



Implementation of Eprofile & benefits of using Talent Summary & Manager Dashboard

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Agenda



E Profile Overview



E Profile Manager Desktop



Manager Dashboard



Talent Summary Dashboard

E Profile

- eProfile is a collaborative application that enables employees to maintain their own profiles, thereby decreasing administrative time, costs and increasing data integrity
- Employees can view, update, and request changes to their personal data, such as:
 - Email address
 - Emergency contacts
 - Home and mailing addresses
 - Marital status
 - Name change
 - Personal information
 - Phone numbers

E Profile

The screenshot shows the 'Personal Information' section of the E Profile interface. It features a header bar with the title 'Personal Information' and a link to 'Edit "Personal Information" Folder'. Below the header, a instruction reads 'Review and update your personal information.' The main content is organized into a 3x3 grid of links, each accompanied by a small icon of a document with a pencil. The links and their descriptions are: 'Personal Information Summary' (Review a summary of your personal information.), 'Home and Mailing Address' (Review and update your home and mailing addresses.), 'Phone Numbers' (Add or update phone numbers, or specify your primary phone number.), 'Email Addresses' (Add or update your email addresses.), 'Emergency Contacts' (Add or update your emergency contact information.), 'Marital Status' (Update your marital status.), 'Name Change' (Review or update your name information.), 'Complete and Submit I-9 Form' (Complete and submit an electronic based I-9 Form), and 'Ethnic Groups' (Add or update ethnic groups, or specify your primary ethnic group.).

Personal Information Edit "Personal Information" Folder		
Review and update your personal information.		
Personal Information Summary Review a summary of your personal information.	Home and Mailing Address Review and update your home and mailing addresses.	Phone Numbers Add or update phone numbers, or specify your primary phone number.
Email Addresses Add or update your email addresses.	Emergency Contacts Add or update your emergency contact information.	Marital Status Update your marital status.
Name Change Review or update your name information.	Complete and Submit I-9 Form Complete and submit an electronic based I-9 Form	Ethnic Groups Add or update ethnic groups, or specify your primary ethnic group.

- Activate eProfile on the Installation Table
- eProfile uses permission lists, roles, and user profiles to authorize or deny access to transactions and data
- PeopleSoft Delivered workflows have been configured for the following
 - Name change
 - Marital status change
 - Address change

eProfile Manager Desktop

eProfile Manager Desktop supports the following business processes:

- Review employee information
- Change employees' reporting manager
- Transfer employees
- Promote employees
- Change employees' location
- Change employees' full-time or part-time status
- Retire employees
- Terminate employees
- Request job changes
- Add and review hires

Delivered Manager Self Service Transactions

Manager Self Service Menu	Actions Available from within the Direct Line Reports Pagelet
Time Management	Request Absence View Absence Balances View Absence History
Job and Personal Information	View Employee Personal Info Request Reporting Change Transfer Employee Promote Employee Request Location Change Change Full/Part Time Status Retire Employee Terminate Employee
Compensation and Stock	Request Ad Hoc Salary Change View Total Rewards View Compensation History View Employee Stock Option Summary

Delivered Manager Self Service Transactions

Manager Self Service Menu	Actions Available from within the Direct Line Reports Pagelet
Development	View Current Team Profiles View Team Historical Profiles View Team Interest Lists
Performance Management	Create Performance Documents Create Development Documents View Performance Documents View Development Documents
Career Planning	Manage Career Plans View Career Progression Chart
Succession Planning	Manage Succession Plans View Succession 360

Manager Dashboard

Configuring the Manager Dashboard Pagelets

- Set up the Alerts pagelet
- Set up the Approvals pagelet
- Set up the Direct Reports pagelet
- Define application data for the Manager Dashboard direct line reports
- Identify access types for the Direct Line Reports pagelet

Understanding Alerts

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

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



Alerts Setup

Alerts Pagelet Setup


User Changes Allowed

- ☒ Alert Types
- ☒ Alert Levels
- ☒ Number of Alerts to Display

Alerts Level to Display

- ☒ Critical ()
- ☒ Warning ()
- ☒ Informational

*Number of Alerts

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

Understanding Approvals

- Compensation Proposal
- Job Offer
- Job Opening
- Manage Payable Time
- Manage Reported Time
- Manager Absence Approve
- Military Rank Change
- Nonperson Profiles
- Performance Document
- Person Profiles
- Promotion
- Reporting Change
- Transfer

Approval Setup


Approvals Pagelet Setup

Maximum Number of Approvals


*Maximum Number of Approvals

Warnings

Display Warnings Based On

☒ Display Overdue Warnings ()

Display Overdue Warnings days before Transaction Effective Date

☒ Display Standard Warnings ()

Display Standard Warnings days before Transaction Effective Date

Approval Workflow Engine (AWE) Transactions

Personalize | Find |  |  First 1-8 of 8 Last

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

Understanding the Direct Line Reports Pagelet Features

Summary Tab	Job Details Tab	Contact Tab	Career Plan Tab
Display Name (frozen)	Employee ID	Telephone	Review Date
First Name (off)	Job Code	Email	Relocate?
Last Name (off)	Years in Job	Department (off)	International?
Actions (frozen)	Job Title	Location (off)	Travel?
Potential	Schedule	Instant Message (off)	
Job Title			
Performance Rating Bar			
Compa-Ratio (off)			
Position in Salary Range			
Compensation Tab	Performance Tab	Time Tab	Succession Tab
Annual Salary	Last Rating	Comp Time Balance (from Time & Labor)	Key Position
Salary Currency	Period Begin Date	Vacation Balance (from Time & Labor)(off)	Successors
Salary Range Minimum	Period End Date	Sick Balance (from Time & Labor)(off)	Risk of Leaving
Salary Range Midpoint		Leave Balance 1 (from Absence Management)	Impact of Loss
Salary Range Maximum		Leave Balance 2 (from Absence Management)	
Compa-Ratio		Leave Balance 3 (from Absence Management)(off)	
Quartile			
Percent Range			

Direct Reports Setup

Direct Reports Pagelet Setup

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

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

Using Manager Dashboard

ORACLE®

All Search

Advanced Search

Home | Worklist | MultiChannel Console | Add to Favorites | Sign out

Favorites | Main Menu > Manager Self Service

Manager Dashboard

Alerts

A compensation cycle is now open and ready for your review. You can update with your proposals. 6/27

Membership Expires on 10/15 for Rosanna Channing - Alliance of Govt Managers

Membership Expires on 11/15 for Netty Owyang - Institute of Chartered Accnts

License/Certificate Expires on 10/28 for Rosanna Channing - Assoc Chartered Certif Accntnt

Development Evaluation Due on 10/28 for Susan Hoinck

View All

Objective Alignment

2009 Objectives for the Finance Organization
01/01/2009 to 12/31/2009

*Section Employee Commitment

Number of Employees

5
4
3
2
1
0

Provide Safe Wo...
Provide Competi...
Provide Quality...

Organizational Objectives

Pending Approvals

Approval

Name

Effective Date

Approval Receipt Date

Performance Document

Heidi Schwartz

N/A

07/14/2011

Direct Line Reports

Summary | Job Details | Contact | Career Plan | Compensation

Personalize | Find | View All | 1-8 of 8

Name		Job Title	*Performance Rating	Position in Salary Range
Diane Palmer	Actions	Assistant-Administrative	★★★★★	
Gabriel Fisher	Actions	Manager-Employment/Recruitm ent		
Jake Pavelka	Actions	Analyst-Financial		
Jill Chancellor	Actions	Manager-Payroll	★★★★★	
Netty Owyang	Actions	Manager-Accounting	★★★★★	
Rosanna Channing	Actions	Senior Manager-Accounting	★★★★★	
Susan Hoinck	Actions	Analyst-Financial Sr	★★★★★	
Tina Palisco	Actions	Manager-Accounting	★★★★★	

View My Organization

Learning

View All Learning

Name All Team Members

Name	Title	Required	Description	Due Date
Carla Yap	Continuous Workplace Improve	✖	Planned	09/01/2009
Carla Yap	Time Management	✖	Planned	09/01/2009
Alexis Calder	Network Design and Administration (Part 1)		Enrolled	
Allison Walker	Communicating a Shared Vision		Enrolled	
Carla Yap	Grid Computing (DIF)		Enrolled	

View All 14

Team Learning

Company Directory

Search by Name, Job Title, Department, or Email

My Profile Advanced Search

My Job Openings

Personalize | Find | View All | 1-5 of 98

Job	Job Title	Days Open	Applicants in Process
994488	Eben Director	0	2
503706	Clerical Assistant - Medical Claims	0	3
500416	Administrative Assistant	0	4
500415	Administrative Assistant	0	1
500414	Administrative Assistant	4	2

Browse Job Openings

Create Job Opening

Quick Links

Search and Compare Profiles

Add Delegation Request

Administer Delegation

Allocate Compensation

Manage My Objectives

Add Template-Based Hire

Manager Dashboard

- View important upcoming dates and events
- Analyze company and employee objectives
- Approve pending requests
- Search for individuals in your company directory
- Manage your current job openings
- Examine details about your direct reports, such as job details, compensation, performance, career and succession plans, and time reporting
- Initiate self service actions, such as creating a performance document or request a reporting change, which you would typically perform from Manager Self Service
- Access and analyze a summary of your employee's abilities on the Talent Summary page
- Manage your employee's learning
- Access quick links to perform additional managerial tasks in the system

Identifying the Manager Dashboard Pagelets to Display

- The Personalize Content: Manager Dashboard page enables you to select or deselect pagelets you wish to view on your dashboard.

The screenshot shows the 'Home Page Designer' window with the title 'Personalize Content: Manager Dashboard'. At the top right, there are buttons for 'New Window' and 'http'. Below the title bar, there is a 'Tab Name' field containing 'Manager Dashboard' and a 'Welcome Message' field. The main content area is divided into two sections: 'Choose Pagelets:' and 'Arrange Pagelets:'. The 'Choose Pagelets:' section includes instructions: 'Simply check the items that you want to appear on your homepage. Remember to click "Save" when done.' The 'Arrange Pagelets:' section has a link: 'Go to [Personalize Layout](#)'. Below these sections, there are two columns of pagelets. The first column, 'PeopleSoft Applications', has one item: 'My Reports' with an unchecked checkbox. The second column, 'HCM Dashboard', has eight items: 'Quick Links', 'Direct Line Reports', 'Pending Approvals', 'Alerts', 'Objective Alignment', 'Company Directory', 'My Job Openings', 'Learning', and 'Business Objective Alignment'. The first seven items have checked checkboxes, while 'Learning' and 'Business Objective Alignment' have unchecked checkboxes. At the bottom, there is a 'Save' button and a 'Return to Home' link. A 'Notify' button is located in the bottom left corner.

Home Page Designer

New Window http

Personalize Content: Manager Dashboard

Tab Name

Welcome Message

Choose Pagelets: Simply check the items that you want to appear on your homepage. Remember to click "Save" when done.

Arrange Pagelets: Go to [Personalize Layout](#)

PeopleSoft Applications

☐ [My Reports](#)

HCM Dashboard

☒ [Quick Links](#)

☒ [Direct Line Reports](#)

☒ [Pending Approvals](#)

☒ [Alerts](#)

☒ [Objective Alignment](#)

☒ [Company Directory](#)

☒ [My Job Openings](#)

☐ [Learning](#)

☐ [Business Objective Alignment](#)

[Return to Home](#)

Defining the Manager Dashboard Layout

- The Personalize Layout: Manager Dashboard page enables you to determine whether you want your dashboard to display in a 2- or 3-column layout. You will also select which pagelets should appear in which column

Home Page Designer

New Window http

Personalize Layout: Manager Dashboard

Tab Name: Manager Dashboard

Basic Layout: ☐ 2 columns ☒ 3 columns

Click arrows to move pagelets up and down or into neighboring columns. Click "Delete Pagelet" to remove the selected pagelet from your portal home page. Remember to click "Save" when done.

Add Pagelets: Go to [Personalize Content](#)

= Required - fixed position pagelet
* = Required - moveable pagelet

Left Column:	Center Column:	Right Column:
Alerts Objective Alignment Business Objective Alignment Learning	Pending Approvals Direct Line Reports	Company Directory My Job Openings Quick Links

Delete Pagelet

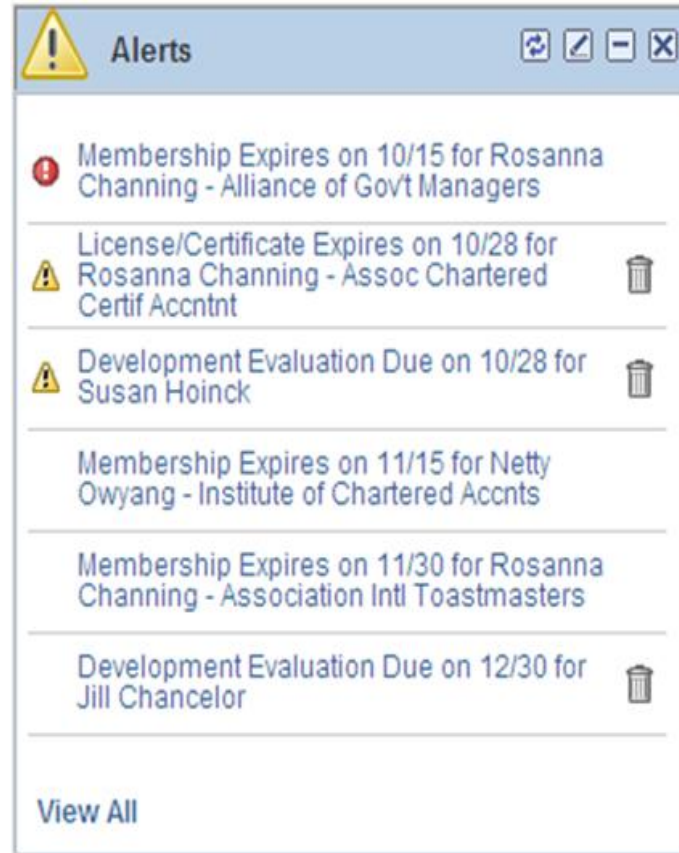
Save [Return to Home](#)

Notify

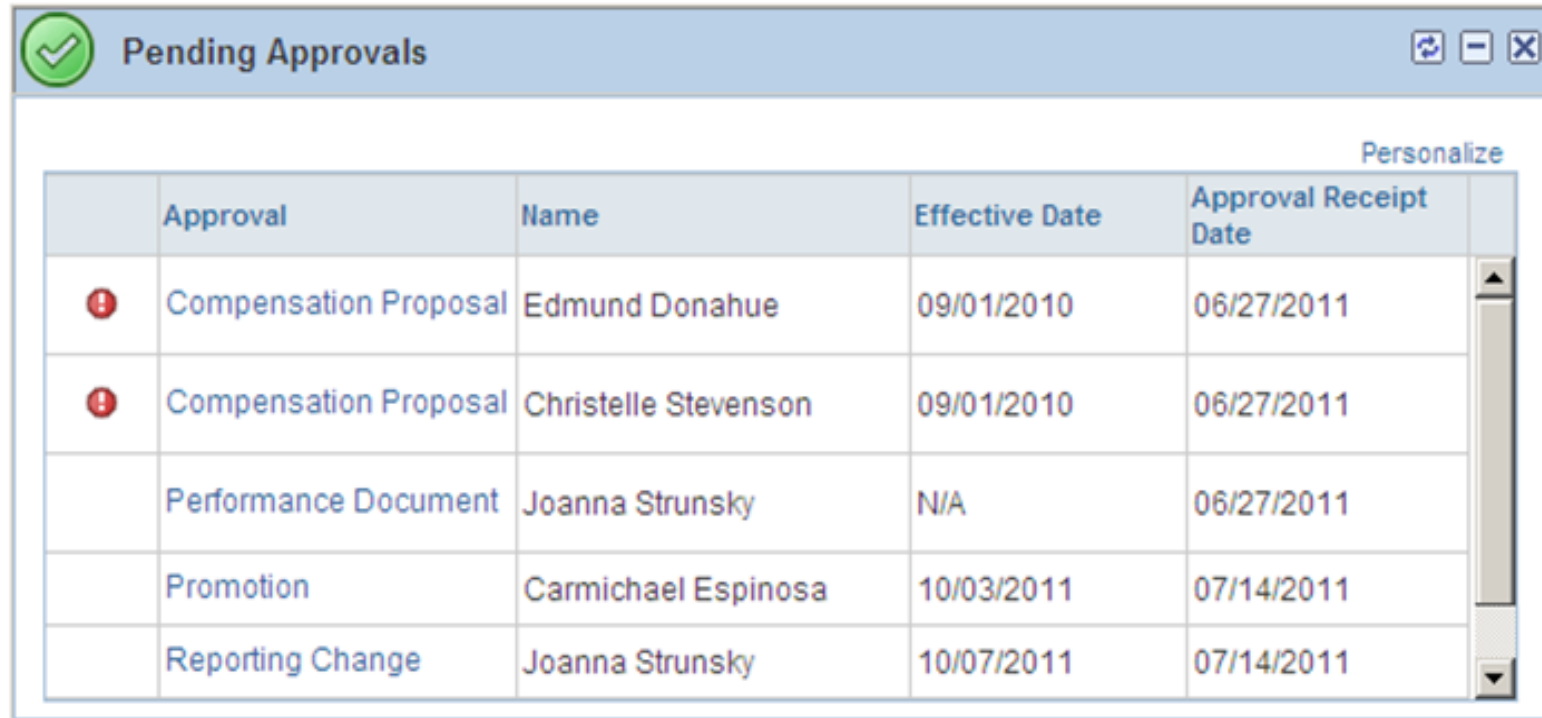
Viewing the Alerts Pagelet

There are seven alert types delivered for the Alerts pagelet:

- ePerformance
- eCompensation
- Expiring Licenses/Certificates
- Expiring Memberships
- Scheduled Training
- Birthday Alerts
- Anniversary Alerts



Viewing the Pending Approvals Pagelet



A screenshot of a web application pagelet titled "Pending Approvals". The pagelet has a light blue header bar with a green checkmark icon on the left and standard window controls (refresh, minimize, maximize) on the right. Below the header, there is a table with five columns: "Approval", "Name", "Effective Date", "Approval Receipt Date", and an empty column. The table contains five rows of data. The first two rows have a red exclamation mark icon in the first column, indicating pending or error status. The last three rows have empty cells in the first column. A "Personalize" link is located in the top right corner of the table area. A vertical scrollbar is visible on the right side of the table.

	Approval	Name	Effective Date	Approval Receipt Date	
!	Compensation Proposal	Edmund Donahue	09/01/2010	06/27/2011	
!	Compensation Proposal	Christelle Stevenson	09/01/2010	06/27/2011	
	Performance Document	Joanna Strunsky	N/A	06/27/2011	
	Promotion	Carmichael Espinosa	10/03/2011	07/14/2011	
	Reporting Change	Joanna Strunsky	10/07/2011	07/14/2011	

Viewing the My Job Openings Pagelet




The screenshot shows a web application window titled "My Job Openings". The window has a toolbar with icons for a briefcase, a person, a refresh button, a minus button, and a close button. Below the toolbar is a navigation bar with links: "Personalize", "Find", "View All", and a "1-5 of 98" indicator. The main content area displays a table with four columns: "Job", "Job Title", "Days Open", and "Applicants in Process". The table contains five rows of job listings. Below the table are two buttons: "Browse Job Openings" and "Create Job Opening".

<u>Job</u>	<u>Job Title</u>	<u>Days Open</u>	<u>Applicants in Process</u>
994488	Eben Director	34	2
503706	Clerical Assistant - Medical Claims	41	3
500416	Administrative Assistant	27	4
500415	Administrative Assistant	39	1
500414	Administrative Assistant	60	2



 Browse Job Openings

 Create Job Opening


Viewing the Learning Pagelet

 Learning ⌵ ⌵ ⌵

View All Learning Name All Team Members

<u>Name</u>	<u>Title</u>	<u>Required</u>	<u>Status</u>	<u>Due Date</u>
Carla Yap	Continuous Workplace Improve		Planned	09/01/2009
Carla Yap	Time Management		Planned	09/01/2009
Alexis Calder	Network Design and Administration (Part 1)		Enrolled	
Allison Walker	Communicating a Shared Vision		Enrolled	
Carla Yap	Grid Computing (DIF)		Enrolled	

[View All 14](#)

 Team Learning

Viewing the Direct Line Reports Pagelet

 Direct Line Reports

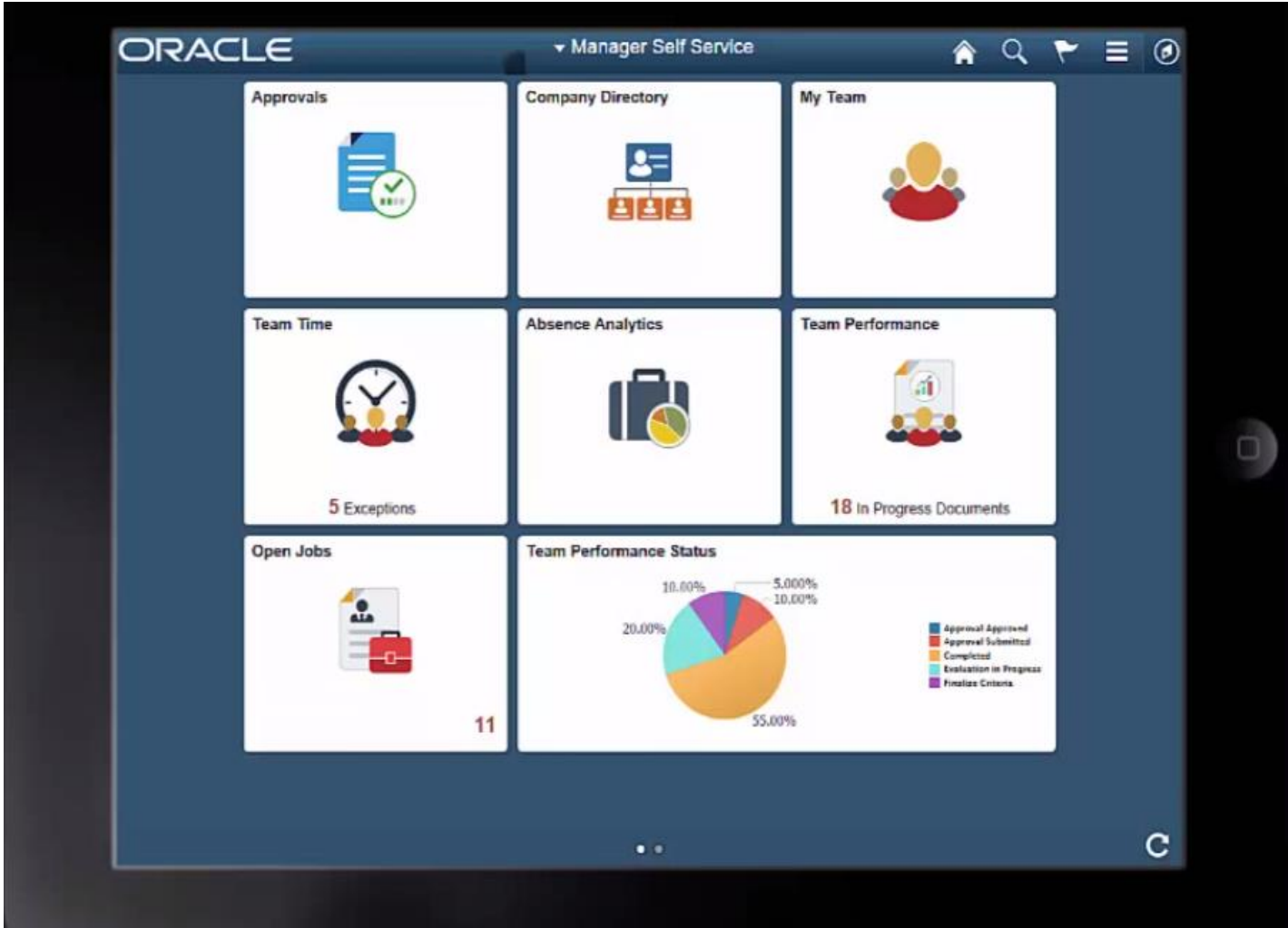
Personalize | Find | View All |   1-6 of 6

Summary Job Details Contact Career Plan Compensation  

Name			Job Title	Performance Rating	Position in Salary Range
Christelle Stevenson	▼ Actions	 	Manager-Accounting	★★★★★	
Daryl Reese	▼ Actions		Analyst-Financial	★★★★★	
Edmund Donahue	▼ Actions		Manager-Accounting	★★★★★	
Mei Lee	▼ Actions		Accountant	★★★★★	
Shawn Quilligan	▼ Actions		Analyst-Financial	★★★★★	
Vicki Zinn	▼ Actions	 	Accountant	★★★★★	

 View My Organization

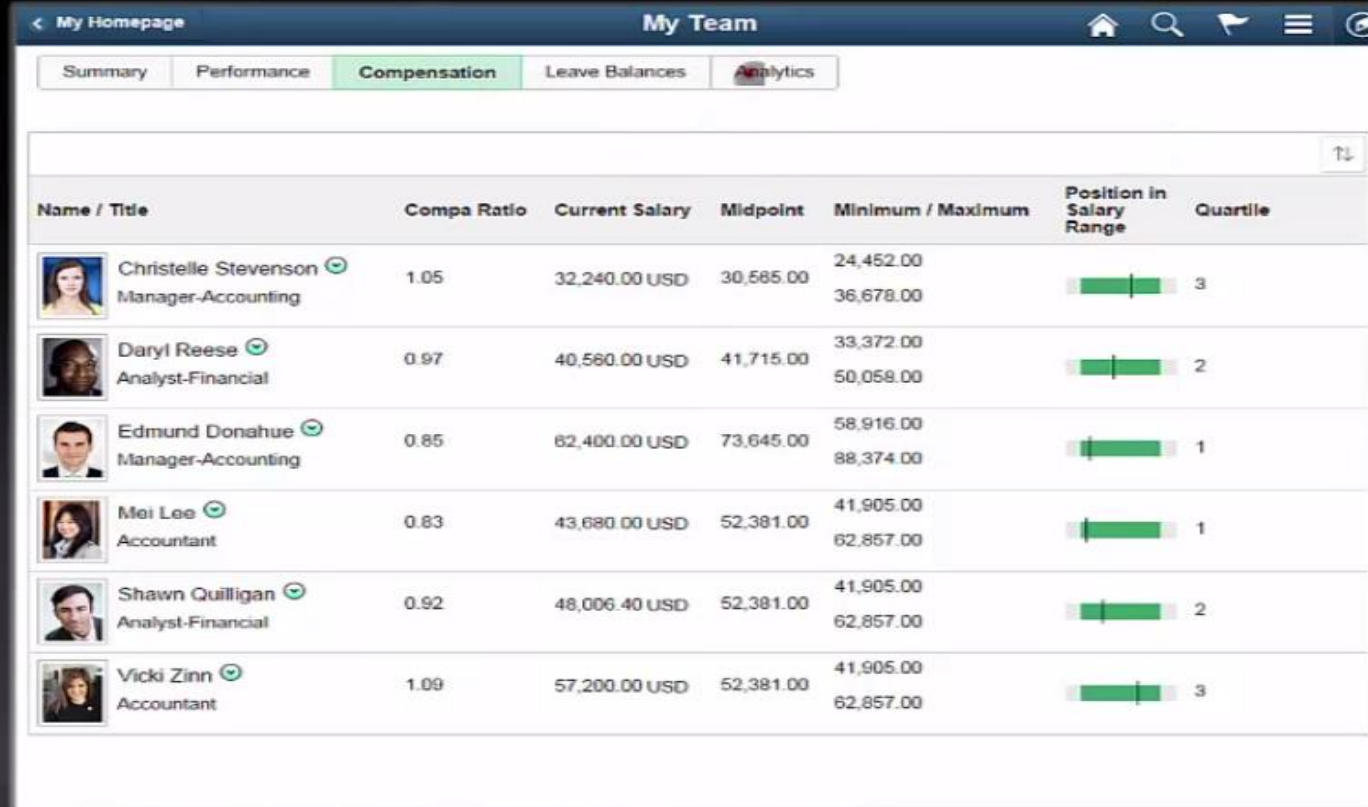
Fluid Interface - Manager Self Service















Manager Self Service



Manager Self Service



The screenshot displays a web application interface for 'My Team' management. At the top, there's a navigation bar with 'My Homepage' and 'My Team' tabs. Below this, a sub-navigation bar includes 'Summary', 'Performance', 'Compensation' (which is highlighted), 'Leave Balances', and 'Analytics'. The main content area features a table with compensation data for six team members. Each row includes a profile picture, name, title, compa ratio, current salary, midpoint, minimum/maximum salary range, a visual position in salary range bar chart, and a quartile value. A sort icon is visible in the top right corner of the table area.

Name / Title	Compa Ratio	Current Salary	Midpoint	Minimum / Maximum	Position in Salary Range	Quartile
 Christelle Stevenson Manager-Accounting	1.05	32,240.00 USD	30,585.00	24,452.00 36,678.00		3
 Daryl Reese Analyst-Financial	0.97	40,560.00 USD	41,715.00	33,372.00 50,058.00		2
 Edmund Donahue Manager-Accounting	0.85	62,400.00 USD	73,645.00	58,916.00 88,374.00		1
 Mei Lee Accountant	0.83	43,680.00 USD	52,381.00	41,905.00 62,857.00		1
 Shawn Quilligan Analyst-Financial	0.92	48,006.40 USD	52,381.00	41,905.00 62,857.00		2
 Vicki Zinn Accountant	1.09	57,200.00 USD	52,381.00	41,905.00 62,857.00		3

Manager Self Service

The screenshot displays the 'Pending Approvals' section of a Manager Self Service application on a tablet. The interface includes a top navigation bar with a home icon, search, flags, and menu options. A left sidebar lists various approval types with their respective counts. The main area shows a list of 12 pending requests, each with details on the request type, requester, dates, and status.

View By: Type

Left Sidebar (Counts):

- All: 12
- Absence Request: 5
- Ad Hoc Salary Change: 1
- Job Opening: 1
- Location change: 2
- Performance: 2
- Reporting Change: 1

Pending Approvals List (12 Rows):

Request Type	Requester	Details	Status	Date
Absence Request	Christelle Stevenson	Vacation 10/06/2014 to 10/08/2014, 24 Hours	Routed	05/22/2014
Performance	David Michelson	Meets Expectations 01/01/2013 To 12/31/2013	Routed	05/22/2014
Location change	Jessica Livingstone	To Arizona Operations	Routed	05/23/2014
Performance	Chris Cameron	Exceeds Expectations 01/01/2013 To 12/31/2013	Routed	05/28/2014
Absence Request	Vicki Zinn	Sick 09/26/2014, 8 Hours	Routed	05/30/2014
Absence Request	David Michelson	Vacation 10/20/2014 to 10/24/2014, 40 Hours	Routed	06/02/2014
Job Opening	Manager-Finance	Hiring Manager - Rosanna Channing	Routed	08/07/2014
Ad Hoc Salary Change	Jessica Livingstone	Requested by Christelle Stevenson	Routed	08/28/2014
Location change	Heidi Dubas	To Connecticut Operations	Routed	09/09/2014
Absence Request	Vicki Zinn	Vacation 09/10/2014, 8 Hours	Routed	09/10/2014

Manager Self Service

< Pending Approvals

Job Opening

Home

Search

Flag

Menu

Profile

Approve

Deny

Pushback

Job Opening Information

Job Posting Title Manager-Finance

Job Opening ID 504033

Target Openings 1

Recruiting Corporation Headquarters Location(s)

Department Corporate Finance

Desired Start Date 10/15/2014

Hiring Manager Rosanna Channing

Recruiter(s) Larry McKinley

Job Creation Date 07/30/2014

Employees Being Danny Johnson Replaced

Additional Details

Posting Destinations

[View Job Opening](#)

Approver Comments

Please enter comments here.

Approval Chain

Supervisor/Recruiter Grp Aprv

Job Opening

Pending

Route to Supervisor/Recruiter

Approved

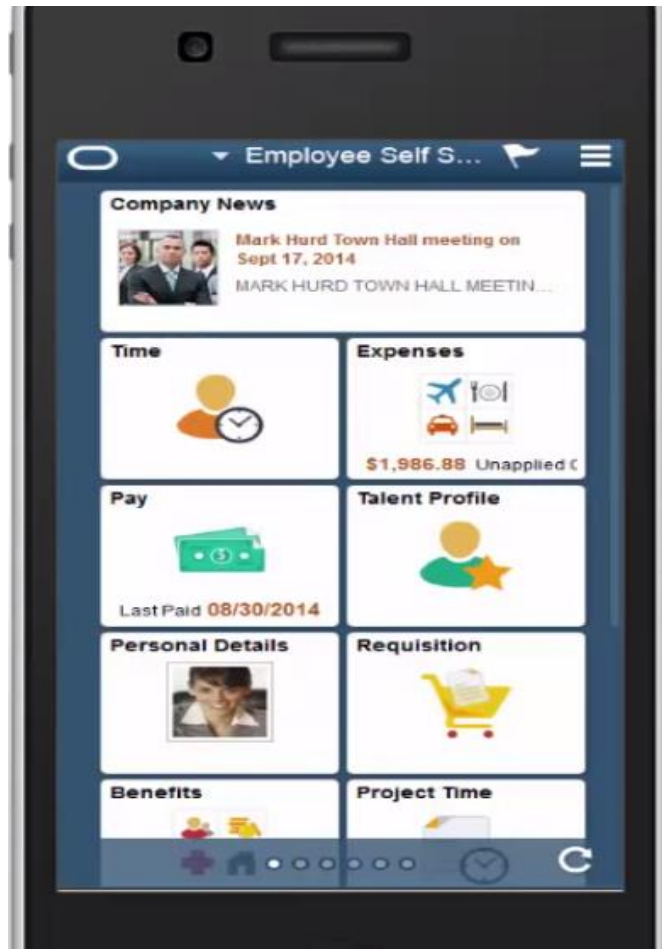
Netty Owyang Recruiter Group

Pending

[PS] Rosanna Channing - MGR Inserted Approver

#PSRECONNECT

Manager Self Service



Talent Summary Dashboard

Understanding the Talent Summary Dashboard

HCM Product	Header and Pagelet Content
Job Data Plan Careers Manage Profiles	Talent Summary header Impact of Loss vs Risk of Leaving box Career History Career Planning E&G Special Projects Education Honors and Awards Interest Lists Job Related Competencies Licenses and Certifications Personal Competencies Responsibilities Special Projects
Compensation	Base Salary History Current Salary Total Rewards


Understanding the Talent Summary Dashboard

HCM Product	Header and Pagelet Content
ePerformance	Performance vs Potential Ratings box Performance History (graphical) Performance History (grid)
Plan Successions	Succession Options
Enterprise Learning Management (ELM)	Learning

Talent Summary Header

Talent Summary

Personalize [Content](#) | [Layout](#)

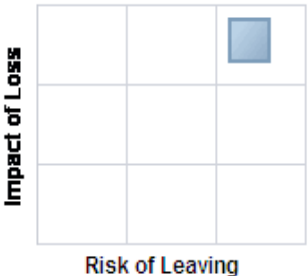
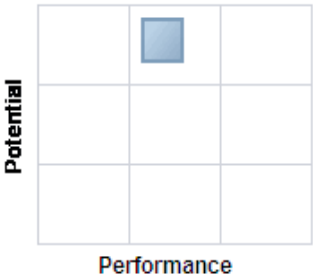
Rosanna Channing 

▼ Actions



Job Title Senior Manager-Accounting
Job Code 600135
Address 4500 Corporate Lane
Pleasanton, CA 94588
Work Phone 925.555.1234
Location Corporation Headquarters
Building 2000
Email rosanna.channing@xyzcompany.com
Full/Part Time Full-Time
Employee ID KU0046
Birthday 01/04

HR Status Active
Org Relationship Employee
Talent Category Achiever    
Last Start Date 08/29/1986
Years of Service 25.1
Date in Current Job 11/04/2008
Years in Current Job 2.9
Last Performance Period Jan 2008 to Dec 2008
Potential Rating High Potential Candidate
Last Performance Rating Exceeds Expectations



Select Another Employee

Identifying the Fields in the Talent Summary Header

Header Fields

Header Rate Boxes

Other Pagelets

Column 1 Display Fields

*Line Number	*Display Field		
1	Job Title	+	-
2	Job Code	+	-
3	Address	+	-
4	Work Phone	+	-
5	Location	+	-
6	Building	+	-
7	Email	+	-
8	Full Time/Part Time	+	-
9	Employee ID	+	-
10	Birthday	+	-

Column 2 Display Fields

*Line Number	*Display Field		
1	HR Status	+	-
2	Organizational Relationship	+	-
3	Talent Category	+	-
4	Last Start Date	+	-
5	Years of Service	+	-
6	Date in Current Job	+	-
7	Years in Current Job	+	-
8	Last Performance Period	+	-
9	Potential Rating	+	-
10	Last Performance Rating	+	-

Instant Messenger

☒ Display IM Icon

Setting Up the Header Ratings Boxes

Header Fields

Header Rate Boxes

Other Pagelets

Performance Versus Potential Rating

☒ Display Performance Versus Potential Ratings Box

Performance Document Type

Performance Rating Axis

Performance Axis Label

Potential Rating Axis

Potential Axis Label

Performance Rating Model Mapping

Find | View All | First 1 of 4 Last

Rating Model 5 Levels

Rating	Description	Rating Box Value
5	Unsat	<input type="text" value="1"/>
4	Needs	<input type="text" value="1"/>
3	Meets	<input type="text" value="2"/>
2	Exceeds	<input type="text" value="2"/>
1	Outstand	<input type="text" value="3"/>

Potential Rating Mappings

Potential Rating	Rating Box Value
High	<input type="text" value="3"/>
Lateral	<input type="text" value="2"/>
Officer	<input type="text" value="2"/>
Promote	<input type="text" value="2"/>
Placed	<input type="text" value="1"/>

Risk of Leaving Versus Impact of Loss

☒ Display Risk of Leaving Versus Impact of Loss Box

Risk Axis Label

Impact Axis Label

Talent Summary page

Talent Summary

Personalize [Content](#) | [Layout](#)

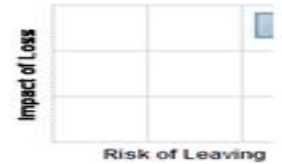
Rosanna Channing

Actions



Job Title Senior Manager-Accounting
Job Code 600135
Address 4500 Corporate Lane
Pleasanton, CA 94588
Work Phone 925.555.1234
Location Corporation Headquarters
Building 2000
Email rosanna.channing@xyzcompany.com
Full/Part Time Full-Time
Employee ID KU0045
Birthday 01/04

HR Status Active
Org Relationship Employee
Talent Category Achiever ★★☆☆
Last Start Date 08/29/1986
Years of Service 25.1
Date in Current Job 11/04/2008
Years in Current Job 2.9
Last Performance Period Jan 2008 to Dec 2008
Potential Rating High Potential Candidate
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Select Another Employee

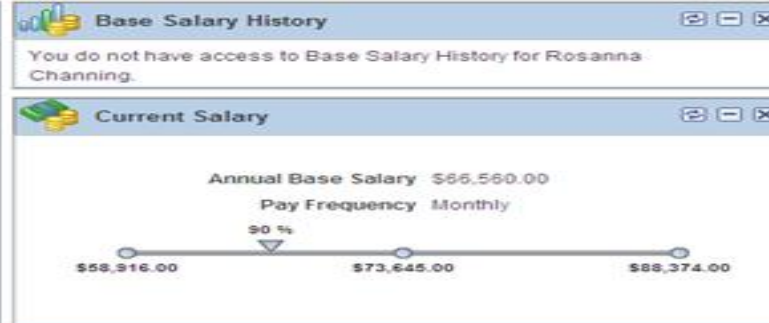


Personal Competencies

Competency	Proficiency
Business Planning	3-Good
Organize people and goal tasks	3-Good
Strategic Planning	4-Very Good

Responsibilities

Responsibilities	Proficiency
Adhere to Accounting Standards	4-Very Good



Succession Options

Successor For	Type	Order	Plan Status
Betty Locherty	Person	1 of 3	Draft
Director-Finance	Position	1 of 3	Draft

Readiness: Ready Now 1-2 Yrs 3-5 Yrs Emergency

Licenses and Certifications

License	Issued On	Expires On
Assoc Chartered Certif Acctnt	01/30/2009	10/28/2011

Education

School Education



Career History

Job Title	Job Code	Start Date	End Date
Senior Manager-Accounting	600135	11/04/2008	
Manager-Finance	600085	08/29/1986	11/03/2008

View Details

Career Planning

Willing To:

- ☒ Relocate
- ☒ Travel
- ☒ Take International Assignment

Talent Summary page

Use the Talent Summary page to manage and analyze information about your workforce. This page enables you to:

- View an employee's profile details such as competencies, responsibilities, and certifications
- Examine career and succession plans for your employees
- View employee compensation data and compare it to the job salary range
- Analyze performance history
- Assess your staff's learning and education














Selecting a Direct or Indirect Report

Talent Summary

Employee Selection Criteria

Select the employee whose Talent Summary you would like to view.

Employee Reporting as of 12/27/2011   Refresh Employees

Betty Locherty's Employees											
Personalize Find  First 1-7 of 7 Last											
Select	Name	Empl ID	Job	Pay Status	Full/Part	HR Status	Position	Job Code	Job Title	Department	Location Description
 Select	 Cynthia Adams	KU0101	0	Active	Full-Time	Active	19000074	600165	Corporate Controller	Corporate Accounting	Corporation Headquarters
 Select	Diane Palmer	K0MTX005	0	Active	Full-Time	Active		170005	Assistant-Administrative	Corporate Finance	Corporation Headquarters
 Select	 Jill Chancelor	KUL702	0	Active	Full-Time	Active		600170	Manager-Payroll	Payroll	Corporation Headquarters
 Select	 Netty Owyang	KU0055	0	Active	Full-Time	Active		600145	Manager-Accounting	International Accounting	Corporation Headquarters
 Select	 Rosanna Channing	KU0046	0	Active	Full-Time	Active		600135	Senior Manager-Accounting	Corporate Accounting	Corporation Headquarters
 Select	Susan Hoinck	KU0119	0	Active	Full-Time	Active		140040	Analyst-Financial Sr	Corporate Finance	Corporation Headquarters
 Select	 Tina Palisco	KU0071	0	Active	Full-Time	Active		600145	Manager-Accounting	Corporate Consolidations	Corporation Headquarters

Viewing the Talent Summary Page and Header

Talent Summary

Personalize [Content](#) | [Layout](#)

Rosanna Channing ✨

▼ Actions



Job Title Senior Manager-Accounting

Job Code 600135

Address 4500 Corporate Lane
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Org Relationship Employee

Talent Category Achiever ★★☆☆

Last Start Date 08/29/1986

Years of Service 25.1

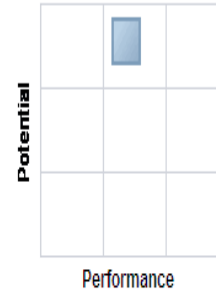
Date in Current Job 11/04/2008

Years in Current Job 2.9

Last Performance Period Jan 2008 to Dec 2008

Potential Rating High Potential Candidate


Last Performance Rating Exceeds Expectations



[Select Another Employee](#)

Career History & Planning Pagelet


- Viewing the Career History Pagelet

 Career History

Job Title	Job Code	Start Date	End Date
Senior Manager-Accounting	600135	11/04/2008	
Manager-Finance	600085	08/29/1986	11/03/2008

View Details

- Viewing the Career Planning Pagelet

 Career Planning

Willing To:


✓ Relocate


✓ Travel


✓ Take International Assignment

Official Path

Career Move	Option	Job Title	Readiness
1st Move	1	Director-Finance	1 - 2 Yrs
2nd Move	1	Senior Vice President Finance	3 - 5 Yrs

 Manage Career Plan

 Career Progression Chart

 Search and Compare Profiles

Education & Awards Pagelet

- Viewing the Education Pagelet

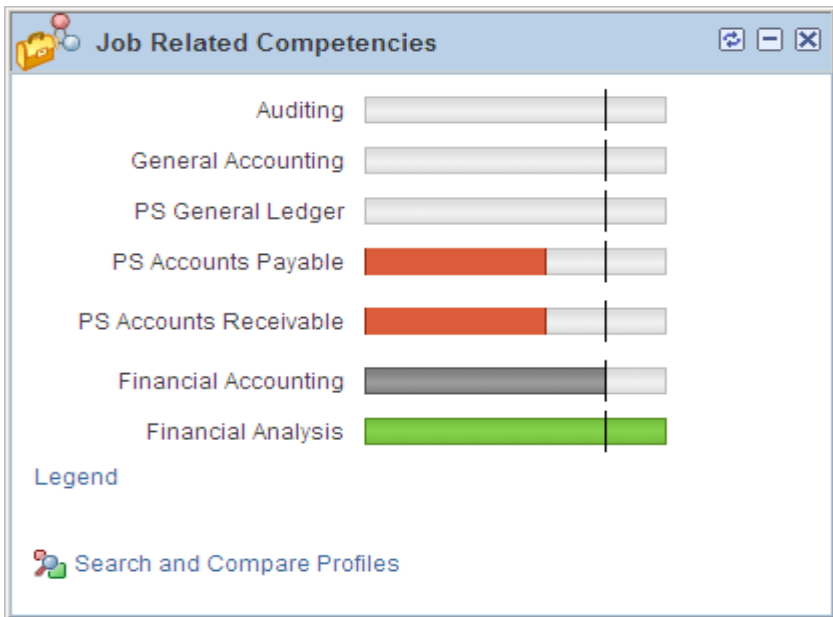
Education		
School Education		
Education Level	School	Date Completed
Degree	Berkeley, University of CA	06/18/1994
Degrees		
Degree	School	Date Acquired
Bachelor of Science		06/10/1994
Master of Business Admin		06/30/1999

- Viewing Honors and Awards Pagelet

Honors and Awards	
Honor and Award	Received On
Outstanding Contributor Award	01/01/2006

Competencies Pagelet

- Viewing the Job Related Competencies Pagelet



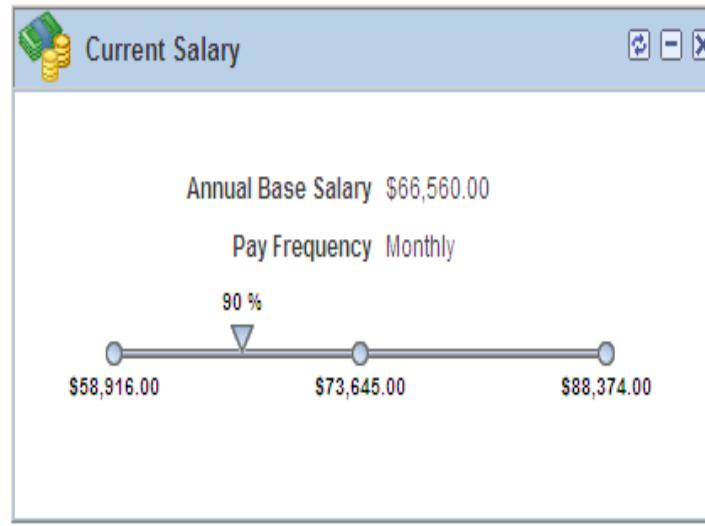
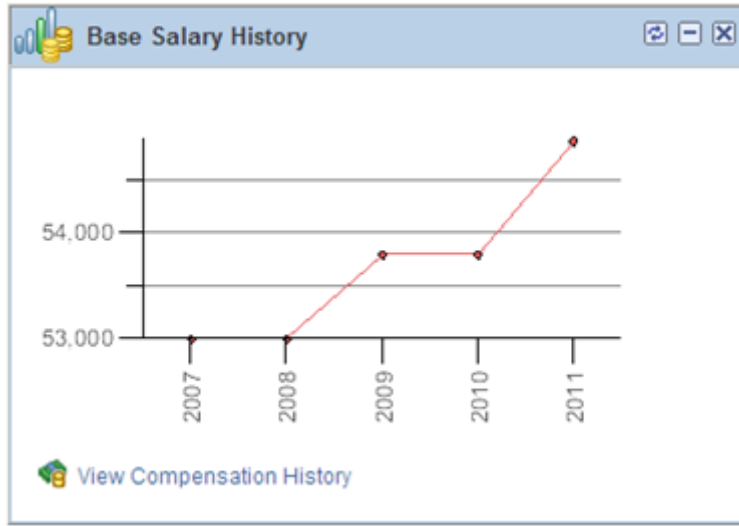
- Viewing the Personal Competencies Pagelet

The 'Personal Competencies' pagelet displays a table with two columns: 'Competency' and 'Proficiency'. The table lists three competencies: Business Planning, Organize people and goal tasks, and Strategic Planning, with their respective proficiency levels: 3-Good, 3-Good, and 4-Very Good.

Competency	Proficiency
Business Planning	3-Good
Organize people and goal tasks	3-Good
Strategic Planning	4-Very Good

Salary Pagelet

- **Viewing Salary Pagelet**





Thank You

Please complete a session evaluation

Session ID: 101920

Contact Info:

vishalr@hexaware.com

Tel: 856-275-0753

