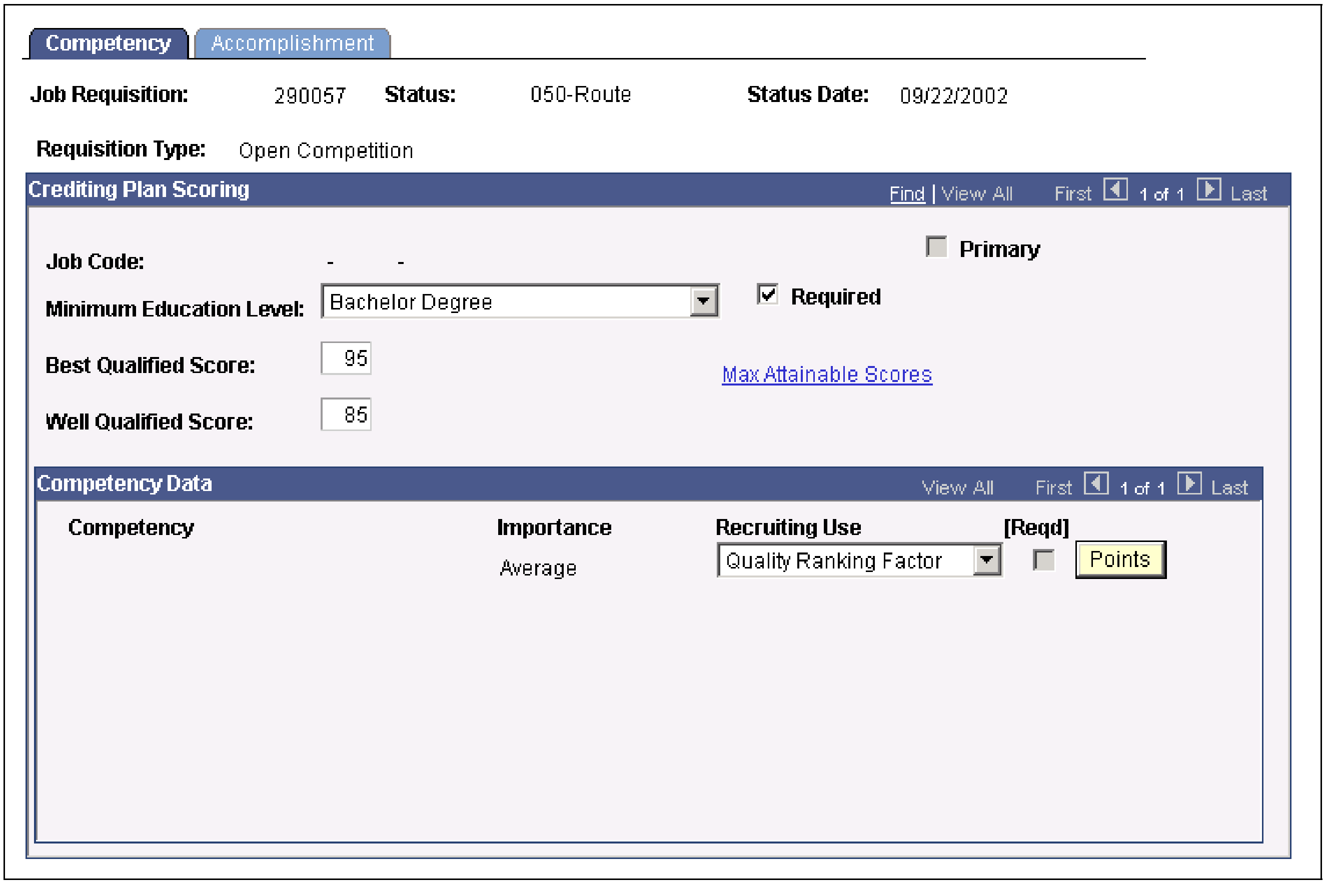
The Crediting Plan is based on the competencies and accomplishments that you defined on the Federal Screening Criteria page. The system automatically copies the competencies and accomplishments you defined for the job requisition to the Crediting Plan. Assign points for the competency proficiency levels and accomplishments using the Crediting Plan Scoring component.

Pages Used to Define Crediting Plan Scoring

Page Name	Object Name	Navigation	Usage
Competency	GVT_CR_PLN_SCORE1	Recruiting, Job Requisitions/Postings, Crediting Plan Scoring USF, Competency	View the minimum education level and competencies that are required for the job requisition. Select the competencies that are augmenting or quality factors.
Accomplishment	GVT_CR_PLN_SCORE2	Recruiting, Job Requisitions/Postings, Crediting Plan Scoring USF, Accomplishments	View the accomplishments that are required for the job requisition. Assign points for those accomplishments that are augmenting or quality factors.
Proficiency Points	GVT_CR_PLN_SEC	Click the Points button on the Competencies page.	View the ratings for a selected competency and assign points for each rating.
Crediting Plan Totals	GVT_CP_SCORES_SEC	Click the Max Attainable Scores link on the Competency page or the Accomplishment page.	View the total points for competencies and accomplishments with augmenting or quality ranking factors. As you change the points associated with each accomplishment or competency, the totals change accordingly.

Defining Competency Scoring

Access the Crediting Plan Scoring - Competency page.



Crediting Plan Scoring – Competency page

Best Qualified Score, Well Qualified Score	These fields are optional. You might return to them after the applicants have been rated when you begin the evaluation of candidates. This enables you to analyze the scoring to determine the natural breaks and enter values in these fields accordingly.
Minimum Education Level	Select the level of education required and select Required if this is a mandatory requirement.
Max Attainable Scores	Click this link to access the Crediting Plan Totals page, where you can view the total points for competencies and accomplishments with augmenting or quality ranking factors.

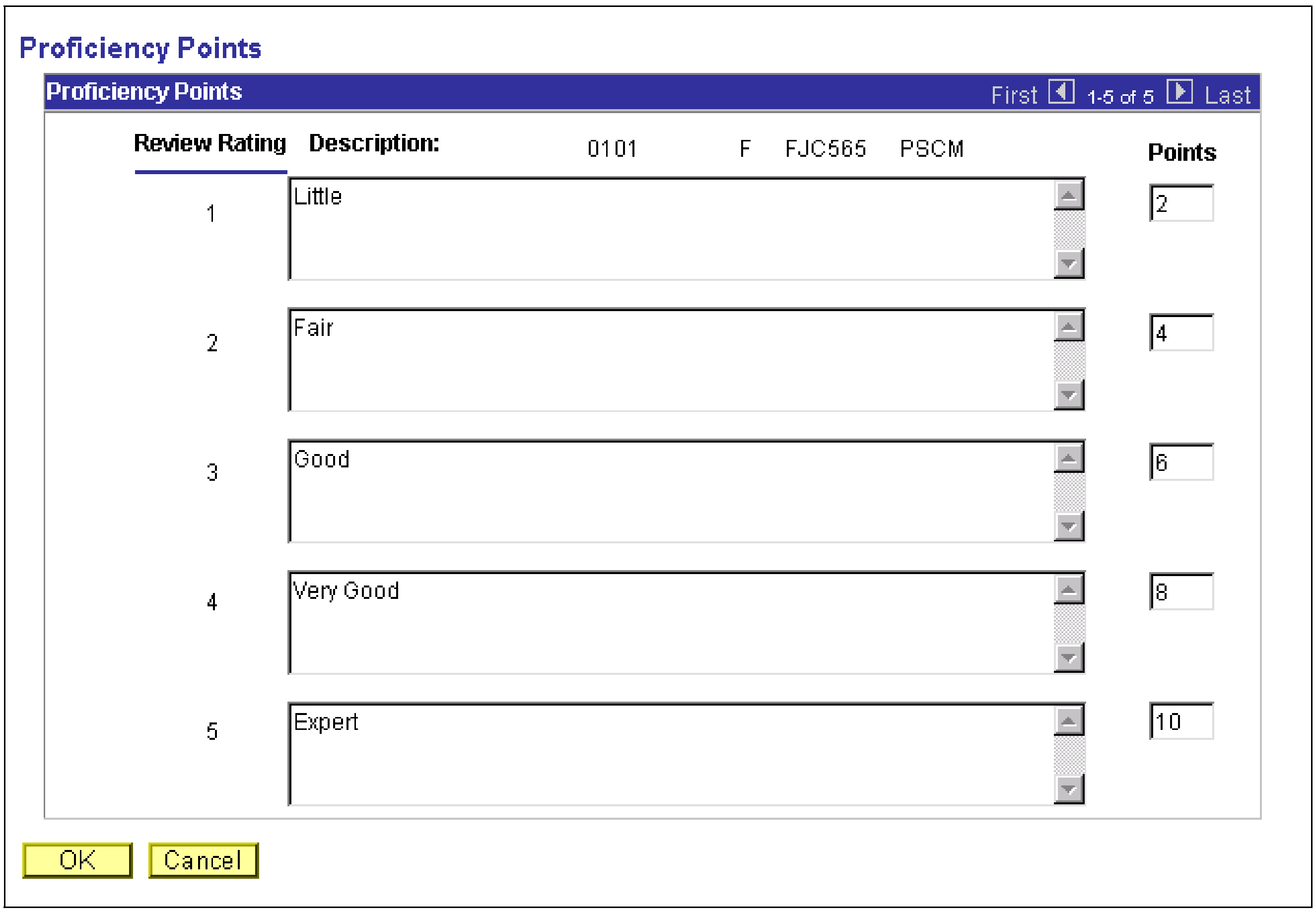
Competency Data

Competency	Competencies and associated Importance are populated from the screening criteria you entered on the Federal Screening Criteria. You cannot edit the list of competencies from here.
Recruiting Use	Select *Augmenting Factor, Minimum Qualification, Quality Ranking Factor,* or *Selective Factor.*
Points	Click this button to access the Proficiency Points page, where you assign points awarded for each proficiency level for the selected competency.

This button is available where Recruiting Use is *Augmenting Factor* or *Quality Ranking Factor*. It is unavailable with *Minimum Qualification,* and *Selective Factor.* This is because applicants receive points in the rating process only from augmenting factors and quality ranking factors. Applicants must meet the minimum qualifications and selective factors, as outlined in the Office of Personnel Management's qualification standards, to be considered minimally qualified, or simply qualified, for the job.

Assigning Proficiency Points

Access the Proficiency Points page.



Proficiency Points page

Review Rating Populated from Manage Competencies.

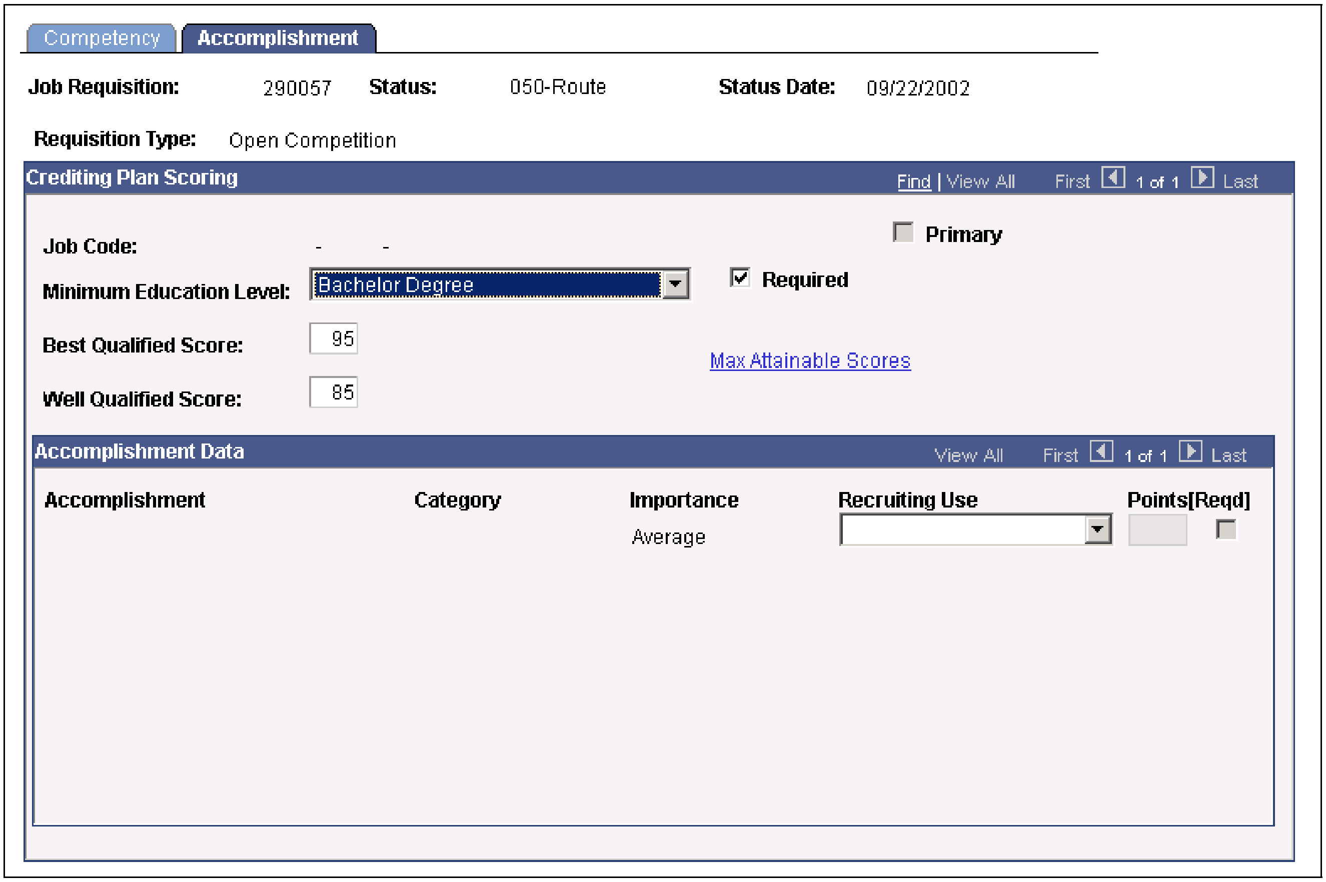
Points Enter the points awarded for each rating level. While all job codes in the job requisition have the same competencies, the proficiency levels required can differ for each job code.

See Also

PeopleSoft 8.8 Human Resources PeopleBook: Manage Competencies, "Setting Up Competencies and Accomplishments"

Defining Accomplishment Scoring

Access the Crediting Plan Scoring - Accomplishment page.



Crediting Plan Scoring – Accomplishment page

Max Attainable Scores Click this link to access the Crediting Plan Totals page, where you can view the total points for competencies and accomplishments with augmenting or quality ranking factors.

Accomplishment Data

Accomplishment Accomplishments and associated Importance are populated from the screening criteria you entered on the Federal Screening Criteria. You cannot edit the list of accomplishments from here.

Recruiting Use Select *Augmenting Factor, Minimum Qualification, Quality Ranking Factor,* or *Selective Factor.*

Points Assign points awarded for accomplishments where Recruiting Use is *Augmenting Factor* and *Quality Ranking Factor.*

This field is unavailable with *Minimum Qualification* and *Selective Factor.*

Cloning Requisitions

This section explains how to clone requisitions.

Understanding Requisition Cloning

Clone Requisition enables you to make one or more copies of an existing requisition automatically, without reentering data.

You select the requisition you want to copy from the list of approved requisitions, enter the number of copies, and the system creates the new requisitions.

The system automatically assigns requisition numbers based on the Last Job Requisition Number Used field on the eRecruit Installation Setting page.

Note. You cannot manually specify the requisition numbers to use for cloned requisitions.

Most requisition data is copied directly to the new requisitions. However, there are some fields where the system adjusts the values, or leaves fields blank. The table below lists the fields that aren't cloned:

Fields	Value in Cloned Requisition
Status	*Open*
Status Reason	*New Authorization*
Open Date, Status Date	Current date
Desired Start Date, Projected Fill Date	Set relative to the Open Date field (current date). The system uses the interval between Open Date and Desired Start Date/Projected Fill Date in the existing requisition to determine the dates for the cloned requisition.
All other dates	Blank
Approval Status	*All Approved* or *Needs Approval* depending on the type of user who is cloning the requisition. See the section "Approval Process for Cloned Requisitions" for details. .
(USF) Vacancy Tracking and USA Job Tracking data	Not copied
Applicant and interview schedule data linked to copied requisition	Not copied

Approval Process for Cloned Requisitions

The Clone Requisition transaction is available to these users:

- Recruiting administrators from the recruiting menu.
- Hiring managers and recruiters through a manager or recruiter self-service transaction.

The transaction is essentially the same for both types of user. The only difference is that requisitions created by self-service users must go through an approval process, whereas those cloned by recruiting administrators bypass this process. Therefore, the Approval Status for cloned requisitions is set to:

- *Needs Approval* for hiring managers and recruiters.
- *All Approved* for recruiting administrators.

The approval process for cloned requisitions is the same as that for requisitions created using the Create Job Requisition self-service transaction. This is explained in PeopleBooks.

See Also

PeopleSoft 8.8 eRecruit Manager Desktop PeopleBook, "Creating and Posting Job Requisitions," Creating Job Requisitions

Pages Used to Clone Requisitions

Page Name	Object Name	Navigation	Usage
Clone Requisition	ER_CLONE_REQ	• Recruiting, Job Requisitions/Postings, Clone Job Requisition, Clone Requisition • Manager Self Service, Recruit Activities, Job Requisitions/Postings, Clone Requisition • Recruiting, Assigned Recruiter Activities, Job Requisitions/Postings, Clone Requisition	Select the requisition you want to clone and the number of copies you want to make. You can clone approved requisitions only. Click the Clone Requisitions button to create the new requisitions.
Confirm Clone Requisition	ER_CLONE_REQ_CONF	Click the Clone Requisition button on the Clone Requisition page	Displays the requisition numbers of the new requisitions. From here, self-service users can view a list of their requisitions. All users can go back to the Clone Requisition page.

See Also

PeopleSoft 8.8 eRecruit Manager Desktop PeopleBook, "Creating and Posting Job Requisitions," Creating Job Requisitions

(USF) Creating Job Requisition Postings

Here's how you use the Job Requisition Posting component to announce job openings:

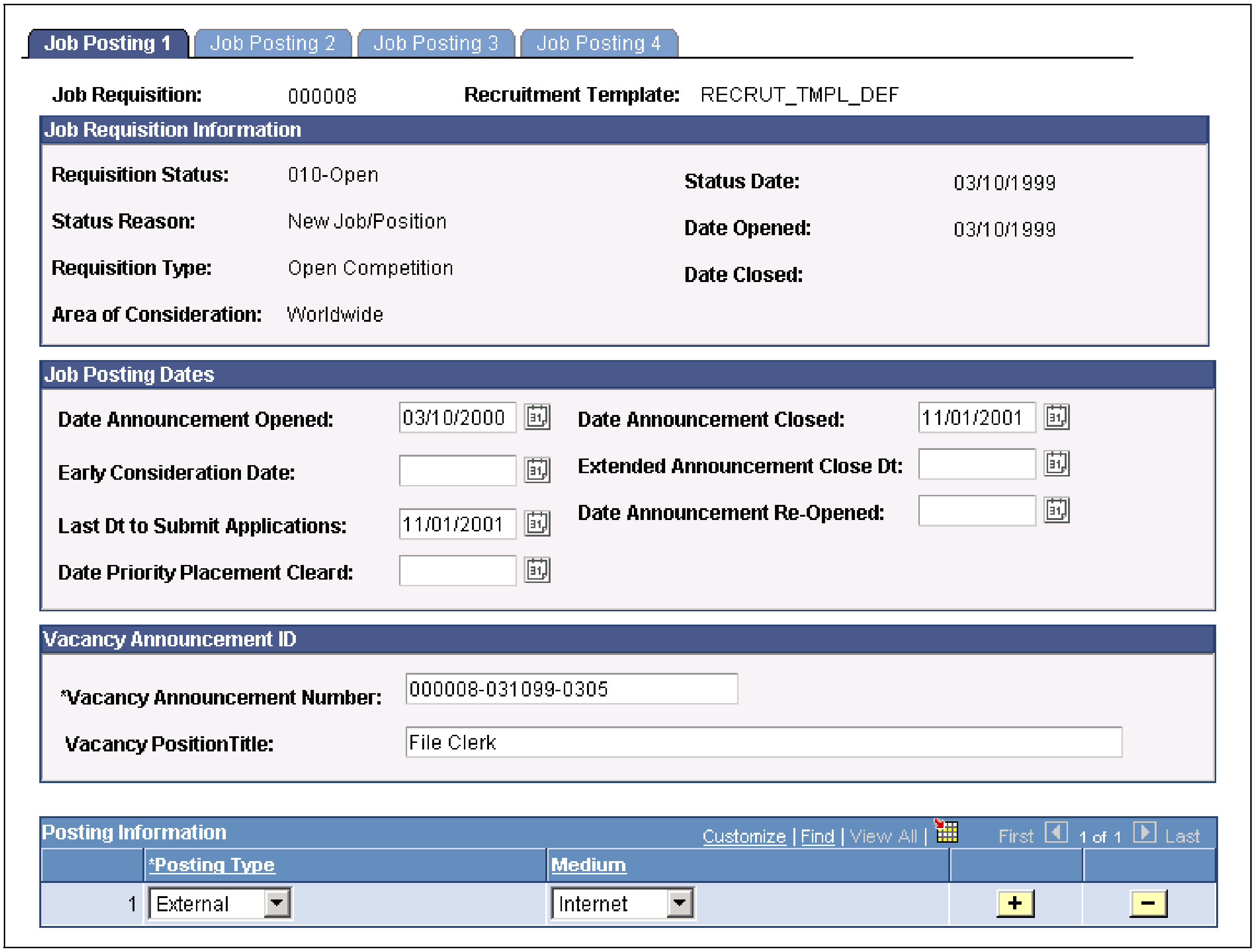
1. Determine job posting dates.
2. Add details to announcements.
3. Review job code information.
4. Complete job posting descriptions.
5. Add remarks for USA Jobs.
6. Complete posting information for USA Jobs.

Pages Used to Create Job Requisition Postings

Page Name	Object Name	Navigation	Usage
Job Posting 1	GVT_RQSN_POSTING1	Recruiting, Job Requisitions/Postings, Maintain Job Req Postings USF, Job Posting 1	Determine the opening and closing dates of a vacancy announcement, track the vacancy announcement number, and determine the actual position title to be posted on the vacancy announcement. You must have created a job requisition.
Job Posting 2	GVT_RQSN_POSTING2	Recruiting, Job Requisitions/Postings, Maintain Job Req Postings USF, Job Posting 2	Add details to vacancy announcements. Add vacancy-specific information including job posting information and descriptions for the job posting.
Requisition Job Codes Information	GVT_JOB_POST_SEC	Click the Requisition Job Codes button on the Job Posting 2 page.	Review information about the job codes associated with the job requisition.
Description - Primary Jobcode	GVT_JOB_DESCR_SEC	Click the Job Description button on the Job Posting 2 page.	Complete job posting descriptions. You can copy and paste all or part of the job code description from here into the body of the description to create the wording for the posting.
Job Posting 3	GVT_RQSN_POSTING3	Recruiting, Job Requisitions/Postings, Maintain Job Req Postings USF, Job Posting 3	Add any remarks that you want highlighted for the USA Jobs Bulletin Board. Office of Personnel Management, USA Jobs, delivers a set of predetermined remark codes and descriptions. These remark codes are available and are maintained on the USA Jobs VA Remarks Table page.
Job Posting 4	GVT_RQSN_POSTING4	Recruiting, Job Requisitions/Postings, Maintain Job Req Postings USF, Job Posting 4	Complete the information used for USA Jobs Feed.

Determining Job Posting Dates

Access the Job Posting 1 page.



Job Posting 1 page

Job Requisition Information This group box is populated with information from the Job Requisition table.

Date Priority Placement Cleard (cleared) If applicable, enter the date after you process priority placement eligibility.

Date Announcement Closed Enter the date when the job requisition is filled.

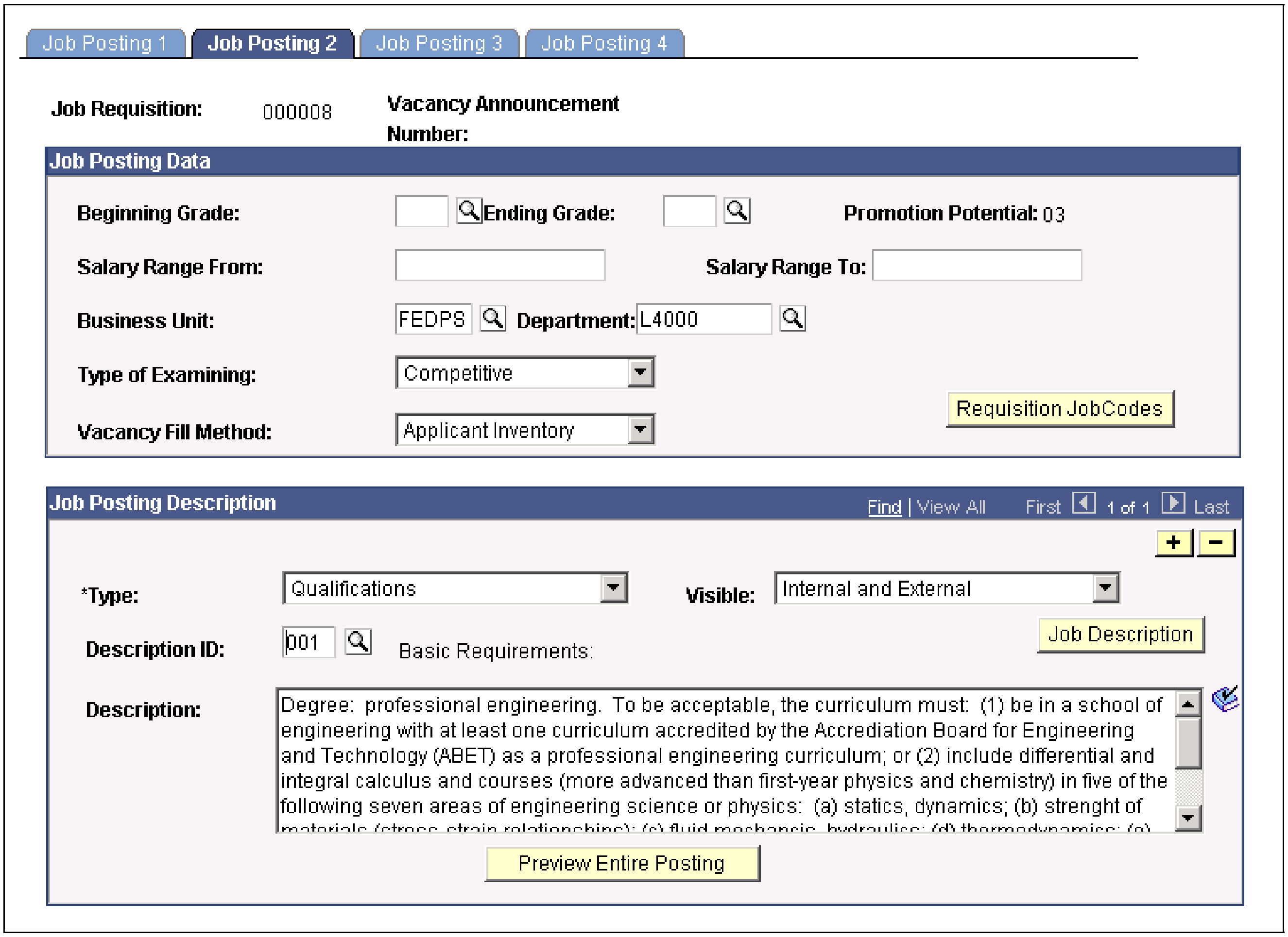
Extended Announcement Close Dt (date) Enter a value if the job requisition is reopened.

Date Announcement Re-Opened Enter a value only when the job requisition posting has been closed and reopened.

Vacancy Position Title Automatically populated from the primary job code title entered on the job requisition. This field is editable to include the pay plan, series, and grade, or, for example, if the job requisition has multiple job codes and you want to include these in the title that appears on the vacancy announcement. For example, *Interdisciplinary: General Engineer/Physical Scientist, GS-801/1301-12/13.*

Adding Details to Announcements

Access the Job Requisition Posting - Job Posting 2 page.



Job Posting 2 page

Business Unit — Select the business unit and Department where the position is to be filled. These may be different from the ones entered on the job requisition table.

Type of Examining — Select from the available options: *Competitive, Outside the Register, Pre-Determined Score,* or *(none).*

Vacancy Fill Method — Select a value specific to the requisition posting: *Applicant Inventory, Case Examining,* or *(none).* The system considers all applicants in the applicant pool. Employees must be entered as applicants to be considered.

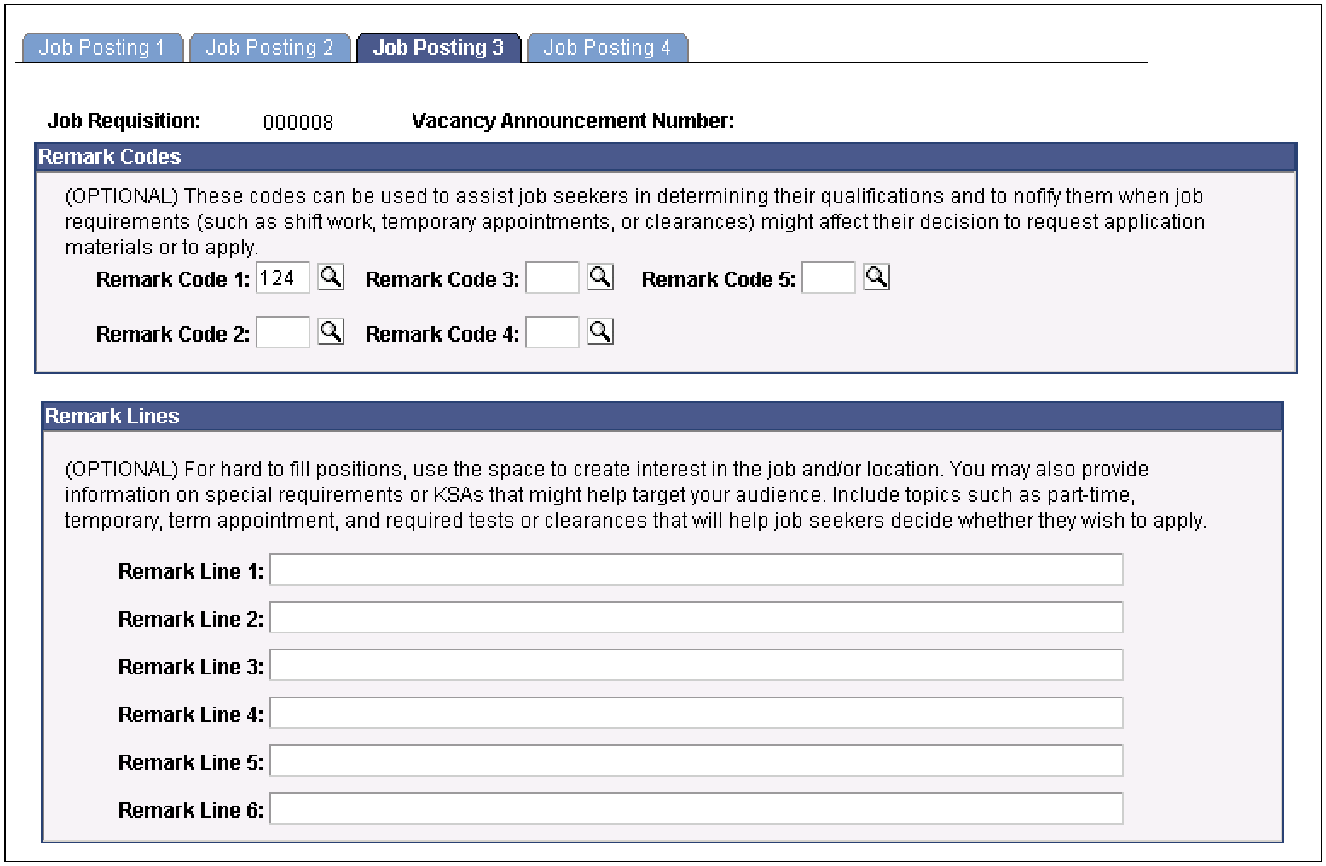
Job Posting Description — Used to create the actual body text of the vacancy announcement.

Requisition JobCodes — Click to access the Requisition JobCodes Information page, where you can review detailed information for the job code. This information helps you enter information in the Job Posting Data group box.

Job Description — Click to access the Description – Primary Jobcode page, where you can view the actual position description of the primary job code entered in the Job Code Table.

Adding Remarks for USA Jobs

Access the Job Posting 3 page.



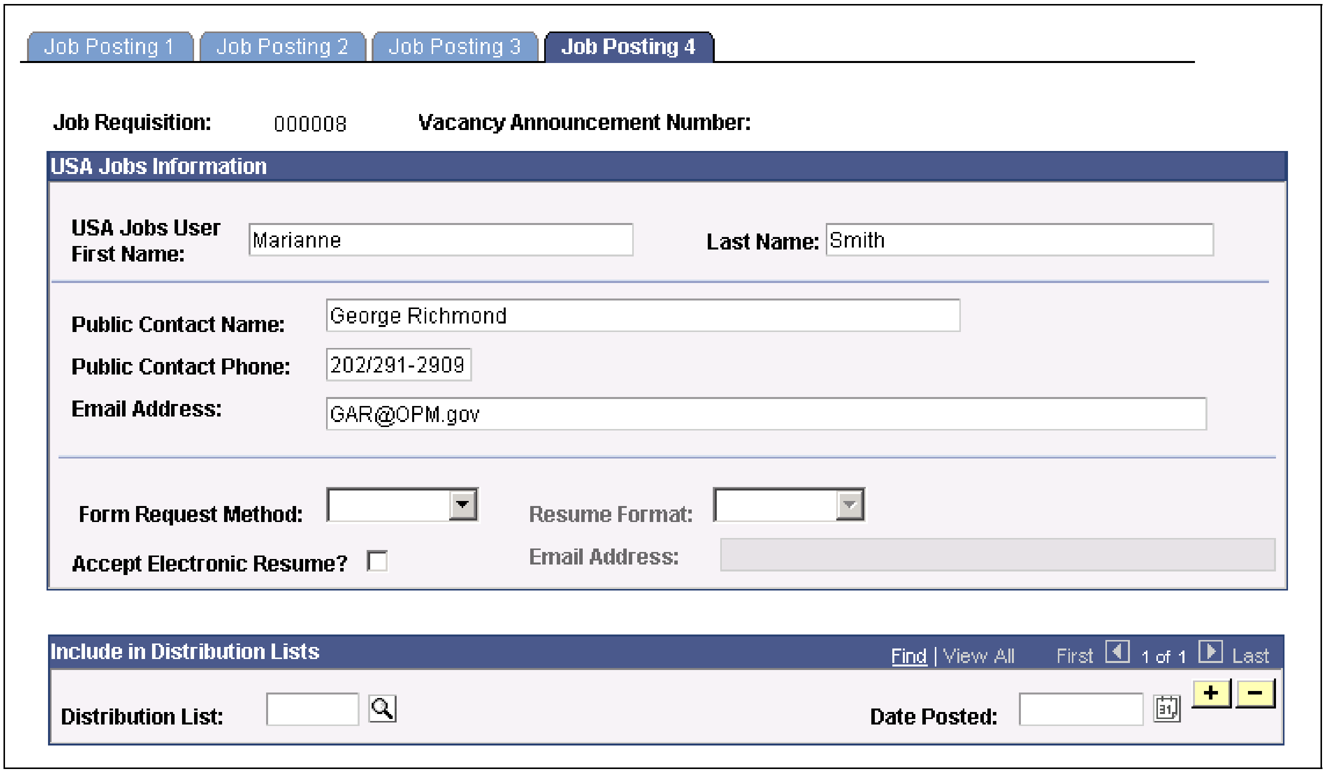
Job Posting 3 page

Remark Code Enter a code, if applicable, to assist job seekers in determining their qualifications and to notify them when job requirements—such as shift work, temporary appointments, or clearances—might affect their decision to request application materials or to apply. You can select up to five different remark codes.

Remark Line Use lines 1–6 to enter remark text that is not delivered as a standard USA Jobs Remark Code.

Completing Posting Information for USA Jobs

Access the Job Requisition Posting - Job Posting 4 page.



Job Posting 4 page

USA Jobs Information Information in this group box is required and is used with the USA Jobs Feed.

USA Jobs User First Name, Last Name Used if USA Jobs needs to respond to the Feed.

Public Contact Name, Public Contact Phone, Email Address Used for the applicant to request or respond to a vacancy announcement posted with USA Jobs.

Forms Request Method Select *Internet* or *Fax.*

Accept Electronic Resume Select this check box and enter a Resume Format and Email Address if your agency accepts the USA Jobs online resume.

Distribution List Select where you want this job posted and enter the Date Posted on the distribution list. Create a new row for each distribution list that you post.

Creating and Reviewing Hot Jobs

You can set up hot job categories with award schedules and select requisitions into each hot job category. Here are some facts about hot job categories:

- The administration of hot jobs occurs independently of any ERP.

The hot job category is like an award category, but you associate the hot job category directly with job requisitions rather than with an ERP. The hot job category is applied against the requisition that the applicant is hired into.

- Hot job awards override ERP awards.
- Hot jobs do not override any ERP eligibility criteria. Hot job awards are paid only if the referral satisfies the ERP's employee eligibility criteria.
- The system checks eligibility by the *rules* of the ERP, but by the *schedule* of the hot job category.

  For example, suppose an ERP pays awards six months after an applicant is hired and the hot job award is paid three months after, then eligibility is checked at the three month point but not at the six month point.
- Hot jobs are not effective-dated.

  Once requisitions are marked as hot jobs, they remain hot jobs until you remove them from the list. Similarly, newly created job requisitions that may meet the criteria to be a hot job are not automatically marked as a hot job. You must run the selection process before any job requisitions can be added to or removed from the hot job list.

Summary of Setting Up and Administering Hot Jobs

Here's how you set up and review hot jobs using the Hot Job component:

1. Name and describe a hot job category on the Hot Jobs page.
2. Define criteria for selecting requisitions as hot jobs on the Selection page.
3. Run the online process to create a list of qualifying requisitions by clicking the button on the Selection page.
4. Remove selected requisitions from the hot job category on the Job Requisitions page.
5. Set up the amounts and timing of awards in the hot job category on the Award Schedule page.
6. View the history of a requisition's hot job status on the Hot Job History page.

Note. The Hot Jobs component also includes the same Awards Schedule page that appears in the Employee Referral Program component.

Pages Used to Create and Review Hot Jobs

Page Name	Object Name	Navigation	Usage
Hot Jobs	ER_RULE_DEFN	Recruiting, Job Requisitions/Postings, Hot Job Administration, Hot Jobs	Identify the requisitions to be designated as a hot job.
Selection	ER_RULE_SQL	Recruiting, Job Requisitions/Postings, Hot Job Administration, Selection	Build the SQL select statements of rules used in setting up hot jobs.
Job Requisitions	ER_RULE_HOTJOB	Recruiting, Job Requisitions/Postings, Hot Job Administration, Job Requisitions	Select requisitions and remove them from the hot job category.
Award Schedule	ER_RULE_AWD_SCH	Recruiting, Job Requisitions/Postings, Hot Job Administration, Award Schedule	Defines the amounts, timing, and earnings code for the rule.
Hot Job History	ER_HOTJOB_HIST	Recruiting, Job Requisitions/Postings, Review Requisition Information, Review Hot Job History, Hot Job History	View the history of a requisition's hot job status.

See Also

Chapter 5, "Creating Employee Referral Programs," Setting Up Employee Eligibility Rules, page 56

Defining Hot Jobs

Here's how you define a hot job:

1. Access the Hot Jobs page.

   Add a new Hot Job ID to access the page when you're creating a new hot job category.

2. Provide the description, short description, and long description of the Hot Job ID.

Defining Selection Criteria for the Hot Job

The Selection page is identical to the Rule SQL page used to set up award category rules with the addition of a Select Hot Jobs button.

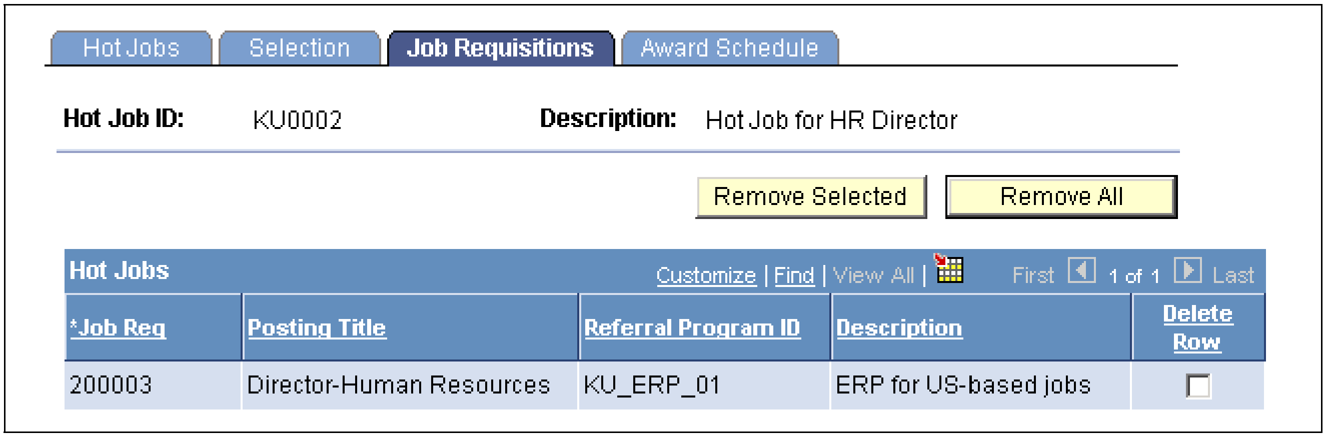
1. Access the Selection page.
2. Define criteria for selecting job requisitions as hot jobs in this Hot Job category.
3. Click the Select Hot Jobs button to load qualifying requisitions into the Job Requisitions page.

   The system does not list requisitions that have already been selected into another hot job category.

   If you previously created a list of requisitions for this hot job category, the system reapplies the criteria and any requisition that no longer qualifies does not appear on the list. For example, if *Open* status is a criterion, a job that now has *Reopen* status does not appear on the list.

Refining Job Requisition Selection

Access the Job Requisitions page.



Job Requisitions page

Sort By — You can sort by job requisition number, job requisition description, referral program description, or referral program ID.

Remove Selected — Click this button to remove requisitions that you have selected in the Delete Row check box. The requisitions are removed when you save.

Remove All — Click this button to remove all requisitions from the list. The requisitions are removed when you save.

Hot Jobs

Referral Program ID — If you have associated the requisition with an ERP, the system enters the ERP ID here. If the requisition is not associated with an ERP, select one here. You must associate a requisition with an ERP; otherwise, the system cannot determine employees' eligibility for awards.

Setting Up Hot Job Award Schedules

The hot job award schedule supercedes the award schedule associated with the requisition through the ERP award category rules. There is no safeguard in the system against creating hot job awards of less value than in the ERP award category. Therefore, you must use caution when setting up hot job awards.

1. Access the Award Schedule page in the Hot Job component.
2. Define the award schedule.

This page is the same as the Award Schedule page in the Award Category Rules component.

See Also

Chapter 5, "Creating Employee Referral Programs," Setting Up Award Schedules, page 60

Extracting Job Posting Information

Once you have created your job requisitions, generate a job posting that includes the following information:

- Job requisition number.
- Job title.
- Salary.
- Description.
- Duties.
- Effective-date of the requisition.

The system uses an SQR to extract data from PeopleSoft Human Resources and a Word for Windows macro to merge the data into a form letter template. Before you can generate form letters, you must understand how this process works, how to set up your form letters, and how to set up the process scheduler.

Understanding How to Generate Job Postings for Jobs Monitored by a Works Council

For German employers, we provide two reports for creating job postings:

- Job Posting List all information related to a job requisition.
- Works Council Posting lists open requisitions that are monitored by the selected Works Council.

Pages Used to Run the Requisition Posting Report

Page Name	Object Name	Navigation	Usage
Parameters	RUNCTL_APP004	Recruiting, Recruiting Reports, Extract Posting Information	Creates standardized job posting announcements.
Works Council Posting	RUNCTL_APP013	Recruiting, Recruiting Reports, Works Council Posting Report	This report lists all open requisitions that are monitored by a specified Works Council.

(USF) Posting Jobs to USA Job Feed

This section provides an overview of the USA Jobs Feed process and discusses how to:

- Create the USA Jobs feed.
- Send the USA Jobs vacancy announcement.
- Run the Full Vacation Announcement report.

Understanding Job Requisition Postings Process

After creating a job requisition, setting up job requirements and ranking criteria, you create the job posting and submit it to USA Jobs.

An agency can enter jobs and vacancy announcements to the Office of Personnel Management's (OPM) Federal Jobs Database using these methods:

- Bulletin Board Entry.
- USA Jobs online entry.
- Job Entry.

PeopleSoft's USA Jobs process uses the Job Entry Template method to feed agencies jobs and vacancy announcements to the Federal Jobs Database.

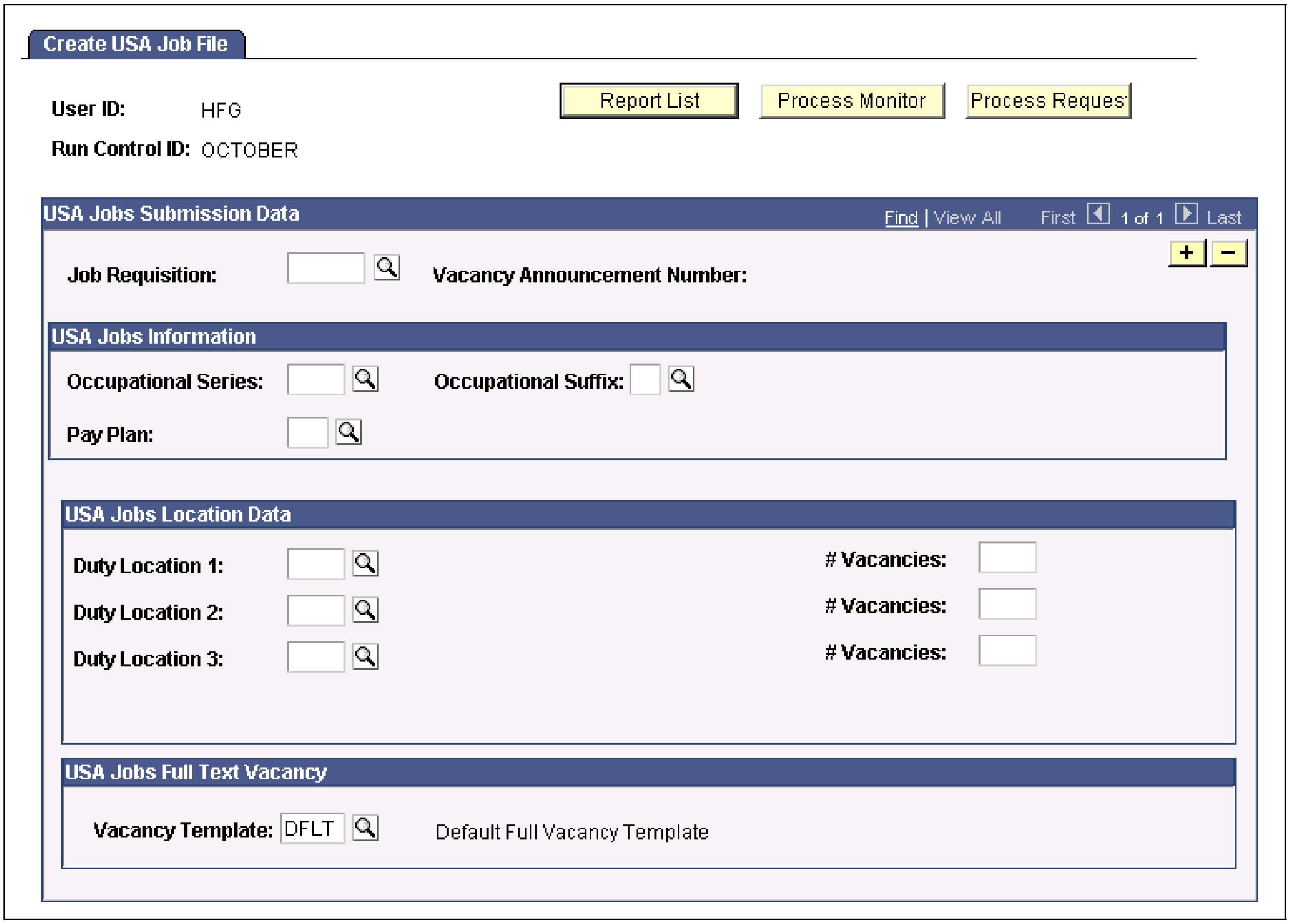
This method submits entries and vacancy announcements by email. The USA Jobs process creates the ASCII 7 bit text file required by the Federal Jobs Database.

Page Used to Process the USA Jobs Feed

Page Name	Object Name	Navigation	Usage
Create USA Job File	GVT_RUNCTL_USAJOB	Recruiting, Job Requisitions/Postings, Review Requisition Information, Create USA Job File USF	Create the USA Jobs Feed. Indicate what information you want sent to USA Jobs and run the process to create the Feed. You must have created a job requisition posting before you run this process.
USA Jobs Tracking	GVT_VA_TRACKING	Recruiting, Job Requisitions/Postings, Review Requisition Information, Track USA Jobs Postings USF	Enter the USA Jobs control number that you received after sending the USA Jobs Feed file. You must have run the Create USA Job Template File (FGHR031) process that creates the USA Jobs Feed.
Full Vacancy Announcement	GVT_RUNCTL_FULLVAC	Recruiting, Recruiting Reports, Create Full Text Posting USF	Creates a printed copy of the vacancy announcement.

Creating the USA Jobs Feed

Access the USA Job Interface Files - Create USA Job File page.



USA Job Interface Files - Create USA Job File page

Vacancy Announcement Number — The number associated with the requisition number.

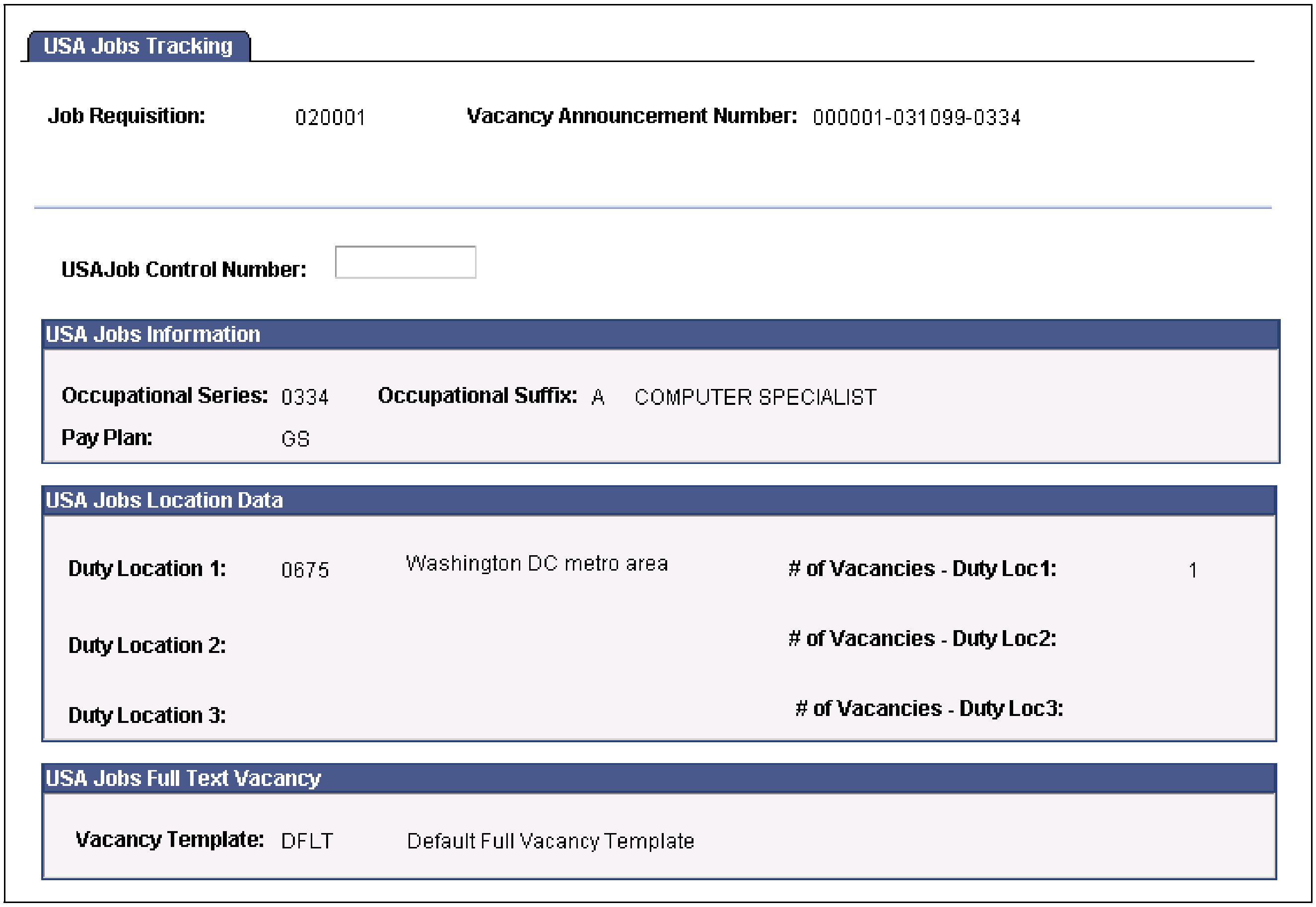
Occupational Series — Select a value. The prompt table displays only the job codes associated with the selected job requisition.

Occupational Suffix — From the delivered prompt table, select a value that references the title of the vacancy announcement position being advertised. If no match is available, leave this blank and the system populates the field and retrieves the title from the Job Posting Table. Occupational suffix values are set up on the USA Jobs – Occ Suffix Table page.

USA Jobs Location Data — Select up to three duty locations for this vacancy announcement. Enter the associated Vacancies # (number) for each location. Because of USA Job requirements, you can submit only one file per job code and one file per three different duty locations.

Sending the USA Jobs Vacancy Announcement

Access the USA Jobs Tracking page.

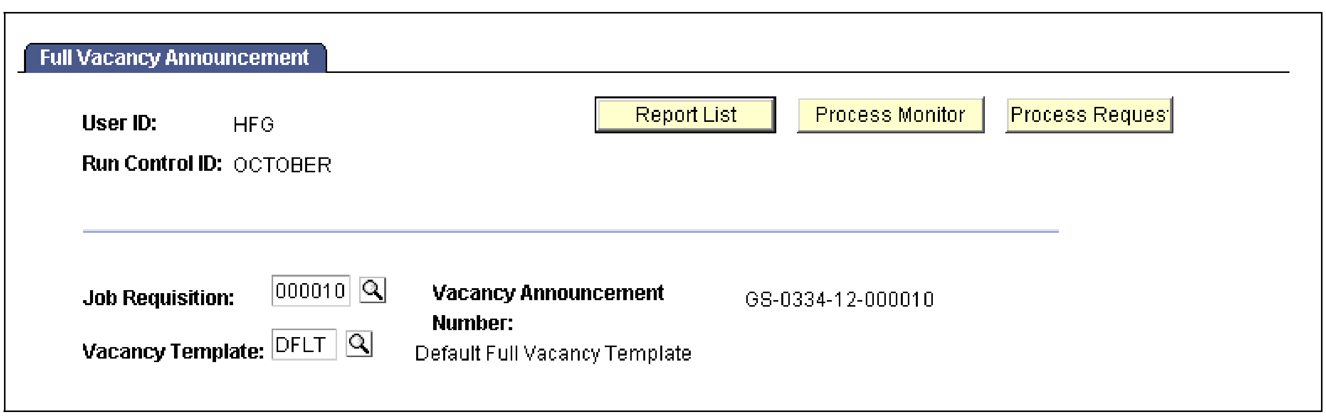


USA Jobs Tracking

USA Job Control Number Enter the number supplied by USA Jobs Feed.

Running the Full Vacation Announcement Report

Access the Full Vacancy Announcement page.



Full Vacancy Announcement page

CHAPTER 7

Managing Applicants

This chapter provides an overview of applicant data management and discusses how to:

- Enter basic applicant information.
- Link applicants to job requisitions.
- Assign priority placement codes for U.S. Federal applicants.
- Enter applicant competencies, education, work experience, and other accomplishments.
- Enter additional applicant information.
- Enter applicant eligibility and identity information.
- Merge duplicate applicant records.
- Change IDs and delete applicant records.

Understanding How to Add Applicant Data

To add applicants:

1. Complete the Applicant Data component.
2. Enter the following applicant information:
    - Competencies
    - Education
    - Accomplishments
    - Previous work experience
    - References
3. Enter additional applicant information as required by your organization.

    The following information that might be required to comply with local country regulatory requirements: disability details, citizenship, visa and work permit information, and bank account details.

For PeopleSoft HRMS Global installations, requisition screening uses applicant preferences from the applicant data component, competency, education, accomplishment, and prior work experience pages to compare applicants against job requisition requirements.

For U.S. Federal installations, the requisition screening process is in two parts. Preliminary screening consists of the Basic Eligibility and Priority Placement process, which uses applicant information that you enter in the applicant data pages to compare applicants against job requisition requirements. Final screening uses a combination of information you enter in the applicant data, education, and work experience pages to determine Minimum Qualifications. The information that you enter for the applicants competency and accomplishment are later used in the rating and ranking process.

Note. If you have installed PeopleSoft eRecruit, you can also use screening questions to screen applicants.

When you hire an applicant, the system automatically copies the applicant information to the new employee records, so you don't have to enter it twice.

Adding Internal Applicants

You must add internal applicants, both employees and non-employees, to your applicant data table so that you can process their applications in the same way as external applicants.

To distinguish between types of applicants, the system assigns applicants an applicant type: *External, Employee,* or *Non-employee.*

Application Dating

When an applicant first submits an application, the system assigns an application date based on the system date. If the applicant subsequently sends you updated details, the system creates a new applicant record with a new application date. Information related to an applicant, such as prior work experience and disability information, is application-dated.

This provides an audit trail of changes to applicant information so you have immediate access to historical applicant data.

See Also

PeopleSoft 8.8 eRecruit Manager Desktop PeopleBook, "Creating and Posting Job Requisitions," Creating Job Requisitions

PeopleSoft 8.8 eRecruit Manager Desktop PeopleBook, "Managing Applicants"

Understanding How to Link Applicants to Requisitions

There are two ways to link an applicant to a requisition.

- At the time you enter the applicant information on the Applicant Data − Applicant Requisition page.
- Using the Applicant Data − Applicant Activity, where you can track many applicant activities.

Each time you link an applicant to a requisition, the system assigns a disposition status, which tells you how far the applicant has progressed for the particular requisition. When you first link an applicant to a requisition, the disposition is set to *Applied* and this changes in line with the recruitment process. Here is an example of how the disposition might change for a successful applicant:

1. *Applied*

2. *Preliminary Screen*
3. *Final Screen*
4. *Route*
5. *Interview*
6. *Offer*
7. *Ready to Hire*
8. *Hired*

The disposition statuses shown are the values supplied by PeopleSoft for global installations only. However, your system may use different values if your organization has modified the default codes.

If you use the requisition screening, requisition activity, and the eRecruit Manager Desktop self-service transactions to process applicants, the system automatically updates the disposition as the applicant progresses.

(USF) Understanding How to Link Applicants to Requisitions

The Priority Placement process is an additional process for U.S. Federal installations that links applicants to job requisitions. The process identifies applicants who should be included in the application process and links the applicant to the open job requisition, even if the applicant hasn't directly applied for the job.

PeopleSoft deliver disposition statuses and requisition screening processes that are specific to U.S. Federal processing. However, the disposition of the applicant is also updated automatically as the applicant progresses through the equivalent U.S. Federal processes (Basic Eligibility, Determine Minimum Qualifications, Rating and Ranking pages) and through requisition activity.

See Also

Chapter 7, "Managing Applicants," (USF) Assigning Priority Placement Codes, page 131

Chapter 8, "(USF) Searching For Qualified Applicants," Running Priority Placement and Basic Eligibility Processes, page 165

(JPN) Understanding How to Track Selectees for Japan

The standard PeopleSoft recruitment process begins with posting requisitions and ends with hiring—when applicants become employees. In between requisition posting and hiring, there are the other recruitment activities such as screening, interviewing, and offering and accepting employment.

The recruitment process followed by most Japanese companies, however, requires "selectee" statuses between applicant and employee. Applicants become known as selectees when they have one of these four user-maintained preliminary offer statuses (applicant and selectee statuses are also known as "dispositions"):

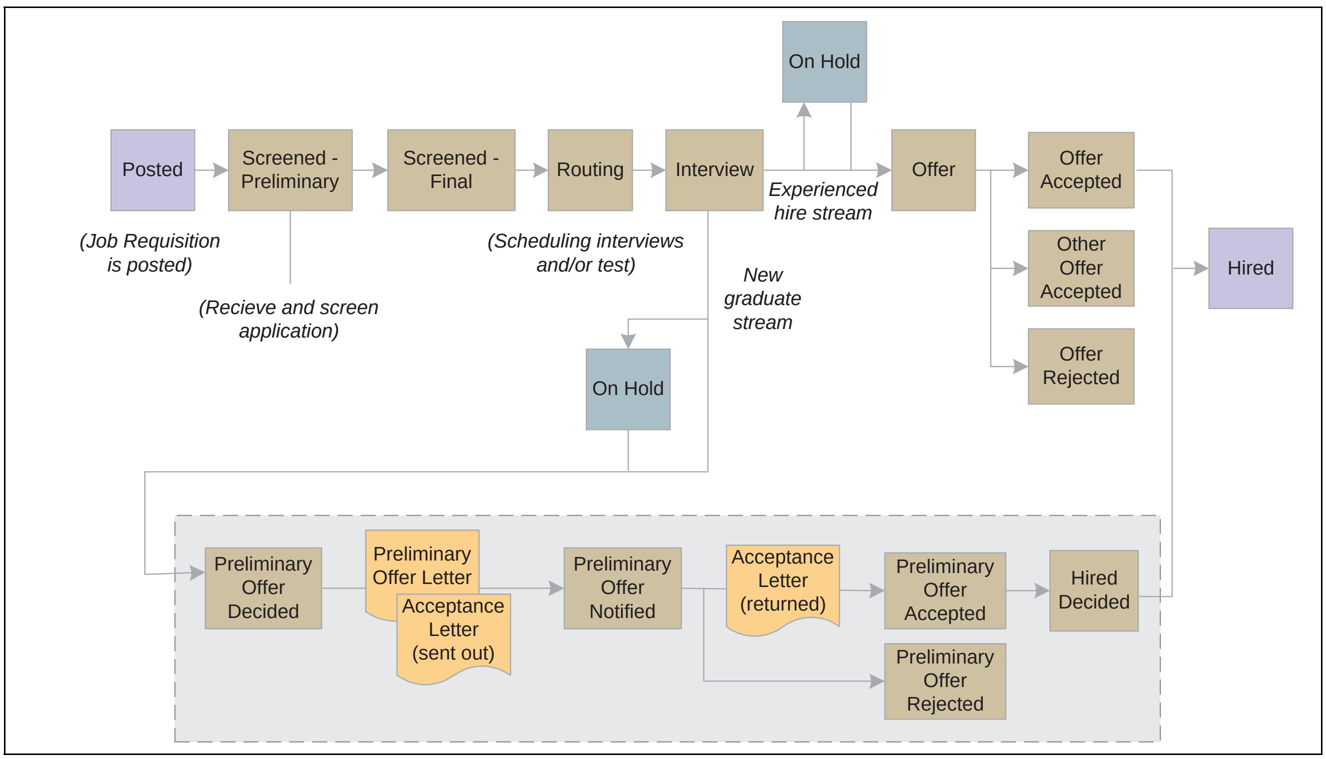
- Preliminary offer decided.
- Preliminary offer notified.

- Preliminary offer accepted.
- Preliminary offer rejected.

There is a fifth user-maintained status of *Hire Decided.* You manually enter the *Hire Decided* status when an applicant who has accepted a preliminary offer is about to be hired. The status of *Preliminary Offer Accepted* remains until that decision is made, because it is possible that an applicant who has accepted may not in fact graduate and may not, therefore, be hired. The *Hire Decided* status distinguishes between those who have accepted and who may be hired and those who have accepted and will be hired.

Note. You maintain Dispositions on the Applicant Data – Applicant Requisitions page or the Applicant Activity - Requisitions page (they are the same page but reside in different components).

The following flow chart illustrates the common additional Japanese recruitment stages within the context of the standard recruitment process. The chart represents an organization that includes an acceptance letter with its version of a preliminary offer letter for the selectee to use when responding.



Recruit Workforce - Applicant Disposition Flowchart

Understanding How to Track the Progress of Applicants

With the Applicant Activity pages you can track where applicants are in the Recruit Workforce process and their status. If you prefer, you can view recruitment activity from the requisition level. Using the Requisition Activity pages you can view all the applicants for a given requisition at each stage in the recruitment process and update applicant information from here.

Understanding Maintaining Applicant Data

Many organizations receive thousands of applications per year that are submitted over the Internet, by email, by fax, and by post, leading to a large volume of applicant data. Sometimes applicants send in more than one resume with different information, which can result in applicants appearing in your system with more than one applicant ID.

To help you remove obsolete applicant data and prevent duplication, PeopleSoft Human Resources includes the following:

- Duplicate Applicant Search and the Process Duplicate Applicants process (ER_DUP_APPS).

  Duplicate Applicant Search identifies possible duplicates based on criteria that you define. You decide whether the applicant is actually duplicated and how to merge the duplicate data. The Process Duplicate Applicants process ensures that only one applicant ID is used throughout PeopleSoft Human Resources.
- Applicant ID Delete process (to delete a selected applicant ID).
- Applicant Purge process (to delete multiple applicants based on the age of their application).

The duplicate applicant process and the ID change process modifies the ID in every record where PeopleSoft HRMS uses it. Deleting an ID also deletes all security profiles associated with the ID.

Common Elements Used in This Chapter

Referral Source

This is used to track how applicants are referred to your organization. Referral source is general source type, such as *Advertisement* or *Agency.*

If referral source is *Employee*, the system makes an EmplID field available for you to select the employee ID from the list of valid values.

Referral Source Subcategory

This is a specific source within a referral source. Referral source subcategories are defined in the Referral Source Subcategory table.

Select the specific referral source. For example, if the applicant was referred by an agency, record the agency name in this field.

Specific Referral Source

Complete this field if the specific referral source is not defined in the Referral Source Subcategory table.

Letter Code

From a number of Applicant Data and applicant Activity pages, you can generate form letters for an applicant.

Select the letter code if you want to generate a form letter. Define additional letter codes in the Standard Letter Table.

Date Letter Printed

The system automatically populates this field once you generate the letter.

Entering Basic Applicant Information

To enter basic applicant information:

- Enter the applicant contact information.
- Enter the applicant preferences.
- Link applicants to job requisitions.

  If applicants apply for specific job openings, link them to the requisitions when you create the applicant ID. You can also link applicants to requisitions later when you identify suitable openings.
- (USF only). Assign priority placement codes.

Note. You must create applicant IDs for employees and non-employees who apply for job requisitions so that they can be included in the requisition process. For such internal applicants, enter the existing employee IDs and the system creates applicant IDs and copies the employee or non-employee information from the Administer Workforce tables.

Prerequisites

Complete these tasks before setting up applicant information:

- (Optional) Set up disability tables.

  To record disability information for your applicants, set up the Diagnosis Table and the Accommodation Type Table.
- (Optional) Set up the Bank/Branch pages.

  To record applicant bank account details, enter bank and branch information. This control table is set up on the Manage Human Resources page.

See Also

PeopleSoft 8.8 Human Resources PeopleBook: Monitor Health and Safety, “Defining Incident, Injury, and Illness Tracking”

PeopleSoft 8.8 Human Resources PeopleBook: Meet Regulatory Requirements, “PeopleSoft Human Resources Meet Regulatory Requirements”

PeopleSoft 8.8 Application Fundamentals for HRMS PeopleBook, “Getting Started With PeopleSoft HRMS”

Pages Used to Enter Basic Applicant Information

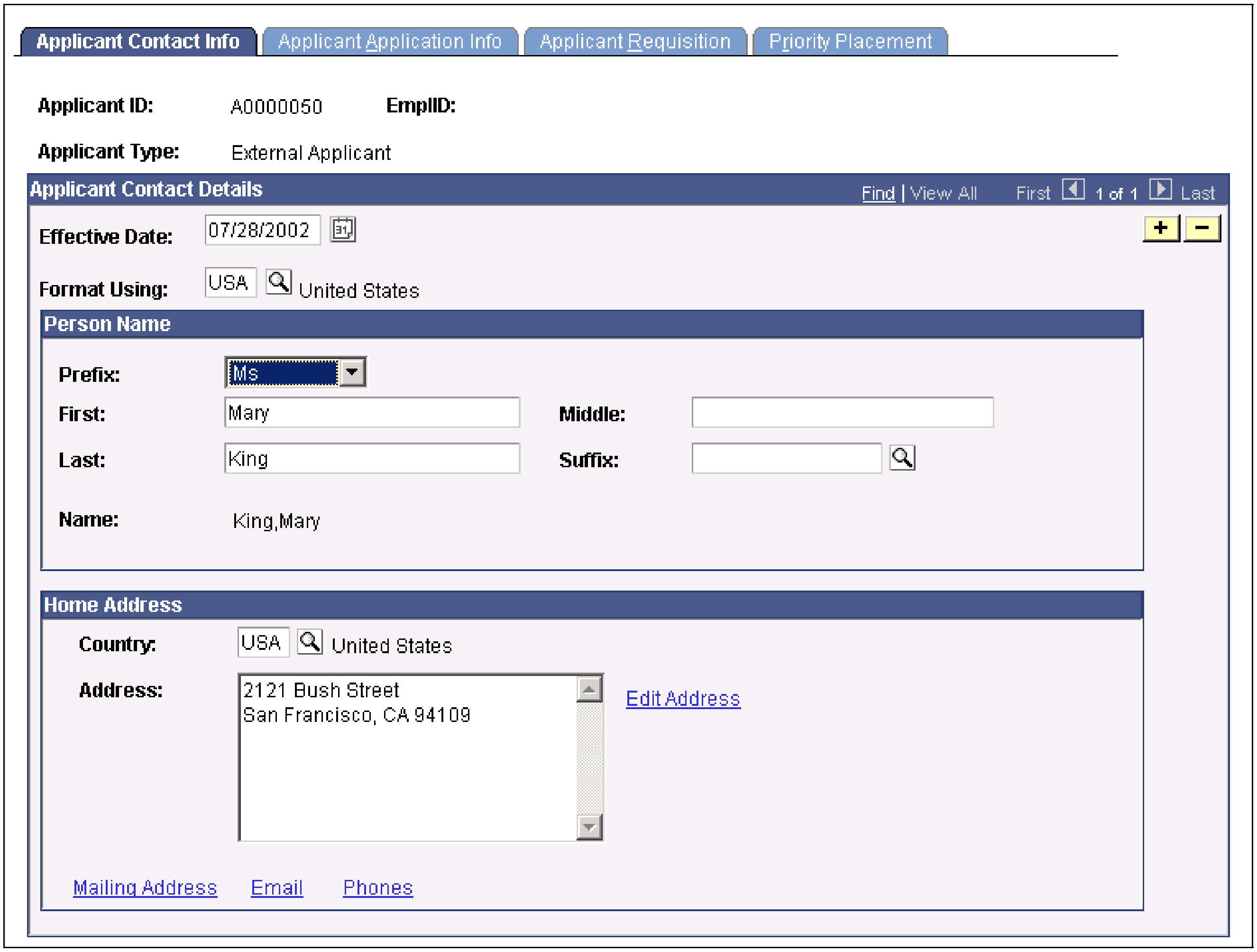
Page Name	Object Name	Navigation	Usage
Applicant Contact Info (information)	APP_PERSONAL_DATA1	Recruiting, Identify/Process Applicants, Capture Applicant Data, Application Data	Record an applicant’s name and address.

Page Name	Object Name	Navigation	Usage
Postal Address	APP_ADDR_OTH_SEC	Click Mailing Address on the Applicant Contact Info page.	Record an applicant's mailing address, if this is different from the address that you entered on the Name page.
Email Addresses	APP_EMAIL_SEC	Click Email on the Applicant Contact Info page.	Record the applicant's email addresses.
Phone Information	APP_PHONE_SEC	Click Phones on the Applicant Contact Info page.	Record the applicant's phone numbers, including fax numbers and cellular phone numbers.
Applicant Application Info (information)	APPLICATION_DATA1	Recruiting, Identify/Process Applicants, Capture Applicant Data, Application Data	Record the applicant's preferences, such as: • Preferred locations and job functions. • Willingness to travel or relocate. • Federal preference data. This information is used to screen applicants.
Additional Attachments	ER_APP_ATTACHMENT	Click Additional Attachments on the Applicant Application Info page.	Add any additional files relevant to applying for a position.
Applicant Requisition	APPLICATION_DATA2	Recruiting, Identify/Process Applicants, Capture Applicant Data, Application Data	If the applicant applies for specific requisitions, link the applicants to those openings.
Applicant Supply File	GVT_APP_SUPPLY_SEC	Click Applicant Supply file on the Applicant Requisition page	For U.S. Federal installations only. U.S. Federal applicants can apply for specific job requisitions, positions, or job codes. Use this page to enter positions or job codes that the applicant is applying for.
Referral Source	APP_ACT_REFSRC_SEC	Click the Referral Source link on the Applicant Requisition page.	Identify the referral source.

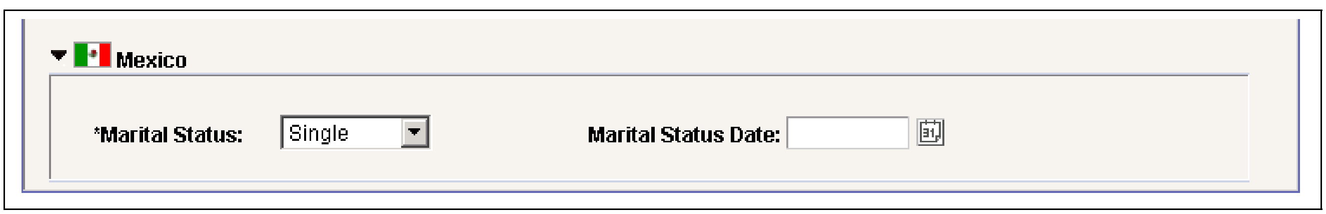
Page Name	Object Name	Navigation	Usage
Applicant Data - Priority Placement	GVT_PRIORITY_PLCMT	Recruiting, Identify/Process Applicants, Capture Applicant Data, Application Data	For U.S. Federal installations only. Assign a priority placement code and other information to an applicant. Depending on individual circumstances, applicants may be entitled to automatic priority consideration for jobs meeting certain criteria. This applies whether they apply for those jobs or not. Special consideration entitlement is extended to an applicant as a result of involuntarily being displaced. This action is usually the result of a Reduction-In-Force, or an involuntary Position Change action that entitles the applicant to a period of Grade Retention.

Entering Applicant Contact Information

Access the Applicant Contact Info page.



Applicant Contact Info page (1 of 2)



Applicant Contact Info page (2 of 2)

Applicant ID

If you let the system automatically assign a new applicant number, it first appears as *NEW.* The actual number assigned to the applicant appears after you save the information that you enter in the Applicant Data pages.

The system assigns employees or non-employees applicant IDs and copies their details to the Applicant Data pages. Information copied from employee or non-employee records is for information only and can't be updated from the recruit workforce pages.

Important! To avoid maintaining two different sets of applicant numbers, we recommend that you either always assign numbers manually or always let the system do it, not both.

Mailing Address If the applicant's mailing address is different the home address, click to access the Postal Address page.

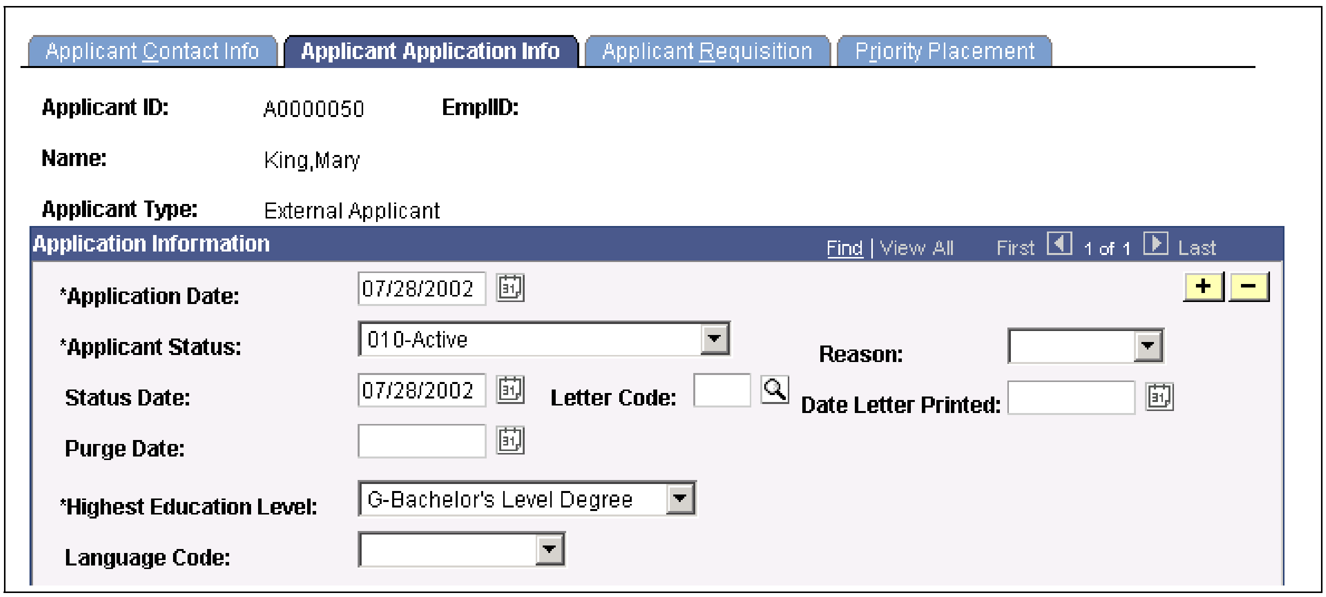
Email Click to access the Email Addresses page where you enter the applicant's email addresses.

Phones Click to access the Phone Information page where you enter details of the applicant's telephone numbers.

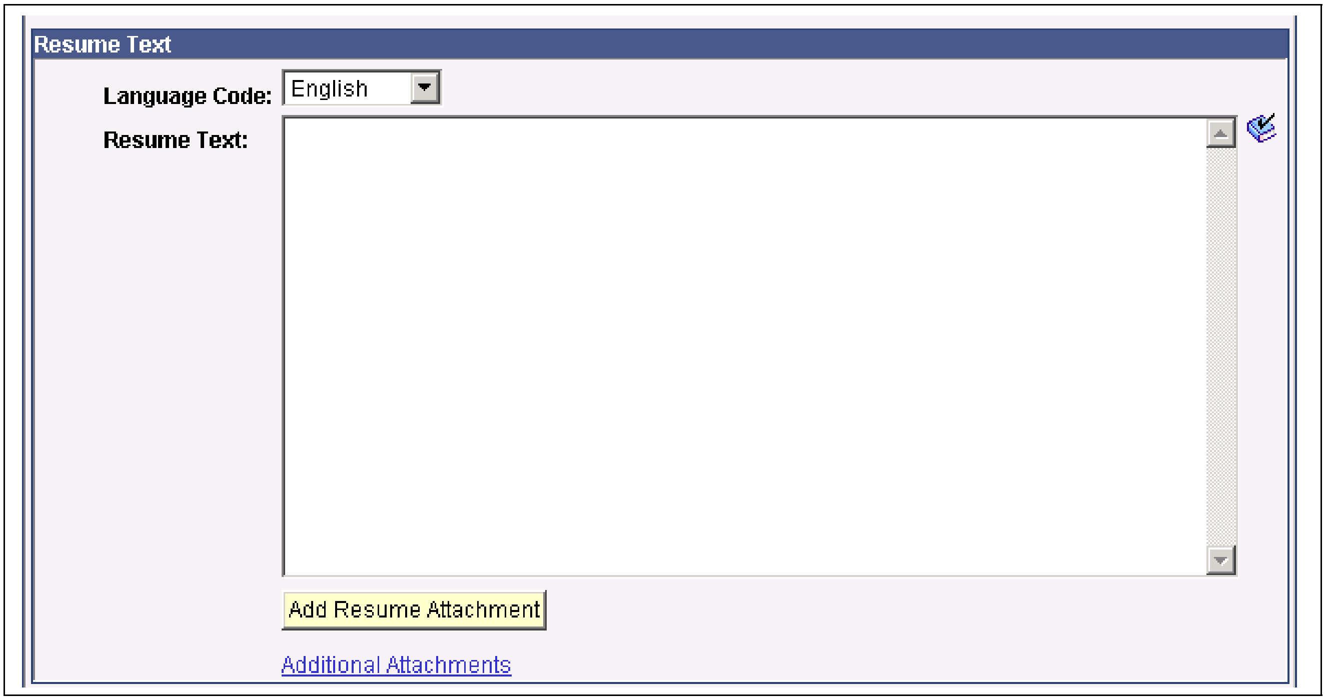
Mexico For Mexico users, select the appropriate marital status and date.

Entering Applicant Preferences

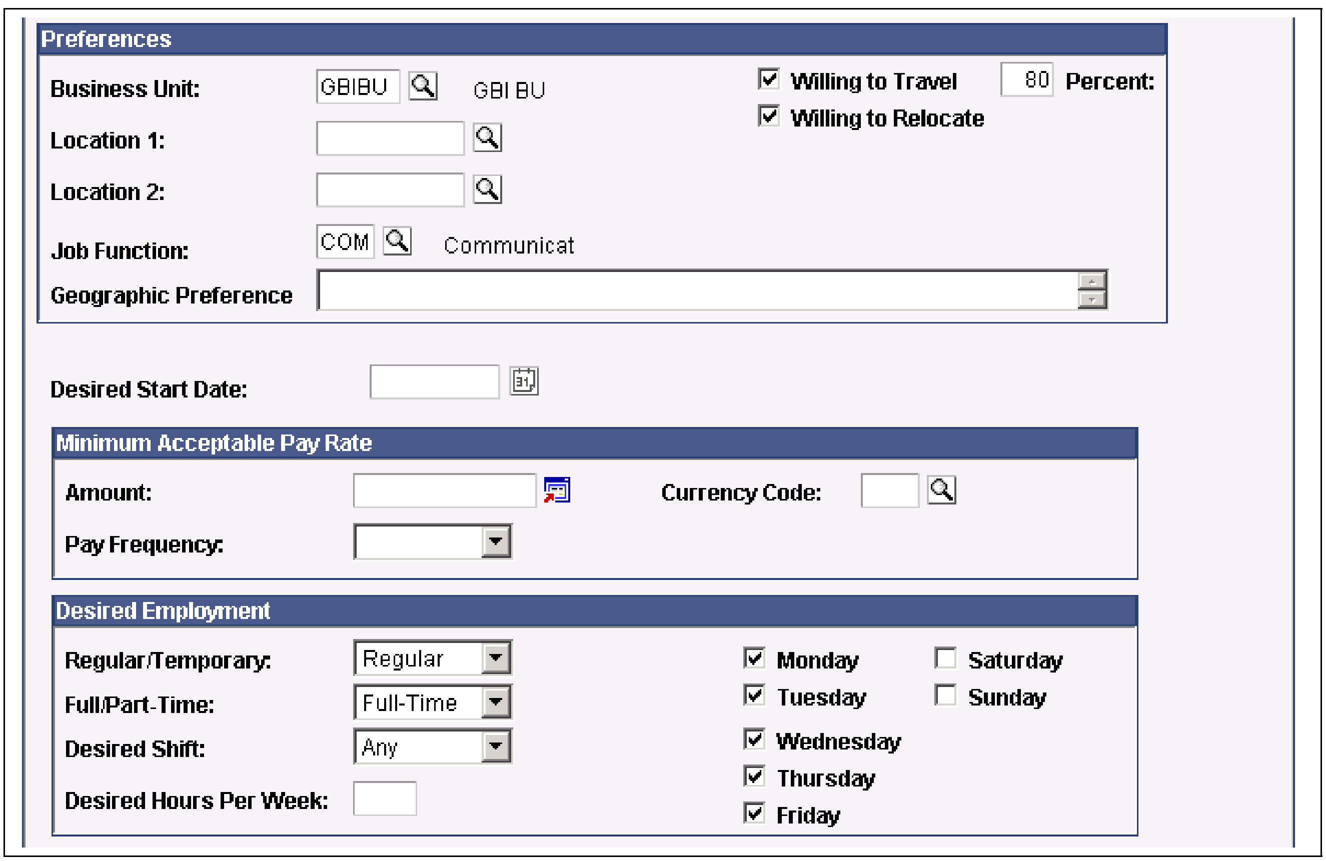
Access the Applicant Data – Applicant Application Info page.



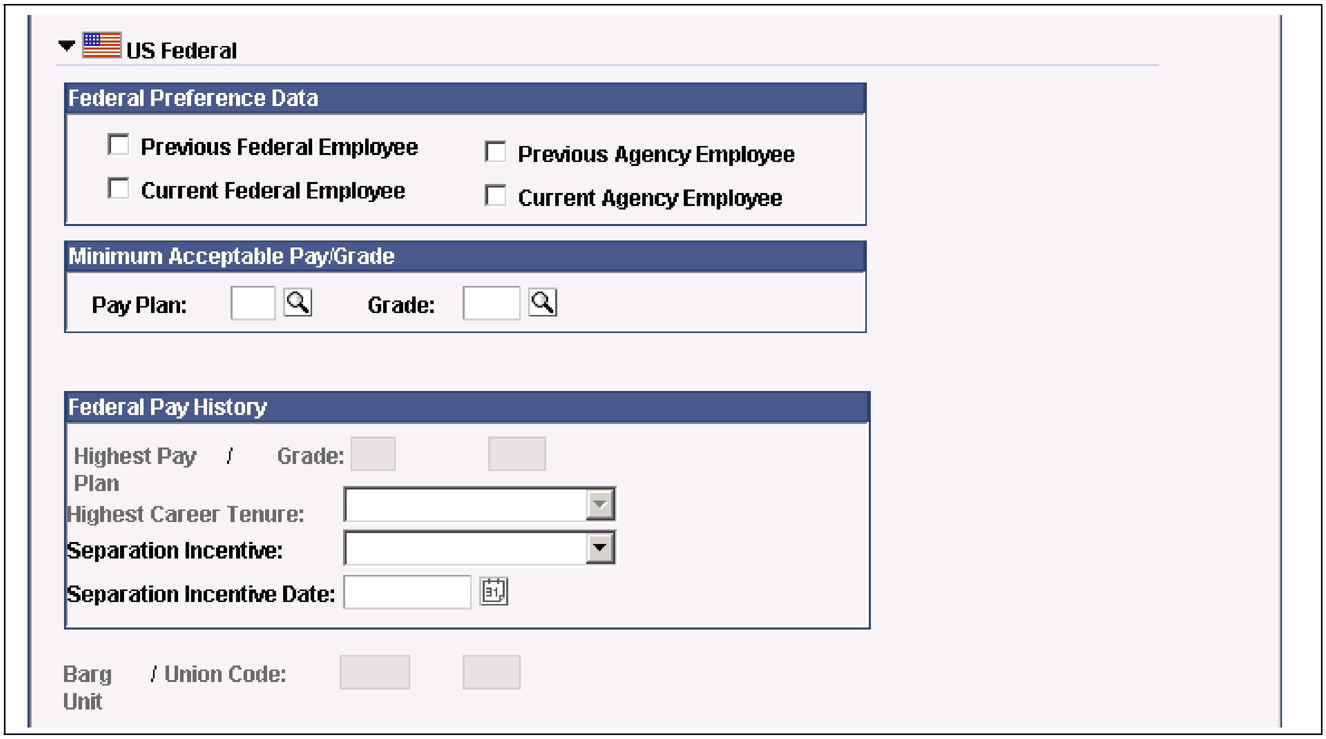
Applicant Application Info page (1 of 5)



Applicant Application Info page (2 of 5)



Applicant Application Info page (3 of 5)



Applicant Application Info page (4 of 5)

Applicant Application Info page (5 of 5)

Application Information

Applicant Status

Select the applicant status from the available options and update Status Date. You can use the status values supplied by PeopleSoft or define your own status values and rules.

PeopleSoft delivers the following values:

Active: The default status for new applicants.

Hired: The system automatically selects *Hired* when you hire applicants. The system also updates the disposition status of other applicants who applied for the job. Do not manually set the status to *Hired,* as this will cause inconsistency in your applicant data.

	Inactive: Use this status for applicants that have withdrawn. When you change applicants' status to *Inactive,* the status of any requisitions that they have applied for is set to *Withdrawn.* The system excludes inactive applicants from requisition screening.
Purge Date	Enter a date to indicate when you no longer need this application information and the data can be removed from the database. This date is used by the Purge Applicant process.
Highest Education Level	Select the applicant's highest education level from the available options.
Language Code	Select the applicant's preferred language from the available options.

Resume Text

Language Code	Select the language in which the resume is written from the available options.
Resume Text	Type or paste the text of the applicant's resume.
Add Attachment	Click this button to add resume attachment.
Additional Attachments	Click to display the Additional Attachments page where you can attach other documents such as cover or reference letters.

Preferences

Business Unit	If the applicant has expressed a preferred location for work, select the appropriate business unit. Select the applicant's first and second choice of location in Location 1 and Location 2.
Location 1	If the applicant has expressed a preferred location for work, select the applicant's first choice of location.
Location 2	If the applicant has expressed a preferred location for work, select the applicant's second choice of location.
Job Function	Select the function in which the applicant is seeking work. The system uses this information when searching for applicants who meet the requirements of a job opening. Set up job functions on the Job Function Table page.
Geographic Preference	Enter the applicant's geographic preference. This is a free-format field so you can use this field to suit your organization. For example, you could use the field to indicate national regions, such as north or west, or international regions. **Note.** This field is not used in requisition screening.
Willing to Travel	Select if the applicant is willing to travel for work and enter a value in Percent to indicate the amount of time the applicant is willing to spend travelling.
Willing to Relocate	Select if the applicant is willing to move to a new location.

Minimum Acceptable Pay Rate

Amount	Enter the amount that the applicant will accept, select the currency, and specify the related unit in Pay Frequency. For example, if the applicant will accept a pay rate of 20,000 USD per year, enter *20,000* in this field and enter the pay frequency *Year*.

Desired Employment

Regular/Temporary	Select *Regular* if the applicant is seeking a permanent job, *Temporary* if the applicant wants a temporary contract, or *Either* if the applicant is willing to consider both.
Full/Part-Time	Select *Full-Time* or *Part-Time* if the applicant is seeking a particular type of job or *Either* if the applicant is willing to consider both full-time and part-time jobs.
Desired Shift	If the applicant wants shift work, select the appropriate shift from the available options.
Desired Hours Per Week	Enter the number of hours that the applicant is willing to work per week and select the days that the applicant wants to work.

Federal Preference Data

Select the appropriate check box to indicate whether the applicant is a current or previous employee of the federal government or an agency.

Minimum Acceptable Pay Grade

Enter the pay or pay grade that the applicant will accept.

Referral Source

Previously Employed by Company	Select this check box if the applicant was previously an employee and complete the Prev Term Dt (previous termination date).
Applicant is a family member	Select if the applicant is related to the employee specified in EmplID.
Referral Time Stamp	Identifies the date and time in which the employee was referred.

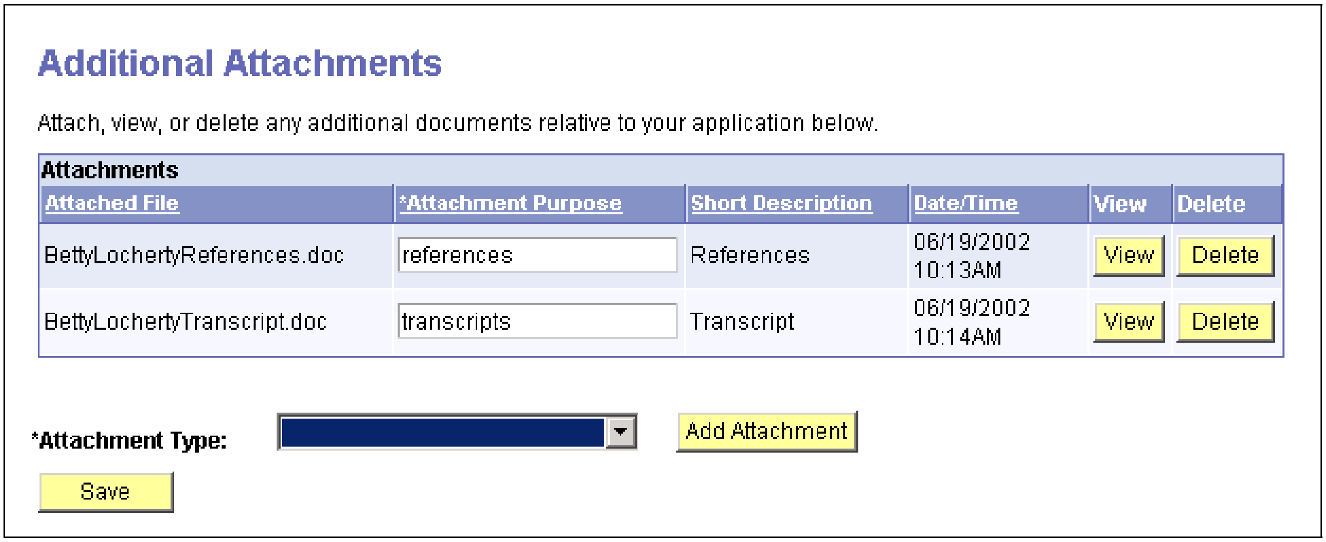
See Also

Chapter 3, “Setting Up Recruit Workforce,” Setting Up Recruitment Status Codes, page 13

PeopleSoft 8.8 Application Fundamentals for HRMS PeopleBook, “Setting Up Jobs,” Page Used to Define Job Function Codes

Attaching Additional Documents to Applications

Access the Additional Attachments page.



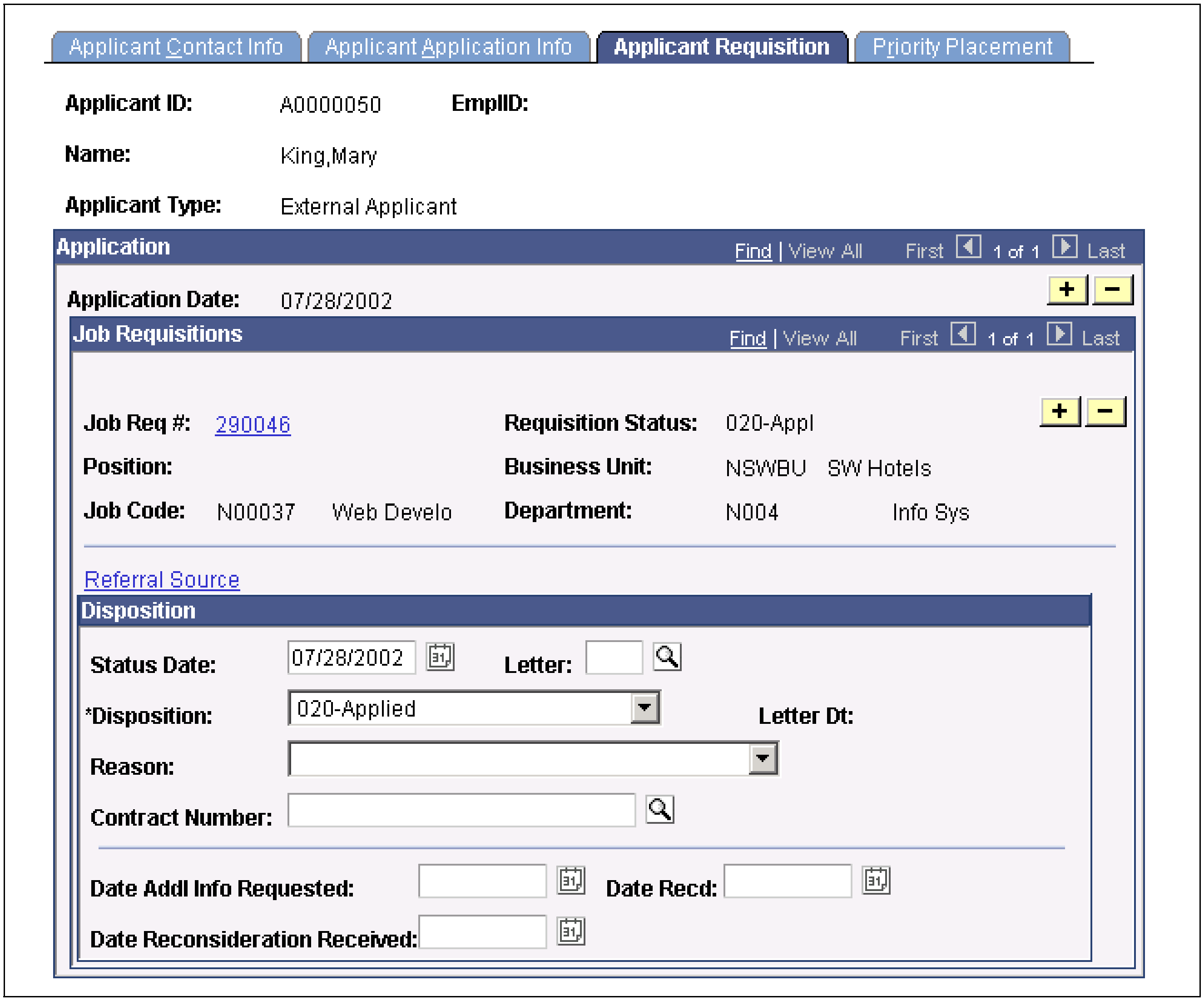
Additional Attachments page

Attachments Displays a list of any attached documents. These documents can be viewed or deleted.

Attachment Type Select the type of attachment. Attachment types are set up on the Attachment Type page. The system uses this field to check to see if the maximum number of attachments of this type has been reached.

Linking Applicants to Requisitions

Access the Applicant Data – Applicant Requisition page.



Applicant Requisition page

Job Req # (job requisition number)
: If the applicant applied for a specific job requisition or you have identified a suitable opening, select the requisition from the list of open requisitions. Otherwise leave this field blank.

Applicant Supply File
: For U.S. Federal installations only. Click this link to access the Applicant Supply File page where you select positions or job codes that the applicant is applying for.

Disposition

Disposition
: The system populates the disposition and Reason from the applicant data. Disposition indicates how far the applicant has progressed for a given job requisition.

: If an applicant submits a resume without specifying a requisition, set the disposition to *Applied* and link the applicant to a requisition later.

If your organization uses requisition screening and the PeopleSoft eRecruit Manager Desktop collaborative application to process applicants, the system updates applicants' dispositions automatically. However, you can also manually update applicants' disposition from this page. When you change disposition, the system uses the recruitment status rules to determine the effect on other records.

Date Addl Info Requested/ Date Recd (date additional information requested/date received)
This field appears for U.S. Federal installations only. Indicate the date when further information was sought or received.

Date Reconsideration Received
This field appears for U.S. Federal installations only. Enter the date when the disposition status changes because further supporting documentation is received.

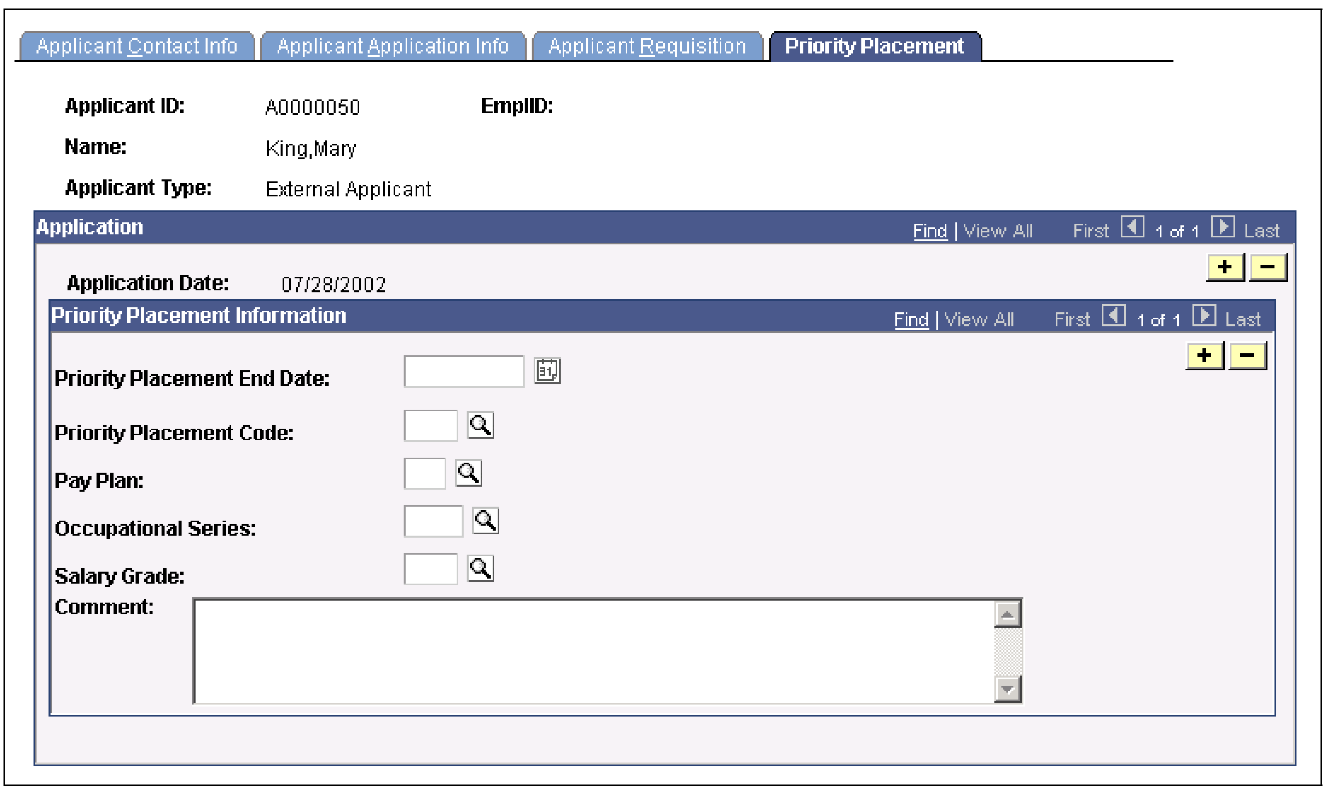
You can also link applicants to requisitions from Applicant Activity.

See Also

Chapter 9, "Processing Applicants," Tracking Applicants, page 198

(USF) Assigning Priority Placement Codes

Access the Applicant Data - Priority Placement page.



Applicant Data - Priority Placement page

Priority Placement End Date	The date when priority placement considerations expire.
Priority Placement Code	Set up values for this field in the Priority Placement Table.
Pay Plan, Occupational Series, and Salary Grade	Select the values associated with the priority considerations being taken.

Entering Applicant Competencies

To enter applicant competencies:

1. Enter evaluation information.
2. Assign competencies to the applicant.
3. Rate the applicant's proficiency in each competency.
4. Enter verification details.

(USF) Competency Information

For U.S. Federal government installations, the competency information entered in the Competencies component is not used to rate applicants. This is for informational purposes only.

Instead, you use the Applicant Rating pages to rate applicants on the competencies and accomplishments that are required for the job requisition. The system populates the Applicant Rating pages with the competencies and accomplishments that were specified on the Federal Screening Criteria page.

If you have installed PeopleSoft eRecruit, applicants can rate themselves when they apply online.

Pages Used to Enter Applicant Competencies

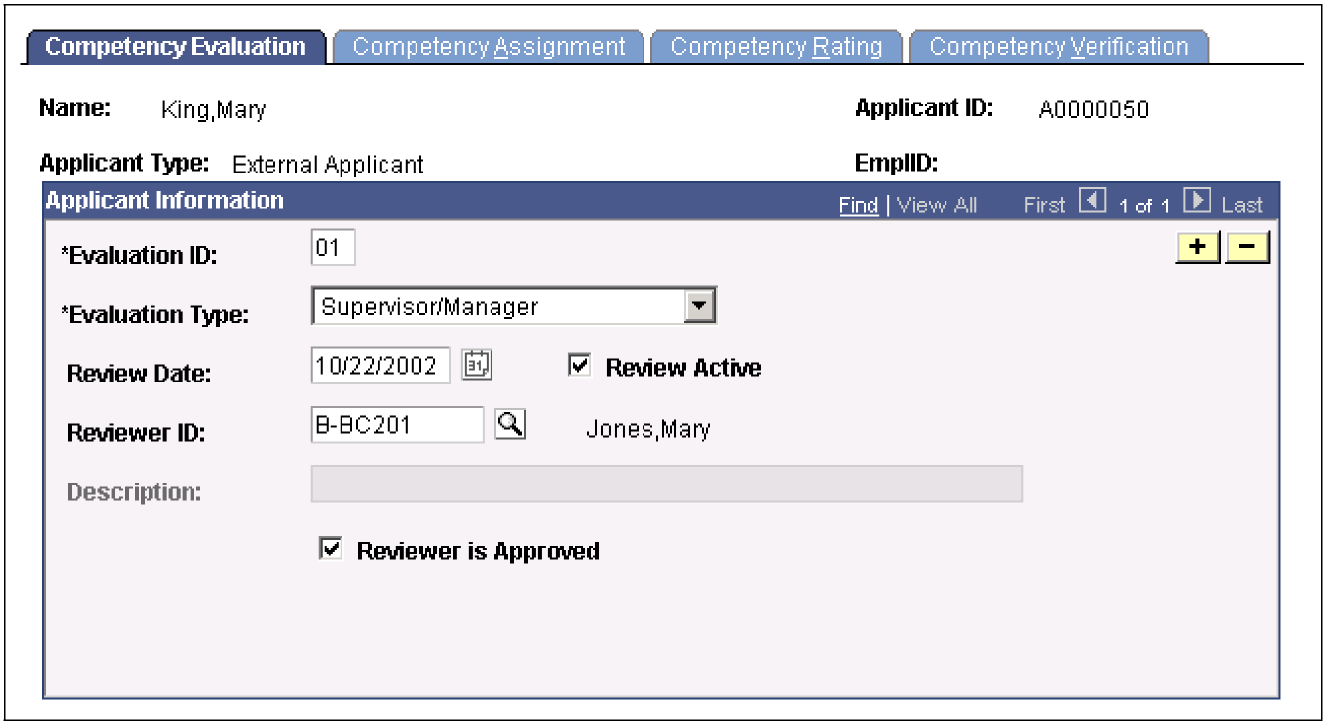
Page Name	Object Name	Navigation	Usage
Competency Evaluation	APP_CM_COMP_EVL1	Recruiting, Identify/Process Applicants, Capture Applicant Data, Competencies	Enter information about applicant competency evaluations and the person who carried out the evaluations.
Competency Assignment	APP_CM_COMP_ASGN	Recruiting, Identify/Process Applicants, Capture Applicant Data, Competencies	Assign competencies to an applicant.
Competency Rating	APP_CM_COMP_PROF	Recruiting, Identify/Process Applicants, Capture Applicant Data, Competencies	Assign a proficiency rating to each of the applicant's competencies.
Competency Verification	APP_COMPETENCIES	Recruiting, Identify/Process Applicants, Capture Applicant Data, Competencies	Define the verification details for each applicant competency, including the year the competency was acquired, when it was last used, and the number years of experience of using the competency.

See Also

PeopleSoft 8.8 Human Resources PeopleBook: Manage Competencies, "Tracking Employee Competencies and Accomplishments"

Identifying Competency Evaluations

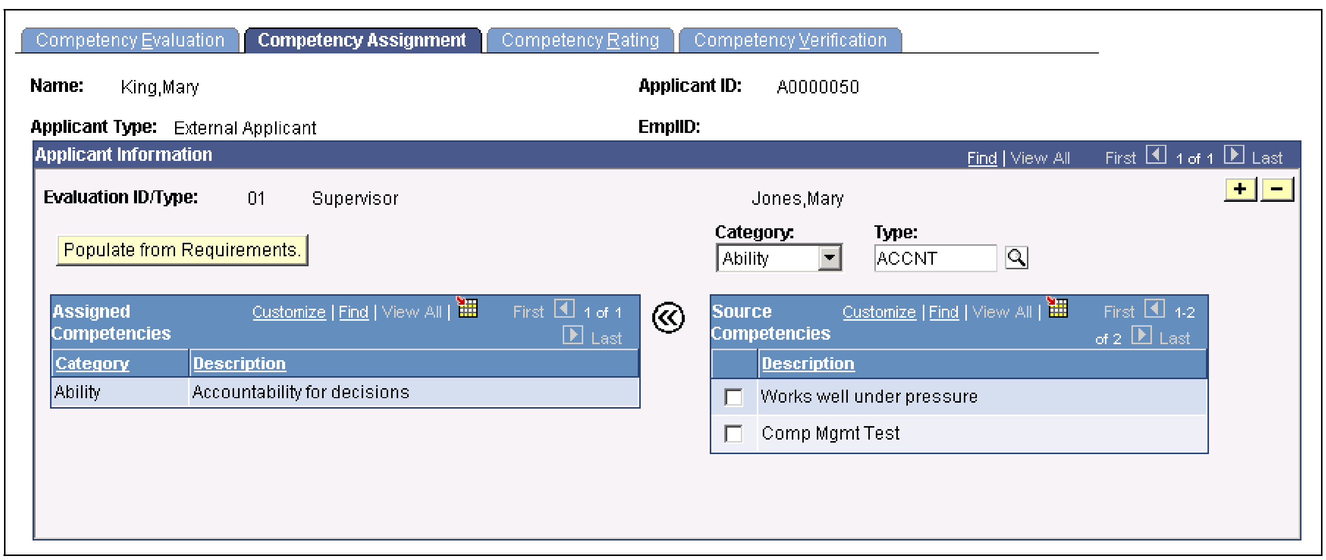
Access the Competency Evaluation page.



Competency Evaluation page

Assigning Competencies to Applicants

Access the Competency Assignment page.



Competency Assignment page

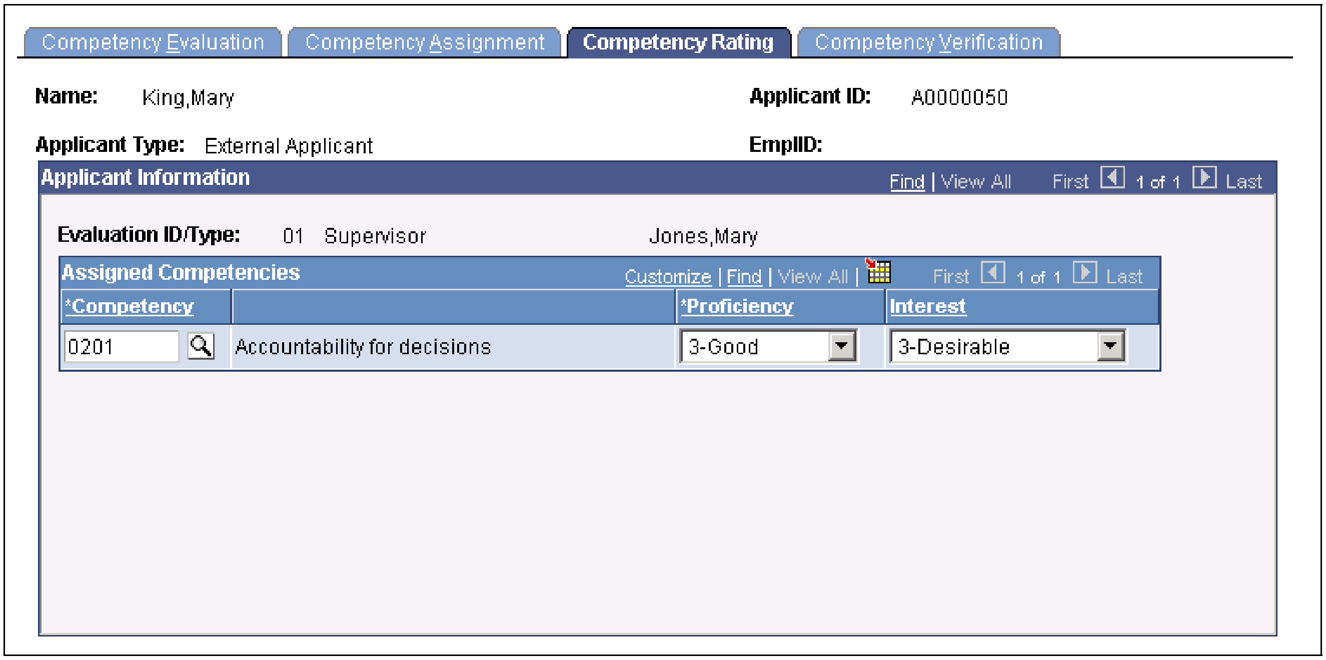
Populate from Requirements

Click to list the competencies required by the job requisitions that the applicant has applied for.

If you have not linked the applicant to requisitions, the system doesn't populate any competencies.

Entering Competency Ratings

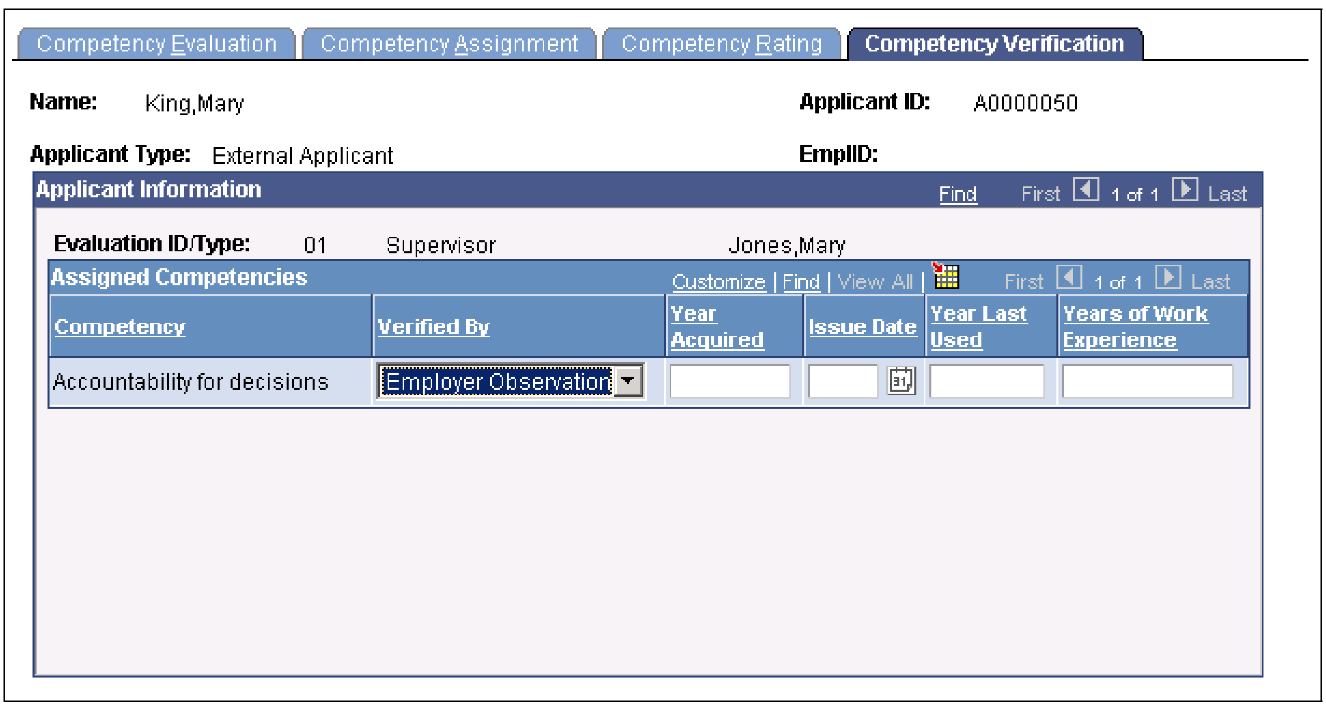
Access the Competency Rating page.



Competency Rating page

Entering Competency Verifications

Access the Competency Verification page.



Competency Verification page

Entering Applicant Education and Qualifications

This section discusses how to enter the following applicant information:

- Education and training.
- Language skills.
- Licenses/certificates.
- Membership of professional organizations.
- Honors or awards.
- Test results.

Pages Used to Enter Education and Qualifications

Page Name	Object Name	Navigation	Usage
School Education	APP_SCHOOL_EDUCATN	Recruiting, Identify/Process Applicants, Capture Applicant Data, Education	Record details of the schools that an applicant has attended and the areas studied.
Professional Ed and Trg (professional education and training)	APP_EDU_TRAIN_GBL1	Recruiting, Identify/Process Applicants, Capture Applicant Data, Education	Enter details of further education that the applicant has completed, including the type of degree acquired and where and when the qualification was acquired. Before you can enter degrees on this page, you must set up your Degree table. If you want to use Major codes and School codes (optional), set up the Major Table and School Table. You enter faculties, sub-faculties, and major categories on the (JPN) Faculty Table page.
Professional Courses	APP_EDU_TRAIN_GBL2	Recruiting, Identify/Process Applicants, Capture Applicant Data, Education	Enter details of the courses that an applicant has completed.

Page Name	Object Name	Navigation	Usage
Licenses/Certificates	APP_LICENSE_CERTIF	Recruiting, Identify/Process Applicants, Capture Applicant Data, Licenses/Certificates	Record any licenses or certificates that applicants have attained that are pertinent to their jobs. For example, if an employee in your Finance and Accounting department has a CPA license, enter the information here. You must set up your Licenses/Certificates table before you enter license or certificate information for applicants.
Memberships	APP_MEMBERSHIPS	Recruiting, Identify/Process Applicants, Capture Applicant Data, Education	Enter details of any professional organizations applicants belong to that are pertinent to their jobs. You must set up your Memberships table before you can enter membership information for applicants.
Languages	APP_LANGUAGES	Recruiting, Identify/Process Applicants, Capture Applicant Data, Education	Enter information about the languages in which applicants are proficient, particularly those pertinent to their jobs or to your industry. You must set up your Language table before you can enter language information for applicants.
Honors Awards	APP_HONORS_AWARDS	Recruiting, Identify/Process Applicants, Capture Applicant Data, Education	Record any special awards or honors that applicants have received. You must set up your Honor/Award table before you can enter honor and award information for applicants.

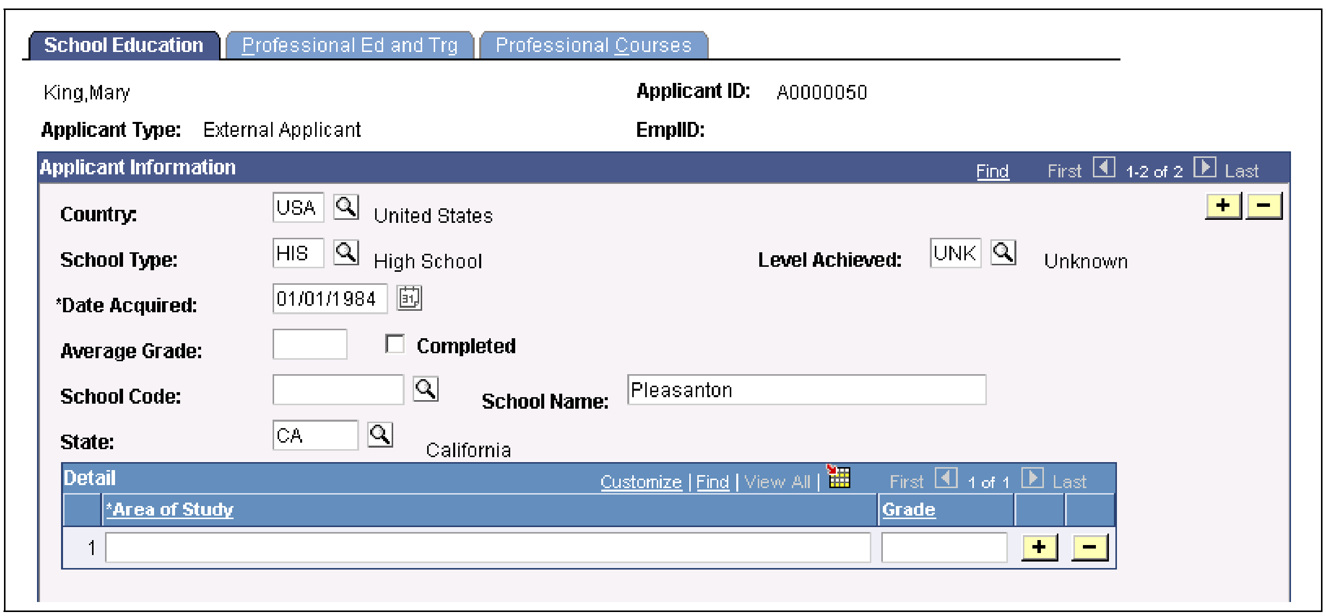
Page Name	Object Name	Navigation	Usage
Test Results	APP_TEST_RESULTS	Recruiting, Identify/Process Applicants, Capture Applicant Data, Education	Enter the results of standard tests that you administer to job applicants, such as typing, programming aptitude, or mathematical tests. You must set up your Test table before you can enter applicant test results. The pages used to enter applicant accomplishments are similar to those used for employees in the Manage Competencies business process.

See Also

PeopleSoft 8.8 Human Resources PeopleBook: Manage Competencies, “Tracking Employee Competencies and Accomplishments”

Entering School Education

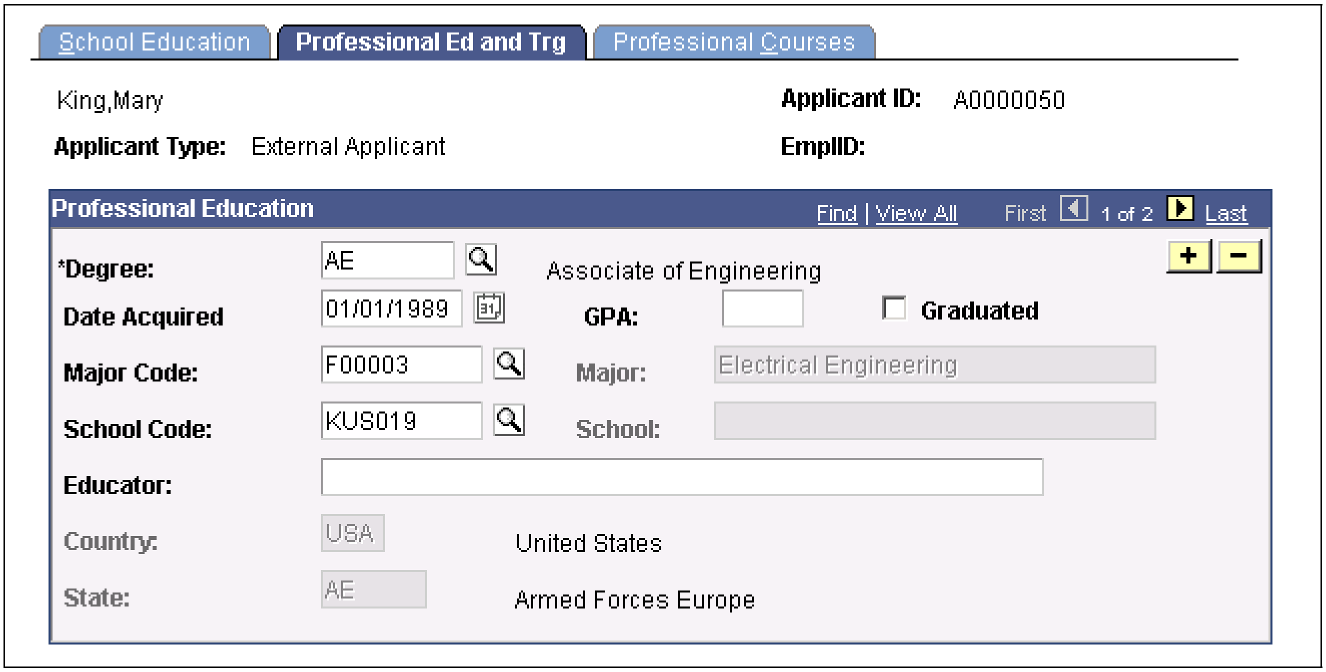
Access the School Education page.



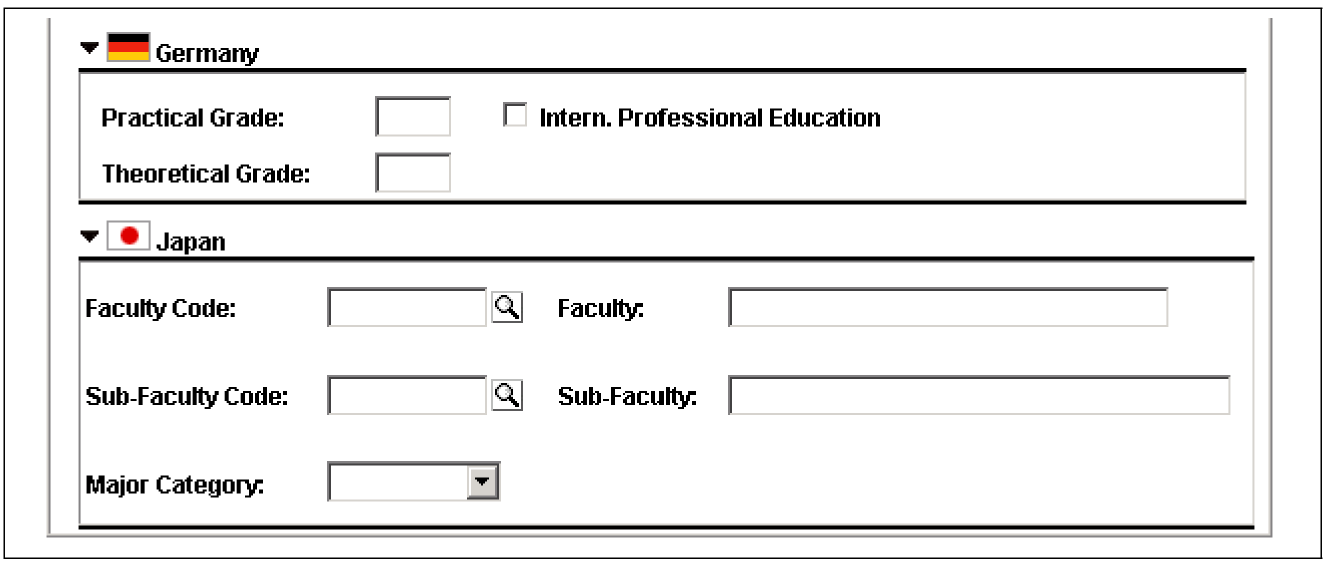
School Education page

Entering Professional Education and Training

Access the Professional Ed and Trg page.



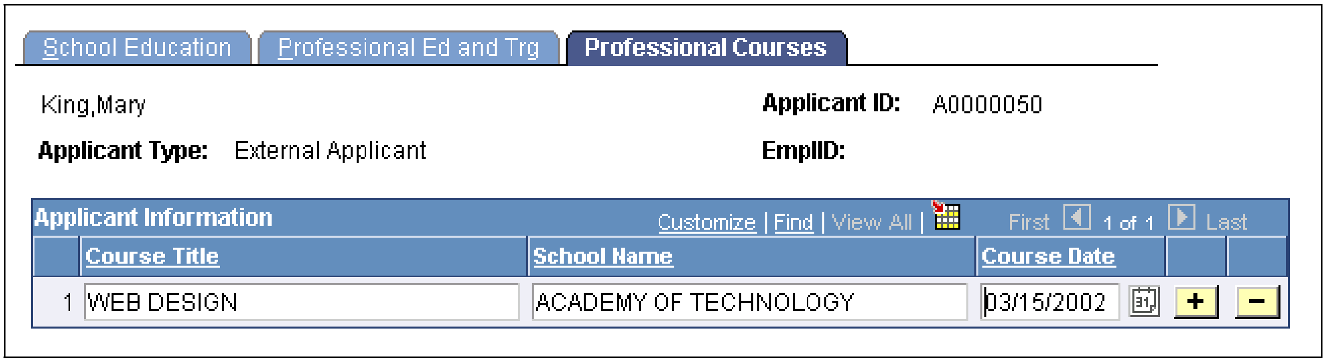
Professional Ed and Trg page (1 of 2)



Professional Ed and Trg page (2 of 2)

Entering Professional Courses

Access the Professional Courses page.



Professional Courses page

Entering Work Experience and References

This section explains how to enter:

- Applicants' employment history.
- References.

Pages Used to Enter Work Experience and References

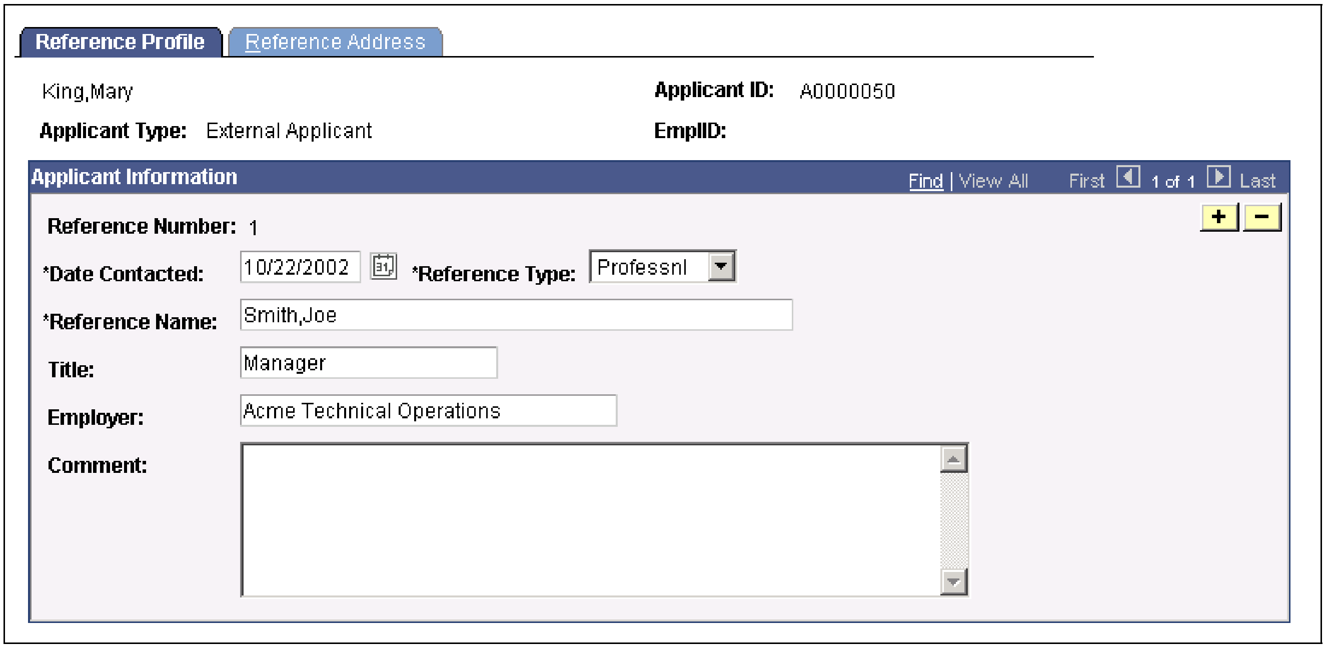
Page Name	Object Name	Navigation	Usage
Prior Work Experience 1	APP_PRIOR_WRK_EXP1	Recruiting, Identify/Process Applicants, Capture Applicant Data, Prior Work Experience	Enter an applicant's current and previous employers.
Prior Work Experience 2	APP_PRIOR_WRK_EXP2	Recruiting, Identify/Process Applicants, Capture Applicant Data, Prior Work Experience	Enter details of an applicant's employment history, including job title and salary information for previous and current jobs.
Reference Profile	APP_REFERENCES1	Recruiting, Identify/Process Applicants, Capture Applicant Data, References	Track references supplied by applicants.
Reference Address	APP_REFERENCES2	Recruiting, Identify/Process Applicants, Capture Applicant Data, Reference	Enter the addresses of references for an applicant.

See Also

PeopleSoft 8.8 Human Resources PeopleBook: Administer Workforce, "Entering Additional Data in Human Resources Records"

Entering Reference Profiles

Access the Reference Profile page.



Reference Profile page

Date Contacted	Enter the date that you contacted the reference.
Reference Type	Select from the available options: *Professnl* (professional), *Personal,* or *Both.*
Reference Name	Enter the name of the person giving the reference.
Title	Enter the title of the person giving the reference.
Employer	Enter the name of the employer where the reference is employed.
Comment	Enter a summary of the comments that the reference made about the applicant.

Entering Additional Applicant Information

This section discusses supplemental applicant information you can enter:

- Disabled applicant tracking information.
- Accommodation requests.
- Accommodation options.
- Bank account information.
- Passport information.
- Passport issue details.
- Visa information.
- Supporting visa information.

Pages Used to Enter Additional Applicant Information

Page Name	Object Name	Navigation	Usage
Disability	APP_DISABILITY	Recruiting, Identify/Process Applicants, Capture Applicant Data, Disability	Track applicants who are disabled and record additional information required by local country regulations.
Accommodation Request	APP_ACCOM_RQST	Recruiting, Identify/Process Applicants, Capture Applicant Data, Disability, Accommodation Request	Enter accommodation requests that an applicant makes of your organization. Enter diagnosis codes for the disabilities applicants have that prevent them from performing essential job tasks and result in the accommodation requests. Before you can assign Diagnosis Codes, you must set up the Diagnosis Table.
Accommodation Option	APP_ACCOM_OPTN	Recruiting, Identify/Process Applicants, Capture Applicant Data, Disability, Accommodation Option	Enter the options or alternatives being considered to resolve an accommodation request. Before you can assign Accommodation Types, you must set up the Accommodation Type Table.
Bank Account	APP_BANKACCT	Recruiting, Identify/Process Applicants, Capture Applicant Data, Bank Accounts	Enter the applicant's bank account information
Citizenship/Passport	APP_CITIZN_PSSPRT1	Recruiting, Identify/Process Applicants, Capture Applicant Data, Identification Data, Citizenship/Passport	Record an applicant's passport number, the country where the passport was issued, and date that it was issued.
Issue Details	APP_CITIZN_PSSPRT2	Recruiting, Identify/Process Applicants, Capture Applicant Data, Identification Data, Issue Details	Enter information about the passport office that issued an applicant's passport.
Visa/Permit	APP_VSA_PMT_DATA1	Recruiting, Identify/Process Applicants, Capture Applicant Data, Identification Data, Visa/Permit	Enter an applicant's work visa information.
Visa/Permit Supporting Docs (visa/permits supporting documents)	APP_VSA_PMT_DATA2	Recruiting, Identify/Process Applicants, Capture Applicant Data, Identification Data, Visa/Permit Supporting Docs	Record details of any documentation used to support an applicant's work visa or permit.

Entering Applicant Eligibility and Identity Information

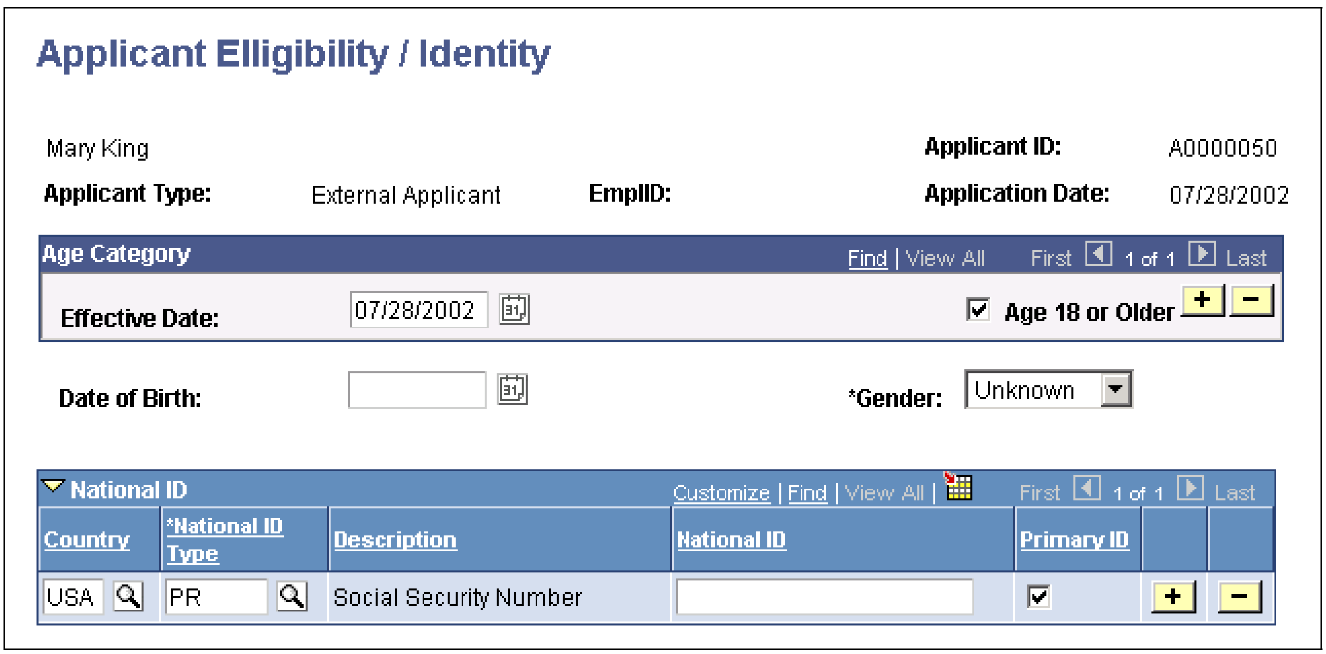
This section discusses how to enter applicant eligibility and identity information required by your local country regulations. You may need to restrict access to this applicant information to comply with equal opportunity laws in your region. PeopleSoft provides a diversity manager role for this purpose. Recruiters should not have access to this information.

Page Used to Enter Applicant Eligibility and Identity Information

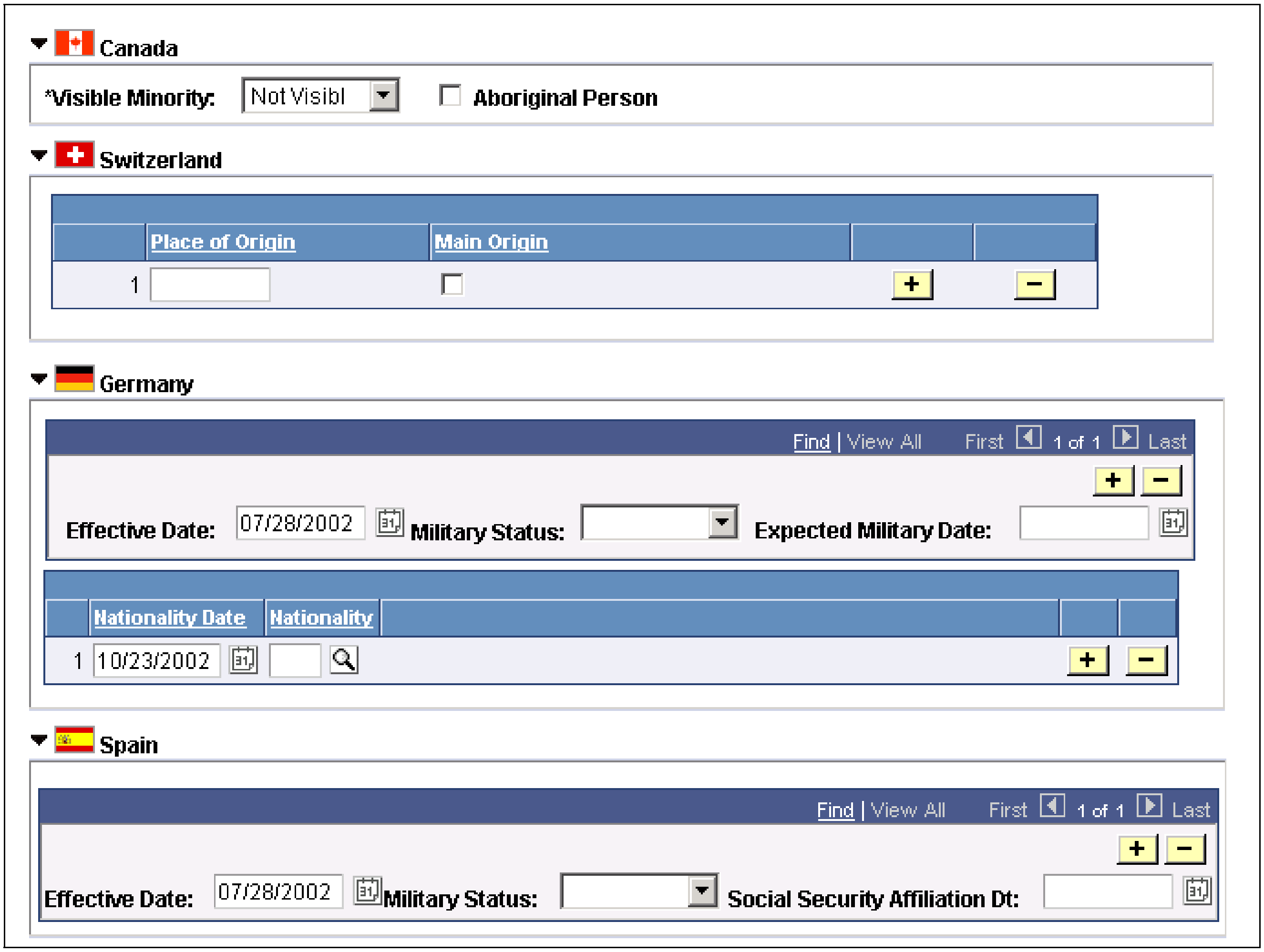
Page Name	Object Name	Navigation	Usage
Eligibility/Identity	APP_PERSONAL_DATA3	Recruiting, Identify/Process Applicants, Capture Applicant Data, Applicant Eligibility/Identity	Enter personal information about the applicant, such as date of birth and gender. Enter information required by local country regulations.

Entering Applicant Self Identification Information

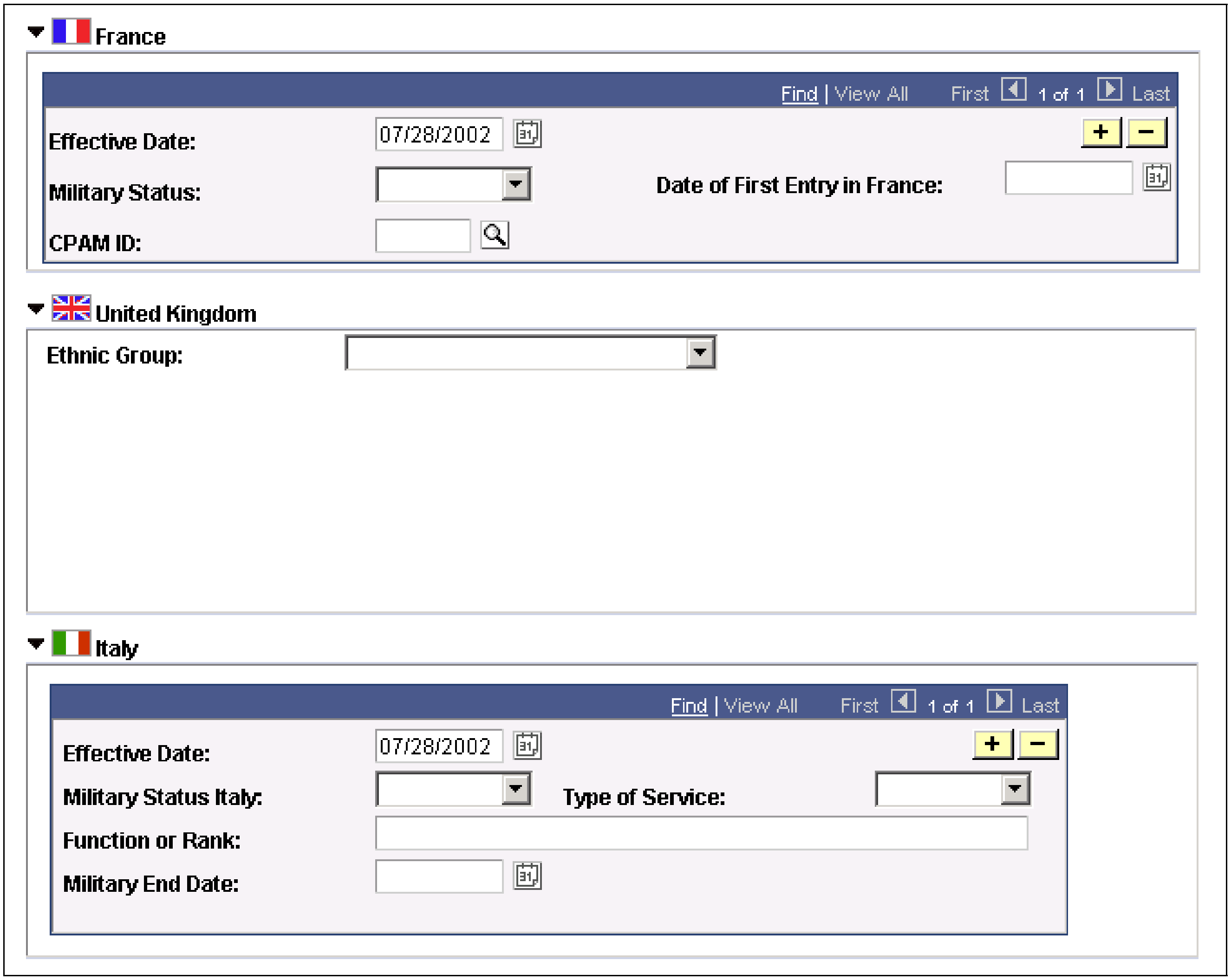
Access the Eligibility/Identity page.



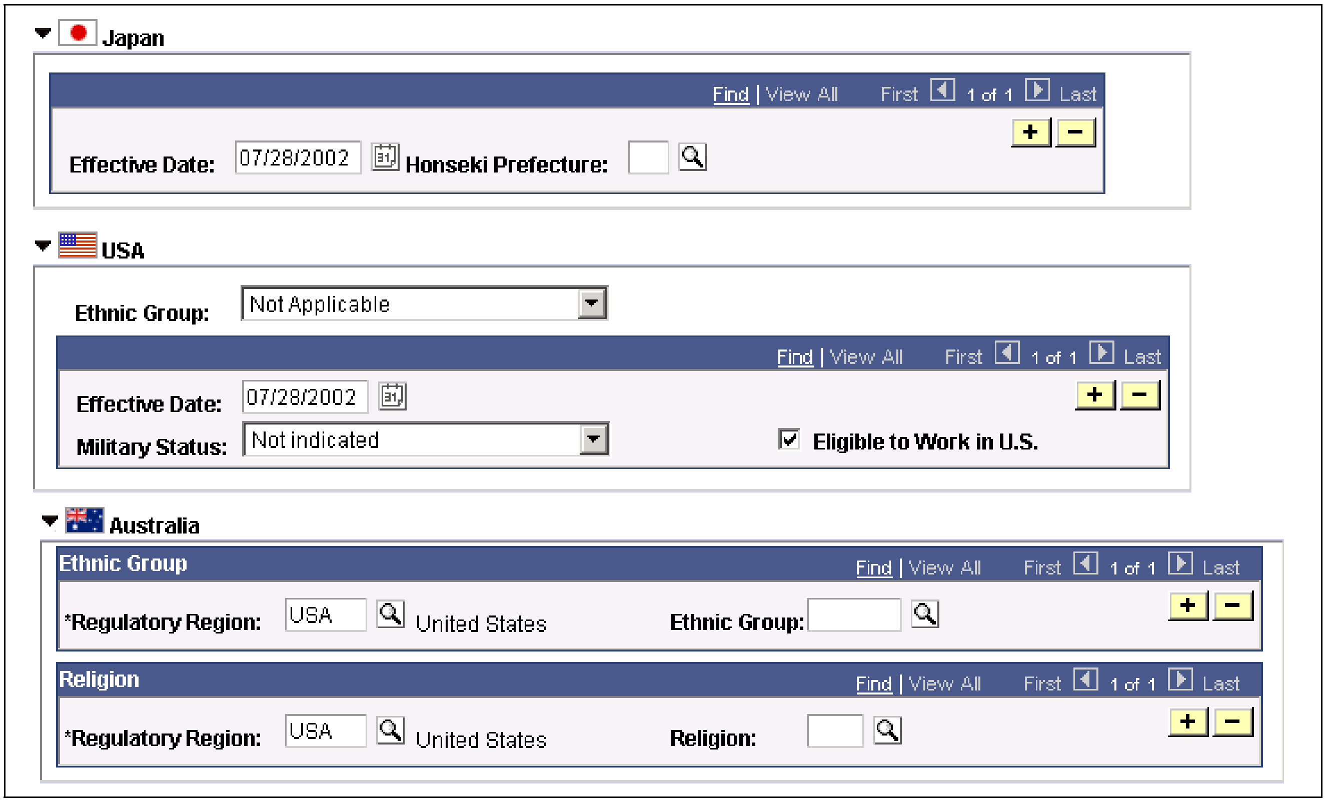
Applicant Eligibility/Identity page (1 of 5)



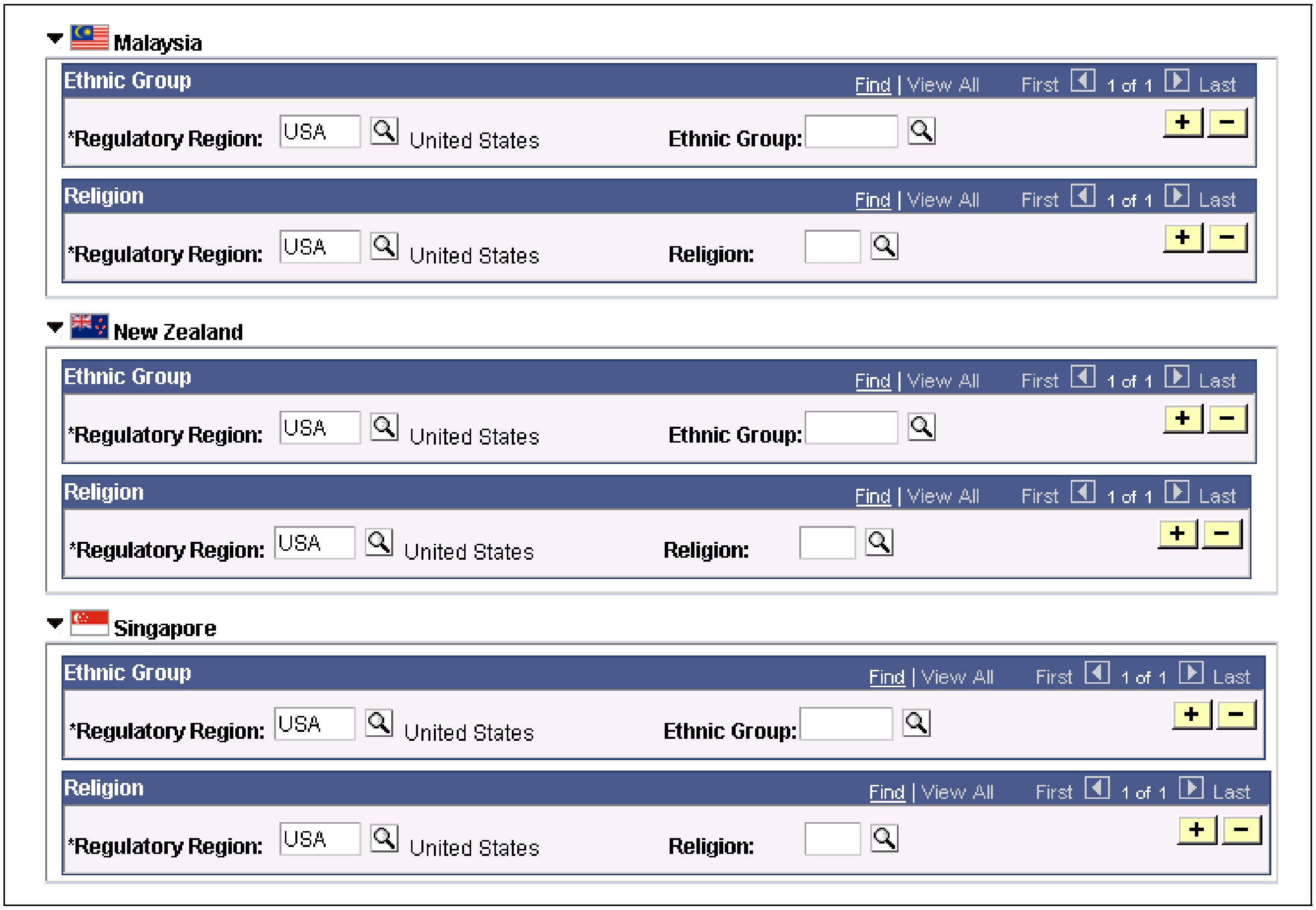
Eligibility/Identity page (2 of 5)



Eligibility/Identity page (3 of 5)



Eligibility/Identity page (4 of 5)



Eligibility/Identity page (5 of 5)

Age 18 or Older Clear the check box if the applicant is less than 18 years old.

Note. This field does not appear for U.S. Federal installations.

National ID

National ID Type Select a national ID type from the list of options and enter the applicant's National ID number.

Country-Specific Fields

Country-specific fields are the same as those on Personal Data – Identity/Diversity page.

US Federal: Veterans Information

Complete this group box for applicants who are veterans. The fields are the same as those on Veterans Info page accessed from Hire – Personal Data page.

US Federal: Other Information

Disability Code If the applicant is disabled, select the code that identifies the type of disability. Otherwise, select *No Handicap.*

See Also

PeopleSoft 8.8 Human Resources PeopleBook: Administer Workforce, “Hiring Your Workforce”

Merging Duplicate Applicant Records

It is possible for an applicant to be entered more than once with different applicant IDs. Duplicate applicant records can occur when applicants apply to your organization more than once and send different information each time or submit their applications using different methods. Having the same person referenced with multiple applicant IDs is confusing for hiring managers and recruiters.

To help you identify and merge duplicate applicant records, PeopleSoft Human Resources includes Duplicate Applicant Search, which searches all your applicant records for duplicates.

The system also checks applicant names when you use Requisition Screening. If the system finds applicants with the same first name and last name, it indicates these applicants with a warning symbol.

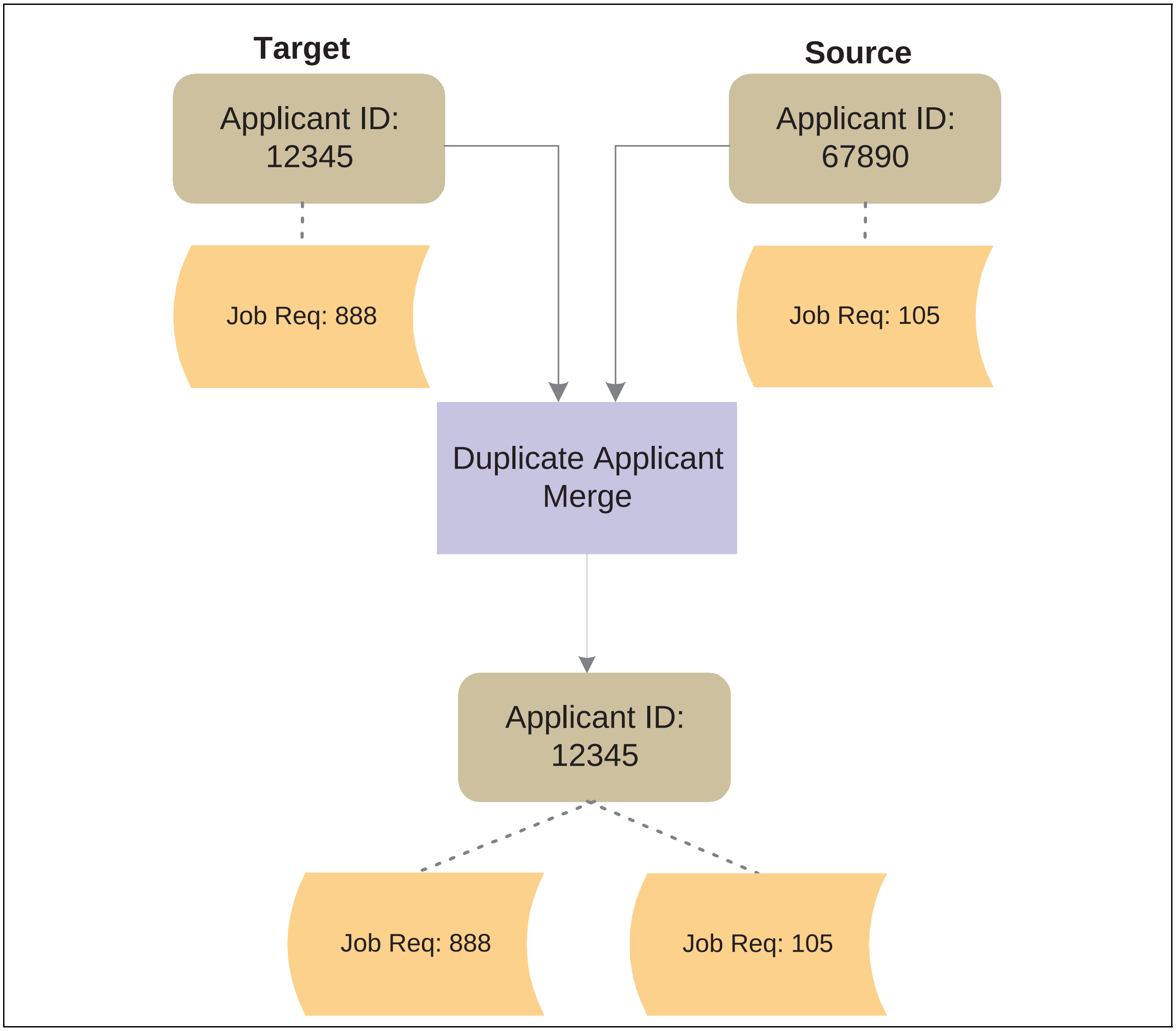
If the user clicks the Route Duplicates for Inspection button, the system adds the highlighted records to the duplicates found. When the administrator displays the Duplicate Summary page, these applicants appear in the list. Once a user routes the applicants to an administrator, the system doesn’t display the warning symbols for those applicants.

Note. Users can’t merge applicant records directly from Requisition Screening.

What Happens During the Merge Process

The Process Duplicate Applicants process searches the applicant data tables for references to the source applicant and replaces such references with the target applicant ID. The records included in the merge process are defined on the Register Duplicate Applicant Records page.

The following exhibit illustrates how the process affects links to job requisitions.



Applicant merge process

In the exhibit, the Target and Source applicants are linked to different job requisitions. The merge process transfers the source applicant's requisition link to the target applicant and removes the source applicant (ID 67890) from the system.

Here's how to identify and merge applicant records:

1. Define records to search and merge.
2. Define search criteria.
3. Review search results.
4. View potential duplicates.

   If applicants are duplicated, select the *Target* applicant ID that should remain in the system and the *Source* applicant IDs that should be replaced. The source applicant records are merged into the target applicant record.

If applicants are not duplicated, mark the applicant IDs as distinct. Once you have marked applicants as distinct, the system doesn't flag the applicants as duplicates when you use Requisition Screening.

5. Run the Process Duplicate Applicants process (ER_DUP_APPS), which merges the duplicate records.

Note. If you select internal applicants (employees and non-employees), the system deletes or modifies the applicant data only. Information held in Personal Data tables is not modified or deleted.

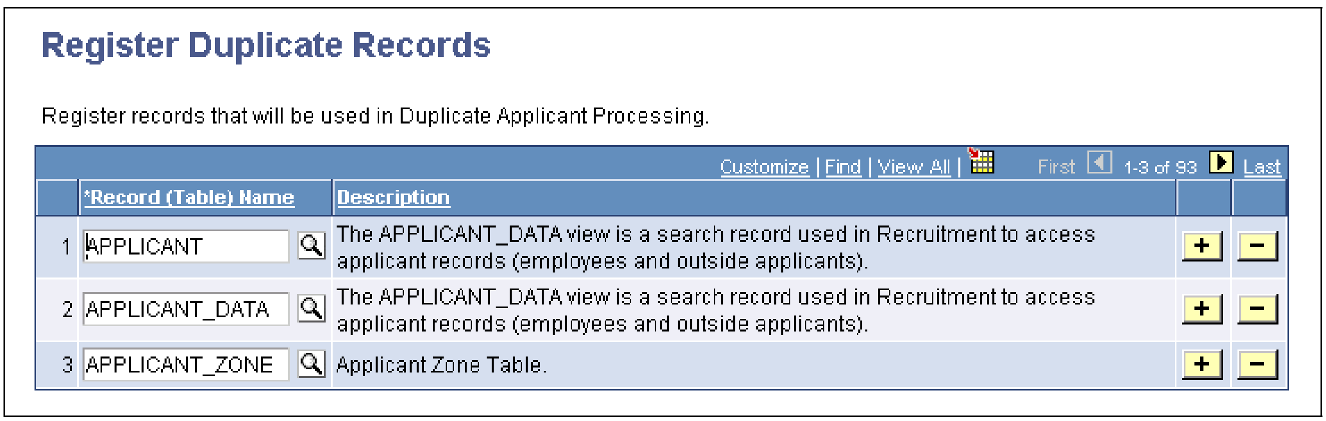
Pages Used to Merge Duplicate Applicant Records

Page Name	Object Name	Navigation	Usage
Register Duplicate Records	ER_DUP_RECORDS	Set Up HRMS, Product Specific, Recruiting, Register Duplicate Records	Define the applicant records that are searched and merged in the Process Duplicate Applicant process. Typically, you do not need to make changes to this page because it is set up for the standard PeopleSoft Human Resources database. However, if you have modified your applicant records you may need to update this page to reflect your modified record structure.
Duplicate Criteria	DUP_APP_CRITERIA	Recruiting, Identify/Process Applicants, Applicant Maintenance, Duplicate Applicant Search	Define the search criteria and initiate the duplicate applicant search. You might need to run the Process Duplicate Applicants process before you initiate the applicant search. This is necessary only if you want to rerun a duplicate applicant search with similar criteria.
Duplicate Summary	DUP_APP_SETS_SMRY	Click the Search button on the Duplicate Criteria page.	Review the results of the duplicate applicant search. Compare applicant records and decide if applicants have been duplicated. If an applicant has duplicate records, you can merge the data into one applicant ID that you select.

Page Name	Object Name	Navigation	Usage
Duplicate Set Detail	DUP_APP_SETS_DETL	Click the Duplicate Set Detail link on the Duplicate Summary page.	View details of the applicants identified as potential duplicates. If you decide that the applicant records are duplicated, select the target applicant ID that remains in the system and the source applicant IDs that are replaced.
Process Duplicate Applicants	RUNCTL_DUPAPPLCNT	• Click Process Duplicate Applicants on the Duplicate Summary page. • Recruiting, Identify/Process Applicants, Applicant Maintenance, Process Duplicate Applicants	Confirm that the applicant records you selected for merging are correct and start the Process Duplicate Applicants process.

Defining Records to Search and Merge

Access the Register Duplicate Records page.



Register Duplicate Records page

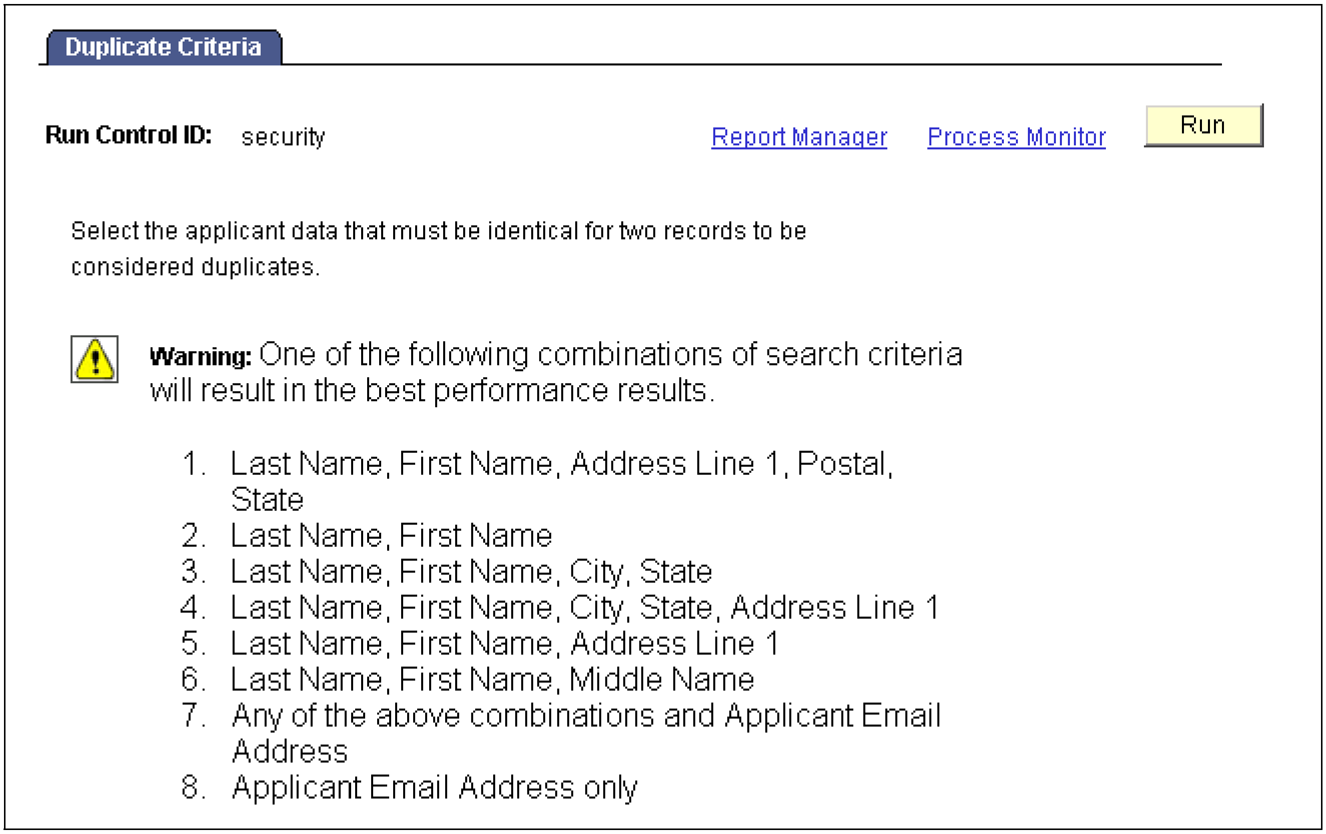
Warning! Changes to this page must be made by technical personnel with an in-depth understanding of the structure of your PeopleSoft Human Resources database. If the Register Duplicate Records page is not set up correctly, there can be data integrity problems when you run the Process Duplicate Applicant process. Always refer to your database administrator before updating this page.

Record (Table) Name Select the table that you want to add from the list of tables

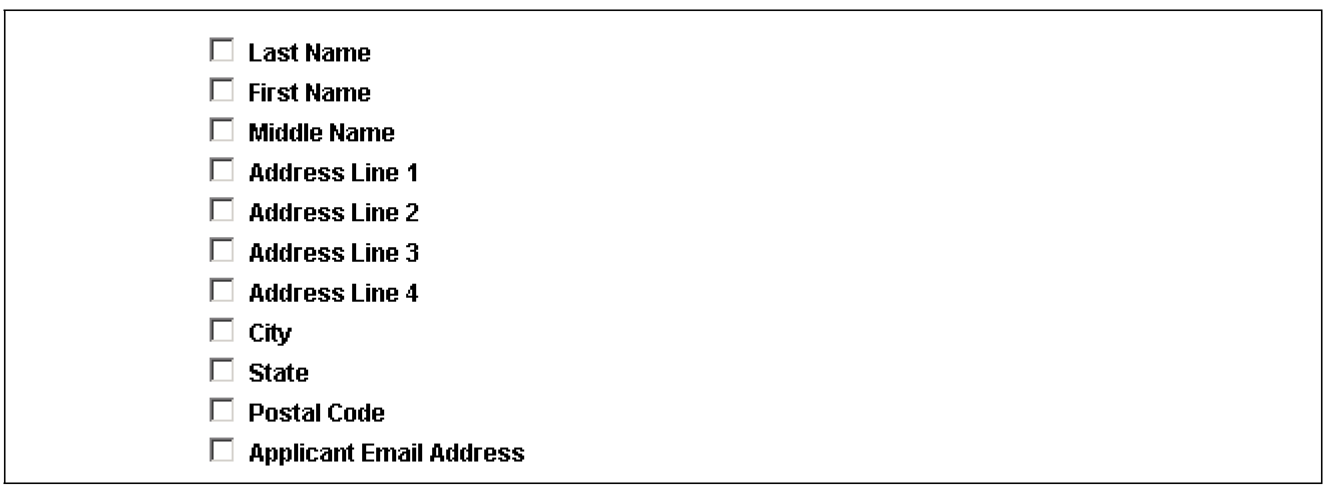
Description The system displays the description of the selected table.

Defining Search Criteria

Access the Duplicate Criteria page.



Duplicate Criteria page (1 of 2)



Duplicate Criteria page (2 of 2)

Select the data that must be identical for applicants to be considered as duplicates. When you start the search, the system identifies applicants where all the selected field names are the same.

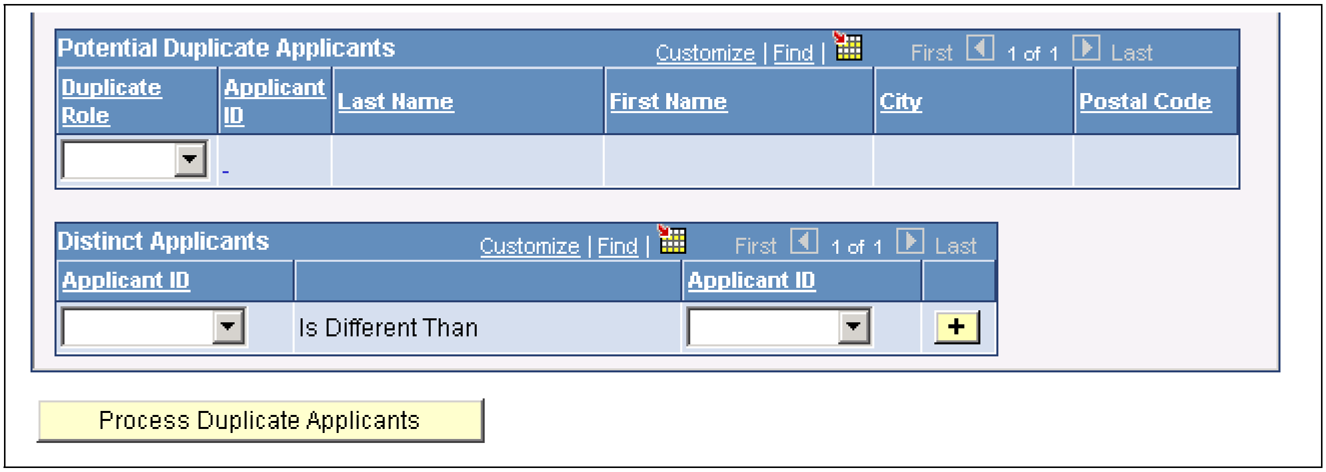
Applicant Email Address	If you select this check box, the system ignores the email type. This means that if two applicants have the same email address but the email type is different, the system still flags the applicants as potential duplicates.
Search	Click to start the search for duplicate applicant records. If the system finds duplicate applicants, it displays the Duplicate Summary page where you decide whether to merge the applicant records.

If the system doesn't find any duplicates, it displays an informational message.

Reviewing Search Results

Access the Duplicate Summary page.

Duplicate Summary page (1 of 2)



Duplicate Summary page (2 of 2)

Duplicate Set

Applicants with matching data are grouped in a Duplicate Set ID. Review each set and decide if the applicant records are duplicates.

Duplicate Set Detail Click this link to display the Duplicate Set Detail page, where you can compare the applicant information.

Potential Duplicate Applicants

If you decide that applicant records should be merged, use this group box to determine how the records are merged.

Applicant ID Click to view the applicant data component.

Duplicate Role Select one of the following values:

Target: The applicant ID that remains in the system after the merge. You can assign only one target applicant ID within a duplicate set.

Source: An applicant ID that is replaced during the merge process by the *Target* applicant ID.

If the *Source* and *Target* applicant IDs have the same application date or effective-date, the system displays a warning. Check that the records are duplicates. If you continue with the merge process, the source applicant record will be deleted.

Note. If an applicant ID appears in multiple duplicate sets, the Duplicate Role must be consistent in all the duplicate sets. Therefore, an applicant ID can't be selected as the target in one duplicate set and the source in another duplicate set.

Distinct Applicants

If you decide that applicants are not duplicates, use this group box to select the applicant IDs that are distinct.

The system populates this group box if the results of the duplicate applicant search include applicants that you previously marked as distinct.

Applicant ID

Select an applicant from the list of applicants in the duplicate set.

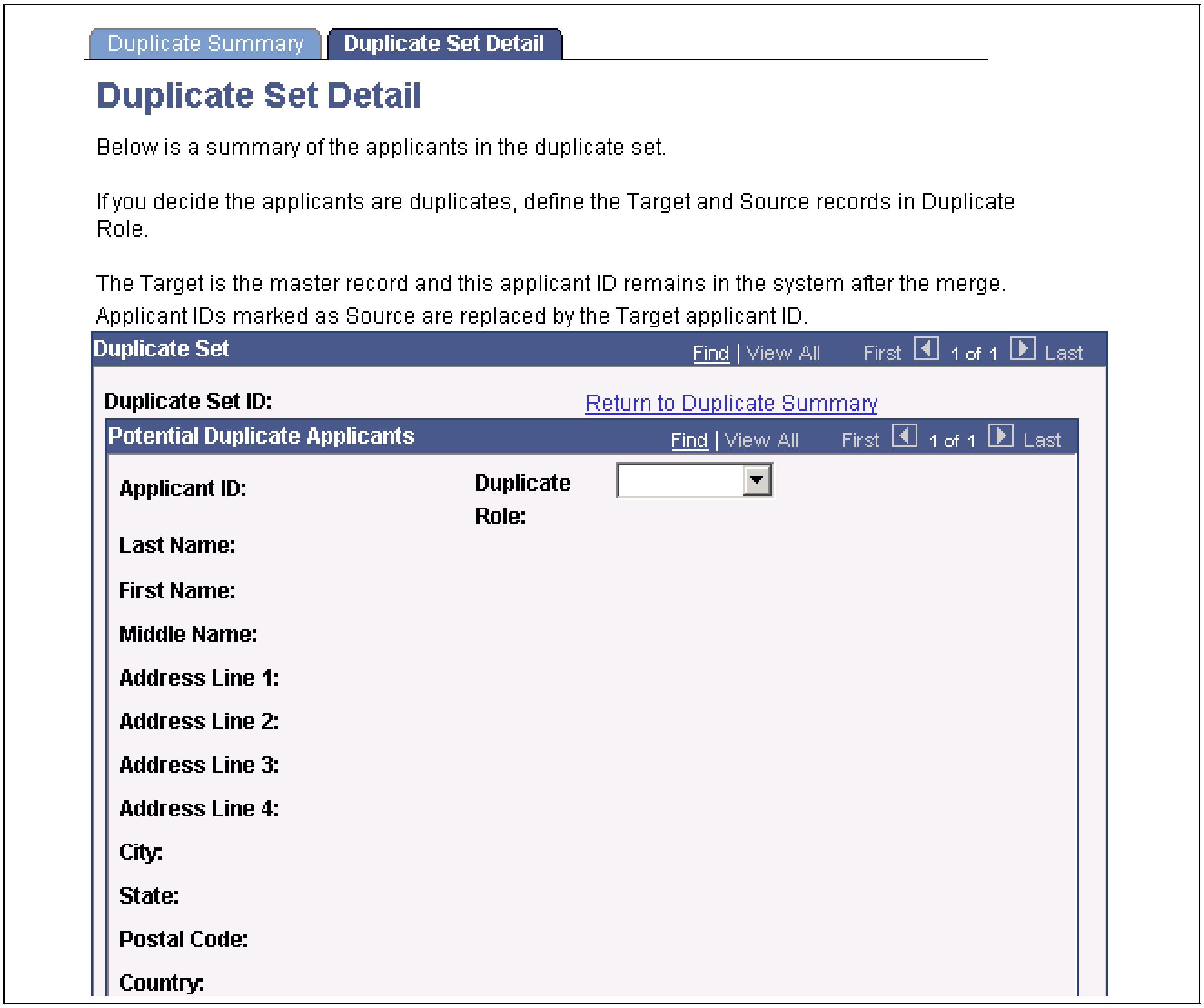
Process Duplicate Applicants

Click to start the merge process once you've finishing reviewing the applicants and either marked them as distinct or selected the target and source applicant IDs. When you click this button, the system displays the Process Duplicate Applicants page.

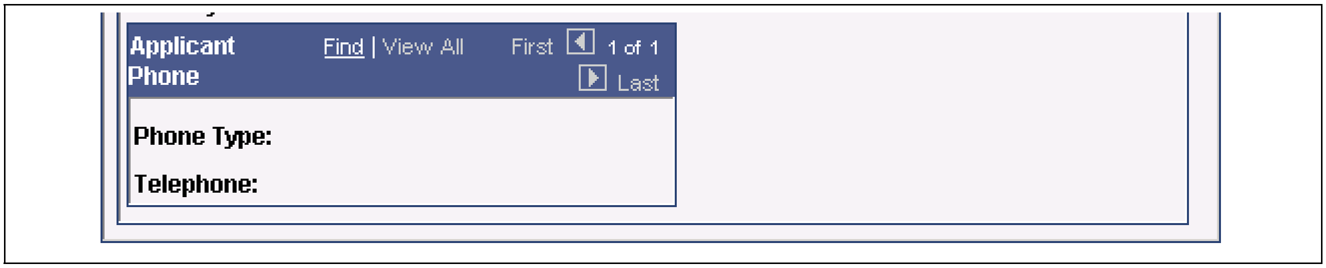
If you don't want to run the merge process now, save the merge information and run the process later.

Viewing Potential Duplicates

Access the Duplicate Set Detail page.



Duplicate Set Detail page (1 of 2)



Duplicate Set Detail page (2 of 2)

Duplicate Set ID The system displays the ID for the group of potential duplicate applicants.

Return to Duplicate Summary Click to return to the Duplicate Summary page.

Potential Duplicate Applicants

The system displays the applicants' contact information.

Duplicate Role If you decide to merge applicant records, use this field to determine how the applicant records are merged.

Select one of the following values:

Target: The applicant ID that remains in the system after the merge.

Source: An applicant ID that is replaced during the merge process by the *Target* applicant ID.

Running the Process Duplicate Applicants Process

The Process Duplicate Applicants process:

- Merges applicant records that you defined as duplicates on the Duplicate Summary page.
- Removes existing duplicate set IDs.

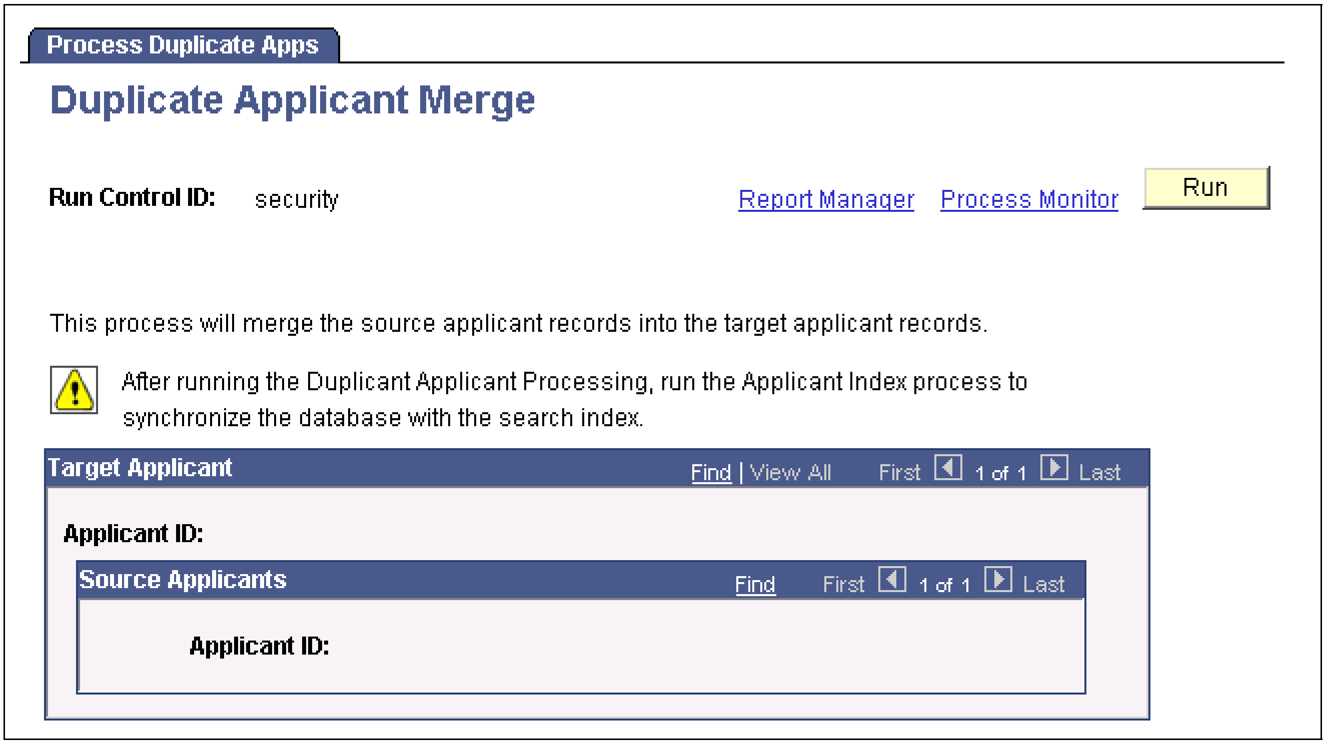
Applicant IDs in duplicate set IDs are unaffected by the removal of duplicate set IDs.

Typically you run this process after you have reviewed the applicants identified as potential duplicates and either marked them as distinct or selected the target and source applicant IDs.

However, you might need to run the process to remove duplicate set IDs even if there are no duplicate applicant records to merge. Removing duplicate set IDs enables you to rerun a duplicate applicant search with similar criteria.

For example, if you search for duplicate applicants and the system returns a large volume of applicants, you might decide to narrow the search. Before you can complete this second search, you must run the Process Duplicate Applicants process to remove the existing duplicate sets. If you don't run the process, the system doesn't create new duplicate set IDs because the applicant IDs are already included in the existing duplicate sets.

Access the Process Duplicate Applicants page.



Process Duplicate Applicants page

The system displays the applicants that you selected as duplicates from the Duplicate Applicant Search component.

Target Applicant

The system displays the Applicant ID that you selected as the target ID. The target applicant ID remains in the system after the merge and replaces the source applicant IDs.

Applicant ID The system displays the ID that you selected as the target ID. The target applicant ID remains in the system after the merge and replaces the source applicant IDs.

Source Applicants

Applicant ID For each target applicant, the system displays the applicant IDs that you selected as the source IDs.

The system replaces source applicants with the related target Applicant.

Run Click to start the Process Duplicate Applicants process.

Note. You can run the Process Duplicate Applicants process to remove duplicate set IDs from the system even if there are no target or source applicants to process.

Changing IDs and Deleting Applicants

Applicant ID identifies applicants throughout PeopleSoft Human Resources. To keep accurate records, change or delete applicant IDs; for example, when you enter an applicant ID in error or when you no longer need an ID.

The ID modification process changes the ID in every record where PeopleSoft HRMS uses it. Deleting an ID also deletes all security profiles associated with the ID.

You can delete single or multiple applicant IDs from your system.

This section discusses how to:

- Change applicant IDs.
- Delete applicants.
- Purge old applicant data.

  Define which applicants are deleted based on the age of their application. If you want to check who will be deleted from the system, you can generate a report listing the applicants who meet the selected criteria before actually deleting them.

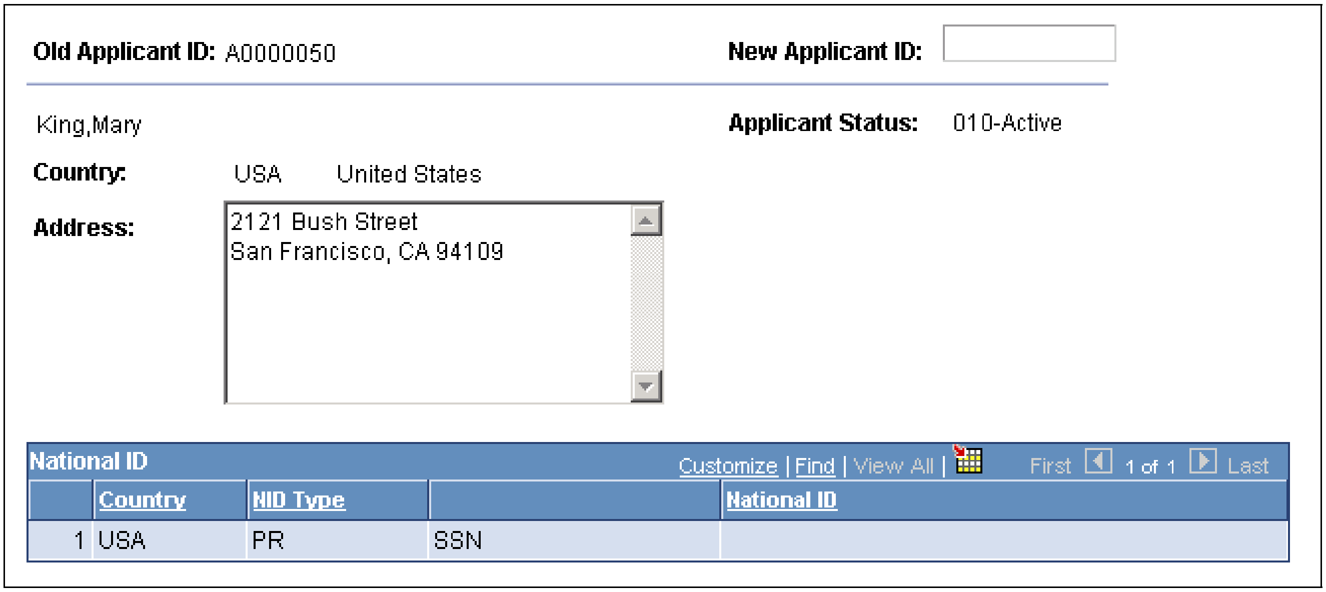
Note. If you select internal applicants (employees and non-employees), the system deletes or modifies the applicant data only. Information held in Personal Data tables is not modified or deleted.

Pages Used to Change and Delete Applicant IDs

Page Name	Object Name	Navigation	Usage
Applicant ID Change	APP_ID_CHANGE	Recruiting, Identify/Process Applicants, Applicant Maintenance, Change Applicant ID	Change an applicant ID.
Applicant ID Delete	APP_ID_DELETE	Recruiting, Identify/Process Applicants, Applicant Maintenance, Delete Applicant ID	Delete an applicant from your system.
Applicant Purge	APPLICANTS_PURGE	Recruiting, Identify/Process Applicants, Applicant Maintenance, Applicant ID Purge	Delete old applicant data from your system. You can delete applicants based on either the Purge Date that you entered in Applicant Data or the applicant's application date.

Changing Applicant IDs

Access the Applicant ID Change page.



Applicant ID Change page

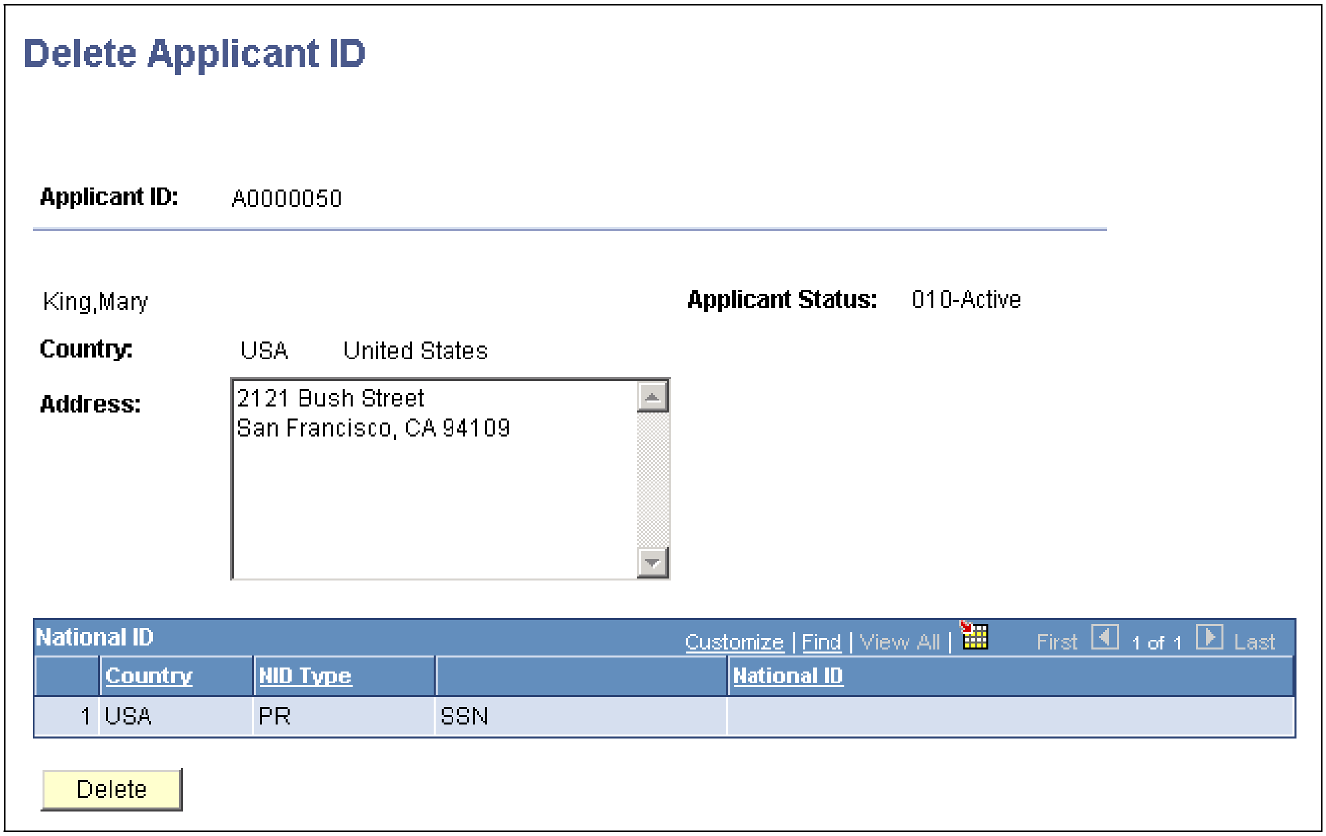
The system displays the applicant ID you entered in Old Applicant ID.

The system populates the applicant's address and National ID details from Applicant Data, so you can check that you have selected the correct applicant.

When you save the page, the system updates all the applicant's records with the new applicant ID.

Deleting an Applicant

Access the Applicant ID Delete page.



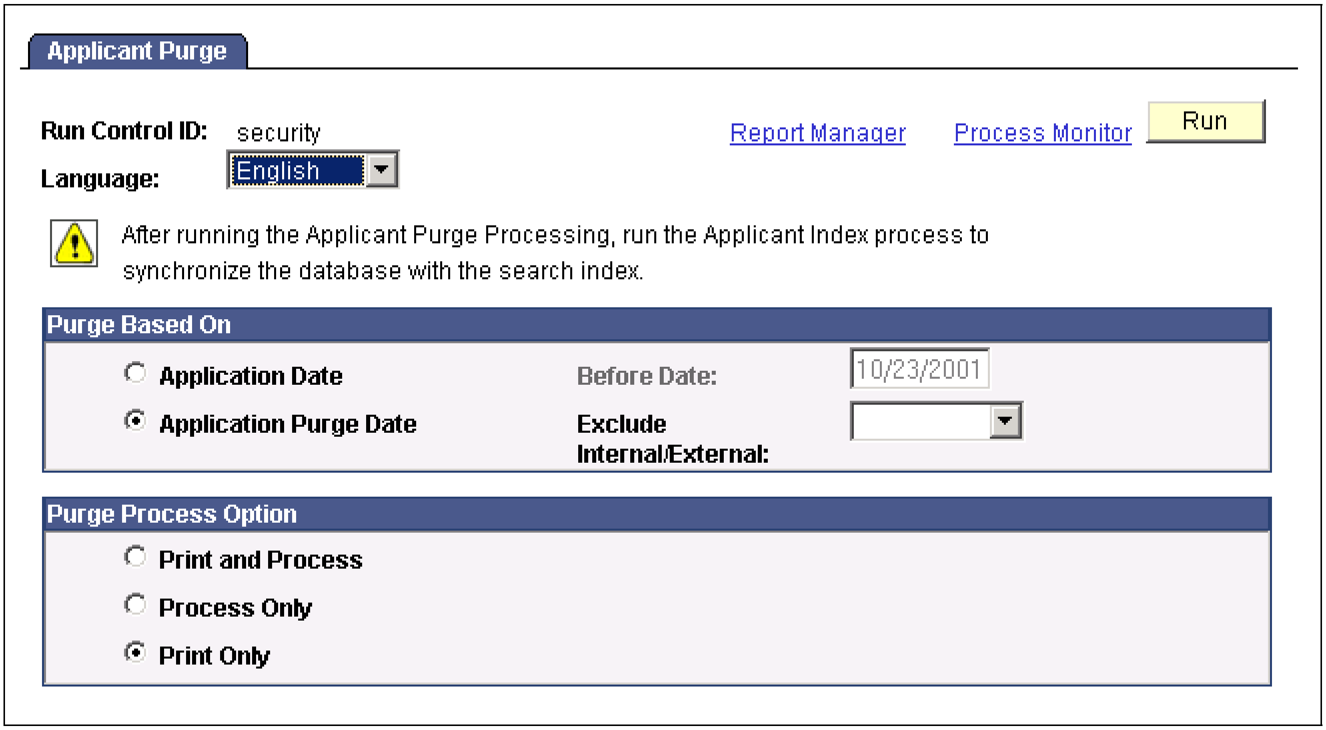
Applicant ID Delete page

The system populates the applicant's address and National ID details from Applicant Data, so you can check that you have selected the correct applicant.

Delete	Click this button to delete the applicant's records throughout your PeopleSoft Human Resources system.

Purging Applicant Data

Access the Applicant Purge page.



Applicant Purge page

Language

Select the Language for the report from the available options. If you print a report of the applicants purged, this field determines the language in which the report is generated.

Purge Based On

Select from these options to define the criteria for deleting applicants:

Application Date: Select to delete applicants based on the date that the applicant applied to your organization. Applicants whose application date is earlier than the date you enter in Before Date are deleted.

Application Purge Date: Select to delete applicants based on the purge date that you entered in the Applicant Data − Applicant Application Info page. The system checks each applicant record and deletes the applicant if the purge date has passed.

Exclude Internal/External

If you want to exclude applicants from the purge, select one of the following options:

External: Select to exclude all external applicants from the purge process.

Internal: Select to exclude all internal applicants, employees, or non-employees from the purge process.

Leave this field blank if you want to delete both internal and external applicants.

Purge Process Option

Select one of the following options:

Print and Process: Select if you want to purge applicants and generate a report of the applicants deleted from the system.

Process Only: Select this option if you want to purge applicants, without running the report.

Print Only: Select if you want to generate a report of the applicants who meet the purge criteria without actually deleting applicant records. Use this report to check who will be deleted before you run the purge process.

CHAPTER 8

(USF) Searching For Qualified Applicants

This chapter provides an overview of applicant processing for U.S. Federal Government installations and discusses how to:

- Run the priority placement and basic eligibility processes.
- Identify applicants who meet minimum qualifications.
- Rate, evaluate, and rank your qualified applicant pool.
- Review applicant ranking.
- Create a Certificate of Eligibles report.
- Update applicant disposition.

Understanding Applicant Processing

Here's how U.S. Federal government installations select, track, and hire applicants using PeopleSoft Human Resources — Recruit Workforce:

1. Screen applicants for those who meet the basic requirements. After this stage is complete, the disposition of successful applicants is *Route.*
   a. Search for applicants in your agency Priority Placement programs.
   b. Narrow the applicant list by discounting applicants who do not meet the job requirements. The Basic Eligibility process determines whether the applicants' employment preferences match the employment conditions of the job.
   c. Select those applicants who meet minimum qualifications and go forward to the next stage. The selected applicants' details are distributed to reviewers who consider the applicants in more detail.
   d. Applicants who are considered "Qualified" are rated and ranked, and placed on the referral list known as the "Certificate of Eligibles".
2. Select applicants to interview based on reviewers' recommendations.

   Hiring managers and recruiters enter reviewers' recommendations and select the applicants who go forward to the interview stage using the Select Applicant for Interview self-service transaction. Recruiting administrators can also update applicants' disposition using Applicant Activity or the Applicant Data − Applicant Requisition page.

   After this stage is complete, the disposition of successful applicants is *Interview.*
3. Schedule and conduct applicant interviews.

Hiring managers, recruiters, and recruiting administrators schedule interviews and track the interviewers and the applicants being interviewed. Recruiting administrators can view interview schedules for any requisition or applicant. Interviewers and applicants can view their own interview schedule using self-service transactions.

4. Select applicants to receive job offers.

   When interviews are complete, interviewers complete an online interview evaluation form, giving their recommendations. Based on this information, hiring managers or recruiters decide whether to make job offers to applicants.

   When you've made job offers, the disposition of successful applicants is *Offer*.

   If there are no further openings for the requisition, the disposition of all other applicants who have not been rejected or withdrawn is *On Hold.*

5. Hire applicants who accept job offers.

   Recruiting administrators enter details of job offers made to applicants and their responses on the Requisition Activity - Offers page or Applicant Activity - Offers page. If you have PeopleSoft eRecruit Manager Desktop installed, hiring managers enter job offers using Prepare Job Offer.

   At this stage, applicants may withdraw because they have accepted other offers, reject your job offers, or accept offers. When applicants accept your job offers, their disposition is set to *Ready to Hire*.

   The hire process varies depending on whether the applicant is an external applicant, a non-employee, or employee. Once you've completed the hiring process, the disposition of successful applicants is *Hired.*

   The system changes the disposition of other applicants linked to the requisition from *On Hold* to *Rejected* and the requisition is set to *Filled/Closed* if there are no further openings for that requisition.

See Also

Chapter 10, "Interviewing Applicants," page 209

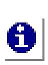
PeopleSoft 8.8 eRecruit Manager Desktop PeopleBook, "Organizing Interviews"

PeopleSoft 8.8 eRecruit PeopleBook, "Interviewing Applicants"

Chapter 11, "Hiring Applicants," page 213

Chapter 9, "Processing Applicants," Generating Recruitment Letters, page 182

Common Elements



Click the Category Description button to access the Category Description page and view descriptions of the ranking categories.

Process Request

Click to run a process request. Process Scheduler runs the selected processes at user-defined intervals.

Letter Code

Select a code from the values that you created in the Standard Letter Table to generate a letter to the applicant. When you generate the letter, the system displays the date that the letter was printed.

Details	Click to access the Details − Candidates page, which provides further information about each applicant.
Sort By	On several pages you can change the order in which applicants are listed by clicking buttons, such as Applid (A) (applicant ID ascending), Name (A) (ascending), Score (Descending), or Rank (D) (descending).
Primary	This check box is selected if this is the primary job code for the job requisition.

See Also

Chapter 9, “Processing Applicants,” Generating Recruitment Letters, page 182

Running Priority Placement and Basic Eligibility Processes

This section discusses how to:

- Identify applicants who are entitled to priority placement considerations.
- Identify applicants who meet the minimum requirements of a specific job requisition.

Understanding Priority Placement and Basic Eligibility Processes

Candidates whose priority consideration rights are identified have special placement privileges granted. Running the priority placement process prompts the system to search all open job requisitions and identify applicants with priority placement codes.

Running the basic eligibility process prompts the system to recognize only those applicants who meet the Recruiting Type determination. For example, for a job requisition with a Recruiting Type of *Internal,* the system does not recognize and recommend an applicant who is applying from the private sector. Other factors that can be used for screening include citizenship, gender, and minimum/maximum age limits. Salary considerations and part-time/full-time employment may also be defined as basic requirements for this qualification process.

Priority Placement Considerations

Priority placement identifies preferred eligibles: candidates who should get special consideration in the selection process because of a specific situation with a current or previous job. For example, an employee who has been displaced during a reduction in force.

The priority placement process also functions when an applicant has two priority placement codes for a particular job and only one priority placement code method can be considered for that job series. In this case, the process determines which code should be used. This determination is based on the recruiting type code that you set up based on agency-specific requirements.

Important! In order for the system to perform as described, you must run the priority placement process *before* running the basic eligibility process in order to identify preferred eligibles or candidates with more than one priority placement code.

Basic Eligibility Requirements

All candidates, whether they are preferred eligibles or not, must go through the basic eligibility process. This process identifies basic requirements for the job, such as full-time or part-time, regular or temporary, as well as citizenship, gender, age limitations, or salary limitations. The job requisition is based on a specific job code, and specifies the requirements for basic eligibility. The basic eligibility process then compares these requirements to the applicant's choices. It eliminates candidates for whom the requirements of the job requisition and the applicant preferences don't match, and identifies candidates whose preferences match.

Multiple Applications

Applicants can apply for more than one position, job requisition, or job code, and may be eligible for different job series. In this case, their basic eligibility and job requirements are compared to the specific job code, requisition, or positions for which they applied.

For example, a job requisition may contain two job codes: job code A and job code B. An applicant applying for that job requisition is considered for all job codes within that requisition. Suppose, for example, that the applicant prefers regular, full-time employment. One of the employment conditions for job code A is full-time regular. For job code B, the employment condition is part-time temporary.

If the applicant does not meet basic eligibility for any job code in that requisition, the disposition code is appropriately set and the applicant is not considered further.

When the basic eligibility program is run:

- Disposition is set to *Preliminary Screen* for job code A.
- Disposition is set to *Reject* and reason is set to *Ineligible − Basic Eligibility* for job code B.

The employee is considered further for job code A but not for job code B.

Pages Used in Priority Placement and Basic Eligibility Processes

Page Name	Object Name	Navigation	Usage
Priority Placement	RUNCTL_PRIO_PLCMNT	Recruiting, Identify/Process Applicants, Identify Candidates, Priority Placement	Run the process that identifies applicants who have been given priority placement considerations. The priority placement process prompts the system to search all open job requisitions and identify applicants who qualify for priority consideration by running the FGPRI_PL process.
Basic Eligibility	RUNCTL_BASIC_ELIG	Recruiting, Identify/Process Applicants, Identify Candidates, Basic Eligibility	Identify applicants who meet the minimum requirements for a job vacancy by running the FGBAS_EL process.

Identifying Applicants Who Meet Minimum Qualifications

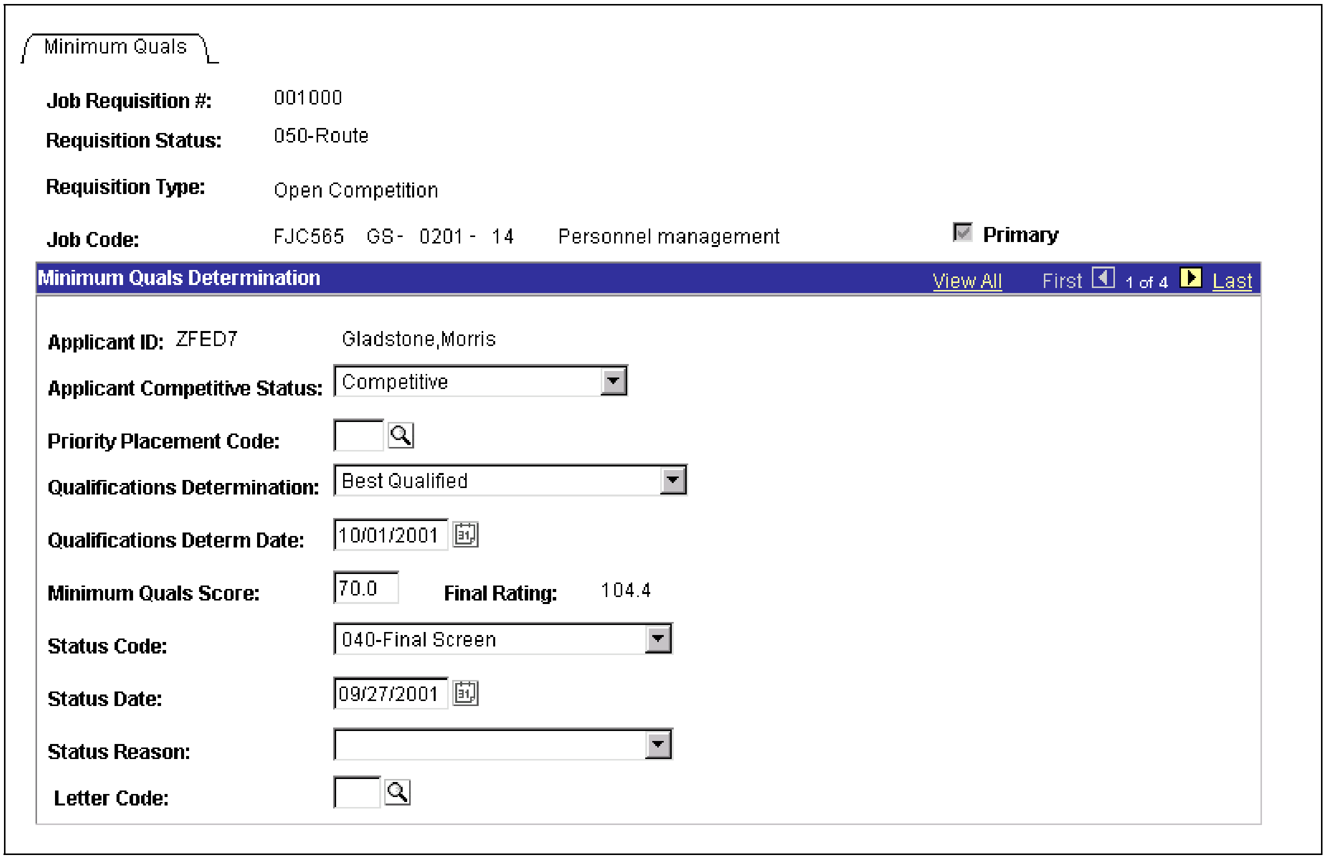
Qualifications standards are published and maintained by the Office of Personnel Management (OPM), or in the absence of an OPM standard, the specific agencies. The qualification standards outline the minimum general and special experience requirements deemed necessary for a candidate to successfully perform the duties of the job. These competencies and accomplishments are rated in order to determine a candidate's probability of success in performing a job.

Pages Used to Identify Applicants Who Meet Minimum Qualifications

Page Name	Object Name	Navigation	Usage
Minimum Quals (minimum qualifications)	GVT_MIN_QUALS_DET	Recruiting, Identify/Process Applicants, Identify Candidates, Determine Minimum Quals USF	Review the qualifications for each candidate associated with the job requisition to determine whether they meet the minimum qualifications. You can enter the results of the applicant's competitive status and priority placement validation.

Reviewing Applicant Qualifications

Access the Minimum Quals page.



Minimum Quals page

Applicant Competitive Status	Select a value from the available options: Competitive, Non-Competitive Other, Non-Competitive VRA, and (none).
Priority Placement Code	For this field to be active, the applicant must have indicated that they are entitled to priority placement consideration on their application. You define the values in the Priority Placement Table.
Qualifications Determination	Select *Qualified* or *Does Not Meet Minimum Qualifications.* If the applicant does not meet minimum qualifications, the Status Code is set to *Reject* and Status Reason is updated to *Not Selected.* An applicant must meet all minimum qualifications and all selective factors to be considered qualified.
Minimum Quals Score	This field is populated with information defined on the Federal Screening Criteria page.

Rating Applicants

In this section we discuss how to:

- Assign ratings and points for competencies.
- Assign points for accomplishments.

Understanding Rating Applicants

Because the determination of basic eligibility and minimum qualifications is partially subjective, use the Applicant Rating component to apply an objective process of rating your applicant and determine how well an applicant is suited to the position and job requirements.

Only applicants whose Qualifications Determination is *Qualified,* and have the Status of Preliminary Screen appear in the rating process. All applicants who pass priority placement, basic eligibility, and minimum qualifications appear in the Applicant Rating component. Use this component to compare an applicant's application against a standard set of criteria that you defined on the Federal Screening Criteria page, including quality ranking factors and augmenting factors. These criteria are then consolidated into a single overall score for each applicant which is used to determine well-qualified and best-qualified applicants.

See Also

PeopleSoft 8.8 Human Resources PeopleBook: Manage Competencies, "Setting Up Competencies and Accomplishments"

Pages Used to Rate Applicants

Page Name	Object Name	Navigation	Usage
Applicant Rating - Competencies	GVT_COMP_RATING	Recruiting, Identify/Process Applicants, Identify Candidates, Rate Applicant USF	Display the competencies that you've indicated are valid for rating applicants who are applying for a specific job requisition and assign ratings and points for each competency to the applicant.
Applicant Rating - Accomplishments	GVT_ACCOMP_RATING	Recruiting, Identify/Process Applicants, Identify Candidates, Rate Applicant USF	Assign accomplishment points for each applicant.

Assigning Ratings and Points for Competencies

Access the Applicant Rating - Competencies page.

Evaluation ID The default value is *01.* You can create multiple evaluations, each representing an evaluation of an individual panel member. The system allows only one overall panel rating. The scores recorded here are the final scores for the applicant, and are used in subsequent stages of the recruiting process.

Evaluation Type Select *Individual Panel Member Rating* or *Overall Panel Rating.*

Assigning Points for Accomplishments

Access the Applicant Rating - Accomplishments page.

Accomp? (accomplished) Select this check box to indicate that points are to be credited to the applicant.

Evaluating Applicants

This section discusses how to:

- Evaluate competitive applicants.
- Determine whether an applicant qualified for a job.
- Evaluate non-competitive applicants.

Understanding Applicant Qualifications

The next step in the recruiting process is to determine an applicant's qualifications. All applicants who passed basic eligibility and minimum qualifications and have been rated populate the Evaluation of Candidates component.

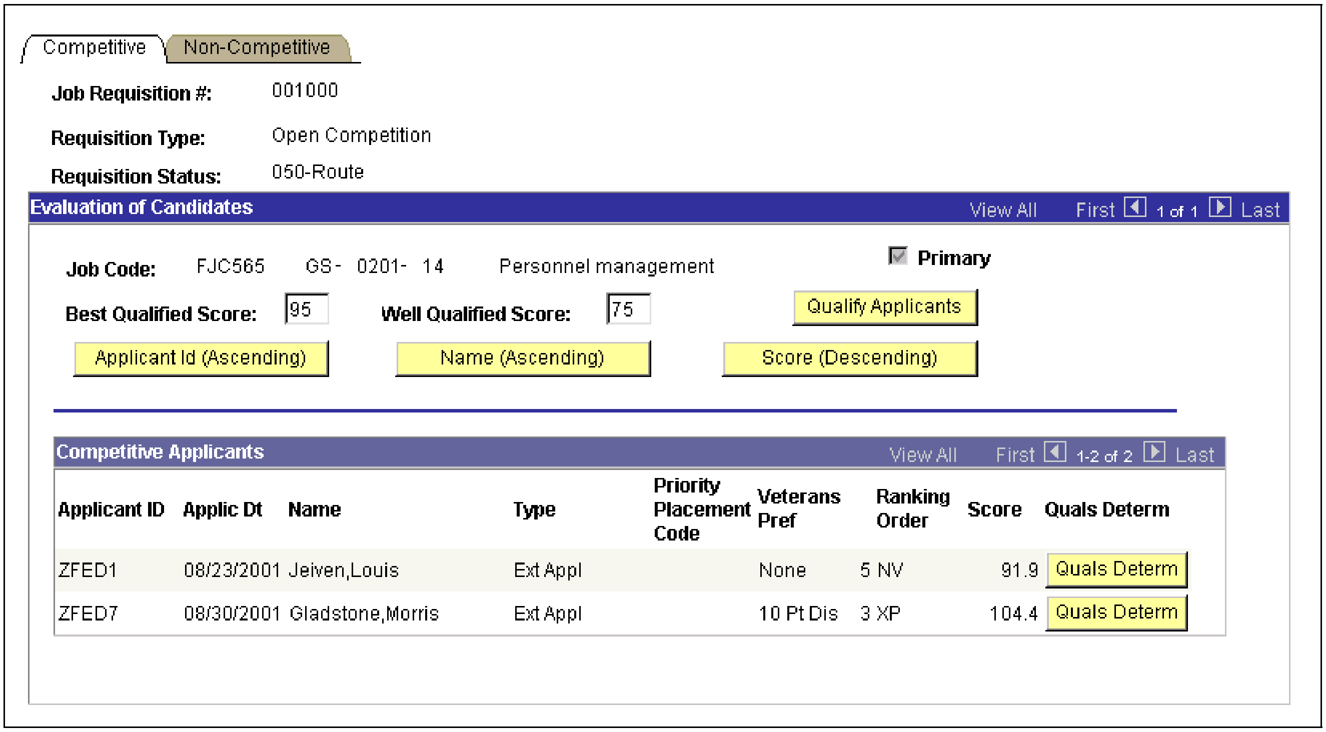
The primary use of the Evaluation of Candidates component is to review applicants and their scores. These pages provide the flexibility to view and update applicant status at any point in the recruiting process.

Pages Used to Evaluate Applicants

Page Name	Object Name	Navigation	Usage
Evaluation of Candidates – Competitive	GVT_CAND_EVALUATN1	Recruiting, Identify/Process Applicants Identify Candidate, Evaluate Candidates USF	Review applicants and their scores for applicants who are considered competitive for the job.
Qualifications Determination	GVT_CAND_EVAL1_SEC	Click the Quals Determ (qualifications determination) link on the Evaluation of Candidates - Competitive page.	Determine whether an applicant qualified for the job and what the disposition was.
Evaluation of Candidates - Non-Competitive	GVT_CAND_EVALUATN2	Recruiting, Identify/Process Applicants, Identify Candidates, Evaluate Candidates USF	Review applicants and their scores for applicants who are not considered competitive for the job.

Evaluating Competitive Applicants

Access the Evaluation of Candidates - Competitive page.



Evaluation of Candidates - Competitive page

Evaluation of Candidates

Best Qualified Score, Well Qualified Score

Values are populated with information from the Federal Scoring Criteria page, if you defined them there. Otherwise, analyze the scoring to determine natural breaks and enter values here.

For example, in the following list of points for applicants there is a natural break between 34 and 25: 45, 37, 35, 34, 25, 20, 19, and 18. You might decide to make 34 points a best-qualified score, and 20 points a well-qualified score.

If there are no preferred eligibles, only the best-qualified candidates are referred. If there are preferred eligibles, the nature of their preference might be that they must be selected if they are well-qualified, or they must at least be referred.

Qualify Applicants

Click to validate each applicant's Qualifications Determination status, based on the values defined in the screening criteria.

Competitive Applicants

This group box lists candidates who have qualified.

Score

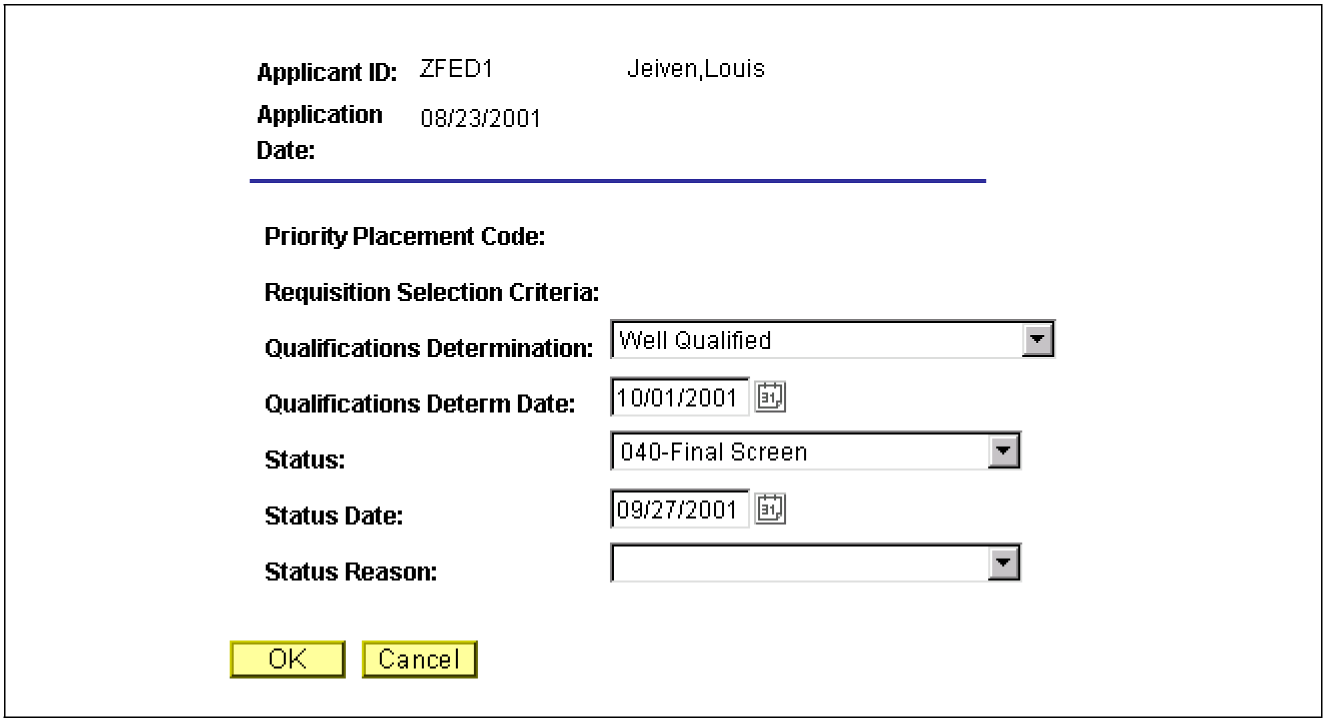
The combined points as determined from the Applicant Rating page.

Quals Determ (qualifications determination)

Click to access the Qualifications Determination page, where you can see whether the applicant qualified for the job and what the disposition was.

Determining Whether an Applicant is Qualified for a Job

Access the Qualifications Determination page.



Qualifications Determination page

Priority Placement Code A code appears if an applicant is entitled to priority consideration (where applicable) and stated so on the application. If so, Requisition Selection Criteria indicates whether it entitled the applicant to any preference for this particular job requisition. The Priority Placement Table determines which priority placement codes receive preference for which types of job requisitions.

Ranking Applicants

This section discusses how to:

- Rank applicants.
- Review descriptions of the ranking categories.
- Track an applicant's ranking results.

Understanding Applicant Ranking

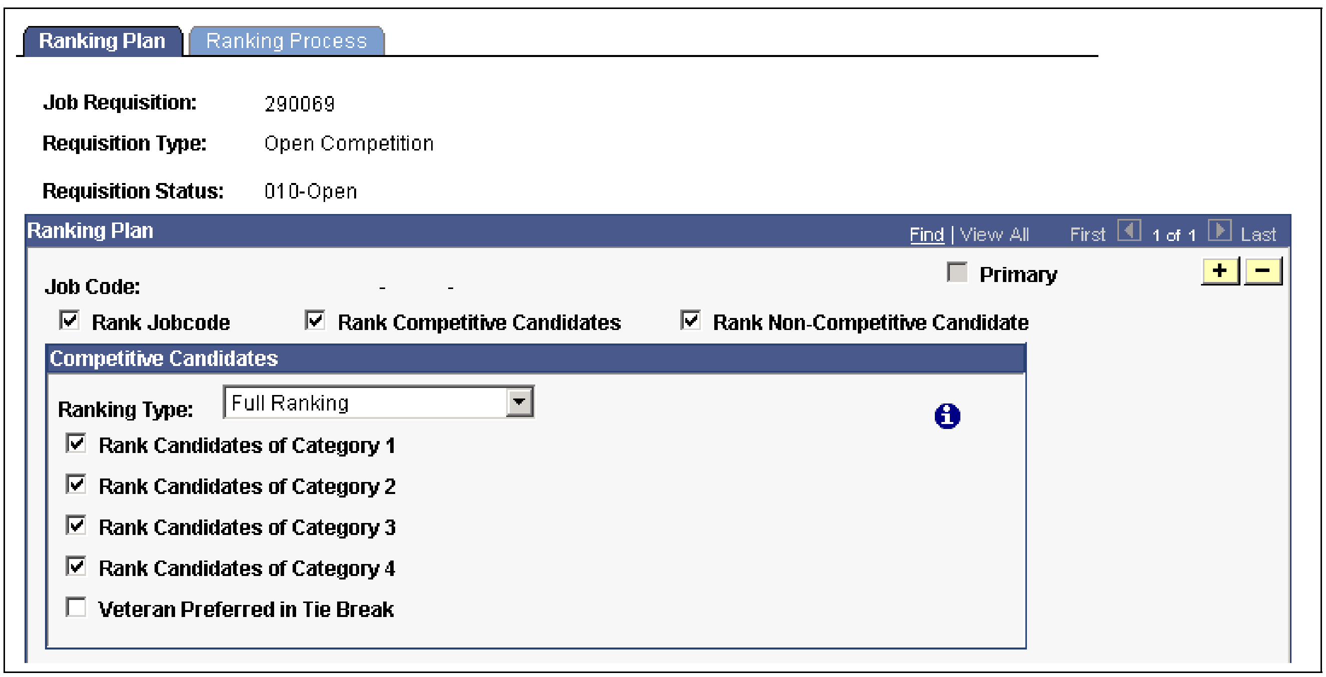
For each job requisition created, the recruiter develops a Ranking Plan. Similar to the crediting plan, the Ranking Plan defines the parameters to use in the Ranking Process. Use the Ranking Plan component to set up and apply the job requisition ranking criteria for competitive and non-competitive candidates.

Pages Used to Rank Applicants

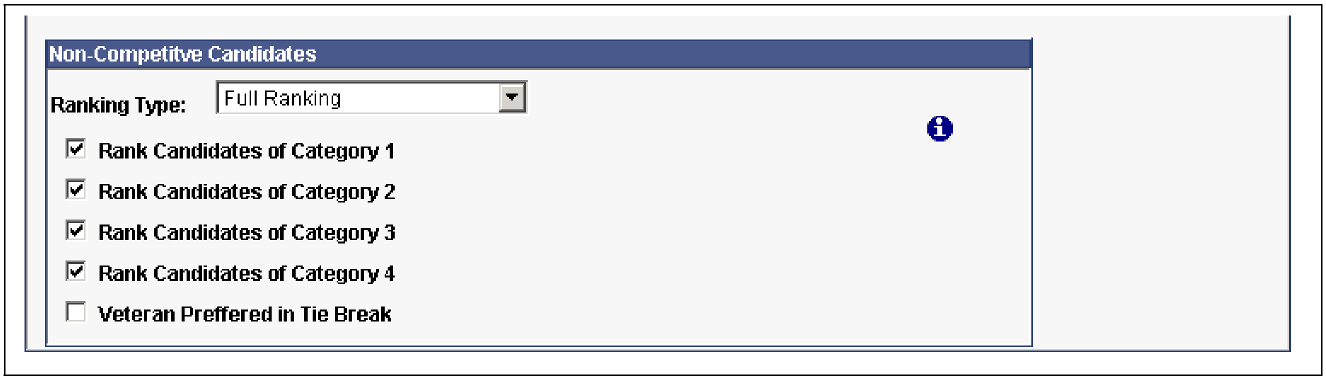
Page Name	Object Name	Navigation	Usage
Ranking Plan - Ranking Plan	GVT_RANKING_PLAN	Recruiting, Identify/Process Applicants, Identify Candidates, Create Ranking Plan USF	Set up parameters for ranking applicants for the selected job requisition.
Category Description	GVT_CATGRY_DES_SEC	Click the Category Description button on the Ranking Plan - Ranking Plan page.	Review descriptions of the ranking categories.
Ranking Plan - Ranking Process	GVT_RANKING_PROC	Recruiting, Identify/Process Applicants, Identify Candidates, Create Ranking Plan USF	Categorize applicants who have passed eligibility processing, apply your ranking plan to those applicants, and rank the applicants.

Ranking Applicants

Access the Ranking Plan - Ranking Plan page.



Ranking Plan - Ranking Plan page (1 of 2)



Ranking Plan - Ranking Plan page (2 of 2)

Rank Jobcode

Select this check box to access the Rank Competitive Candidates and Rank Non-Competitive Candidate check boxes. Selecting the Rank Competitive Candidates check box makes the Competitive Candidates group box available for entry. Selecting the Rank Non-Competitive Candidates check box makes the Non-Competitive Candidates group box available for entry. Use these group boxes for establishing further ranking criteria.

Ranking Type

Select *Full Ranking* or *Order By Name Only.* If you select *(none),* the ranking type is automatically set to *Full Ranking.*

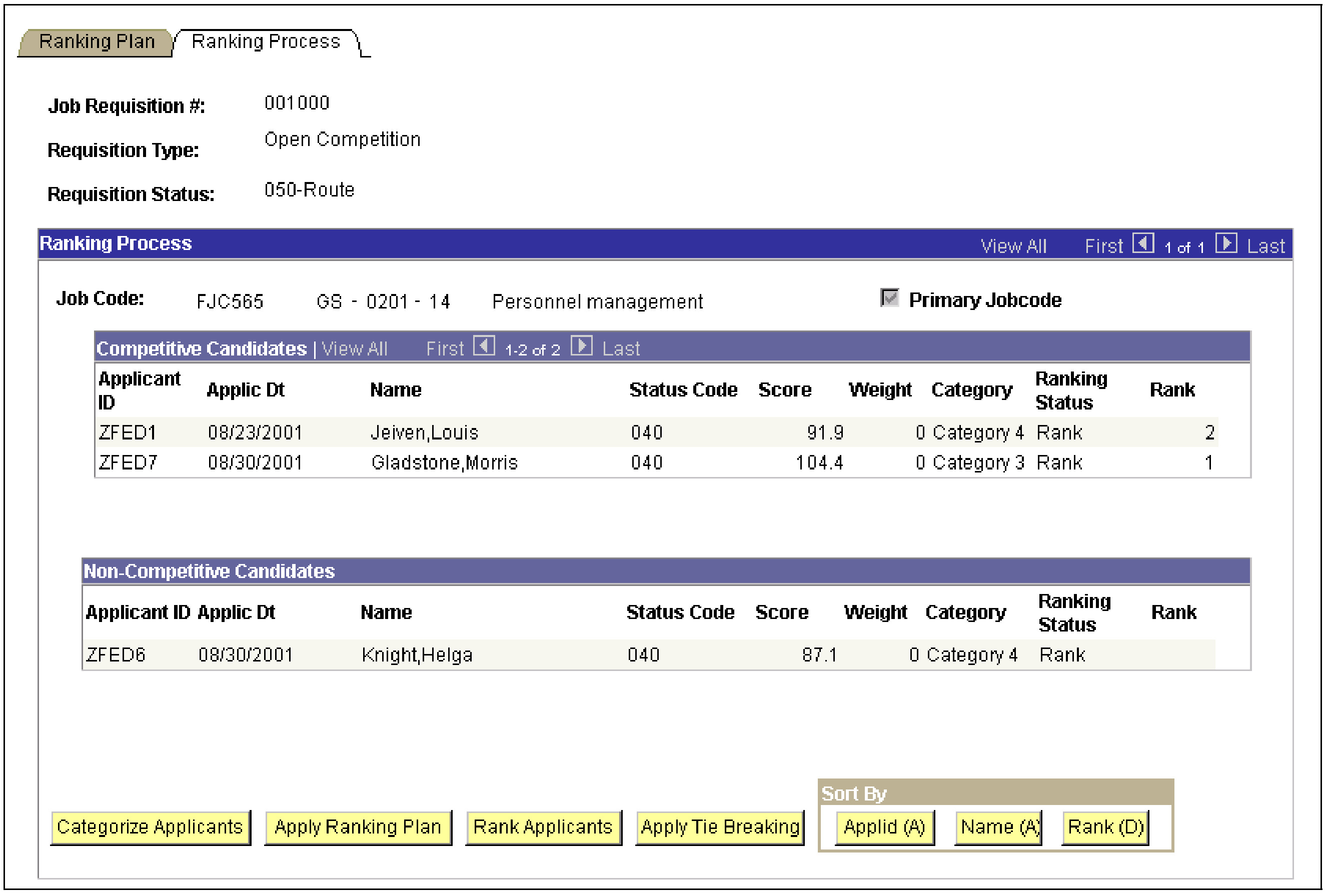
Candidates fall into one of four ranking categories for each job code for which they are qualified. Indicate the category to be used in ranking the candidates for the job requisition by selecting the appropriate check box.

Consider Vet Pref in Tie-Break (consider veterans preference in tie-break)

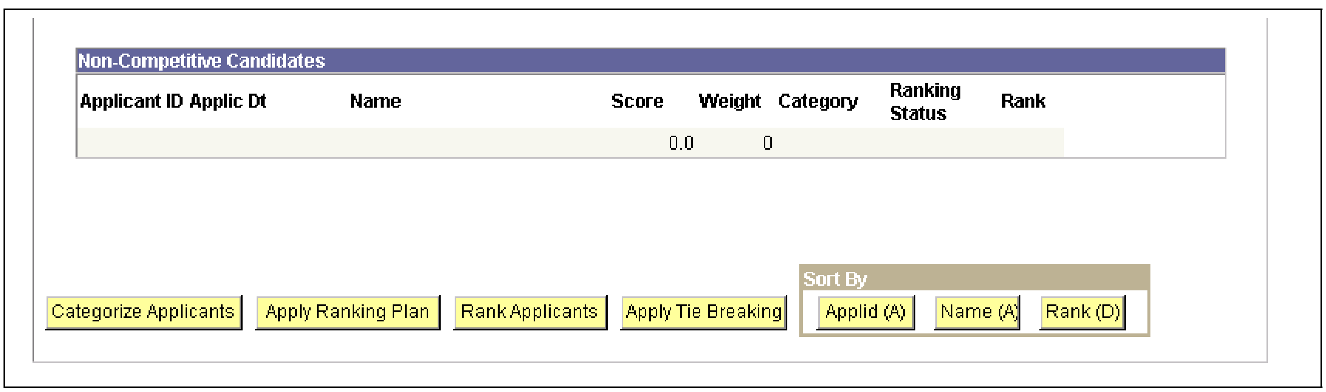
Select this check box if you want veterans to have preference over an equally qualified candidate.

Tracking Ranking Results

Access the Ranking Plan - Ranking Process page.



Ranking Plan - Ranking Process page (1 of 2)



Ranking Plan - Ranking Process page (2 of 2)

Categorize Applicants	Click to set the ranking Category to which each qualified applicant belongs.
Apply Ranking Plan	Click to prompt the system to set the Ranking Status for each qualified applicant.
Rank Applicants	Click to assign a Rank to each qualified applicant.
Apply Tie Breaking	Click to apply the tie break. You need to specify the Tie Break Number on the Federal Scoring Criteria page before you can use the tie break.

Reviewing Applicant Ranking

This section discusses how to:

- Review ranking for competitive applicants.
- Review additional information about applicants.
- Review ranking for non-competitive applicants.

Understanding the Ranked List of Applicants

Once you've completed the Ranking Process, use the Applicant Selection component to view the ranked list of highly qualified applicants. This list is the end result of all of the identification and qualifying processes that you performed in order to produce a selection of applicants for the Selecting Official to choose from.

Pages Used to Review Applicant Ranking

Page Name	Object Name	Navigation	Usage
Competitive	GVT_CERT_ELIG1	Recruiting, Identify/Process Applicants, Identify Candidates, Applicant Ranking USF, Competitive	Override any rankings that the system has generated for the applicants considered to be competitive for the vacancy. You can also create a Certificate of Eligibles report.
Details - Candidates	GVT_APPLRNKDT3_SEC	Click the Details button on the Applicant Selection - Competitive page.	Review additional information about an applicant.
Non-Competitive	GVT_CERT_ELIG2	Recruiting, Identify/Process Applicants, Identify Candidates, Applicant Ranking USF, Non-Competitive	Override any rankings that the system has generated for the applicants not considered competitive for the vacancy. You can also create a Certificate of Eligibles report.

Reviewing Competitive Applicants

Access the Applicant Selection - Competitive page.

Num of Applicants to Consider (number of applicants to consider)
Enter a value. For example, if you enter *3,* only the top three best-qualified applicants are referred to the Selecting Official. The Competitive Candidates group box displays the qualified applicants in ranked order. All non-competitive candidates for this requisition who meet the criteria in the Ranking Plan are also referred to the Selecting Official.

Certificate of Eligibles Nbr (certificate of eligibles number)
Enter a number; you define the numbering scheme. You use this number later when printing your Certificate of Eligibles report.

Create Certificate When you click this button, the system automatically assigns the certificate number that you entered to each applicant and creates a referral list commonly referred to as the Certificate of Eligibles. Once a certificate has been created, the Re-Issue Certificate button becomes available. You can reissue the certificate if there is a change in the list of eligibles.

Rank This field is populated with information from the Ranking Plan component. This field is editable, which enables you to change a candidate's rank.

Reviewing Additional Information About Applicants

Access the Details - Candidates page.

Qualifications Determination This value is based on values defined in the Crediting Plan.

Ranking Category This value is based on values defined in the Category Description page.

Veteran's Code This value is derived from the Veterans Preference Table.

Creating a Certificate of Eligibles Report

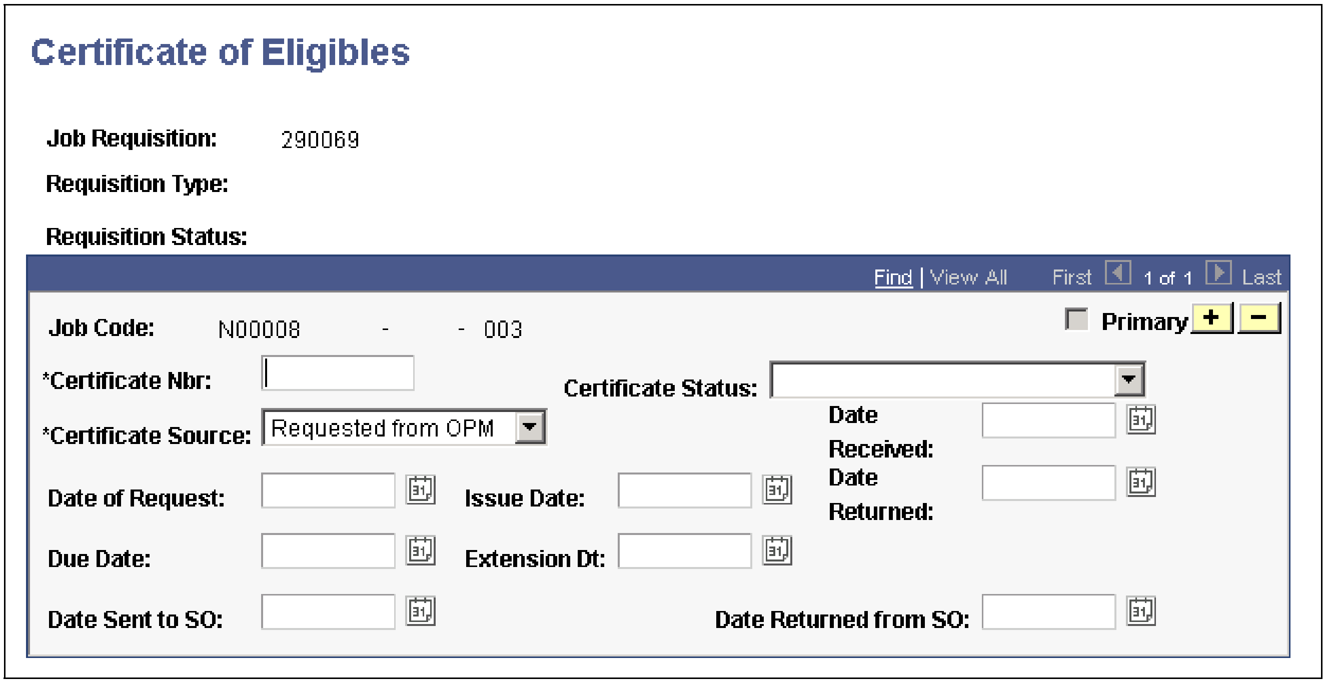
Create and forward a Certificate of Eligibles report for applicants that you have rated and ranked.

Page Used to Create a Certificate of Eligibles Report

Page Name	Object Name	Navigation	Usage
Certificate of Eligibles	GVT_CERT_ELIG	Recruiting, Recruiting Reports, Certificate of Eligibles Report USF	Track pertinent information for each requisition and record and track the progress of certificates.

Creating a Certificate of Eligibles

Access the Certificate of Eligibles page.



Certificate of Eligibles page

Certificate # (certificate number)
This number either comes from the Applicant Ranking pages (if you click the Create Certificate button) or you can enter the number here. This number is required.

Certificate Source
Select Generated Internally or Requested from OPM.

Certificate Status
Select Requested, Forwarded by Selecting Off (forwarded by selecting official) or Cancelled.

Dt Returned (date returned)
Enter the date that the certificate is returned.

Date Sent to SO (date sent to selecting official)
Enter the date that the certificate is ready to be sent to the Selecting Official.

Date Returned from SO (date returned from selecting official)
Enter the date when the certificate is returned.

Creating Evaluation of Candidate Reports

This section explains how to print the Evaluation of Candidate report.

Page Used to Create Evaluation of Candidate Reports

Page Name	Object Name	Navigation	Usage
Candidates List	RUN_FGREC820	Recruiting, Recruiting Reports, Candidate Evaluation Report USF	Provides an analysis of the candidates for a job requisition.

Updating Dispositions

Before making an offer to the qualified candidate, use the Applicant Selection pages to update applicants' disposition. You can also update the dispositions of those applicants who do not receive an offer.

The Applicant Selection pages display all applicants who were selected for the Certificate of Eligibles. The Selecting Official selects the applicant of choice and updates the applicants Disposition to *Selected.* This disposition status makes those applicants available on the Requisition Activity - Offer page when you are ready to extend an offer.

For applicants who are not being extended an offer, select the appropriate disposition.

CHAPTER 9

Processing Applicants

This chapter provides an overview of applicant processing and discusses how to:

- Generate recruitment letters.
- Screen applicants.
- Track requisition activity.
- Search for potential candidates.
- Use checklists to process applicants.

Understanding Applicant Processing

Here's how to select, track, and hire applicants using PeopleSoft Human Resources:

1. Screen applicants for those who meet the basic requirements.
   a. Narrow the applicant list by discounting applicants who do not meet the job requirements. The Requisition Screening feature automates this task. The system compares applicants against the requirements set up in Job Requisition Data and displays only those applicants who meet the requirements.
   b. Select those applicants who go forward to the next stage (routing) and distribute the selected applicants' details to reviewers who consider the applicants in more detail.

      Applicants selected for routing have a disposition of *Route.*
2. Select applicants to interview based on reviewers' recommendations.

   Hiring managers and recruiters enter reviewers' recommendations and select the applicants who go forward to the interview stage using the Select Applicant for Interview self-service transaction. Recruiting administrators can also update applicants' disposition using Applicant Activity or the Applicant Data − Applicant Requisition page.

   Once this stage is complete, the disposition of successful applicants is *Interview.*
3. Schedule and conduct applicant interviews.

   Hiring managers, recruiters, and recruiting administrators schedule interviews and track the interviewers and the applicants being interviewed. Recruiting administrators can view interview schedules for any requisition or applicant. Interviewers and applicants can view their own interview schedule using self-service transactions.
4. Select applicants to receive job offers.

When interviews are complete, interviewers complete an online interview evaluation form, giving their recommendations. Based on this information, hiring managers or recruiters decide whether to make job offers to applicants.

Once you've made job offers, the disposition of successful applicants is *Offer*.

If there are no further openings for the requisition, the disposition of all other applicants who have not been rejected or withdrawn is *On Hold.*

5. Hire applicants who accept job offers.

   Recruiting administrators enter details of job offers made to applicants and their responses on the Requisition Activity - Offers page or Applicant Activity - Offers page. If you have PeopleSoft eRecruit Manager Desktop installed, hiring managers enter job offers using Prepare Job Offer.

   At this stage, applicants may withdraw because they have accepted other offers, reject your job offers, or accept offers. When applicants accept your job offers, their disposition is set to *Ready to Hire*.

   The hire process varies depending on whether the applicant is an external applicant, a non-employee, or employee. Once you've completed the hiring process, the disposition of successful applicants is *Hired.*

   The system changes the disposition of other applicants linked to the requisition from *On Hold* to *Rejected* and the requisition is set to *Filled/Closed* if there are no further openings for that requisition.

Note. The disposition statuses listed above are the values supplied by PeopleSoft for global installations only. Your system may use different values.

If you have PeopleSoft eRecruit Manager Desktop installed, Search for Applicants provides an alternative method for screening applicants.

Generating Recruitment Letters

With PeopleSoft Human Resources you can implement automated procedures for producing form letters to applicants. PeopleSoft Human Resources merges information automatically and sends it to your Windows-based word processor.

PeopleSoft delivers sample letters for these types of recruitment letters:

- Acknowledgment of receipt of resume.
- No current openings.
- Offer of employment.
- Rejection after interview.

Here's how to generate recruitment letters:

1. Select letter codes on recruitment pages in PeopleSoft Human Resources to designate the applicants to send letters to.
   - Applicant Data − Applicant Application Information page
   - Applicant Data − Requisitions page.
   - Requisition Activity − Offers page.

2. Once you've marked applicant records with letter codes, you can generate form letters at any time, as often or as infrequently as you want to. For example, you might find that generating form letters once a week is sufficient. Or you might generate letters daily, especially if you generate a high volume of letters or require quick responses from letter recipients.
   - Use an SQR to extract data from PeopleSoft Human Resources and a Word for Windows macro to merge the data into a form letter template.
   - Use the Recruitment Letters Report page to create and print the letters.
3. Print the recruitment letters using Word for Windows.

   The system creates the form letters in a temporary directory on the application server, putting all the letters of the same type in one file.

See Also

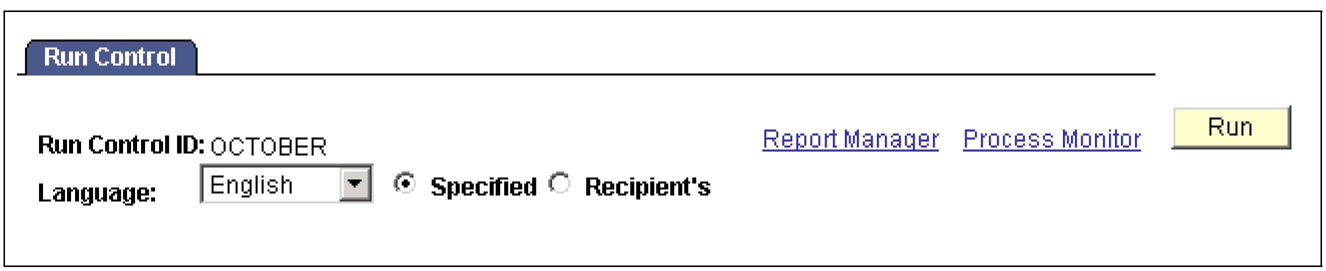
PeopleSoft 8.8 Application Fundamentals for HRMS PeopleBook, "Generating Form Letters"

Pages Used to Generate Recruitment Letters

Page Name	Object Name	Navigation	Usage
Run Control	RUNCTL_APP007	Recruiting, Recruiting Reports, Recruitment Letters	Runs the Recruitment Letters report (APP007). This generates the recruitment letters for applicants that you have tagged with a letter code.

Running the Recruitment Letters Report

Access the Run Control page.



Run Control page

Screening Applicants

Use the Requisition Screening component to start the search for suitable applicants to fill a requisition. You can start the screening process when you have all the applicants who applied for a requisition linked to the requisition.

Here's how to screen applicants:

- Review applicants using the Postings page.

  This page lists all applicants who applied for the requisition. No screening takes place on this page. It enables you to see how many applicants there are.

- Review preliminary screening results using the Preliminary page.

  When you navigate to the Preliminary page, the system compares applicants with the preliminary screen requirements set up on the Job Requisition - Screening Criteria page and lists applicants who meet or exceed those requirements. When you save this page, the system updates the disposition of applicants who pass the screening to *Screened - Preliminary.*

  Note. In some countries, discrimination laws require organizations to show that applicant screening is based on published job descriptions. If this applies to your requisitions, set up the preliminary screening criteria to match the advertised job description and do not make changes to the criteria. However, you can adjust the final screening criteria, as necessary, to narrow the applicant list once applicants have passed the preliminary screening stage.

- Review final screening results using the Final page.

  When you navigate to the Final page, the system compares applicants with the final screen requirements and lists applicants who meet or exceed those requirements. You select applicants who will go forward to the next stage in the selection process. When you save this page, the system updates the disposition of applicants who pass the screening to *Screened - Final*, if you selected the applicants to go on to the next stage, or to *Routing* if the Route check box is selected.

Adjusting Screening Requirements

On the Final page, if the list of applicants who pass the final screening is too large or too small, you can adjust the screening criteria and rerun the screening to see how this affects the applicant list. Click the Screening Criteria link to navigate to where you modify the requirements. When you return to the Final page, the system reruns the screening and refreshes the page with the new list of applicants.

Note. You can continue to change the final screening requirements and rerun the screening as long as you do not save the screening page. Once you save the page, the system updates applicants' dispositions.

Widening the Search for Suitable Applicants

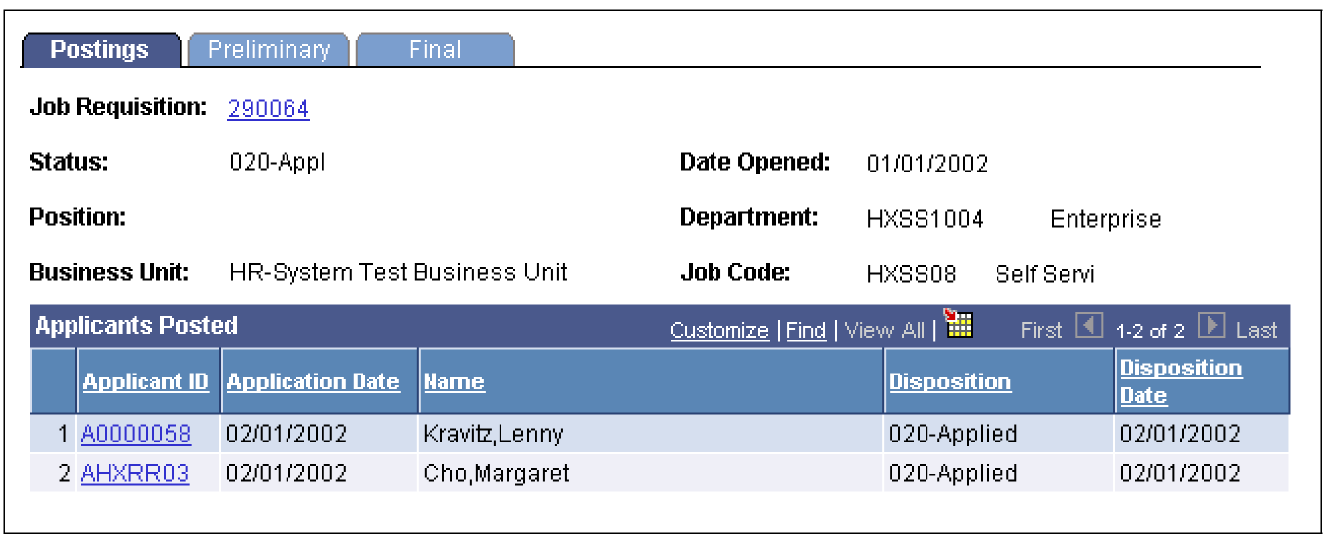
If you are not satisfied with the applicants who have applied for a requisition, you can widen the search for other active applicants who meet the requisition requirements. From the Preliminary and Final pages, you can use the Search All button to search your entire applicant data for applicants who meet the screening criteria but did not apply for the requisition.

Pages Used to Screen Applicants

Page Name	Object Name	Navigation	Usage
Postings	REQ_SCREEN_POSTING	Recruiting, Identify/Process Applicants, Identify Candidates, Requisition Screening	Review the applicants who applied for a given job requisition.
Preliminary	REQ_SCREEN_PRELIM	Recruiting, Identify/Process Applicants, Identify Candidates, Requisition Screening, Preliminary Screening	Review the applicants who meet or exceed the preliminary screening criteria.
Requirements Matched	REQ_SCR_CM_SEC	Click Rqmts Met (requirements met) on the Preliminary page or the Final page.	Review the job requirements that the applicant meets.
Final	REQ_SCREEN_FINAL	Recruiting, Identify/Process Applicants, Identify Candidates, Requisition Screening, Final Screening	Review the applicants who meet or exceed the final screening criteria, and select applicants for routing.
Route To	REQ_SCR_ROUTE_SEC	Click Route To on the Final page	Enter the names of employees who will review routed applicants' details and dates when responses are due.

Reviewing Applications

Access the Postings page.



Postings page

Applicants Posted

This group box lists the applicants who applied for the requisition or you linked to the requisition.

Applicant ID Click an applicant ID to display the applicant's address, work preferences, and the full resume text.

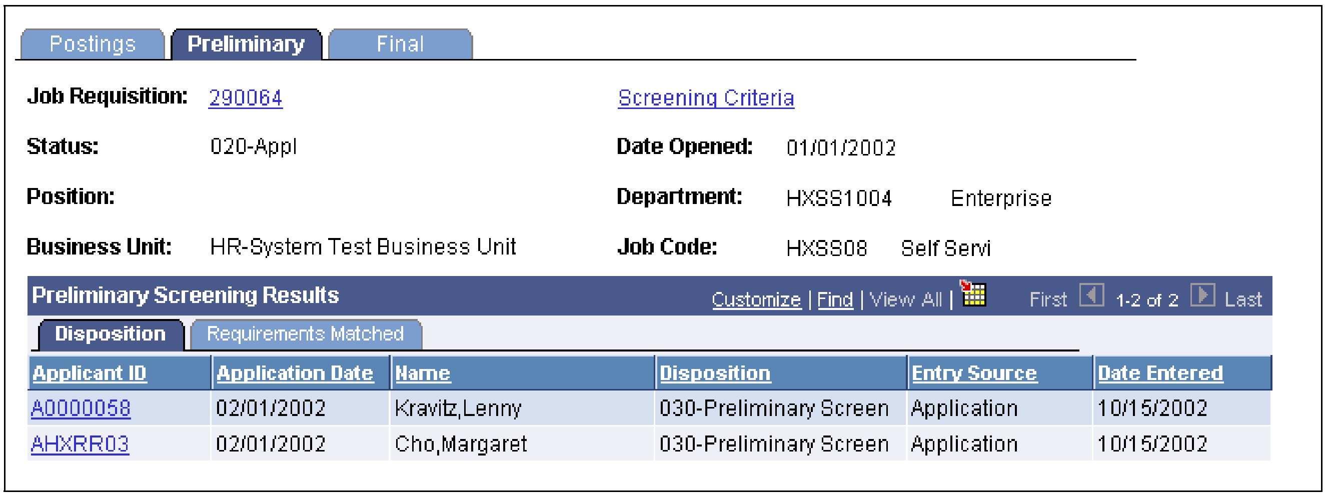
Route Duplicates for Inspection This button appears if the system finds two or more applicants with the same first and last name. The applicants are designated with a warning symbol. Click this button if you want an administrator to check the applicant data and merge duplicate applicants.

See Also

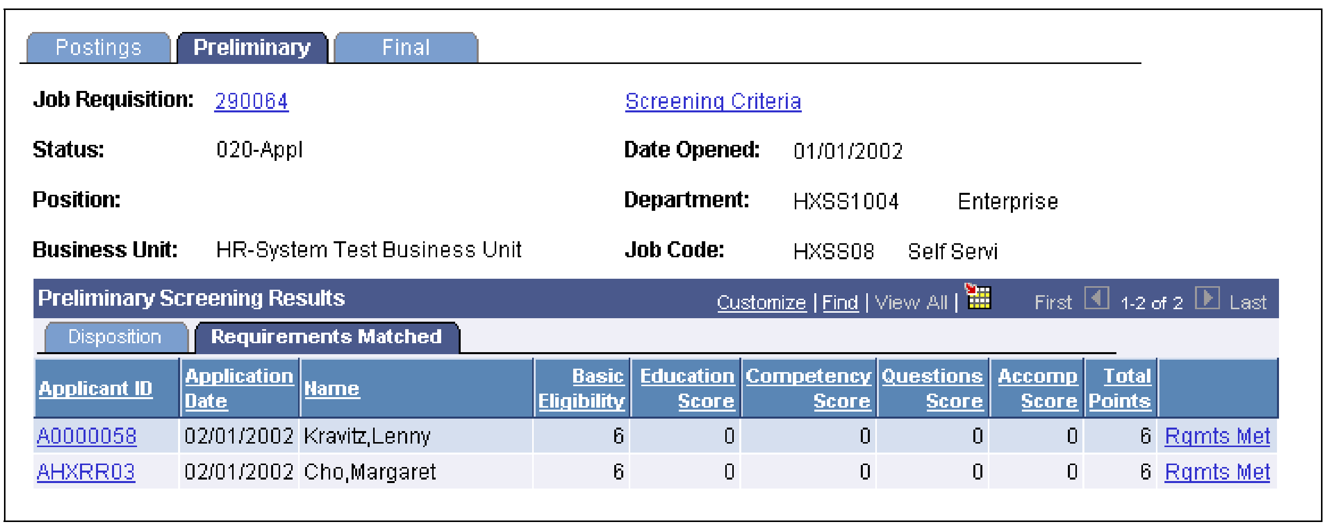
Chapter 7, "Managing Applicants," Merging Duplicate Applicant Records, page 148

Reviewing Preliminary Screening Results

Access the Preliminary page.



Preliminary page: Disposition tab



Preliminary page: Rqmts Met tab

Job Req # The Job Req # acts as a link to the Job Requisition Data page.

Preliminary Screening Results

This group box lists only applicants who meet or exceed the preliminary screening criteria.

Disposition This section provides detailed information about the applicants who passed the preliminary screening.

Rqmts Met The Rqmts Met (requirements met) tab displays the points awarded to the applicant for Basic Elig (basic eligibility), Educ/Expr (education/work experience), Compts (competencies), Accomps (accomplishments), and Questions (screening questions).

The points awarded depend on the importance that you assigned to that requirement. For the screening questions, you assign a point value for each possible answer. Assign importance values and points values on the Job Requisition Data - Screening Criteria page.

Search All Click to search your entire applicant data table for applicants who meet the preliminary screening criteria that you set up. The system uses the Job Function field to search for applicants who are looking for work in the same function. You specify job function on the Job Code table and on the Applicant Data - Application Data 1 page.

The system updates the list of applicants with additional applicants who meet the screening criteria but did not apply for the requisition.

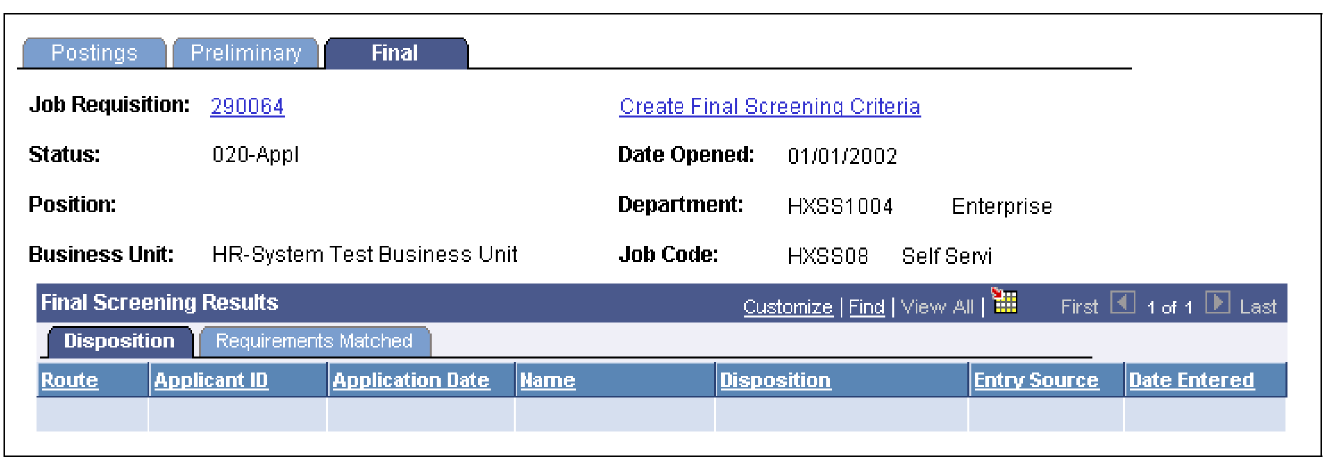
Reset Click to remove applicants who did not apply for the requisition from the list. This button is available after you click Search All.

See Also

Chapter 6, "Creating and Posting Job Requisitions," page 67

Reviewing Final Screening Results

Access the Final page.



Final page: Disposition tab

All of the elements on this page are identical to the fields on the Requisition Screening - Preliminary page with the following exceptions:

Final Screening Results This group box lists only applicants who meet or exceed the final screening criteria.

Route When you are satisfied with the list of applicants who pass the final screening, select the applicants who go forward for consideration by selecting this check box.

When you save the page, applicants who are being routed are assigned a disposition of *Route* and the remaining applicants who passed the screening are assigned *Final Screen.*

Route To Click to access the Route To page, where you enter the names of employees who will review routed applicants' details. Hiring managers enter their recommendations using the Select Applicant for Interview self-service transaction.

See Also

PeopleSoft eRecruit Manager Desktop PeopleBook

Entering Works Council Decision Data

This section discusses how to enter Works Council decision data.

Pages Used to Enter Works Council Decisions

Page Name	Object Name	Navigation	Usage
HR Administrator Information	APP_HR_DECISION1	Recruiting, Identify/Process Applicants, HR Administrator Decision	Review an employee's personnel action and related information. The information on this page is display only. LKS:not sure this page is relevant to works council process
Works Council Decision	APP_WC_DEC2_INQ	Recruiting, Identify/Process Applicants, Works Council Decision	Enter the works council's decision, or response, to the pending personnel action.
Works Council Recruit Status	RECRUIT_STATUS_TBL	Set Up HRMS, Product Related, Recruiting, Status Effects, Works Council Recruit Status	Enter information to update an applicant's status in the Applicant Activity component when a works council makes a decision pertaining to the applicant.

Tracking Requisition Activity

When you've completed screening and narrowed down the applicant list to a manageable size, you can start reviewing remaining applicants in detail.

This section discusses using the Requisition Activity component to:

- View the list of applicants who passed screening.
- View routing information.
- View interview schedules for each applicant.

  Recruiting administrators, hiring managers, or recruiters schedule interviews using the Schedule Applicant for Interview page.
- View the results of interviews.

  Interviewers submit their evaluation of applicants using the Interview Evaluation Form self-service transaction. From Requisition Activity, you can view each interviewer's overall rating and recommendations.
- Enter job offer information and record applicants' responses to offers.
- Record expenses claimed by applicants.

See Also

Chapter 10, "Interviewing Applicants," page 209

PeopleSoft 8.8 eRecruit PeopleBook, "Interviewing Applicants"

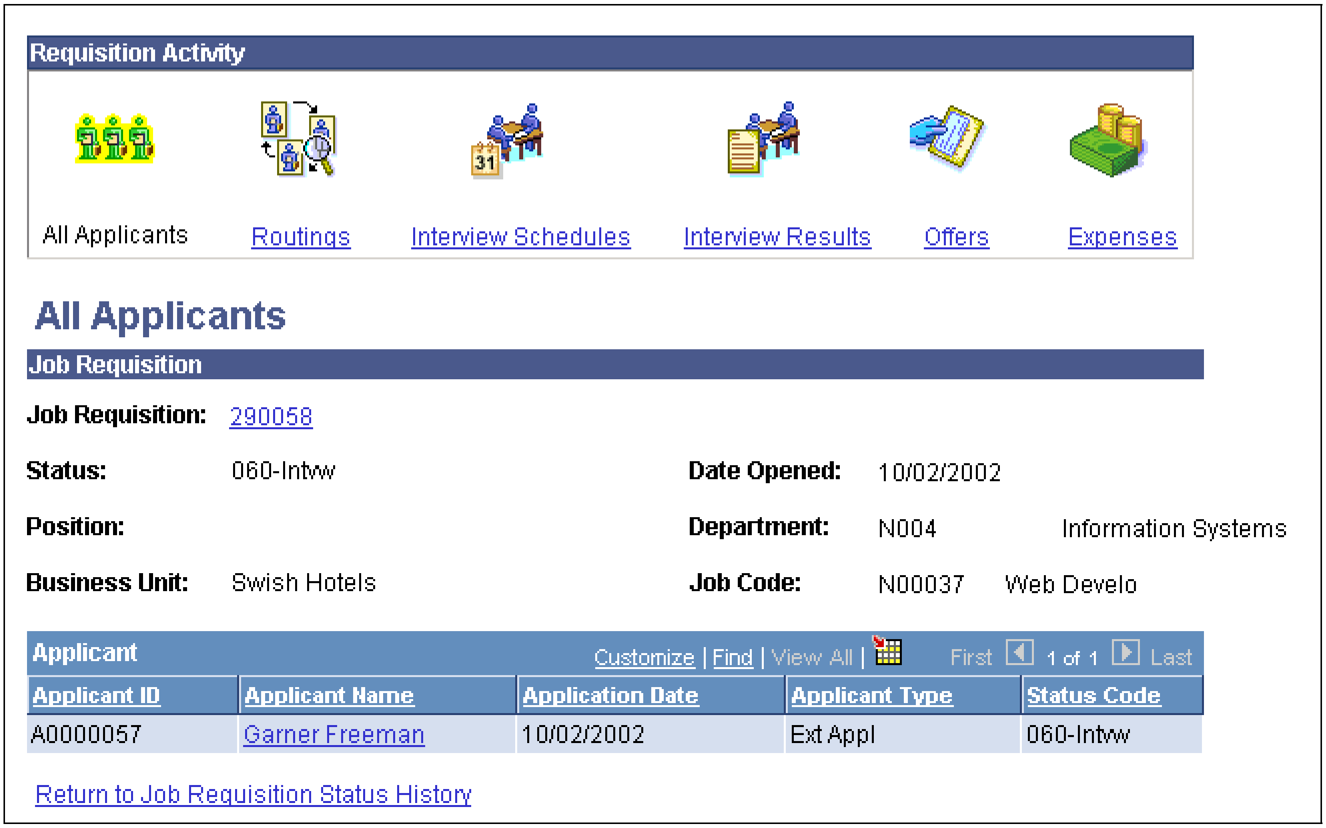
Chapter 13, "Tracking Recruitment Expenses," page 241

Pages Used to Track Requisition Activity

Page Name	Object Name	Navigation	Usage
All Applicants	REQ_ACTIVITY_APPL	Recruiting, Job Requisitions/Posting,s Track Requisition Activities	Review the status of applicants who applied for the job requisition.
Routings	REQ_ACTIVITY_ROUTE	Recruiting, Job Requisitions/Postings, Track Requisition Activities, Routings	View the list of applicants whose details were routed to reviewers for consideration. View details of the reviewers and their recommendations.
Interview Schedules	REQ_ACTIVITY_SCHDL	Recruiting, Job Requisitions/Posting,s Track Requisition Activities, Interview Schedules	View a list of applicants invited for interviews and details of the interviews scheduled for each applicant.
Interview Results	REQ_ACTIVITY_RSLTS	Recruiting, Job Requisitions/Posting,s Track Requisition Activities, Interview Results	View the results of interviews. For each applicant, you can view the interviewers' rating and recommendation.
Offers	REQ_ACTIVITY_OFFER	Recruiting, Job Requisitions/Posting,s Track Requisition Activities, Offers	View applicants who received a job offer. Enter the details of the applicants' job offers.
Offer Comments	ER_OFFER_COMMENTS	Click the Comments link on the Offers page	View the history of the comments related to the job offer. For example, you might use it to track contact with the applicant, such as the date that the contract is sent or discussions with the applicant.
Offer Status	ER_OFFER_STATUS	Click the Status link on the Offers page	View the history of the job offer.
Expenses	REQ_ACTIVITY_EXPS	Recruiting, Job Requisitions/Posting,s Track Requisition Activities, Expenses	Record costs claimed by applicants related to the requisition.

Viewing All Applicants

Access the All Applicants page.



All Applicants page

Job Requisition

Click to access the Job Requisition Summary page, where you can view all details of the job requisition.

Applicant

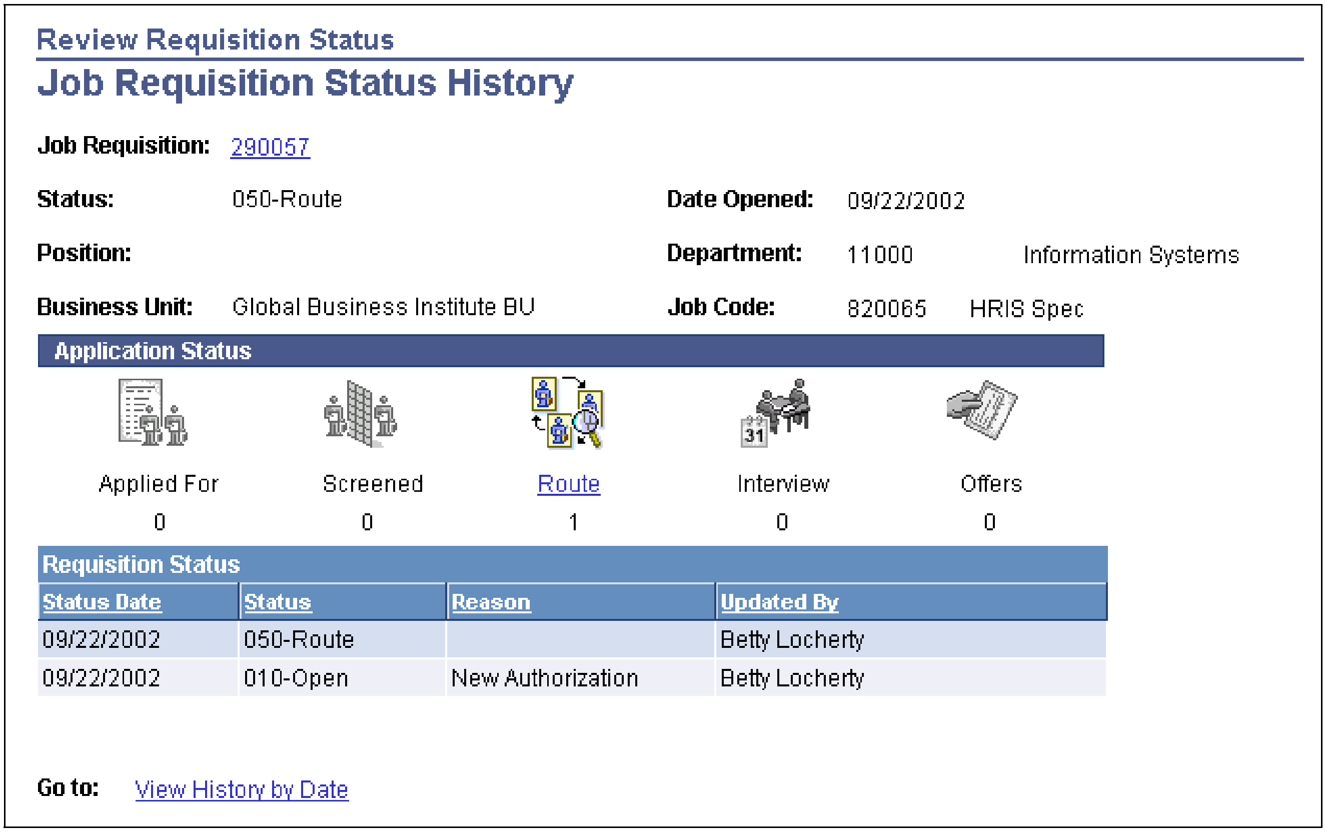
This group box lists the status of all applicants who are linked to the job requisition. This includes applicants who have specifically applied for the requisition and applicants that you have identified as suitable for the requisition.

See Also

Chapter 6, “Creating and Posting Job Requisitions,” page 67

Reviewing Routing Information

Access the Routings page.



Review Requisition Status

Job Requisition Status History

Job Requisition: 290057

Status: 050-Route

Date Opened: 09/22/2002

Position:

Department: 11000 Information Systems

Business Unit: Global Business Institute BU

Job Code: 820065 HRIS Spec

Application Status

Applied For	Screened	Route	Interview	Offers
0	0	1	0	0

Requisition Status

Status Date	Status	Reason	Updated By
09/22/2002	050-Route		Betty Locherty
09/22/2002	010-Open	New Authorization	Betty Locherty

Go to: View History by Date

Routings page

Route To ID	The employee who reviewed the applicant’s information.
Due Date	The date by which the reviewer should respond with a recommendation.
Status	The route status.

Reviewing Interview Schedules

Access the Interview Schedules page.

Interview Schedule page

For applicants selected for interview, the system displays the date and time of their interviews.

See Also

Chapter 10, "Interviewing Applicants," page 209

Viewing Interview Results

Access the View Interview Results page.

View Interview Results page

Interviewer The employee who interviewed the applicant.

Overall Rating The interviewer's rating of the applicant. The rating scale is defined when you create the interview evaluation form. Create forms using the Interview Evaluation Definition page.

Recommendation The interviewer's recommendation. The choice of recommendations is defined when you create the interview evaluation form.

Total Score The applicant's total score. This comes from the interview evaluation forms. For each item evaluated, applicants are awarded a number of points according to the interviewer's rating of the applicant.

Evaluation Click to view the Interview Evaluation form that the interviewer completed.

See Also

Chapter 3, "Setting Up Recruit Workforce," page 11

Entering Job Offers

Access the Offers page.

Offers page

Offers

Status

Select an offer status and Status Reason from the available options. PeopleSoft deliver the following offer statuses:

010-Extend: You made a job offer, but the applicant hasn’t responded.

020-Accept: The applicant accepted the job offer.

030-Acc WD (acceptance withdrawn): The applicant has withdrawn after previously accepting the job offer.

100-Hold: The applicant is on hold.

110-Reject: The applicant rejected your job offer. Select the reason for the rejection.

120-Withdr (withdrawn): The applicant withdrew or is no longer being considered for the requisition.

For a full history of the changes in offer status, click the Status link to access the Offer Status page.

Letter Code

Select a letter code to generate a form letter. The standard codes supplied by PeopleSoft for use on this page are *OF1* and *OF2.* These codes generate job offer letters.

Define letter codes in the Standard Letter Table.

Comments

Click to access the Offer Comments page, where you can view a history of comments related to the job offer and add comments.

Offer Details

Add each component of the applicant's job offer, such as base salary, bonus payments, and stock options.

Offer Component

Select the offer component from the options set up on the Offer Component Table.

Offer Amount

Enter the amount for the offer component, set the Currency Code, and select the Frequency.

See Also

PeopleSoft Application Fundamentals for HRMS PeopleBook

Chapter 3, "Setting Up Recruit Workforce," page 11

Chapter 7, "Managing Applicants," page 115

Entering Applicant Expenses

Access the Expenses page.

Requisition Activity - Expenses page

Charge Date Enter the date that the expense is charged to the selected Department.

Expense Code Select the type of expense from the available options.

Expense Amount Enter the expense amount and the Currency Code.

Using Checklists to Process Applicants

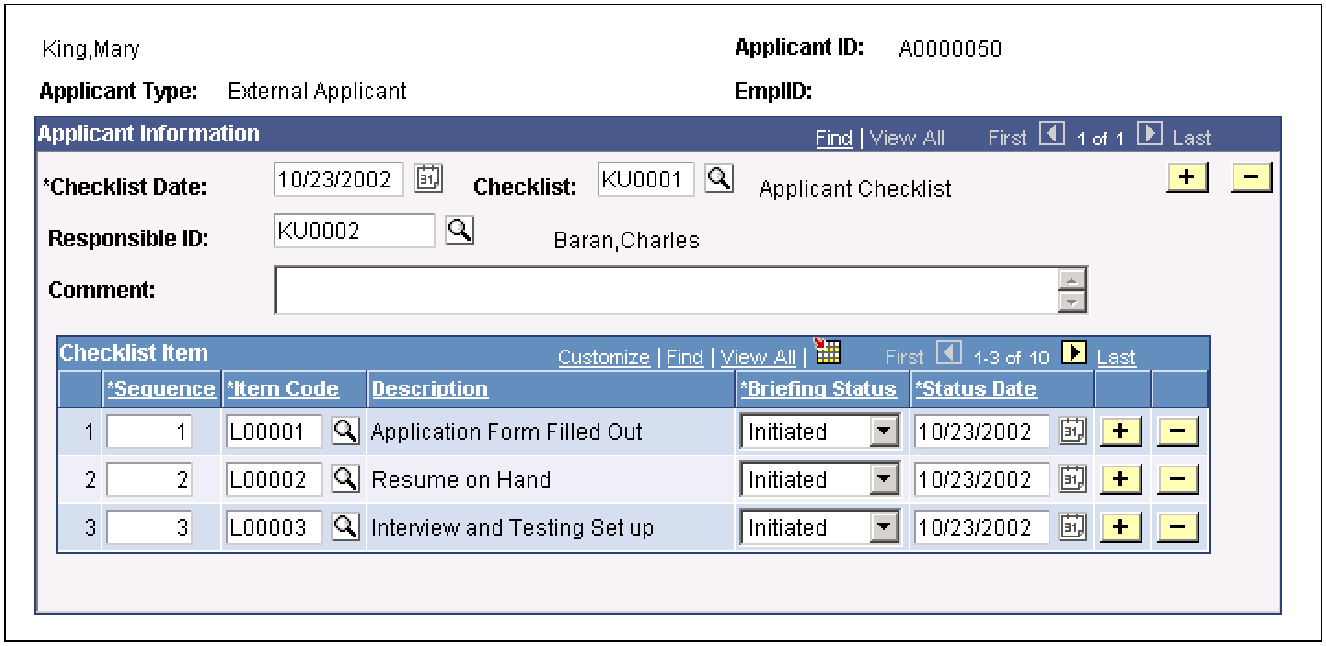
A checklist helps you remember all the details you need to get applicants through the recruiting process. You can use standard lists that you create in the Checklist Table or create an individualized checklist for a particular applicant for whom you're processing recruitment activities.

Page Used to Modify Checklists

Page Name	Object Name	Navigation	Usage
Checklist	APP_CHECKLIST	Recruiting, Hire Applicants, Prepare for Hire, Create Applicant Checklist	Modify a checklist for a particular applicant.

Modifying Checklists

Access the Checklist page.



Checklist page

The fields on this page are the same as those on the Checklist page accessed from the Administer Workforce business process.

See Also

PeopleSoft 8.8 Human Resources PeopleBook: Administer Workforce, "Setting Up the Administer Workforce Business Process"

Tracking Applicants

With the Applicant Activity pages, you can easily track the progress of applicants in the recruitment process from one convenient page. You can:

- View applicants' applications and link them to additional job requisitions.
- View routing information.
- View interview schedules.

- View and enter interview results.
- Enter job offer details.
- Record expenses claimed by applicants.

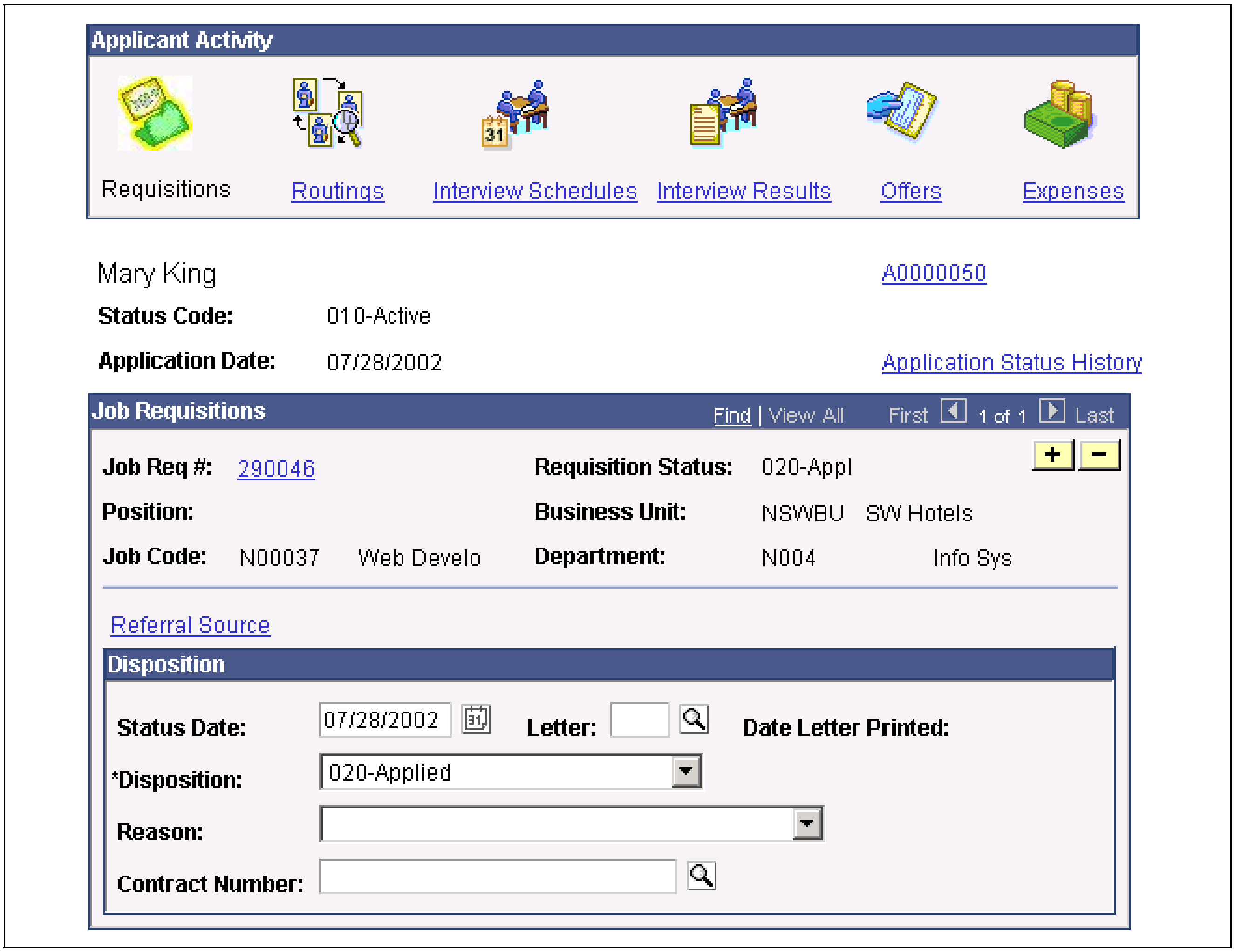
U.S. Federal users have an additional link on all the Applicant Activity pages to the Applicant Supply File page where they link applicants to job codes or positions that an applicant is applying for. This page is also accessible from the Applicant Data – Applicant Requisitions page.

Pages Used to Track Applicants

Page Name	Object Name	Navigation	Usage
Applicant Activity - Requisitions	APP_ACTIVITY_REQNS	Recruiting, Identify/Process Applicants, Track Applicant Activity	View the applicant's applications. From here, you can also link the applicant to additional job requisitions.
Referral Source Information	APP_ACT_REFSRC_SEC	Click the Referral Source link on the Applicant Activity - Requisitions page.	View and enter information about how the applicant was referred to your organization.
Applicant Activity - Routings	APP_ACTIVITY_ROUTE	Recruiting, Identify/Process Applicants, Track Applicant Activity, Routings	Record details of the people who reviewed the applicant's information or work samples and their recommendations.
Applicant Activity - Interview Schedule	APP_ACTIVITY_SCHDL	Recruiting, Identify/Process Applicants, Track Applicant Activity, Interview Schedule	View a list of the interviews that you have scheduled for the selected applicant. You can also enter interview evaluations and change the applicant status.
Applicant Activity – Interview Results	APP_ACTIVITY_RSLTS	Recruiting, Identify/Process Applicants, Track Applicant Activity, Interview Results	View the interviewers' rating and recommendation. You can also enter interview evaluations and change the applicant status.
Applicant Activity - Offers	APP_ACTIVITY_OFFER	Recruiting, Identify/Process Applicants, Track Applicant Activity, Offers	Enter the details of the applicant's job offers.
Applicant Activity – Expenses	APP_ACTIVITY_EXPS	Recruiting, Identify/Process Applicants, Track Applicant Activity, Expenses	Record costs claimed by applicants related to the requisition.

Linking Applicants to Requisitions from Applicant Activity

Access the Applicant Activity – Requisitions page.



Applicant Activity − Requisitions page (1 of 2)

Application Status History Click to access the Application Status History page where you can view a history of the application. The page lists, in chronological order, the application status/reason changes, and the user ID of the person who changed the status.

Referral Source Click to access the Referral Source Information page where you can view and add referral information

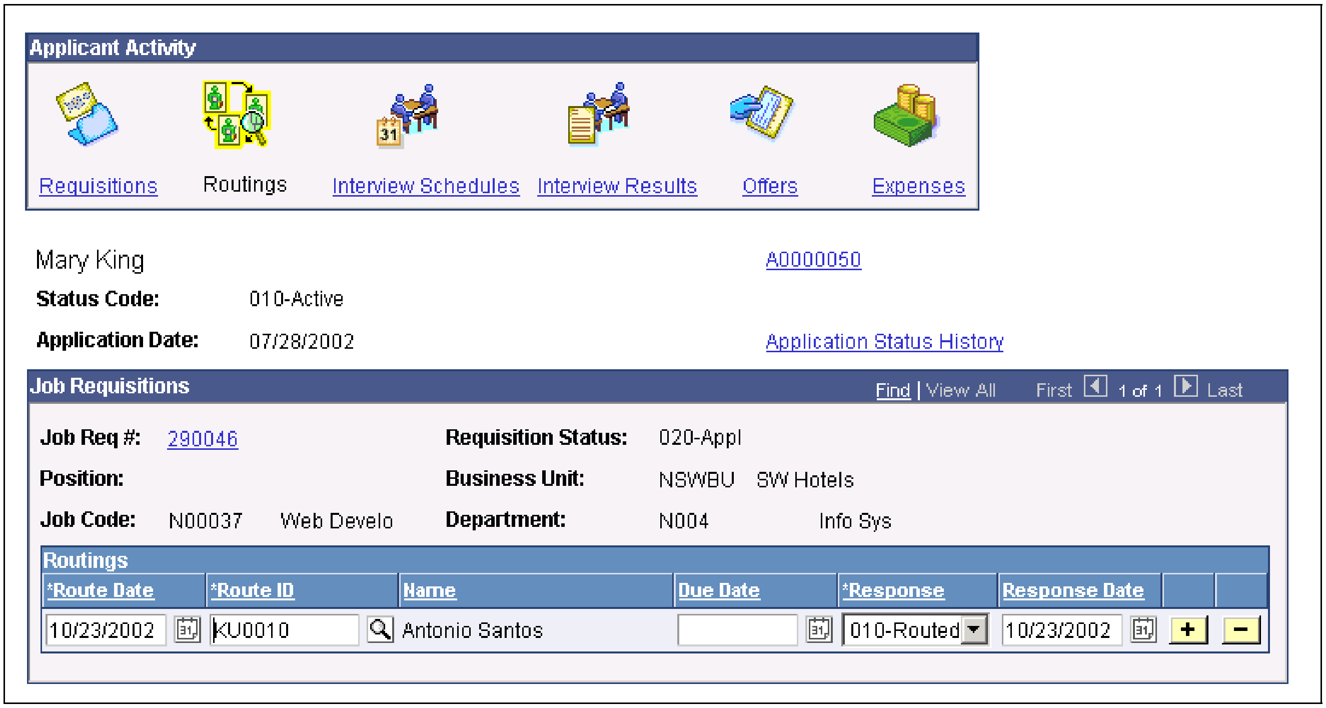
Disposition

You do not need to change any of the values in this group box if your organization uses requisition screening and PeopleSoft eRecruit Manager Desktop to process applicants. When you use those transactions, the system automatically updates this information.

Contract Number If you have defined a contract for the applicant, select the contract number.

Recording Routing Information

Access the Applicant Activity - Routings page.

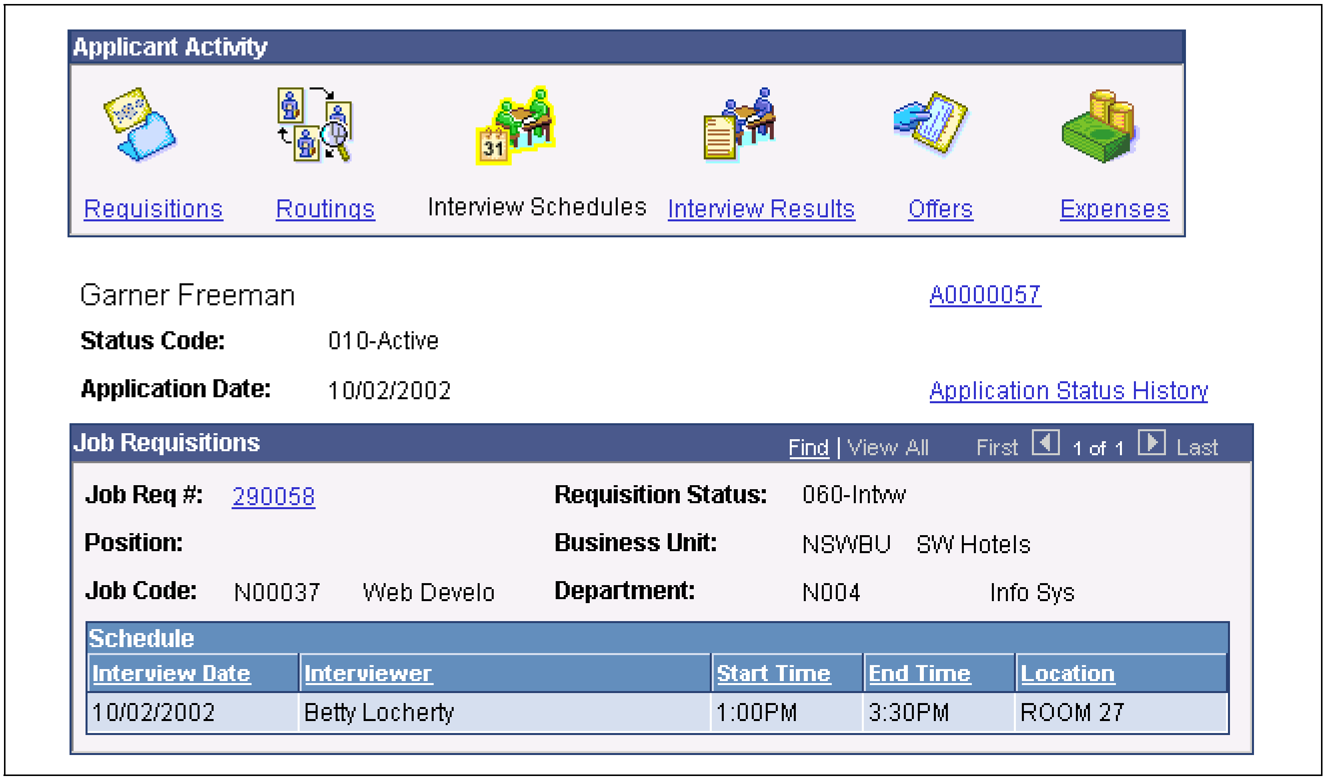


Applicant Activity - Routings page

Route to ID	The employee ID of the person who will review the application or resume.
Due Date	The date when a response is due from the reviewer.
Response Code	The reviewer’s recommendation and the Response Date.

Viewing Interview Schedules

Access the Applicant Activity - Interview Schedule page.



Applicant Activity - Interview Schedule page

The data displayed in the Schedule group box is populated from the interview schedule set up for the job requisition.

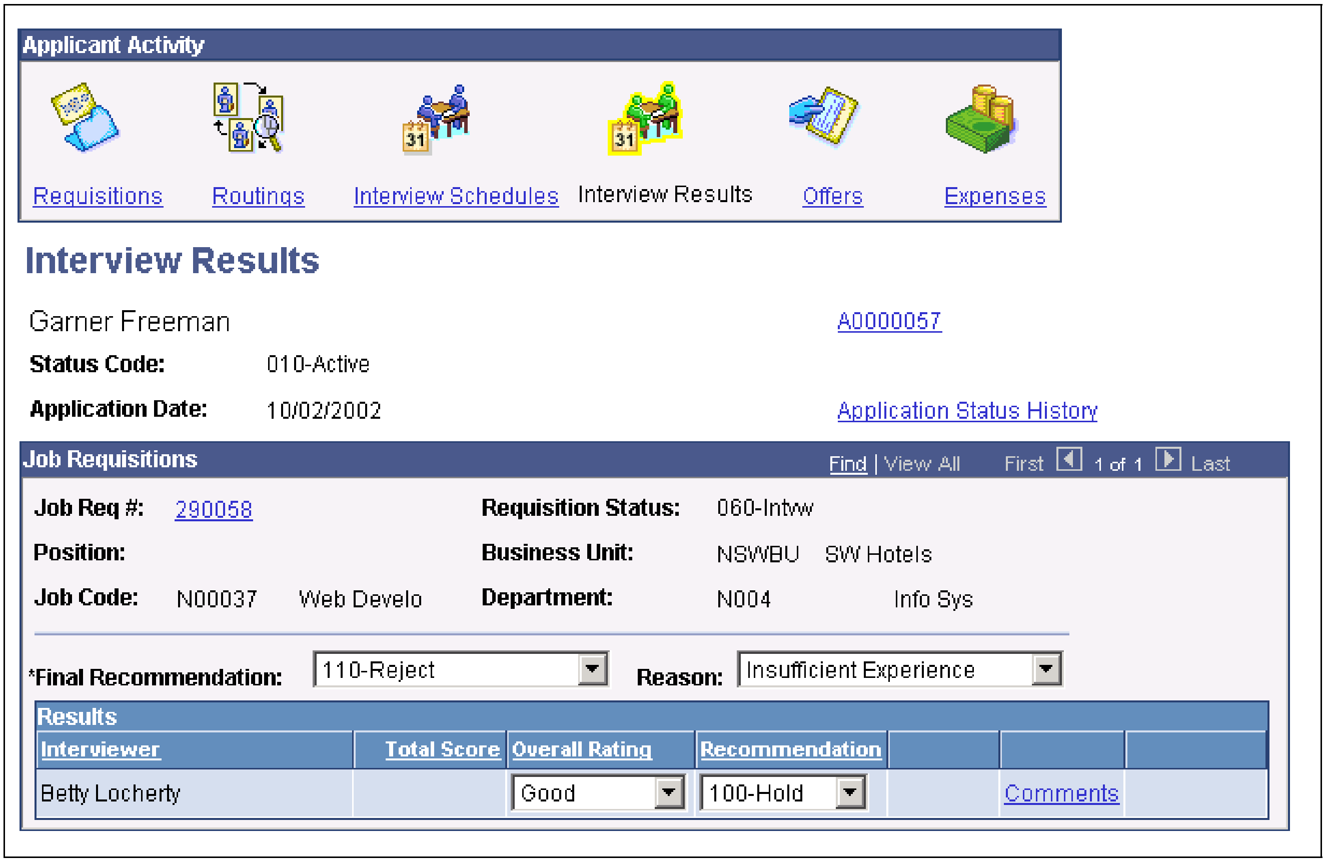
Set up interviews on the Schedule Applicant for Interview page.

See Also

Chapter 10, “Interviewing Applicants,” Scheduling Interviews, page 210

Viewing Interview Results

Access the Applicant Activity – Interview Results page.



Applicant Activity – Interview Results page

Interviewer The employee who interviewed the applicant.

Overall Rating The interviewer’s rating of the applicant. The rating scale is defined when you create the interview evaluation form. Create forms using the Interview Evaluation Definition page.

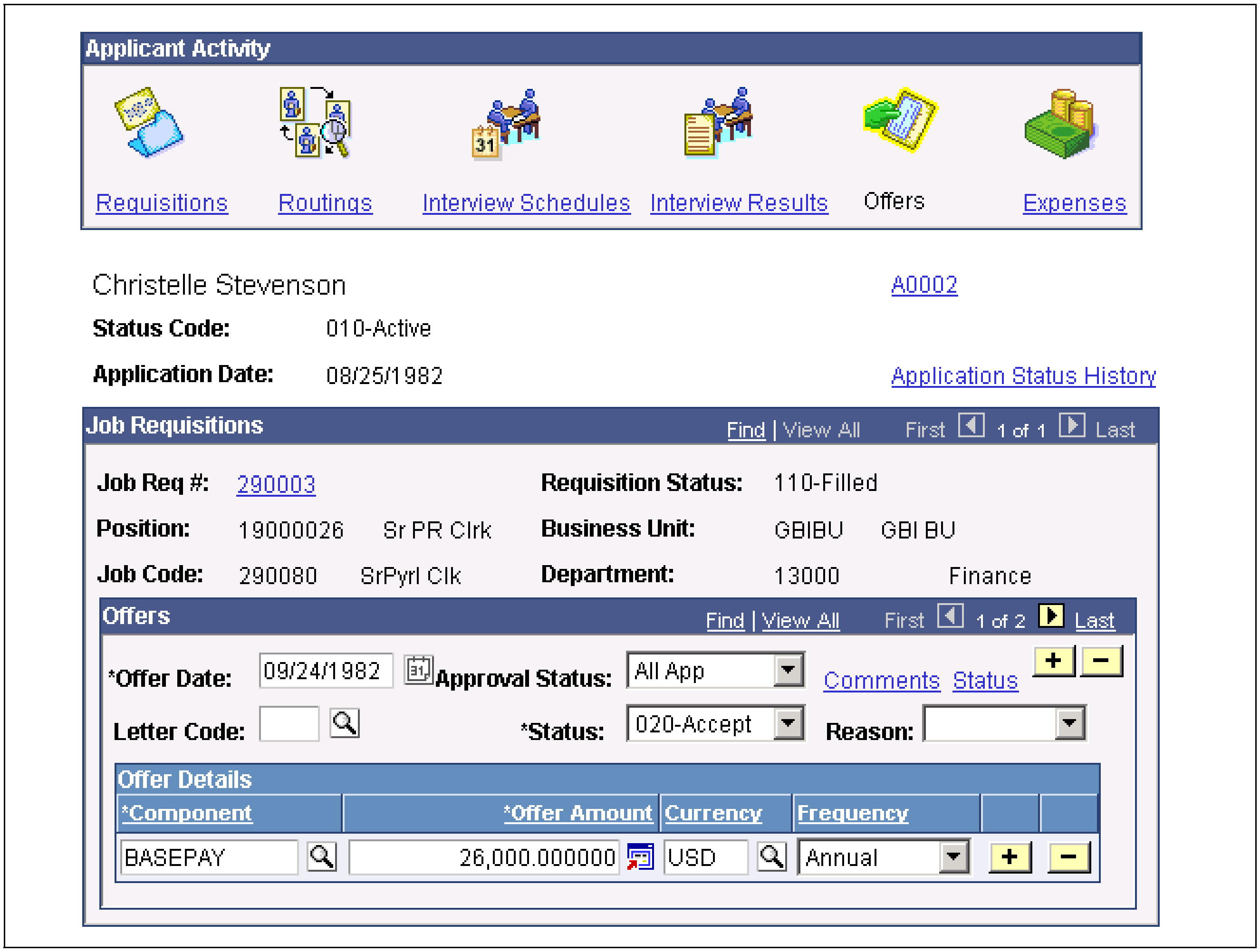
Recommendation The interviewer’s recommendation. The choice of recommendations is defined when you create the interview evaluation form.

Total Score The applicant’s total score. This comes from the interview evaluation forms. For each item evaluated, applicants are awarded a number of points according to the interviewer’s rating of the applicant.

Evaluation Click to view the Interview Evaluation form that the interviewer completed.

Tracking Job Offer Details

Access the Applicant Activity - Offers page.



Applicant Activity - Offers page

Offers

Status

Select an offer status and Status Reason from the available options. PeopleSoft deliver the following offer statuses:

010-Extend: You made a job offer, but the applicant hasn't responded.

020-Accept: The applicant accepted the job offer.

030-Acc WD (acceptance withdrawn): The applicant has withdrawn after previously accepting the job offer.

100-Hold: The applicant is on hold.

110-Reject: The applicant rejected your job offer. Select the reason for the rejection.

120-Withdr (withdrawn): The applicant withdrew or is no longer being considered for the requisition.

For a full history of the changes in offer status, click the Status link to access the Offer Status page.

Comments Click to access the Offer Comments page where you can view a history of comments related to the job offer and add comments.

Offer Details

Add each component of the applicant's job offer, such as base salary, bonus payments, and stock options.

Offer Component Select the offer component from the options set up on the Offer Component table.

Offer Amount Enter the amount for the offer component, set the Currency Code, and select the Frequency.

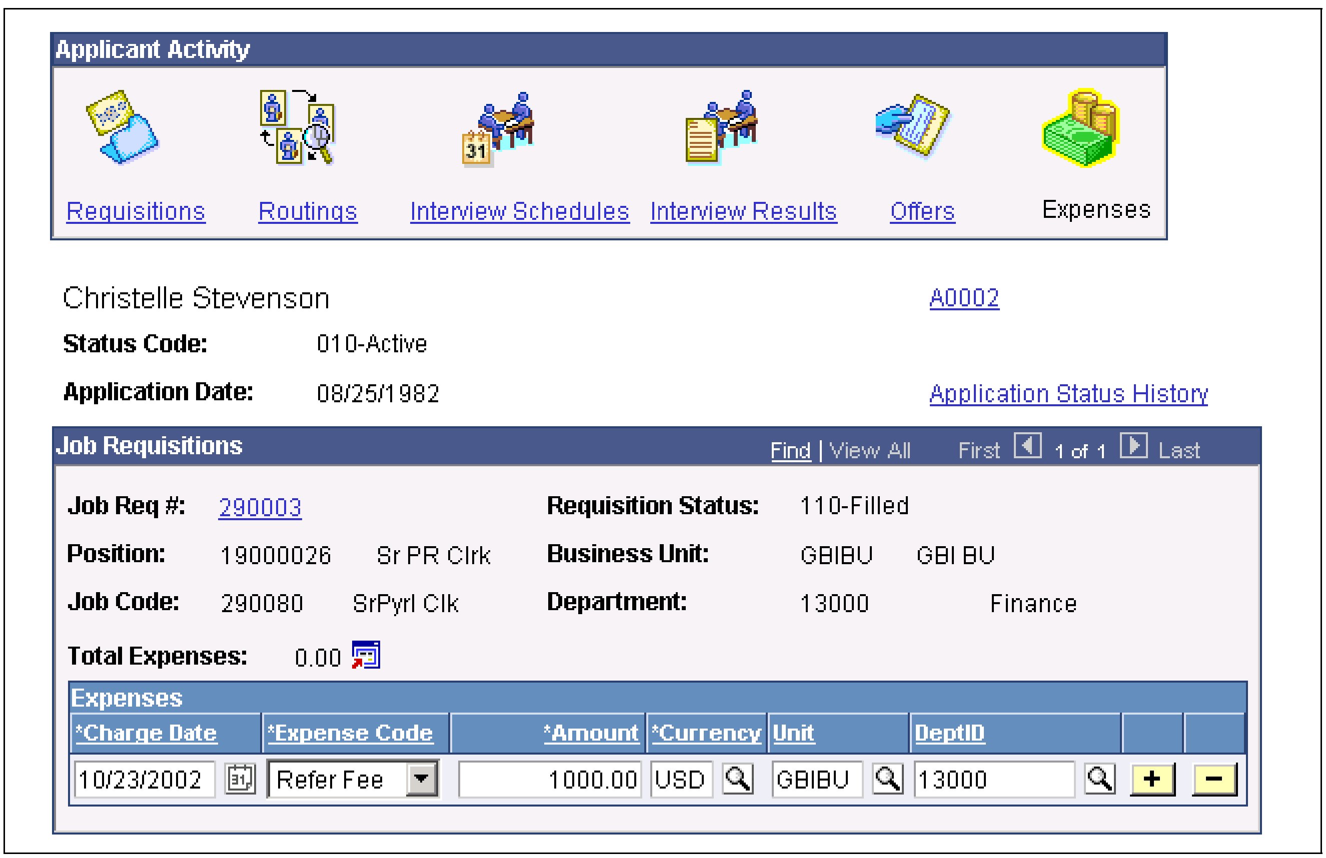
See Also

Chapter 3, "Setting Up Recruit Workforce," page 11

PeopleSoft Application Fundamentals for HRMS PeopleBook"

Entering Applicant Expenses

Access the Expenses page.



Applicant Activity - Expenses page

Charge Date Enter the date that the expense is charged to the selected Department.

Expense Code Select the type of expense from the available options.

Expense Amount Enter the expense amount and the Currency Code.

Viewing Applicant Status

Use the Applicant Status inquiry to view a history of applicants' job applications. For each job requisition that an applicant has applied for, you can view:

- The applicant's current disposition status and reason.
- The date on which the status changed.
- The person who changed the status.

Pages Used to View Applicant Status

Page Name	Object Name	Navigation	Usage
Application Status History	ER_POSN_STATUS	Recruiting, Identify/Process Applicants, Review Applicant Status Click Application Status History on any of the Applicant Activity pages	View the status of an applicant's applications. This page lists all the job requisitions to which the applicant is linked. U.S. Federal users have an additional link to the Applicant Supply File page where they can view the job codes or positions that an applicant is applying for. This page is also accessible from the Applicant Data – Applicant Requisitions page.

Viewing Job Requisition Status

Use the Requisition Status inquiry to view a history of the changes to requisition status. From the Job Requisition Status History page you can immediately see the current status of a requisition and the number of applicants at each recruitment phase. From here you can drill down to each recruitment phase and view applicant information.

Pages Used in Viewing Job Requisition Status

Page Name	Object Name	Navigation	Usage
Job Requisition Status History	ER_REQ_STS_SUMM1	Recruiting, Job Requisitions/Postings, Review Requisition Information, Requisition Status	View a summary of the job requisition.
Job Requisition Status History Detail	ER_REQ_STATUS_SEC	Click a link in the Application Status group box on the Job Requisition Status History page	View a list of applicants at the recruitment phase you selected (applied for, screened, route, interview, or offer).
Job Requisition Status History by Date	ER_REQ_STS_SUMM2	Click View History By Date link on the Job Requisition History page	View a history of the status changes made to a job requisition and a list of applicants linked to it.
Applicant Resume	APPLICANT_INFO	Click applicant ID on the Job Requisition Status History Detail page.	View an applicant's full details. This page shows all applicant information, including contact details, preferences, competencies, and accomplishments.

Running Reports of Recruiting Activity

This section explains how to generate reports of:

- Status of requisitions.
- Applicants being interviewed for open requisitions.
- Source of applicants.
- Racial and gender demographic data regarding your hiring process.

Pages Use to Print Recruiting Activity Reports

Page Name	Object Name	Navigation	Usage
Requisition Status Report	PRCSRUNCNTL	Recruiting, Recruiting Reports, Requisition Status Report	Runs the Requisition Status report (APP003), which lists job information, requisition status, recruiter, number of applicants, and expense information for each job requisition.
Applicant Summary by Requisition Report	PRCSRUNCNTL	Recruiting, Recruiting Reports, Summarize Applicants by Req	Runs the Applicant Summary by Requisition report (APP011), which lists the number of applicants and percentage of total applicants that applied, sorted by source type and specific source.
Applicant Summary by Source Report	PRCSRUNCNTL	Recruiting, Recruiting Reports, Summarize Applicants by Source	Runs the Applicant Summary by Source report (APP012, which lists the number of applicants and percentage of total applicants that applied, sorted by source type and specific source regardless of requisition.
Candidate Listing Report	PRCSRUNCNTL	Recruiting, Recruiting Reports, Candidate Listing	Runs the Candidate Listing report (APP005), which combines job requisition information with a list of candidates being interviewed for the position. It groups requisitions by department ID. For each candidate interviewed, the report displays employee ID, name, and status.
Job Group Movement Analysis	RUN_CNTL_REG	Recruiting, Hire Applicants, Job Group Movement Report	Run the Job Group Movement Analysis report (APP002), which provides gender and ethnic group movements in and out of the organization, and tracks career progression patterns.

Chapter 10

Interviewing Applicants

This chapter provides an overview of interview administration and discusses how to:

- Schedule interviews.
- Review interview schedules.
- Generate interview evaluation reminders.

Understanding the Interview Process

To organize interviews:

1. Schedule the interviews.
2. (Optional) Schedule the Interview Evaluation Reminder process.

   The Interview Evaluation Reminder process issues reminders to interviewers who haven't completed the interview evaluation form.
3. Enter interview results.

   When interviews are completed, interviewers complete the interview evaluation form and make recommendations using self-service transactions. The hiring manager or recruiter views a summary of all the interviewers' recommendations and makes the final decision whether to hire the applicant.

   You can define different evaluation forms for different types of jobs. The form used for an evaluation is determined by the recruitment template that you select when you create the job requisition.

See Also

PeopleSoft 8.8 eRecruit Manager Desktop PeopleBook, "Organizing Interviews"

Chapter 9, "Processing Applicants," Tracking Requisition Activity, page 189

Chapter 7, "Managing Applicants," Understanding How to Track the Progress of Applicants, page 118

Prerequisites

Interview results are recorded on interview evaluation forms. Each job requisition is associated with a recruitment template that defines the interview evaluation form used for that job.

You must define your interview evaluation forms and link these to recruitment templates before you can enter interview results. The Interview Evaluation self-service transaction displays only the form that is associated with the requisition.

Scheduling Interviews

Recruiting administrators schedule interviews for any requisitions. If you have PeopleSoft eRecruit Manager Desktop installed, hiring managers and recruiters can also set up interviews for their own requisitions.

Here's how to schedule an interview:

1. Select the interviewer, date, and time for the interview.
2. Check interviewer availability.

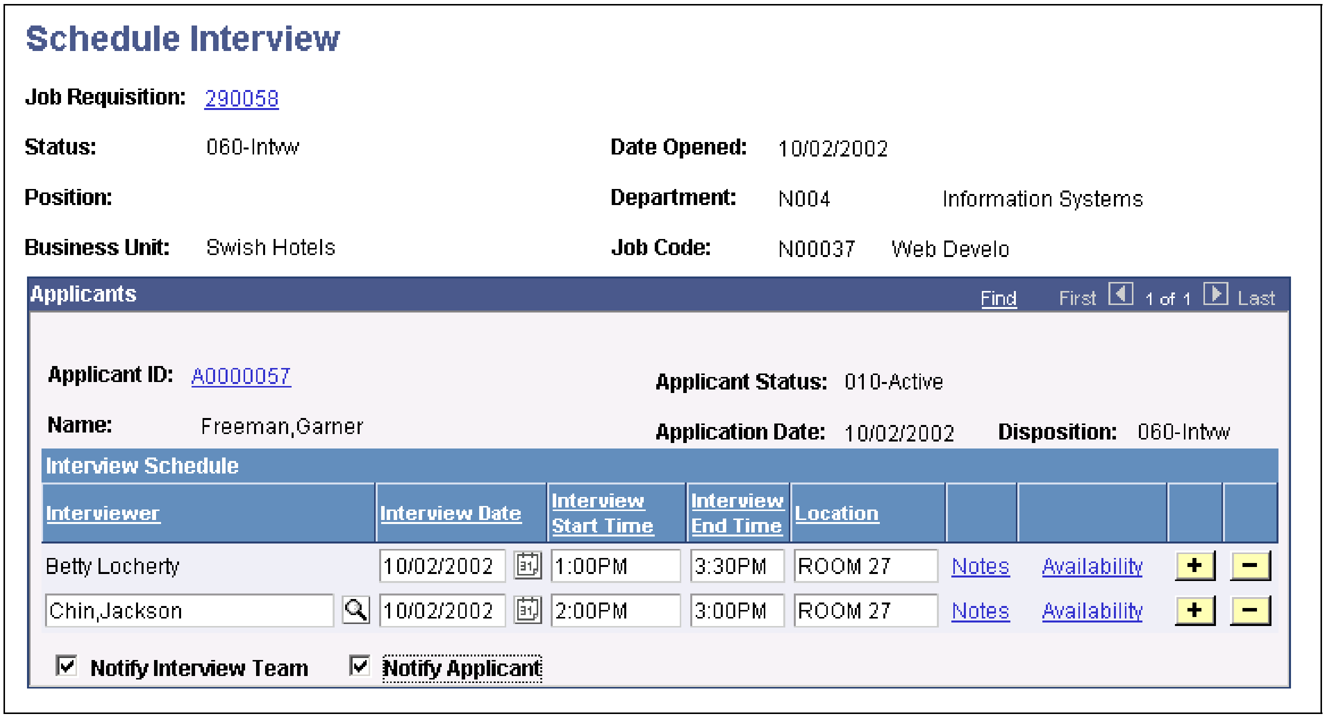
   You can view other interviews scheduled for an interviewer on the selected date to avoid time conflicts.
3. (Optional). Add comments regarding the interview.
4. Review the interview schedule.

Pages Used to Schedule Interviews

Page Name	Object Name	Navigation	Usage
Schedule Interviews	ER_INTERVIEW_SCHED	Recruiting, Interview Applicants, Schedule Interviews	Set up interviews for a given requisition.
Interviewer Availability	ER_INTVW_AVAIL_SEC	Click Availability link on the Schedule Interview page	View a list of interviews scheduled for the selected interviewer on a given day.
Recruiter Comments	ER_RCRTR_CMTS_SEC	Click Comments link on the Schedule Interview page	Enter comments for interviewers.
Review Schedule by Requisition	ER_INTVW_SCHED_REQ	Recruiting, Interview Applicants, Review Schedule by Requisition	View the entire interview schedule for a specific requisition.

Scheduling Interviews

Access the Schedule Interviews page.



Schedule Interview

Job Requisition: 290058

Status: 060-Intvw
Date Opened: 10/02/2002

Position:
Department: N004 Information Systems

Business Unit: Swish Hotels
Job Code: N00037 Web Develo

Applicants — Find First 1 of 1 Last

Applicant ID: A0000057
Applicant Status: 010-Active

Name: Freeman,Garner
Application Date: 10/02/2002
Disposition: 060-Intvw

Interview Schedule

Interviewer	Interview Date	Interview Start Time	Interview End Time	Location				
Betty Locherty	10/02/2002	1:00PM	3:30PM	ROOM 27	Notes	Availability	+	−
Chin,Jackson	10/02/2002	2:00PM	3:00PM	ROOM 27	Notes	Availability	+	−

☑ Notify Interview Team ☑ Notify Applicant

Schedule Interview page

Interviewer The system automatically displays the interviewers that you selected when you created the job requisition. If no interviewers were specified, the system displays the originator.

Interview Date Enter the date of the interview, the Start Time, and the End Time for the interview.

Notes Click this link to display the Recruiter Comments page, where you enter information for interviewers.

Note. Comments are visible to applicants viewing their interview schedule using PeopleSoft eRecruit.

Availability Click this link to display the Interviewer Availability page, where you can view details of interviews scheduled for the interviewer on the date selected. This link is available only when you enter an interview date.

Generating Interview Evaluation Reminders

The Interview Evaluation Reminder process (ER_IN_EVAL) issues workflow emails or worklists to interviewers who have not completed the interview evaluation form.

Depending on your organizational requirements, run this process at regular intervals or on ad-hoc basis. If you have interviews scheduled regularly throughout the year, it is more effective to run the process at defined intervals.

The default recurrence definition associated with this process is *Weekly - Friday,* which means the process runs once a week every Friday.

Create your own recurrence definition for the process or modify the *Weekly - Friday* definition to suit your needs. To create or modify recurrence definitions, from PeopleTools select Process Scheduler Manager, Use, Recurrence Definitions.

In the Every fields in the Repeat group box, enter the frequency and time unit (*Hours, Minutes,* or *Seconds*).

Once you have set up the schedule and started the PeopleSoft Process Scheduler, the process runs automatically without user intervention. However, if you need to run the process manually at an unscheduled time, use the Interview Evaluation Reminder - Run Control page.

See Also

PeopleTools PeopleBook: PeopleSoft Process Scheduler

Page Used to Run the Interview Evaluation Reminder Process

Page Name	Object Name	Navigation	Usage
Interview Evaluation Reminder - Run Control	RUNCNTL_ER_INT_REM	Recruiting, Interview Applicants, Create Interview Eval Reminder	Run the Interview Evaluation Reminder process (ER_INT_EVAL) on an ad-hoc basis. Define the interview period by entering a From Date. The system generates reminders for interviews that were scheduled after this date but before the current date. This ensures that you don't issue reminders for all old interviews in your system.

Running Candidate Listing Reports

This section explains how to run a Candidate Listing report.

Page Used to Run Candidate Listing Reports

Page Name	Object Name	Navigation	Usage
Candidate Listing	PRCSRUNCNTL	Recruiting, Identify/Process Applicants, Identify Candidates, Candidate Listing	This report combines job requisition information with a list of candidates being interviewed for the position. It groups requisitions by Department ID.

CHAPTER 11

Hiring Applicants

This chapter provides an overview of the hiring process for the three types of applicants and discusses how to:

- Set up contracts.
- Specify employment information in contracts.
- Enter hiring data.

Understanding the Hiring Process

The process of hiring applicants varies according to the type of applicant:

- External applicant.
- Non-employee.
- Employee.

Note. If you're rehiring employees, they are processed as external applicants. The only difference is that you can assign their previous employee ID.

Hiring External Applicants

Here's how to hire an external applicant:

1. Set up the applicant's contract data (optional).

   In some countries you might be required to set up employment contracts in advance of hiring applicants. If this applies to you, set up the applicant's contract using the Applicant Contract Data . Next, enter the applicant's contract number on the Applicant Activity − Requisitions page.

2. Add the applicant as a non-employee if you want to enroll the applicant in training courses prior to hiring (optional).

   Sometimes you need to train applicants before you actually hire them. To enroll someone in a course using Administer Training the person must be an employee or non-employee, so create a temporary non-employee record for the applicant. Click the Add Non-Employee link on the Applicant Data − Applicant Requisition page or Applicant Activity pages.

3. Hire the applicant using the Hire Applicant pages.

   This creates an employee ID for the applicant and the system copies the applicant information that you entered in Recruit Workforce to the new employee records. If you specified an employment contract, the system automatically transfers the contract information to the hired applicant's employee records.

See Also

Chapter 11, "Hiring Applicants," Specifying Employment Contracts for Applicants, page 215

Chapter 11, "Hiring Applicants," What Happens When You Hire Applicants?, page 214

Hiring Non-Employees

Here's how to hire an applicant who is currently a non-employee:

1. Set up the applicant's contract data (optional).
2. Hire the applicant using the Hire Applicant pages.

Note. The non-employee data remains in your system when you hire the applicant. You must manually update the non-employee data to indicate that it is no longer active. Maintaining non-employee data is explained in *PeopleSoft Human Resources PeopleBook: Administer Workforce.*

See Also

Chapter 11, "Hiring Applicants," Hiring External Applicants, page 213

Hiring Employees

Employees who apply for openings within your organization already have employment contracts and employee IDs. To record the employee's job transfer, update the employee's job data instead of using the Hire Applicant pages.

Here's how to transfer employees:

1. From the Job Data − Work Location page, insert a new row. Enter the effective-date that the employee starts the new job.
2. In the Action field, select *Transfer* from the available options. In the Reason field, select *Internal Recruitment.*

   When you navigate out of the Reason field, the system displays the Job Requisition # (job requisition number) field.
3. Select the job requisition from the list of open requisitions and save the changes.

   When you save the page, the system changes the employee's job details and updates the status of the successful applicant and other applicants linked to the requisition.

What Happens When You Hire Applicants?

Although the process for hiring applicants varies according to the type of applicant, the system updates the applicant and job requisition records in the same way.

Here's how the system handles the following types of data:

- Hired applicant's records.

The system sets the applicant's application status to *Hired* and the disposition status to *Hired.* You can't link hired applicants to requisitions and the system excludes hired applicants when searching for applicants to match requisitions. This prevents you from accidentally linking the applicant to any new requisitions. If the applicant is linked to more than one requisition, the system updates the disposition of the other applications to *Reject* with a reason of *Selected* for *Other Position.* This means the applicant has withdrawn from those requisitions and is automatically excluded from requisition screening and subsequent recruitment activity.

- Data for other applicants linked to the requisition.

  If all the openings for the requisition are filled, the system changes the disposition of all applicants linked to the requisition with a disposition of *On Hold* to *Rejected* and sets the Reject Reason field to *Another applicant hired.*

- Requisition data.

  If the requisition has no further openings (Target Openings is *0*), then the system sets the requisition status to *Filled.*

Setting Up Contracts

If your organization creates and uses employment contracts, you can use PeopleSoft Human Resources to define and maintain those contracts. Three tables are included for setting up employment contract components:

- Contract Type Table

  Use this table to define the different types of contracts that your organization administers.

- Contract Clause Table

  Because contracts often have additional language and riders that can be added to the main body of an agreement, define these contract clauses in this table and reference them when you establish a contract between your organization and your workers in the Administer Workforce pages.

- Contract Template Table

  Use this table to set up and store all of your organization's standard employment contracts. Use this information when you assign particular contracts to employees and temporary workers in your organization.

Access these pages from the Set Up HRMS, Common Definitions, Contracts/Unions menu.

Specifying Employment Contracts for Applicants

Use the Applicant Contract Data pages to record important information about agreements and contracts that you are negotiating between your organization and job applicants and build contracts based on standard language and exclusions that you set up in the Contract Type, Contract Template, and Contract Clause Tables.

In this section we discuss how to:

1. Record basic contract information.
2. Define special contract clauses.

3. Track contract dates.

Note. The fields on these pages are the same as those on the Contract Status/Content page and Signature Date/Probation Info page accessed from the Workforce Administration business process.

Pages Used to Specify Employment Contracts

Page Name	Object Name	Navigation	Usage
Contract Status/Content	APP_CONTRACT1	Recruiting, Hire Applicants, Prepare for Hire, Create Employee Contracts, Contract Status/Content	Record basic information about the contract between your organization and the applicant, including the contract duration, type, and content information.
Contract Clause	APP_CONTRACT2	Recruiting, Hire Applicants, Prepare for Hire, Create Employee Contracts, Contract Clause	Define any special contract clause information to be added to the standard contract for the applicant.
Signature Date/Probation Info (signature date/probation information)	APP_CONTRACT3	Recruiting, Hire Applicants, Prepare for Hire, Create Employee Contracts, Signature Date/Probation Info	Track who is responsible for drafting the applicant's contract, the signature date, and information about the applicant's probationary period.

Entering Hiring Data

When you are ready to hire an applicant in Recruit Workforce, perform the actual hire using the Hire Applicant pages. Any contract information, along with other relevant data, transfers to the applicant's employee records automatically.

In this section we discuss how to:

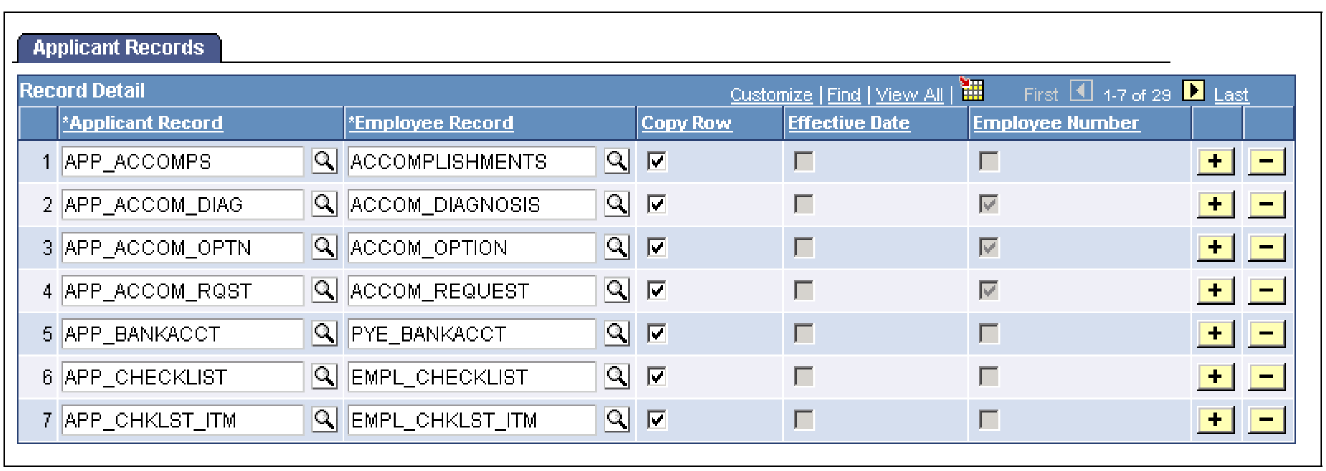
1. (Optional) Define applicant records copied to employee records.
2. Assign an employee ID.
3. Review applicant data.

Pages Used to Enter Hiring Data

Page Name	Object Name	Navigation	Usage
Applicant Records	RW_APP_EMP_CPY	Set Up HRMS, Install, Product and Country Specific, Recruit: Copied Appl Rcrds, Applicant Records	Define the applicant records that are copied to employee records during the hire process. When you hire external applicants and non-employees, the system copies the applicant data listed on this page to the new employee records. If you have modified the structure of your applicant or employee records, you might need to update this page to reflect your modified record structure.
Hire Applicant - Applicant	APPLICANT_HIRE	Recruiting, Hire Applicants, Hire	Assign an applicant an employee ID. Use this page only for external applicants or non-employees. The applicant's disposition must be *Ready to Hire.*
Applicant Hire	GVT_APPLICANT_HIRE	Recruiting, Hire Applicants, Hire (USF)	For U.S. Federal government installations only. This page has the same options for assigning an applicant an employee ID. Use this page only for external applicants or non-employees. The applicant's disposition must be *Ready to Hire.*

Defining Applicant Records

Access the Applicant Records page.



Applicant Records page

Warning! Changes to the Applicant Records page must be made by technical personnel with an in-depth understanding of the structure of your PeopleSoft Human Resources database. If the Applicant Records page is not set up correctly, employee records created by the hire process may be incomplete or set up incorrectly. Always refer to your database administrator before updating this page.

Applicant Record Select the record that you want to copy to the employee record.

Employee Record Select the employee record that you want to populate with data copied from the Applicant Record field.

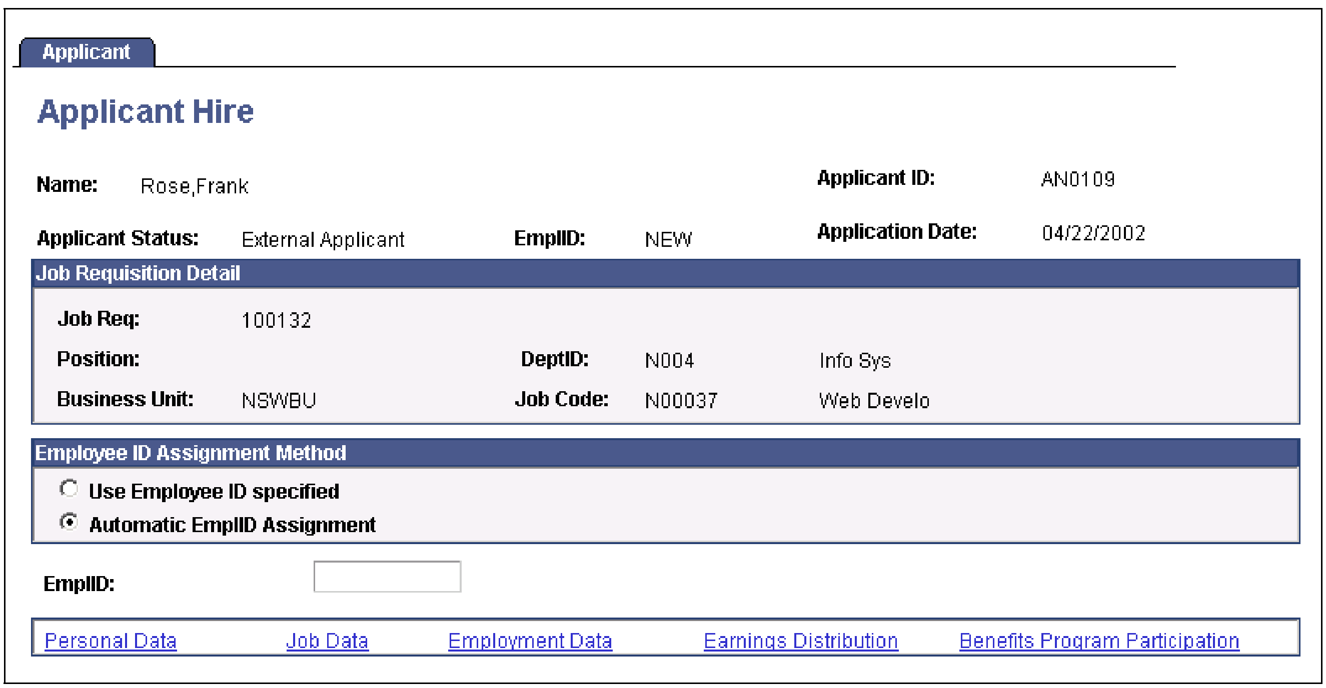
Copy Row Select this check box if you want to copy an applicant's data to the record specified in the Employee Record field.

Effective Date The system automatically selects this check box if the employee record is an effective-dated table. The system makes this field unavailable for entry.

Employee Number The system automatically selects this check box if the employee record number is a key for the table specified in the Employee Record field. The system makes this field unavailable for entry.

Assigning an Employee ID

Access the Hire Applicant - Applicant page.



Applicant page

Job Requisition Detail

The system populates the fields in this group box from job requisition data. These fields are for information only.

Employee ID Assignment Method

Select one of these options for assigning an employee ID:

Use Employee ID specified	Select if you want to enter the new employee ID manually. Enter the employee ID in the EmplID (employee ID) field.
Automatic EmplID Assignment	Select if you want the system to automatically assign an employee ID.

Reviewing Applicant Data

You must complete the following pages for every applicant:

- Personal Data
- Job Data
- Employment Data
- Earning Distribution
- Benefits Program Participation

If you have already entered personal data or application data, some information appears automatically in these pages. Review these pages carefully to make sure all the information that you need is there.

These are the same pages that you access if you hire employees from Workforce Administration.

See Also

PeopleSoft 8.8 Human Resources PeopleBook: Administer Workforce, “Hiring Your Workforce”

Auditing Your Hiring Practices

This section discusses how to print the Job Group Movement Analysis report.

Page Used to Print Job Group Movement Analysis Reports

Page Name	Object Name	Navigation	Usage
Job Group Movement Analysis	RUN_CNTL_REG_INTRO	Recruiting, Recruiting Reports, Job Group Movement Report	Provides an analysis of the number of males and females by ethnic group who were applicants, hires, promotions, or terminations during a specified time period. It show which sex and ethnic groups are moving in and out of the organization and which group are offered opportunities for advancement.

CHAPTER 12

Managing Employee Referral Programs

This chapter provides an overview of managing employee referral programs (ERP) and discusses how to:

- Process eligibility and awards.
- View and override referral awards.
- Approve awards.
- Payout awards.

Processing Eligibility and Awards

When you set up ERPs, you capture time-sensitive rules that dictate eligibility and awards for each referral under the particular ERP. The Eligibility and Awards process applies these time-sensitive rules at the appropriate times in a referral's life span.

It is necessary to establish which ERP a referral is associated with before eligibility and awards can be determined. This association occurs only when an applicant is hired and is determined by the ERP associated with the job requisition template. Therefore, eligibility and awards cannot be determined before an applicant is hired.

The Eligibility and Awards process is actually two processes in one:

- Eligibility processing determines whether the referring employee is eligible for ERP awards.
- Awards processing determines the amount and timing of awards.

You can run the Eligibility and Awards process for a specified ERP or for all ERPs.

Understanding Eligibility Processing

The Eligibility and Awards process checks employee eligibility according to the rules and criteria set up in the ERP for the following three dates:

- Referral date.
- Hire date.
- Award date.

You associate rules with these dates using the When to Apply field on the Employee Referral Program - Rules page. Criteria apply at various times depending on the particular criteria or on how you set up the program. The following table shows the dates for which the rules and criteria are processed:

Rule or Criterion	Referral Date	Hire Date	Award Date
Employee Eligibility Rule	Determined by the When to Apply value on the Rules page.	Determined by the When to Apply value on the Rules page.	Determined by the When to Apply value on the Rules page.
Award Category Rules	na	Applies	na
Referral Life Span criteria	na	Applies (Checks the referral life span against the time elapsed between the referral and hire dates.)	na
Is the employee a direct or indirect manager of the hired applicant? (criteria)	na	Applies if selected on the Criteria page.	na
Manager level criteria	na	Applies	na
Previous employee criteria	May apply, depending on whether selected and the “prior to” value in the criteria setup.	May apply, depending on whether selected and the “prior to” value in the criteria setup.	na
Family member referral criteria	na	Applies if selected on the Criteria page.	na
Applicant must be actively employed	na	Applies	Applies

When Eligibility is Not Recalculated

The process does not recalculate eligibility for every referral in an ERP every time it runs. It does not process or reprocess eligibility under the following conditions:

- The applicant has not been hired.
- The referral has been processed and marked *Ineligible*.
- The referral was processed and marked *Eligible* as of the hire date, but the award date has not been reached when the process runs again.
- The eligibility status has been overridden and not marked as a reprocess.

Reprocessing Eligibility for Duplicate Applicants

Duplicate applicant records can result in erroneous ERP eligibility results after applicant data is merged. Before the duplicate applicant records are merged, there can be multiple distinct applicant records and multiple distinct referral records all for the same applicant. After merging, there is only one applicant record, but PeopleSoft maintains multiple referral records. You must run the Eligibility and Awards process again to make sure eligibility status is correct, because the original results were based on an unmerged data set. You can override eligibility on the Referral Administration component and rerun the eligibility process, if necessary.

You can distribute the referral award among multiple eligible employees on the Review Duplicate Referrals page.

See Also

Chapter 7, "Managing Applicants," Merging Duplicate Applicant Records, page 148

Understanding Awards Processing

After checking eligibility, the process begins award processing if the referral meets both of the following conditions for a particular ERP:

- Applicant is hired.
- Employee is eligible as of the referral date (if any rules apply) and as of the applicant's hire date.

Following is the sequence of award processing:

1. Checks the job requisition that the applicant was hired into against the ERP's award category rules.
   a. If the requisition *is not* in any of the award categories, the process:

      Sets eligibility status to Ineligible.

      Issues a message that the requisition is not covered by the ERP.

   b. If the requisition *is* in an award category, the process schedules awards.

      The first award category rule satisfied by the job requisition determines the schedule.
2. Checks hot jobs.

   If the requisition is a hot job, the hot job award schedule overrides the award schedule of the ERP award category rule.

Understanding Payment Status

The following table explains the values that you might see in the Payment Status field when viewing ERP award data. Unless otherwise specified, "payroll" refers to PeopleSoft Payroll for North America only.

Payment Status	Description	Process that Writes Status
Approved - Goes to Payroll (AP)	Approved award that has not yet been submitted for payment.	• Entered by the Eligibility and Awards process if Require Approval for Payment is not selected on the Employee Referral Programs setup page. • Manually entered on the Referral Award Approval page or the Referral Award Details page if Require Approval for Payment is selected on the Employee Referral Programs setup page or after correcting rejected awards.
Needs Approval (NA)	The ERP requires approval of awards and this award has not yet been approved.	• Entered by the Eligibility and Awards process if Require Approval for Payment is selected on the Employee Referral Programs setup page. • Manually entered on the Referral Award Approval page if a non-approver corrects rejected awards.
Cancelled (CN)	Plan administrator cancels an award.	Manually entered on the Referral Award Details page.
Sent to Payroll (SP)	Awards have been published to PeopleSoft Payroll for North America.	Interface to Payroll for North America process.
Taken by Payroll (TP)	Payroll confirms receipt of award.	Interface to Payroll for North America process.
Paid (PD)	Payroll has paid award.	Interface to Payroll for North America process.
Rejected by Payroll (RP)	Payroll rejects award payment. (Typically due to erroneous data.)	Interface to Payroll for North America process.
Reversed by Payroll (RV)	Payroll reverses award payment. (Typically due to an employee being incorrectly paid.)	Interface to Payroll for North America process.

See Also

Chapter 12, "Managing Employee Referral Programs," Paying Awards, page 236

Page Used to Process Eligibility and Awards

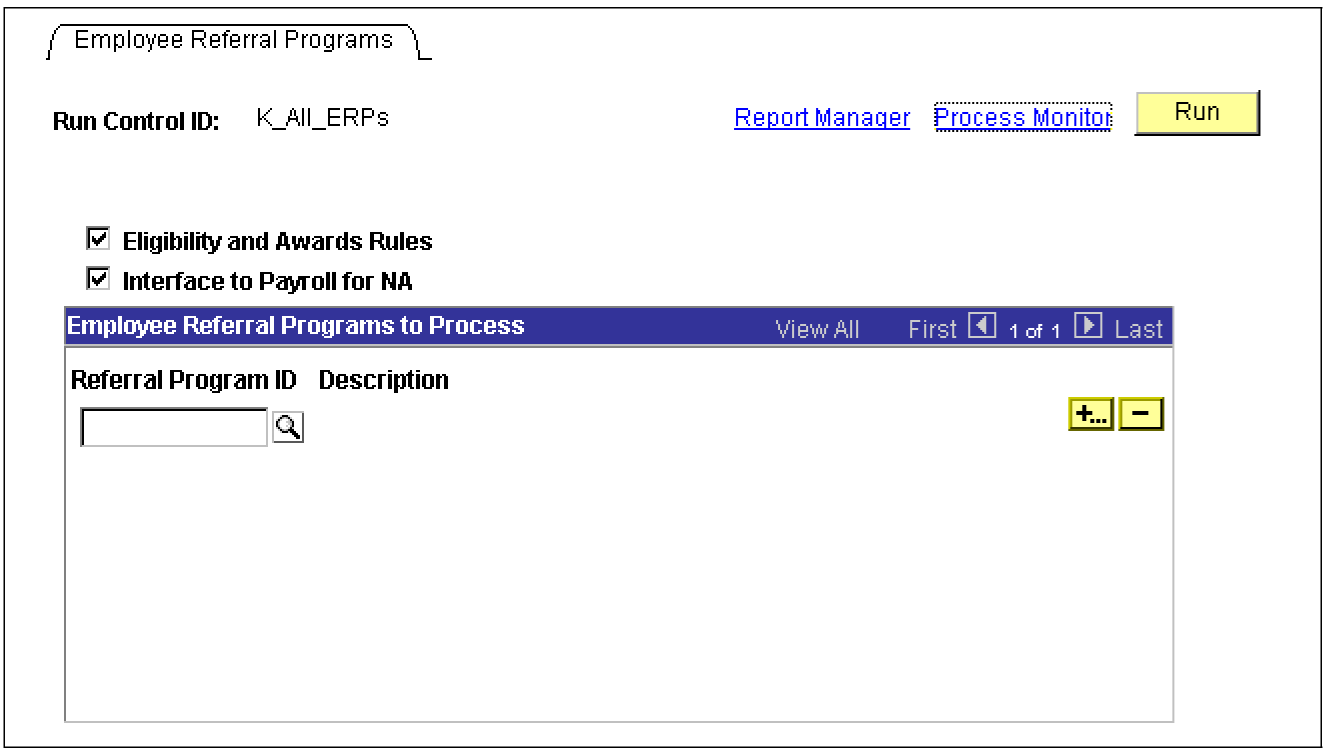
Page Name	Object Name	Navigation	Usage
Employee Referral Programs	RUNCNTL_ERP	Recruiting, Employee Referrals, Employee Referral Programs	Run the process to evaluate and update eligibility status and award status. Run the process to submit awards to PeopleSoft Payroll for North America.

See Also

Chapter 12, "Managing Employee Referral Programs," Using the Interface to Payroll for North America Process, page 239

Running the Eligibility and Awards Process

Access the Employee Referral Programs page.



Employee Referral Programs page

Eligibility and Awards Rules

Select this check box to process eligibility and create awards.

This selection does not send awards to payroll.

Interface to Payroll for NA (interface to payroll for North America)

Select this check box to process award payments through PeopleSoft Payroll for North America.

Referral Program ID	Select the ERPs that you want to process. You can add rows as necessary. If you do not select an ERP, the process runs for all ERPs.

See Also

Chapter 12, "Managing Employee Referral Programs," Using the Interface to Payroll for North America Process, page 239

Viewing and Overriding Referral Awards

Here's how you manage referral overrides:

- View and override eligibility and award information for referrals. Use the Referral Administration component.
- View duplicate referrals and adjust award amounts among eligible employees if desired.

  Sometimes the same applicant is referred by more than one employee. The system selects just the first eligible employee for awards. If your organization honors duplicate referrals, you can use the Review Duplicate Referrals page to:

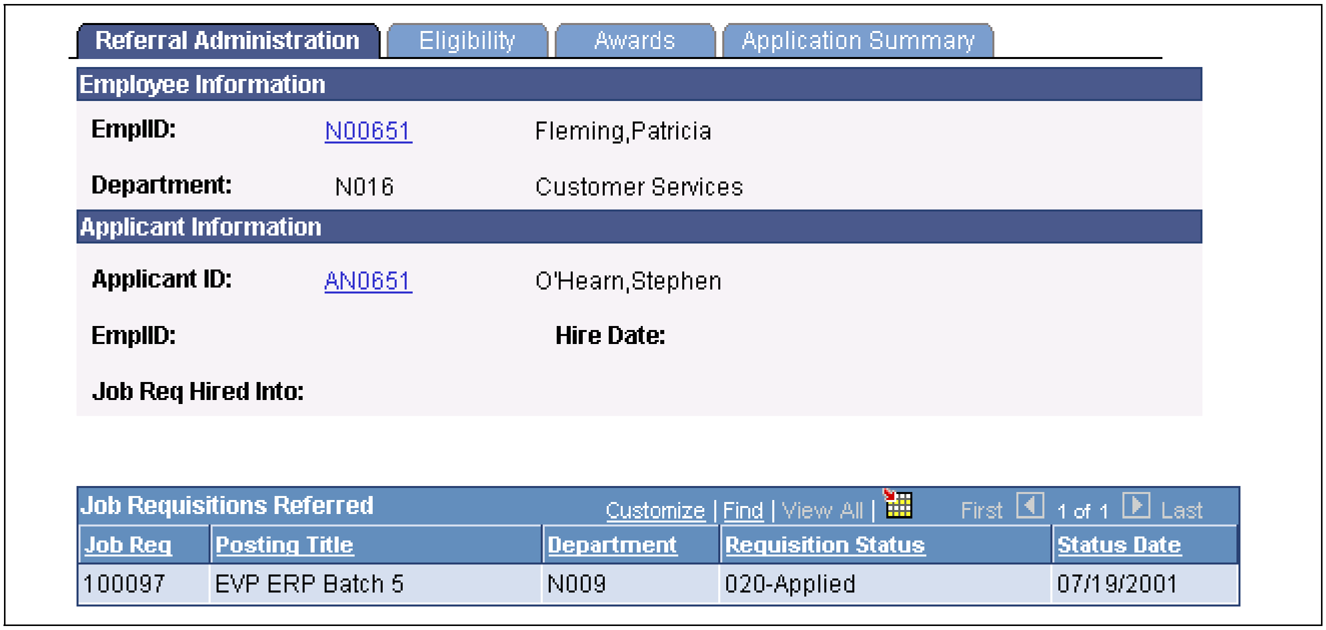
  - Detect situations where the same applicant is referred by more than one employee.
  - Override the award amounts for the referring employees.
- View an audit list of manual overrides, including who made the change, when the change was made, and details of the change. Use the Override Audit component.

Pages Used to View and Override Referrals

Page Name	Object Name	Navigation	Usage
Referral Administration	ER_REF_ADMN_MAIN	Recruiting, Employee Referrals, Respond to Referrals	View summary information about a referral.
Referral Administration - Eligibility	ER_REF_ADMN_ELIG	Recruiting, Employee Referrals, Respond to Referral, Eligibility	View and Override employee eligibility.
Referral Administration - Awards	ER_REF_ADMN_AWD	Recruiting, Employee Referrals, Respond to Referrals, Awards	View award status.
Referral Award Details	ER_EE_REF_AWD_OVR	Click the Details link on the Awards page.	View and override details of the award.
Referral Administration - Application Summary	ER_REF_ADMN_APPDT	Recruiting, Employee Referrals, Respond to Referrals, Application Summary	View eligibility by application.
Review Duplicate Referrals	ER_DUP_REFERRAL	Recruiting, Employee Referrals, Track Duplicate Referrals	Identify duplicate employee referrals and split awards.
Eligibility Overrides	ER_AUDIT_OVR_ELIG	Recruiting, Employee Referrals, Review Override Audit	View the audit details of manual overrides to eligibility data. You can select overrides by applicant, by employee, or by the administrator who overrode the audited field. Only referrals that contain audit information are available in the search.
Award Overrides	ER_AUDIT_OVR_AWD	Recruiting, Employee Referrals, Review Override Audit	View the audit details of manual overrides to award data.

Viewing Referral Summary Information

Access the Referral Administration page.



Referral Administration page

This view-only page provides information about the employee, the applicant, and the referred job requisitions.

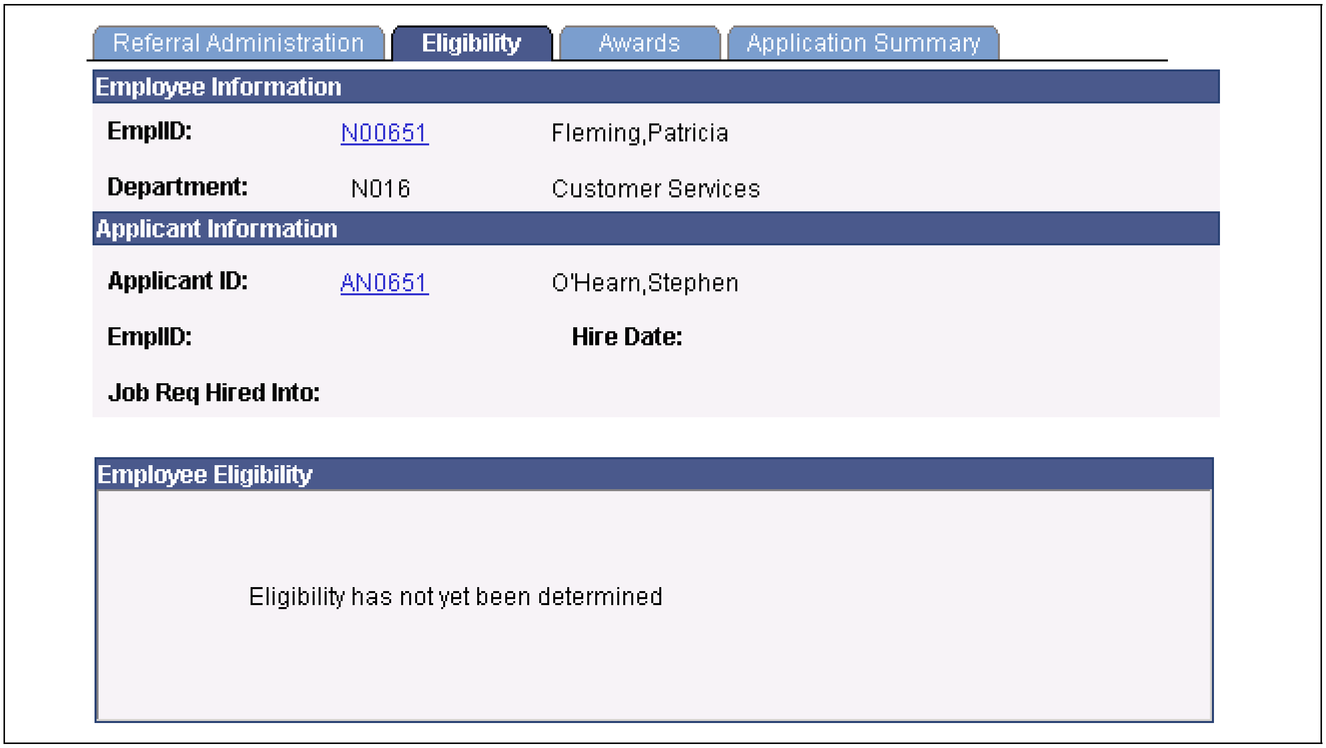
EmplID Click to view the employee's job data.

Applicant ID Click to view the applicant's resume.

Job Req Hired Into (job requisition hired into) Click to view the job data of the applicant who has become an employee.

Viewing and Overriding Employee Eligibility

Access the Referral Administration - Eligibility page.



Referral Administration - Eligibility page

Employee Eligibility

The system displays a row of eligibility data for each application of eligibility rules defined by the When to Apply field on the Employee Referral Program - Rules page.

If the applicant has not been hired, the system issues the following message: “Eligibility has not yet been determined” in place of the fields in the Employee Eligibility group box.

Applic Dt (application date)	The date of the earliest application with eligible status that is associated with the referral. If there is no application date with eligible status, the earliest application date is the referral date.
Status	The current employee eligibility status. Values are *Eligible* and *Ineligible.* You can override the *Eligible* status only if the award has not been submitted for payment. If you manually change the status from *Ineligible* to *Eligible,* the system does not reprocess eligibility rules that are evaluated as of the referral date or hire date.
Reprocess Eligibility/Awards	Select this check box if you want to rerun all eligibility and awards processing the next time the Eligibility and Awards process runs.
Comments	The system prints a comment here that explains the reason for the eligibility status. If you manually change the status, the system enters the comment “Manual override by administrator.” You can view details of a manual override on the Eligibility Overrides page.

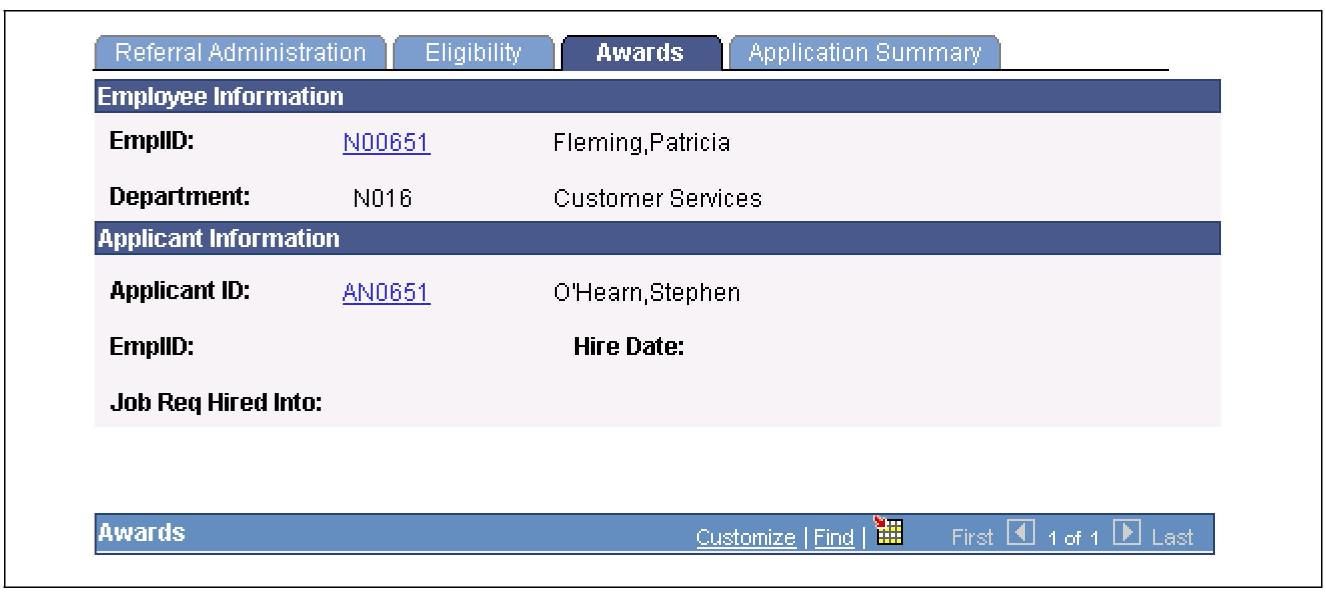
	You can manually enter a comment that supercedes the system-generated comment.
Creation Date	The date the eligibility status was originally determined by the system.
Event Type	The system categorizes the rule or criteria that causes the ineligibility status. The valid values are: *General Eligibility Criteria:* Any of the criteria defined on the Employee Referral Program - Criteria page. *Referral Eligibility Rule:* Eligibility rule associated with the referral date in the When to Apply field on the Employee Referral Program - Rules page. *Hire Eligibility Rule:* Eligibility rule associated with the applicant's hire date in the When to Apply field on the Employee Referral Program - Rules page. *Award Eligibility Rule:* Eligibility rule associated with the award date in the When to Apply field on the Employee Referral Program - Rules page. *Manual Override:* Manual change on this page.
Event Date	The system enters the date that the eligibility status was last changed.

See Also

Chapter 12, "Managing Employee Referral Programs," Understanding Eligibility Processing, page 221

Viewing Awards

Access the Referral Administration - Awards page.



Referral Administration - Awards page

Award Date	The system calculates this date according to the duration in the award schedule.
Award Value	Determined by the award schedule of the award category.

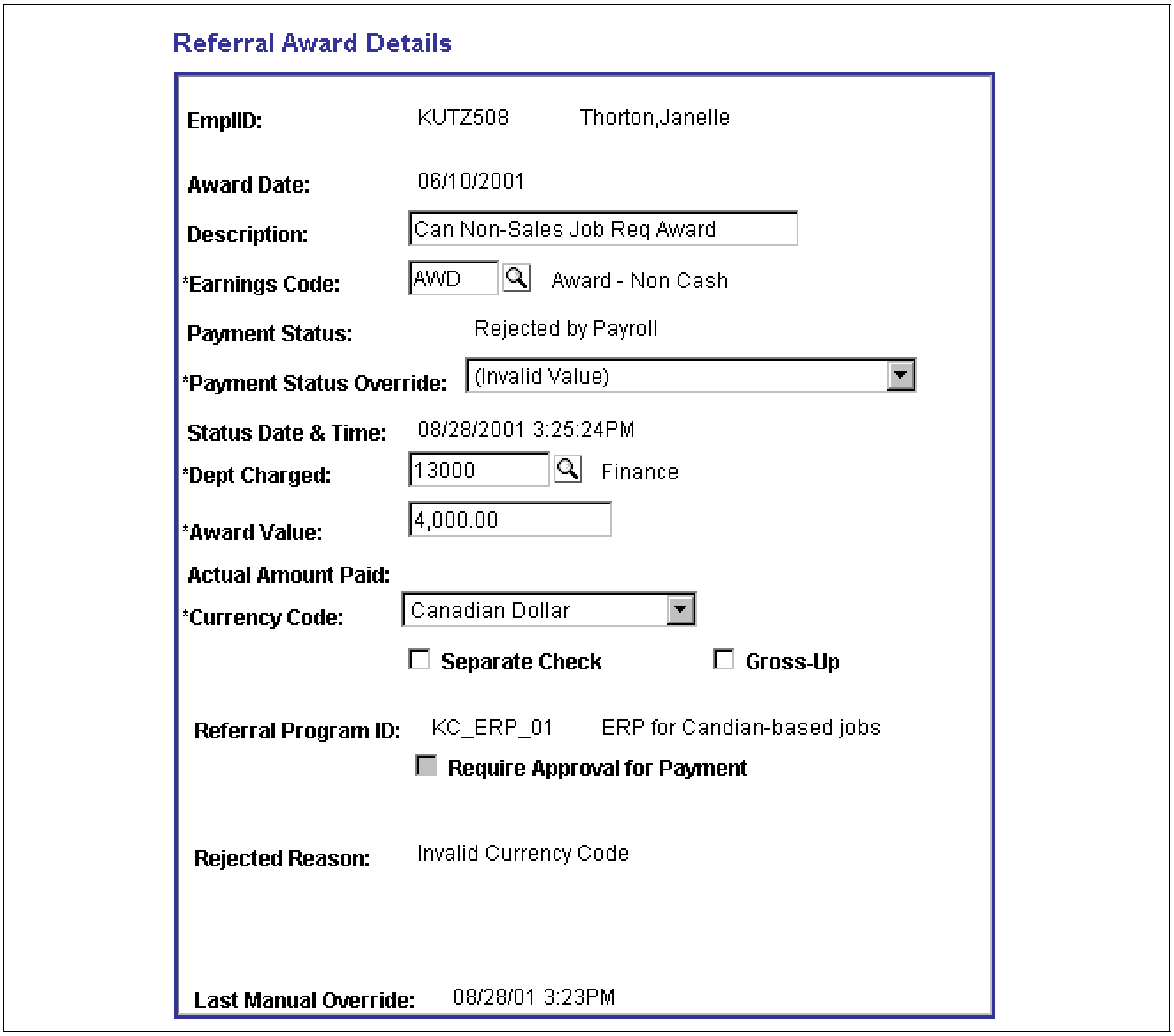
Details Click this link to access the Referral Award Details page.

See Also

Chapter 12, "Managing Employee Referral Programs," Understanding Payment Status, page 223

Overriding Award Details

Access the Referral Award Details page.



Referral Award Details

EmplID: KUTZ508 Thorton,Janelle

Award Date: 06/10/2001

Description: Can Non-Sales Job Req Award

*Earnings Code: AWD Award - Non Cash

Payment Status: Rejected by Payroll

*Payment Status Override: (Invalid Value)

Status Date & Time: 08/28/2001 3:25:24PM

*Dept Charged: 13000 Finance

*Award Value: 4,000.00

Actual Amount Paid:

*Currency Code: Canadian Dollar

Separate Check Gross-Up

Referral Program ID: KC_ERP_01 ERP for Candian-based jobs

Require Approval for Payment

Rejected Reason: Invalid Currency Code

Last Manual Override: 08/28/01 3:23PM

Referral Award Details page

Much of the data on this page reflects the rules and criteria set up for the ERP. You can override the value in any editable field.

Award Date This date is calculated according to the duration in the award schedule.

Description The duration that you specified for the award on the Award Schedule page.

Payment Status Override	Use this field to manually approve an award that has *Needs Approval* status. You can only do this if the eligibility status is *Eligible.* The ERP administrator can manually change the payment status to or from *Needs Approval, Approved,* or *Cancelled.* You cannot manually override the status of an award that is submitted to be paid, unless PeopleSoft Payroll for North America has rejected it. If an award has been rejected by PeopleSoft Payroll for North America, the ERP administrator can change a *Rejected by Payroll* or *Reversed by Payroll* status to: *Cancelled:* You accept the reason for the rejection and do not intend to correct it. *Needs approval:* You corrected the reason for the rejection and now the award is ready to be approved again. *Approved:* You corrected the reason for the rejection and now the award is ready to be submitted when the process runs again for the ERP.
Dept Charged (department charged)	The default is the department (of the job requisition) into which the applicant was hired.
Award Value	The amount of the award as defined in the award schedule. The currency defined for the award schedule also appears.
Actual Amount Paid	This value is entered when the award is paid through PeopleSoft Payroll for North America.
Currency Code	This is the currency in which the award is paid to the employee.
Separate Check	Select this check box to override the default that you set up on the Employee Referral Programs page.
Gross-Up	Select this check box to override the default that you set up on the Award Schedule page. If you select Gross-Up and use PeopleSoft Payroll for North America, the award is paid by separate check.
Require Approval for Payment	Set the value for this field on the Employee Referral Program page. You cannot change it here.
Rejected Reason	The reason that PeopleSoft Payroll for North America rejected the award.
Last Manual Override	The system enters the date of the last manual override. You can view details of the override on the Award Overrides page.

See Also

Chapter 12, "Managing Employee Referral Programs," Understanding Payment Status, page 223

Chapter 12, "Managing Employee Referral Programs," Viewing Awards Rejected by PeopleSoft Payroll for North America, page 239

Viewing Eligibility by Application

Access the Referral Administration - Application Summary page.

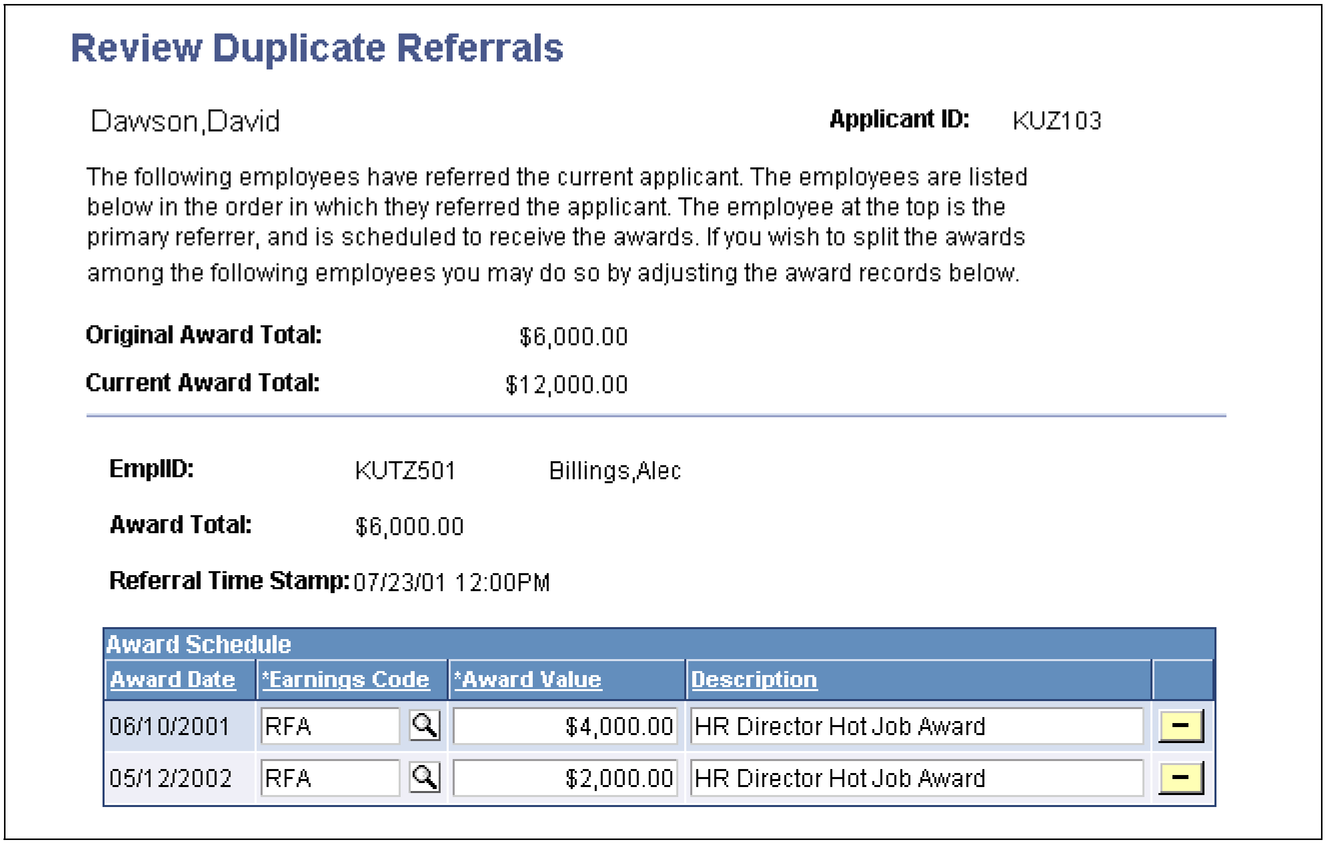
Referral Administration - Application Summary page

This page shows all the dates that the employee referred the applicant and the employee's eligibility status for each referral. Remember that eligibility for award payment is determined by the job requisition into which the applicant is hired.

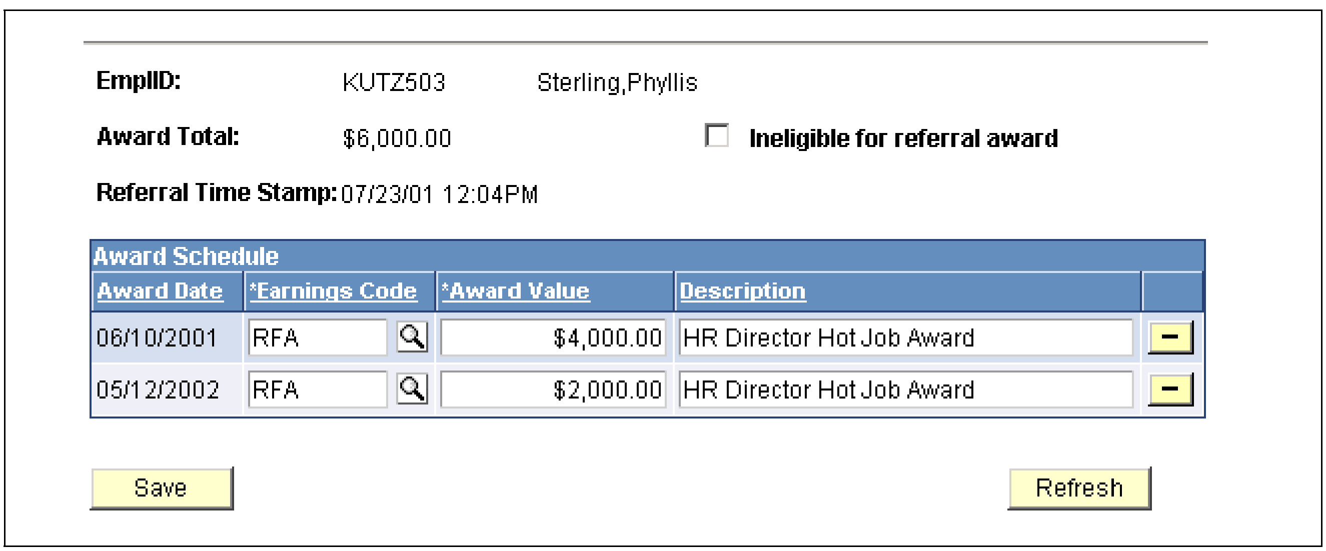
Comment	The system provides the reason for ineligible status only.

Viewing and Overriding Duplicate Referrals

Access the Review Duplicate Referrals page.



Review Duplicate Referral page (1 of 2)



Review Duplicate Referral page (2 of 2)

The page lists eligible employees in the order in which they referred the applicant. The award schedule and amounts are listed for the first employee only. You can divide the amounts among some or all of the referring employees.

The total award for all employees can be more than the original award if you selected Allow Dups to Exceed Original on the Criteria page when setting up the ERP.

Original Award Total	The total value of all awards in the original award schedule awarded to the first employee.
Current Award Total	The total of all awards entered on the page for all the referring employees.
Award Value	Adjust the award amount for each employee.

Approving Awards

When you set up the ERP, define whether or not awards require approval before payment. If approval is required, the Eligibility and Awards process gives awards the *Needs Approval* payment status, and you must manually approve them.

You can manually approve awards on one of the following pages:

- Use the Referral Award Approval page to quickly approve all or selected awards in the ERP when the payment status is *Needs Approval*.
- Use the Rejected Awards page to correct and approve awards when the payment status is *Rejected by Payroll*.
- Use the Award Details Override page in the Referral Administration component to override award details and approve the award when the payment status is other than *Needs Approval* or *Rejected by Payroll*.

Page Used to Approve Awards

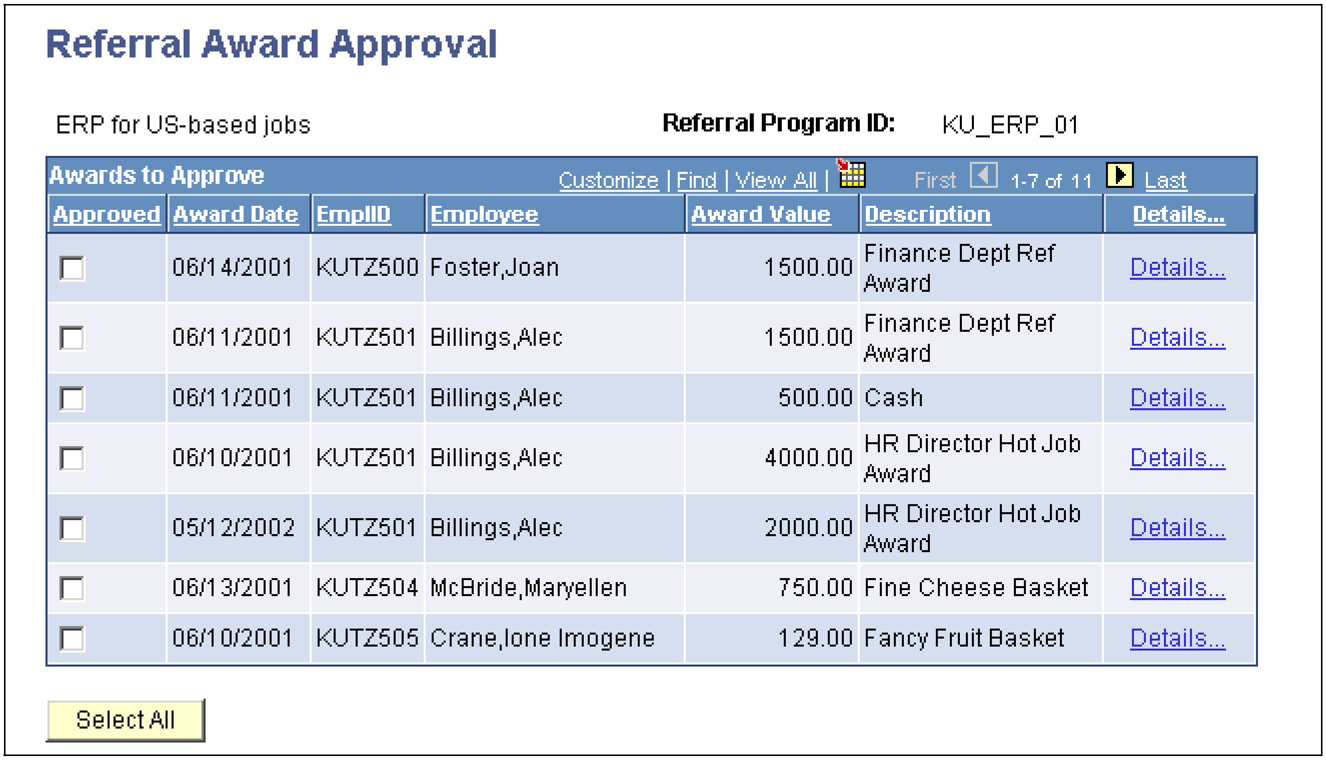
Page Name	Object Name	Navigation	Usage
Referral Award Approval	ER_MASS_APPROVE	Recruiting, Employee Referrals, Approve Employee Referrals	View and approve awards that have the status of *Needs Approval*.

See Also

Chapter 12, “Managing Employee Referral Programs,” Overriding Award Details, page 231

Approving Referral Awards with Needs Approval Status

Access the Referral Award Approval page.


Referral Award Approval

ERP for US-based jobs **Referral Program ID:** KU_ERP_01

Awards to Approve — Customize | Find | View All | First 1-7 of 11 Last

Approved	Award Date	EmplID	Employee	Award Value	Description	Details...
☐	06/14/2001	KUTZ500	Foster,Joan	1500.00	Finance Dept Ref Award	Details...
☐	06/11/2001	KUTZ501	Billings,Alec	1500.00	Finance Dept Ref Award	Details...
☐	06/11/2001	KUTZ501	Billings,Alec	500.00	Cash	Details...
☐	06/10/2001	KUTZ501	Billings,Alec	4000.00	HR Director Hot Job Award	Details...
☐	05/12/2002	KUTZ501	Billings,Alec	2000.00	HR Director Hot Job Award	Details...
☐	06/13/2001	KUTZ504	McBride,Maryellen	750.00	Fine Cheese Basket	Details...
☐	06/10/2001	KUTZ505	Crane,Ione Imogene	129.00	Fancy Fruit Basket	Details...

Select All

Referral Award Approval page

For the selected ERP, the page lists all awards that have the *Needs Approval* payment status.

Approved Select this check box to approve individual awards in the list.

Select All Click to select the Approved check box for all awards in the list, including those outside the view area.

Details Click the link to view details of the award before approving.

Note. You must save the page to approve the awards. Once awards are approved, they do not appear on this page again.

See Also

Chapter 12, “Managing Employee Referral Programs,” Understanding Payment Status, page 223

Paying Awards

The interface between employee referral programs and payroll processing depends upon the payroll system used to pay the referring employee.

PeopleSoft Payroll for North America

If the employee is paid through PeopleSoft Payroll for North America, use the Interface to Payroll for North America process to publish the monetary and non-stock, non-monetary awards directly to PeopleSoft Payroll for North America using PeopleSoft Application Messaging.

Other Payroll Systems

If the employee is not paid through PeopleSoft Payroll for North America, you can create your own interface to your payroll system.

Understanding Integration With PeopleSoft Payroll for North America

The following table outlines the award payout integration between employee referral programs and PeopleSoft Payroll for North America (payroll):

Integration Step	Description
Employee referral program publishes a payment request for approved awards to payroll.	Publishes the award amount in the currency of the award category. Sets the award's payment status to *Sent to Payroll*.
Payroll subscribes to the payment request, which automatically runs a PeopleSoft Application Engine process to validate or reject the award data and publishes an acknowledgement of acceptance or rejection.	Subscription inserts the awards into a subscribing staging table. Validation checks for error conditions that require correction prior to loading to paysheet. If award data are valid, the system inserts the awards into the application table and publishes an acknowledgement that sets the award's payment status to *Taken by Payroll*. If errors are detected, the system publishes an acknowledgment that sets the award's payment status to *Rejected by Payroll* and supplies a reason code.
Employee referral program subscribes to the acknowledgement of rejected or awards with errors.	ERP administrator uses the Rejected Awards page to view the reason for rejection and to correct the award data.
Payroll processes validated awards and issues checks.	Payroll creates paysheets, calculates gross up amounts and taxes, confirms pay, issues checks, and posts amounts to General Ledger (GL).
Payroll runs a PeopleSoft Application Engine process to publish a notification of payment.	This process runs after payments are calculated and confirmed.
Employee referral program subscribes to the notification of payment.	The subscription updates the award's payment status to *Paid* or *Reversed by Payroll* and updates the Status Date and Time, Actual Amount Paid, Paycheck Status, Paycheck Number, and Check Date.

Enterprise Integration Points Related to Integration Between Employee Referral Programs and PeopleSoft Payroll for North America

The system uses the following application messages to transfer awards and payout data between employee referral programs and PeopleSoft Payroll for North America (payroll).

EIP Name	Message Name	Message Definition
ERECRUIT REQUEST FOR PAYMENT	PAYMENT_ERECRUIT_ REQUEST	Employee referral programs publish award data to payroll and payroll subscribes to the award data.
ACKNOWLEDGMENT /VERIFICATION OF ERECRUIT PAYMENT	PAYMENT_ERECRUIT_ ACKNOWLEDGE	Payroll validates the requested awards and publishes the results of validation. Employee referral programs subscribe to the acknowledgement.
PAYROLL ISSUED ERECRUIT PAYMENT	PAYMENT_ERECRUIT_ISSUED	Payroll publishes notification of payment and employee referral programs subscribe to the notification.

Activating Enterprise Integration Point Messages and Channels

All enterprise integration point (EIP) messages are delivered inactive. In PeopleSoft Application Designer, you must activate the PAYMENT_ERECRUIT_REQUEST, PAYMENT_ERECRUIT_ACKNOWLEDGE, and PAYMENT_ERECRUIT_ISSUED messages. Set the status of each selected message to *Active,* and set the status of the corresponding message channel to *Run.*

See Also

Chapter 12, "Managing Employee Referral Programs," Understanding Payment Status, page 223

EIP Catalog database on the Customer Connection Website under Open Integration Framework in the Documentation section.

PeopleTools PeopleBook: PeopleSoft Enterprise Integration

Page Used to Pay Awards Through PeopleSoft Payroll for North America

Page Name	Object Name	Navigation	Usage
Rejected Awards	ER_REJECTED_AWDS	Recruiting, Employee Referrals, Rejected Awards	View awards that are rejected by PeopleSoft Payroll for North America. Access the Referral Award Details page where you can correct rejected awards.

See Also

Chapter 12, "Managing Employee Referral Programs," Page Used to Process Eligibility and Awards, page 225

Using the Interface to Payroll for North America Process

The Interface to Payroll for North America process submits awards for payment and retrieves paid award information from PeopleSoft Payroll for North America (payroll). You do not run the submittal and retrieval processes separately. You can run the process on demand or schedule it.

Paying Awards

The process only sends approved awards to payroll that have been scheduled with an award date prior to or equal to the current date.

Payroll calculates gross-up amounts and taxes, pays the cash awards, and posts the amounts to the appropriate General Ledger account.

If the currency code of the award does not match the currency code of the employee's paygroup, the award is rejected and the ERP administrator can use the Rejected Awards page to override the values.

If the converted amount of the award is greater than 8.2 digits, the award is rejected and the ERP administrator can use the Rejected Awards page to split the award into two payments.

Recording Awards

After payroll pays an award and publishes the results, the subscription process retrieves payment information and updates the following records:

- ERP data records. (ER_EE_REF_AWD)
- Job requisition expense data (ER_JOB_REQ_EXP).

  The job requisition expense amount is the amount paid by payroll, including taxes that have been grossed up.

  You can view the expense information on the Job Requisition Expense page. The expense code is *Refer Fee* (referral fee).

Running the Interface to Payroll for North America Process

Access the Employee Referral Programs process page to run this process. The same page runs the Eligibility and Awards process.

See Also

Chapter 12, "Managing Employee Referral Programs," Understanding Integration With PeopleSoft Payroll for North America, page 237

Chapter 13, "Tracking Recruitment Expenses," Entering Requisition Expenses, page 241

Chapter 12, "Managing Employee Referral Programs," Running the Eligibility and Awards Process, page 225

Viewing Awards Rejected by PeopleSoft Payroll for North America

Access the Rejected Awards page.

Award Date	EmplID	Employee	Award Value	Description	Rejected Reason	Edit
06/10/2001	KUTZ508	Thorton,Janelle	4000.00	Can Non-Sales Job Req Award	Invalid Currency Code	Edit

Rejected Awards page

Rejected Reason

The reason that payroll rejected the award. Use this to determine which data to correct. Rejected reasons are:

Invalid Earning Code

Invalid Employee ID & Record #

Invalid Currency Code

Transaction already exists

Amount Exceeds Payroll Maximum

Edit

Click this link to access the Referral Award Details page to correct the error that caused rejection.

Editing Rejected Awards

Use the Referral Award Details page to edit rejected awards.

Note. You can also override or reprocess eligibility for a rejected award on the Referral Administration - Eligibility page.

See Also

Chapter 12, "Managing Employee Referral Programs," Overriding Award Details, page 231

Chapter 12, "Managing Employee Referral Programs," Viewing and Overriding Employee Eligibility, page 228

CHAPTER 13

Tracking Recruitment Expenses

This chapter provides an overview of tracking recruitment expenses and discusses how to:

- Enter expenses related to a job requisition.
- Enter expenses incurred by applicants.
- Review all expenses related to a job requisition.

Understanding Recruitment Expenses

With PeopleSoft Human Resources you can record and analyze all your recruitment costs and track two types of expenses:

- Job requisition expenses.

  These are costs incurred for the requisition, such as costs of advertising or engaging an agency to handle the requisition.

- Applicant expenses.

  Your organization might incur costs related to applicants; for example, if you reimburse applicants for travel costs or overnight accommodations.

Entering Requisition Expenses

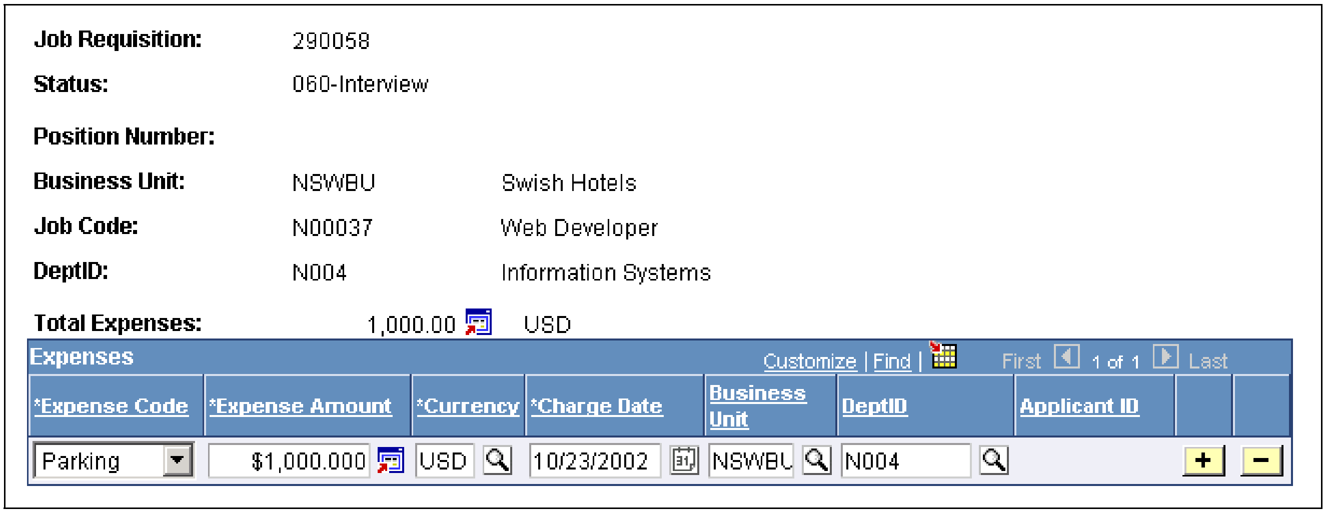
If you incur expenses related to a job requisition that aren't specific to a particular applicant, record them on the Job Requisition Exp page.

Page Used to Enter Requisition Expenses

Page Name	Object Name	Navigation	Usage
Job Requisition Exp (job requisition expenses)	JOB_REQUISITN_EXP	Recruiting, Job Requisitions/Postings, Capture Requisition Expenses	Record expenses related to a requisition that are not associated with a particular applicant, such as advertising costs or other one-time costs incurred as a result of an open requisition.

Entering Expenses

Access the Job Requisition Exp page.



Job Requisition: 290058
Status: 060-Interview
Position Number:
Business Unit: NSWBU Swish Hotels
Job Code: N00037 Web Developer
DeptID: N004 Information Systems
Total Expenses: 1,000.00 USD

Expenses — Customize | Find | First 1 of 1 Last

*Expense Code	*Expense Amount	*Currency	*Charge Date	Business Unit	DeptID	Applicant ID
Parking	$1,000.000	USD	10/23/2002	NSWBU	N004	

Job Requisition Exp page

Total Expenses The system automatically sums the expenses and displays the total.

Expenses

Expense Code Select a valid expense code for expenses such as advertising, publications, or other one-time costs not associated with a particular applicant.

The system automatically enters the following expense codes on this page:

Job Boards are expenses associated with posting requisitions to online job boards. These expenses are inserted if you have integrated your system with RecruitUSA and activated the expense application message.

Pre-Employ (pre-employment) are expenses for pre-employment checks. These expenses are inserted if you have integrated your system with HireRight and activated the expense application message.

Refer Fee (referral fee) are employee referral awards.

Expense Amount Enter the expense amount. The system automatically updates the Total Expenses field when you add an expense.

Charge Date Enter the date that the expense is charged to the selected department.

Entering Applicant Expenses

You can enter expenses at any time in the recruitment process once you have set up your job requisitions and linked applicants to them.

You can enter expenses incurred by applicants for a given job requisition in two ways, either using Requisition Activity − Expenses or Applicant Activity − Expenses. It doesn't matter which page you use; the information is added to the same records.

If an applicant submits expenses for more than one requisition, it is quicker to use the Applicant Activity - Expenses page to enter those expenses.

See Also

Chapter 9, "Processing Applicants," Tracking Applicants, page 198

Running Requisition Cost Analysis Reports

This section explains how to generate a report of your recruitment expenses.

Pages Used to Run the Requisition Cost Analysis Report

Page Name	Object Name	Navigation	Usage
Run Control	PRCSRUNCNTL	Recruiting, Recruiting Reports, Requisition Cost Analysis Rpt	Creates Requisition Cost Analysis report (APP006). This report provides a breakdown of expense types and amounts for your job requisition. For each job requisition, the report lists the requisition number, job code, position number, status, title of the position offered, and the recruiter's name. The last two columns contain a breakdown of each type of expense incurred and its monetary amount, including a total by requisition number. A department summary includes an expense total for all requisitions, each expense category, and calculates a department-average cost-per-hire amount.

Glossary of PeopleSoft Terms

absence entitlement This element defines rules for granting paid time off for valid absences, such as sick time, vacation, and maternity leave. An absence entitlement element defines the entitlement amount, frequency, and entitlement period.

absence take This element defines the conditions that must be met before a payee is entitled to take paid time off.

account You use an account code to record and summarize financial transactions as expenditures, revenues, assets, or liabilities balances. The use of this delivered PeopleSoft ChartField is typically defined when you implement PeopleSoft General Ledger.

accounting class In PeopleSoft Enterprise Performance Management, the accounting class defines how a resource is treated for generally accepted accounting practices. The Inventory class indicates whether a resource becomes part of a balance sheet account, such as inventory or fixed assets, while the Non-inventory class indicates that the resource is treated as an expense of the period during which it occurs.

accounting date The accounting date indicates when a transaction is recognized, as opposed to the date the transaction actually occurred. The accounting date and transaction date can be the same. The accounting date determines the period in the general ledger to which the transaction is to be posted. You can only select an accounting date that falls within an open period in the ledger to which you are posting. The accounting date for an item is normally the invoice date.

accounting entry A set of related debits and credits. An accounting entry is made up of multiple accounting lines. In most PeopleSoft applications, accounting entries are always balanced (debits equal credits). Accounting entries are created to record accruals, payments, payment cancellations, manual closures, project activities in the general ledger, and so forth, depending on the application.

accounting split The accounting split method indicates how expenses are allocated or divided among one or more sets of accounting ChartFields.

accumulator You use an accumulator to store cumulative values of defined items as they are processed. You can accumulate a single value over time or multiple values over time. For example, an accumulator could consist of all voluntary deductions, or all company deductions, enabling you to accumulate amounts. It allows total flexibility for time periods and values accumulated.

action reason The reason an employee's job or employment information is updated. The action reason is entered in two parts: a personnel action, such as a promotion, termination, or change from one pay group to anotherand a reason for that action. Action reasons are used by PeopleSoft Human Resources, PeopleSoft Benefits Administration, PeopleSoft Stock Administration, and the COBRA Administration feature of the Base Benefits business process.

activity In PeopleSoft Enterprise Learning Management, an instance of a catalog item delivery methodit may also be called a class. The activity defines such things as meeting times and locations, instructors, reserved equipment and materials, and detailed costs that are associated with the offering, enrollment limits and deadlines, and waitlisting capacities.

allocation rule In PeopleSoft Enterprise Incentive Management, an expression within compensation plans that enables the system to assign transactions to nodes and participants. During transaction allocation, the allocation engine traverses the compensation structure from the current node to the root node, checking each node for plans that contain allocation rules.

alternate account A feature in PeopleSoft General Ledger that enables you to create a statutory chart of accounts and enter statutory account transactions at the detail transaction level, as required for recording and reporting by some national governments.

application agent An application agent is an online agent that is loaded into memory with a PeopleSoft page. It detects when a business rule has been triggered and determines the appropriate action.

asset class An asset group used for reporting purposes. It can be used in conjunction with the asset category to refine asset classification.

attachment In PeopleSoft Enterprise Learning Management, nonsystem-defined electronic material that supplements a learning resource, such as an equipment items user handbook or the site map of a large facility.

background process In PeopleSoft, background processes are executed through process-specific COBOL programs and run outside the Windows environment.

benchmark job In PeopleSoft Workforce Analytics, a benchmark job is a job code for which there is corresponding salary survey data from published, third-party sources.

branch A tree node that rolls up to nodes above it in the hierarchy, as defined in PeopleSoft Tree Manager.

budgetary account only An account used by the system only and not by users; this type of account does not accept transactions. You can only budget with this account. Formerly called system-maintained account.

budget check In commitment control, the processing of source transactions against control budget ledgers, to see if they pass, fail, or pass with a warning.

budget control In commitment control, budget control ensures that commitments and expenditures don't exceed budgets. It enables you to track transactions against corresponding budgets and terminate a document's cycle if the defined budget conditions are not met. For example, you can prevent a purchase order from being dispatched to a vendor if there are insufficient funds in the related budget to support it.

budget period The interval of time (such as 12 months or 4 quarters) into which a period is divided for budgetary and reporting purposes. The ChartField allows maximum flexibility to define operational accounting time periods without restriction to only one calendar.

business event In PeopleSoft Sales Incentive Management, an original business transaction or activity that may justify the creation of a PeopleSoft Enterprise Incentive Management event (a sale, for example).

catalog item In PeopleSoft Enterprise Learning Management, a specific topic that a learner can study and have tracked. For example, Introduction to Microsoft Word. A catalog item contains general information about the topic and includes a course code, description, categorization, keywords, and delivery methods.

category In PeopleSoft Enterprise Learning Management, a way to classify catalog items so that users can easily browse and search relevant entries in the learning catalog. Categories can be hierarchical.

ChartField A field that stores a chart of accounts, resources, and so on, depending on the PeopleSoft application. ChartField values represent individual account numbers, department codes, and so forth.

ChartField balancing You can require specific ChartFields to match up (balance) on the debit and the credit side of a transaction.

ChartField combination edit	The process of editing journal lines for valid ChartField combinations based on user-defined rules.
ChartKey	One or more fields that uniquely identify each row in a table. Some tables contain only one field as the key, while others require a combination.
child	In PeopleSoft Tree Manager trees, a child is a node or detail on a tree linked to another, higher-level node (referred to as the parent). Child nodes can be rolled up into the parent. A node can be a child and a parent at the same time depending on its location within the tree.
Class ChartField	A ChartField value that identifies a unique appropriation budget key when you combine it with a fund, department ID, and program code, as well as a budget period. Formerly called *sub-classification.*
clone	In PeopleCode, to make a unique copy. In contrast, to *copy* may mean making a new reference to an object, so if the underlying object is changed, both the copy and the original change.
collection	To make a set of documents available for searching in Verity, you must first create at least one collection. A collection is set of directories and files that allow search application users to use the Verity search engine to quickly find and display source documents that match search criteria. A collection is a set of statistics and pointers to the source documents, stored in a proprietary format on a file server. Because a collection can only store information for a single location, PeopleSoft maintains a set of collections (one per language code) for each search index object.
compensation object	In PeopleSoft Enterprise Incentive Management, a node within a compensation structure. Compensation objects are the building blocks that make up a compensation structure's hierarchical representation.
compensation structure	In PeopleSoft Enterprise Incentive Management, a hierarchical relationship of compensation objects that represents the compensation-related relationship between the objects.
configuration parameter catalog	Used to configure an external system with PeopleSoft. For example, a configuration parameter catalog might set up configuration and communication parameters for an external server.
configuration plan	In PeopleSoft Enterprise Incentive Management, configuration plans hold allocation information for common variables (not incentive rules) and are attached to a node without a participant. Configuration plans are not processed by transactions.
content reference	Content references are pointers to content registered in the portal registry. These are typically either URLs or iScripts. Content references fall into three categories: target content, templates, and template pagelets.
context	In PeopleSoft Enterprise Incentive Management, a mechanism that is used to determine the scope of a processing run. PeopleSoft Enterprise Incentive Management uses three types of context: plan, period, and run-level.
corporate account	Equivalent to the Account ChartField. Distinguishes between the chart of accounts typically used to record and report financial information for management, stockholders, and the general public, as opposed to a chart of statutory (alternate) accounts required by a regulatory authority for recording and reporting financial information.
cost profile	A combination of a receipt cost method, a cost flow, and a deplete cost method. A profile is associated with a cost book and determines how items in that book are valued, as well as how the material movement of the item is valued for the book.
cost row	A cost transaction and amount for a set of ChartFields.

data acquisition	In PeopleSoft Enterprise Incentive Management, the process during which raw business transactions are acquired from external source systems and fed into the operational data store (ODS).
data elements	Data elements, at their simplest level, define a subset of data and the rules by which to group them. For Workforce Analytics, data elements are rules that tell the system what measures to retrieve about your workforce groups.
data row	Contains the entries for each field in a table. To identify each data row uniquely, PeopleSoft applications use a key consisting of one or more fields in the table.
data validation	In PeopleSoft Enterprise Incentive Management, a process of validating and cleansing the feed data to resolve conflicts and make the data processable.
DAT file	This text file, used with the Verity search engine, contains all of the information from documents that are searchable but not returned in the results list.
delivery method	In PeopleSoft Enterprise Learning Management, identifies a learning activitys delivery method type. An activity can have one or more delivery methods.
delivery method type	In PeopleSoft Enterprise Learning Management, specifies a method that your organization uses to deliver learning activities, for example, scheduled or self-paced learning.
distribution	The process of assigning values to ChartFields. A distribution is a string of ChartField values assigned to items, payments, and budget amounts.
double byte character	If youre working with Japanese or other Asian employees, you can enter the employee's name using double-byte characters. The standard double byte character set name format in PeopleSoft applications is: [last name] space [first name].
dynamic tree	A tree that takes its detail valuesdynamic detailsdirectly from a table in the database, rather than from a range of values entered by the user.
edit table	A table in the database that has its own record definition, such as the Department table. As fields are entered into a PeopleSoft application, they can be validated against an edit table to ensure data integrity throughout the system.
effective date	A method of dating information in PeopleSoft applications. You can predate information to add historical data to your system, or postdate information in order to enter it before it actually goes into effect. By using effective dates, you don't delete values; you enter a new value with a current effective date.
EIM job	Abbreviation for *Enterprise Incentive Management job.* In PeopleSoft Enterprise Incentive Management, a collection of job steps that corresponds to the steps in an organizations compensation-related business process. An EIM job can be stopped to allow manual changes or corrections to be applied between steps, and then resumed from where it left off, continuing with the next step. A run can also be restarted or rolled back.
EIM ledger	Abbreviation for *Enterprise Incentive Management ledger.* In PeopleSoft Enterprise Incentive Management, an object to handle incremental result gathering within the scope of a participant. The ledger captures a result set with all of the appropriate traces to the data origin and to the processing steps of which it is a result.
equipment	In PeopleSoft Enterprise Learning Management, resource items that can be assigned to a training facility, to a specific training room, or directly to an activity session. Equipment items are generally items that are used (sometimes for a fee) and returned after the activity is complete.

event Events are predefined points either in the application processor flow or in the program flow. As each point is encountered, the event activates each component, triggering any PeopleCode program associated with that component and that event. Examples of events are FieldChange, SavePreChange, and OnRouteSubscription. In PeopleSoft Human Resources, *event* also refers to incidents that affect benefits eligibility.

event propagation process In PeopleSoft Sales Incentive Management, a process that determines, through logic, the propagation of an original PeopleSoft Enterprise Incentive Management event and creates a derivative (duplicate) of the original event to be processed by other objects. Sales Incentive Management uses this mechanism to implement splits, roll-ups, and so on. Event propagation determines who receives the credit.

external system In PeopleSoft, any system that is not directly compiled with PeopleTools servers.

fact In PeopleSoft applications, facts are numeric data values from fields from a source database as well as an analytic application. A fact can be anything you want to measure your business by, for example, revenue, actual, budget data, or sales numbers. A fact is stored on a fact table.

filter In PeopleSoft applications, a filter creates a subset of information. Filters are used in templates to limit your information from a pick list of attribute values.

generic process type In PeopleSoft Process Scheduler, process types are identified by a generic process type. For example, the generic process type SQR includes all SQR process types, such as SQR process and SQR report.

group Any set of records associated under a single name or variable in order to run calculations in PeopleSoft business processes. In PeopleSoft Time and Labor, for example, employees are placed in groups for time reporting purposes.

homepage Users can personalize the homepage, or the page that first appears when they access the portal.

incentive object In PeopleSoft Enterprise Incentive Management, the incentive-related objects that define and support the PeopleSoft Enterprise Incentive Management calculation process and results, such as plan templates, plans, results data, user interaction objects, and so on.

incentive rule In PeopleSoft Sales Incentive Management, the commands that act on transactions and turn them into compensation. A rule is one part in the process of turning a transaction into compensation.

key One or more fields that uniquely identify each row in a table. Some tables contain only one field as the key, while others require a combination.

learner group In PeopleSoft Enterprise Learning Management, a group of learners within the same learning environment that share the same attributes, such as department or job code.

learning activity See *activity.*

learning history In PeopleSoft Enterprise Learning Management, a self-service repository for all of a learner's completed learning activities.

learning plan In PeopleSoft Enterprise Learning Management, a self-service repository for all of a learner's planned and in-progress learning activities.

ledger mapping You use ledger mapping to relate expense data from general ledger accounts to resource objects. Multiple ledger line items can be mapped to one or more resource IDs. You can also use ledger mapping to map dollar amounts (referred to as *rates*) to business units. You can map the amounts in two different ways: an actual amount that represents actual costs of the accounting period, or a budgeted amount that can be used to calculate the capacity rates as well as budgeted model results. In PeopleSoft Enterprise Warehouse, you can map general ledger accounts to the EW Ledger table.

level A section of a tree that organizes groups of nodes.

library section In PeopleSoft Enterprise Incentive Management, a section that is defined in a plan (or template) and that is available for other plans to share. Changes to a library section are reflected in all plans that use it.

linked section In PeopleSoft Enterprise Incentive Management, a section that is defined in a plan template but appears in a plan. Changes to linked sections propagate to plans using that section.

linked variable In PeopleSoft Enterprise Incentive Management, a variable that is defined and maintained in a plan template and that also appears in a plan. Changes to linked variables propagate to plans using that variable.

load The feature that initiates a process to automatically load information into a PeopleSoft applicationfor example, populating the PeopleSoft Benefits database with plan-level election information.

local functionality In PeopleSoft HRMS, the set of information that is available for a specific country. You can access this information when you click the appropriate country flag in the global window, or when you access it by a local country menu.

location Locations enable you to indicate the different types of addressesfor a company, for example, one address to receive bills, another for shipping, a third for postal deliveries, and a separate street address. Each address has a different location number. The primary locationindicated by a *1*is the address you use most often and may be different from the main address.

market template In PeopleSoft Enterprise Incentive Management, additional functionality that is specific to a given market or industry and is built on top of a product category.

material In PeopleSoft Enterprise Learning Management, a resource item that can be assigned to the sessions of an activity. Material items are generally consumed during the duration of an activity and not returned, and they may have an associated cost.

message definition An object definition specified in PeopleSoft Application Designer that contains message information for PeopleSoft Application Messaging.

meta-SQL Meta-SQL constructs expand into platform-specific SQL substrings. They are used in functions that pass SQL strings, such as in SQL objects, the SQLExec function, and PeopleSoft Application Engine programs.

metastring Metastrings are special expressions included in SQL string literals. The metastrings, prefixed with a percent (%) symbol, are included directly in the string literals. They expand at run time into an appropriate substring for the current database platform.

multibook Processes in PeopleSoft applications that can create both application entries and general ledgers denominated in more than one currency.

multicurrency The ability to process transactions in a currency other than the business unit's base currency.

objective In PeopleSoft Enterprise Learning Management, an individual's learning goal. An example of a learning goal is a competency gap.

override In PeopleSoft Enterprise Incentive Management, the ability to make a change to a plan that applies to only one plan context.

pagelet Each block of content on the homepage is called a pagelet. These pagelets display summary information within a small rectangular area on the page. The pagelet provide users with a snapshot of their most relevant PeopleSoft and non-PeopleSoft content.

parent node A tree node linked to lower-level nodes or details that roll up into it. A node can be a parent and a child at the same time, depending on its location within the tree.

participant In PeopleSoft Enterprise Incentive Management, participants are recipients of the incentive compensation calculation process.

participant object Each participant object may be related to one or more compensation objects.

See also *participant object.*

payout In PeopleSoft Enterprise Incentive Management, the resulting incentive plan computation that is provided to payroll.

PeopleCode PeopleCode is a proprietary language, executed by the PeopleSoft application processor. PeopleCode generates results based upon existing data or user actions. By using business interlink objects, external services are available to all PeopleSoft applications wherever PeopleCode can be executed.

PeopleCode event An action that a user takes upon an object, usually a record field, that is referenced within a PeopleSoft page.

PeopleSoft Internet Architecture The fundamental architecture on which PeopleSoft 8 applications are constructed, consisting of an RDBMS, an application server, a Web server, and a browser.

performance measurement In PeopleSoft Enterprise Incentive Management, a variable used to store data (similar to an aggregator, but without a predefined formula) within the scope of an incentive plan. Performance measures are associated with a plan calendar, territory, and participant. Performance measurements are used for quota calculation and reporting.

period context In PeopleSoft Enterprise Incentive Management, because a participant typically uses the same compensation plan for multiple periods, the period context associates a plan context with a specific calendar period and fiscal year. The period context references the associated plan context, thus forming a chain. Each plan context has a corresponding set of period contexts.

per seat cost In PeopleSoft Enterprise Learning Management, the cost per learner, based on the total activity costs divided by either minimum attendees or maximum attendees. Organizations use this cost to price PeopleSoft Enterprise Learning Management activities.

plan In PeopleSoft Sales Incentive Management, a collection of allocation rules, variables, steps, sections, and incentive rules that instruct the PeopleSoft Enterprise Incentive Management engine in how to process transactions.

plan context In PeopleSoft Enterprise Incentive Management, correlates a participant with the compensation plan and node to which the participant is assigned, enabling the PeopleSoft Enterprise Incentive Management system to find anything that is associated with the node and that is required to perform compensation processing. Each participant, node, and plan combination represents a unique plan contextif three participants are on a compensation structure, each has a different plan context. Configuration plans are identified by plan contexts and are associated with the participants that refer to them.

plan section In PeopleSoft Enterprise Incentive Management, a segment of a plan that handles a specific type of event processing.

plan template In PeopleSoft Enterprise Incentive Management, the base from which a plan is created. A plan template contains common sections and variables that are inherited by all plans that are created from the template. A template may contain steps and sections that are not visible in the plan definition.

portal registry In PeopleSoft applications, the portal registry is a tree-like structure in which content references are organized, classified, and registered. It is a central repository that defines both the structure and content of a portal through a hierarchical, tree-like structure of folders useful for organizing and securing content references.

private view	A user-defined view that is available only to the user who created it.
process	See *Batch Processes.*
process definition	Process definitions define each run request.
process instance	A unique number that identifies each process request. This value is automatically incremented and assigned to each requested process when the process is submitted to run.
process job	You can link process definitions into a job request and process each request serially or in parallel. You can also initiate subsequent processes based on the return code from each prior request.
process request	A single run request, such as an SQR, a COBOL program, or a Crystal report that you run through PeopleSoft Process Scheduler.
process run control	A PeopleTools variable used to retain PeopleSoft Process Scheduler values needed at runtime for all requests that reference a run control ID. Do not confuse these with application run controls, which may be defined with the same run control ID, but only contain information specific to a given application process request.
product category	In PeopleSoft Enterprise Incentive Management, indicates an application in the Enterprise Incentive Management suite of products. Each transaction in the PeopleSoft Enterprise Incentive Management system is associated with a product category.
publishing	In PeopleSoft Enterprise Incentive Management, a stage in processing that makes incentive-related results available to participants.
record definition	A logical grouping of data elements.
record field	A field within a record definition.
record group	A set of logically and functionally related control tables and views. Record groups help enable TableSet sharing, which eliminates redundant data entry. Record groups ensure that TableSet sharing is applied consistently across all related tables and views.
record input VAT flag	Abbreviation for *record input value-added tax flag.* Within PeopleSoft Purchasing, Payables, and General Ledger, this flag indicates that you are recording input VAT on the transaction. This flag, in conjunction with the record output VAT flag, is used to determine the accounting entries created for a transaction and to determine how a transaction is reported on the VAT return. For all cases within Purchasing and Payables where VAT information is tracked on a transaction, this flag is set to Yes. This flag is not used in PeopleSoft Order Management, Billing, or Receivables, where it is assumed that you are always recording only output VAT, or in PeopleSoft Expenses, where it is assumed that you are always recording only input VAT.
record output VAT flag	Abbreviation for *record output value-added tax flag.* See *record input VAT flag.*
reference data	In PeopleSoft Sales Incentive Management, system objects that represent the sales organization, such as territories, participants, products, customers, channels, and so on.
reference object	In PeopleSoft Enterprise Incentive Management, this dimension-type object further defines the business. Reference objects can have their own hierarchy (for example, product tree, customer tree, industry tree, and geography tree).
reference transaction	In commitment control, a reference transaction is a source transaction that is referenced by a higher-level (and usually later) source transaction, in order to

automatically reverse all or part of the referenced transaction's budget-checked amount. This avoids duplicate postings during the sequential entry of the transaction at different commitment levels. For example, the amount of an encumbrance transaction (such as a purchase order) will, when checked and recorded against a budget, cause the system to concurrently reference and relieve all or part of the amount of a corresponding pre-encumbrance transaction, such as a purchase requisition.

relationship object In PeopleSoft Enterprise Incentive Management, these objects further define a compensation structure to resolve transactions by establishing associations between compensation objects and business objects.

results management process In PeopleSoft Sales Incentive Management, the process during which compensation administrators may review processing results, manually change transactions, process draws, update and review payouts, process approvals, and accumulate and push payments to the EIM ledger.

role user A PeopleSoft Workflow user. A person's role user ID serves much the same purpose as a user ID does in other parts of the system. PeopleSoft Workflow uses role user IDs to determine how to route worklist items to users (through an email address, for example) and to track the roles that users play in the workflow. Role users do not need PeopleSoft user IDs.

role Describes how people fit into PeopleSoft Workflow. A role is a class of users who perform the same type of work, such as clerks or managers. Your business rules typically specify what user role needs to do an activity.

roll up In a tree, to roll up is to total sums based on the information hierarchy.

routing Connects activities in PeopleSoft Workflow. Routings specify where the information goes and what form it takesemail message, electronic form, or worklist entry.

run control A run control is a type of online page that is used to begin a process, such as the batch processing of a payroll run. Run control pages generally start a program that manipulates data.

run control ID A unique ID to associate each user with his or her own run control table entries.

run-level context In PeopleSoft Enterprise Incentive Management, associates a particular run (and batch ID) with a period context and plan context. Every plan context that participates in a run has a separate run-level context. Because a run cannot span periods, only one run-level context is associated with each plan context.

search query You use this set of objects to pass a query string and operators to the search engine. The search index returns a set of matching results with keys to the source documents.

section In PeopleSoft Enterprise Incentive Management, a collection of incentive rules that operate on transactions of a specific type. Sections enable plans to be segmented to process logical events in different sections.

security event In commitment control, security events trigger security authorization checking, such as budget entries, transfers, and adjustments; exception overrides and notifications; and inquiries.

self-service application Self-service refers to PeopleSoft applications that are accessed by end users with a browser.

session In PeopleSoft Enterprise Learning Management, a single meeting day of an activity (that is, the period of time between start and finish times within a day). The session stores the specific date, location, meeting time, and instructor. Sessions are used for scheduled training.

session template In PeopleSoft Enterprise Learning Management, enables you to set up common activity characteristics that may be reused while scheduling a PeopleSoft Enterprise

	Learning Management activitycharacteristics such as days of the week, start and end times, facility and room assignments, instructors, and equipment. A session pattern template can be attached to an activity that is being scheduled. Attaching a template to an activity causes all of the default template information to populate the activity session pattern.
setup relationship	In PeopleSoft Enterprise Incentive Management, a relationship object type that associates a configuration plan with any structure node.
sibling	A tree node at the same level as another node, where both roll up into the same parent. A node can be a sibling, parent, and child all at the same time, depending on its location in the tree.
single signon	With single signon, users can, after being authenticated by a PeopleSoft application server, access a second PeopleSoft application server without entering a user ID or password.
source transaction	In commitment control, any transaction generated in a PeopleSoft or third-party application that is integrated with commitment control and which can be checked against commitment control budgets. For example, a pre-encumbrance, encumbrance, expenditure, recognized revenue, or collected revenue transaction.
SpeedChart	A user-defined shorthand key that designates several ChartKeys to be used for voucher entry. Percentages can optionally be related to each ChartKey in a SpeedChart definition.
SpeedType	A code representing a combination of ChartField values. SpeedTypes simplify the entry of ChartFields commonly used together.
SQR	See *Structured Query Report (SQR).*
statutory account	Account required by a regulatory authority for recording and reporting financial results. In PeopleSoft, this is equivalent to the Alternate Account (ALTACCT) ChartField.
step	In PeopleSoft Sales Incentive Management, a collection of sections in a plan. Each step corresponds to a step in the job run.
Structured Query Report (SQR)	A type of printed or displayed report generated from data extracted from a PeopleSoft SQL-based relational database. PeopleSoft applications provide a variety of standard SQRs that summarize table information and data. You can use these reports as is, customize them, or create your own.
Summary ChartField	You use summary ChartFields to create summary ledgers that roll up detail amounts based on specific detail values or on selected tree nodes. When detail values are summarized using tree nodes, summary ChartFields must be used in the summary ledger data record to accommodate the maximum length of a node name (20 characters).
summary ledger	An accounting feature used primarily in allocations, inquiries, and PS/nVision reporting to store combined account balances from detail ledgers. Summary ledgers increase speed and efficiency of reporting by eliminating the need to summarize detail ledger balances each time a report is requested. Instead, detail balances are summarized in a background process according to user-specified criteria and stored on summary ledgers. The summary ledgers are then accessed directly for reporting.
summary tree	A tree used to roll up accounts for each type of report in summary ledgers. Summary trees enable you to define trees on trees. In a summary tree, the detail values are really nodes on a detail tree or another summary tree (known as the *basis* tree). A summary tree structure specifies the details on which the summary trees are to be built.

table The underlying PeopleSoft data format, in which data is stored by columns (fields) and rows (records, or instances).

TableSet sharing Specifies control table data for each business unit so that redundancy is eliminated.

target currency The value of the entry currency or currencies converted to a single currency for budget viewing and inquiry purposes.

template A template is HTML code associated with a Web page. It defines the layout of the page and also where to get HTML for each part of the page. In PeopleSoft, you use templates to build a page by combining HTML from a number of sources. For a PeopleSoft portal, all templates must be registered in the portal registry, and each content reference must be assigned a template.

territory In PeopleSoft Sales Incentive Management, hierarchical relationships of business objects, including regions, products, customers, industries, and participants.

TimeSpan A relative period, such as year-to-date or current period, that can be used in various PeopleSoft General Ledger functions and reports when a rolling time frame, rather than a specific date, is required. TimeSpans can also be used with flexible formulas in PeopleSoft Projects.

transaction allocation In PeopleSoft Enterprise Incentive Management, the process of identifying the owner of a transaction. When a raw transaction from a batch is allocated to a plan context, the transaction is duplicated in the PeopleSoft Enterprise Incentive Management transaction tables.

transaction loading process In PeopleSoft Enterprise Incentive Management, the process during which transactions are loaded into Sales Incentive Management. During loading, the source currency is converted to the business unit currency while retaining the source currency code. At the completion of this stage, the transaction is in the first state.

transaction state In PeopleSoft Enterprise Incentive Management, a value assigned by an incentive rule to a transaction. Transaction states enable sections to process only transactions that are at a specific stage in system processing. After being successfully processed, transactions may be promoted to the next transaction state and picked up by a different section for further processing.

transaction type In PeopleSoft Enterprise Incentive Management, a way to categorize transactions to identify specific transaction types (for example, shipment, order, opportunity, and so on). Plan sections process only one type of transaction type. Transaction types can be defined based on a company's specific processes model.

Translate table A system edit table that stores codes and translate values for the miscellaneous fields in the database that do not warrant individual edit tables of their own.

tree The graphical hierarchy in PeopleSoft systems that displays the relationship between all accounting units (for example, corporate divisions, projects, reporting groups, account numbers) and determines roll-up hierarchies.

unclaimed transaction In PeopleSoft Enterprise Incentive Management, a transaction that is not claimed by a node or participant after the allocation process has completed, usually due to missing or incomplete data. Unclaimed transactions may be manually assigned to the appropriate node or participant by a compensation administrator.

uniform resource locator (URL) In PeopleSoft, the term URL refers to the entire query string. The following is an example of a URL: http://serverx/InternetClient/InternetClientServlet?ICType=Script&ICScriptProgramName=WEBLIB_BEN_401k.PAGES.FieldFormula.iScript_Home401k

universal navigation header Every PeopleSoft portal includes the universal navigation header, intended to appear at the top of every page as long as the user is signed on to the portal. In addition to providing access to the standard navigation buttons (like Home, Favorites, and signoff) the universal navigation header can also display a welcome message for each user.

URL See *uniform resource locator (URL).*

user interaction object In PeopleSoft Sales Incentive Management, used to define the reporting components and reports that a participant can access in his or her context. All Sales Incentive Management user interface objects and reports are registered as user interaction objects. User interaction objects can be linked to a compensation structure node through a compensation relationship object (individually or as groups).

variable In PeopleSoft Sales Incentive Management, the intermediate results of calculations. Variables hold the calculation results and are then inputs to other calculations. Variables can be plan variables that persist beyond the run of an engine or local variables that exist only during the processing of a section.

warehouse A PeopleSoft data warehouse that consists of predefined ETL maps, data warehouse tools, and DataMart definitions.

worksheet A way of presenting data through a PeopleSoft Business Analysis Modeler interface that enables users to do in-depth analysis using pivoting tables, charts, notes, and history information.

workflow The background process that creates a list of administrative actions based on selection criteria and specifies the procedure associated with each action.

worklist The automated to-do list that PeopleSoft Workflow creates. From the worklist, you can directly access the pages you need to perform the next action, and then return to the worklist for another item.

zero-rated VAT Abbreviation for *zero-rated value-added tax.* A VAT transaction with a VAT code that has a tax percent of zero. Used to track taxable VAT activity where no actual VAT amount is charged.

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