

HRMS 9.1 45 Minute Fit Gap Experiences from an Upgrade

by HyperGen



Rapid Generation of Innovative Software Solutions

Proprietary and Confidential for HyperGen Inc. Use Only

HyperGen

- www.hypergeninc.com (800497-3744)
- Founded in 1992
- PeopleSoft Practice Since 1997
- IT Consulting Service
- IT Recruitment
- On-Shore Remote Services
- Up Grade Tool Kit
- Upgrade in 3 months!
- Oracle Partner



Certifications

- Oracle Partner
- WBENC Certified
- GSA Schedule 70 (Holder)
- SF 86 Security Clearances: Pending
- SWAM and DMBE



Remote Services Offered

- On-Shore
- Upgrade Lab
- PeopleSoft & Database Administration
- Business Analysis
- Custom Development
- Help Desk and Technical Support
- Data Migration
- Functional & Technical Documentation

HG Upgrade Tool Kit

- SQR Conversion
- Query Conversion
- Custom Object Identification
- Portal Navigation Matching
- Security Analysis
- HG Script Automation
 - Upgrade Scripts Splitter : Splits long running upgrade scripts
 - Change Assistant Script Integration
 - CA Script Modification

Presenters

- Scott Eubank
- PeopleSoft Since 1999
- HRMS and Financials versions 7.5 to 9.1
- PeopleTools 8.5
- Presenter: Quest North East, South East RUG, MARUG, DC Circuit and others
- Develop and Deliver Training for HRMS
- HRMS Fit Gaps

Today

- PeopleSoft Focus for 9.1
- Key Changes by Version
- Person Model
- Profile Management
- Walk Thru of Changes Enhancements
- Upgrade Gotcha's
- Demo Time
- Q& A

PeopleSoft Focus



Attract, Retain, Engage

Key Changes.

New in 8.9

- Person Model
- Recruiting Solutions
- Security Enhancements

New in 9.0

- Profile Management
- Template Based Hiring
- Mass Update – Using Group Build

New in 9.1

- New Look and Feel
- Employee Self Service Profile Mgt Enhancements
- Succession 360°
- Commitment Accounting Support

New Look and Feel

Navigation Menu Appears When Pulled Down

New Mouse Over Menu Pop Ups

Recently Used Items and Menu Favorites

Recently Used pages now appear on one convenient menu.

My Job Openings

No results found for the search criteria specified.

[Create Job Opening](#)

Recruiter Alerts

New Applicants:	0
Unconfirmed Interviews:	0
Interviews Today:	0
Interview Evaluations:	1
Prepare Job Offer:	0
Approve Job Offer:	0
Approve Job Opening:	0
Prepare for Hire:	3
Online Job Offer:	0
Unevaluated Answers:	0
Questionnaire Request:	42

Quick Search

Applicant (Last,First Name)

[Search](#)

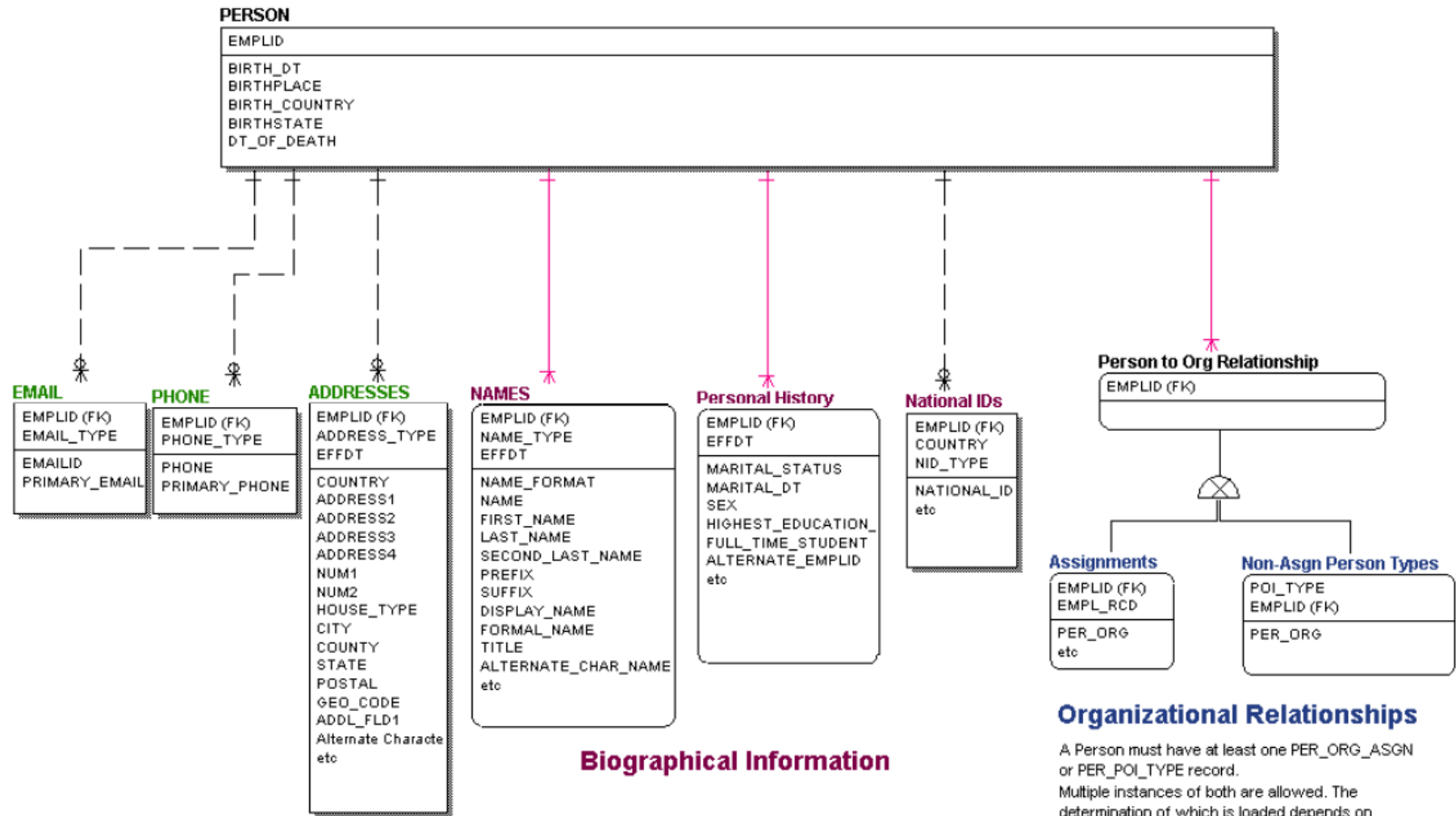
Job Opening	Title	Status
603314	Data Entry Clerk (Federal Operations - Salaried Transmutation)	Open
603313	Data Entry Clerk (Federal Operations - Hourly Transmutation)	Open
603312	Data Entry Clerk (Federal Operations - Hourly Transmutation)	Open
603311	Data Entry Clerk (Federal Operations - Hourly Transmutation)	Open

Person Model

- Major Enhancements Delivered:
 - Ability to track a person without creating a JOB record
 - Ability to use the same ID across multiple relationships to the organization
 - Improved handling of Global Assignments
 - Improved handling of Additional Assignments

Person Model

HCM 8.9 Person Object Model - Core Entities



Organizational Relationships

A Person must have at least one PER_ORG_ASGN or PER_POI_TYPE record.

Multiple instances of both are allowed. The determination of which is loaded depends on whether a JOB record is needed.

PER_ORG_ASGN is used when Assignment (aka JOB) information about the relationship will be captured.

April 8, 2005

Profile Management

*The creation, maintenance and management of the **attributes** that are required for success in a job or organizational entity.*

Person Profile
and
Job Profiles

Skills

Competencies

Interests

Knowledge

Education

Degrees

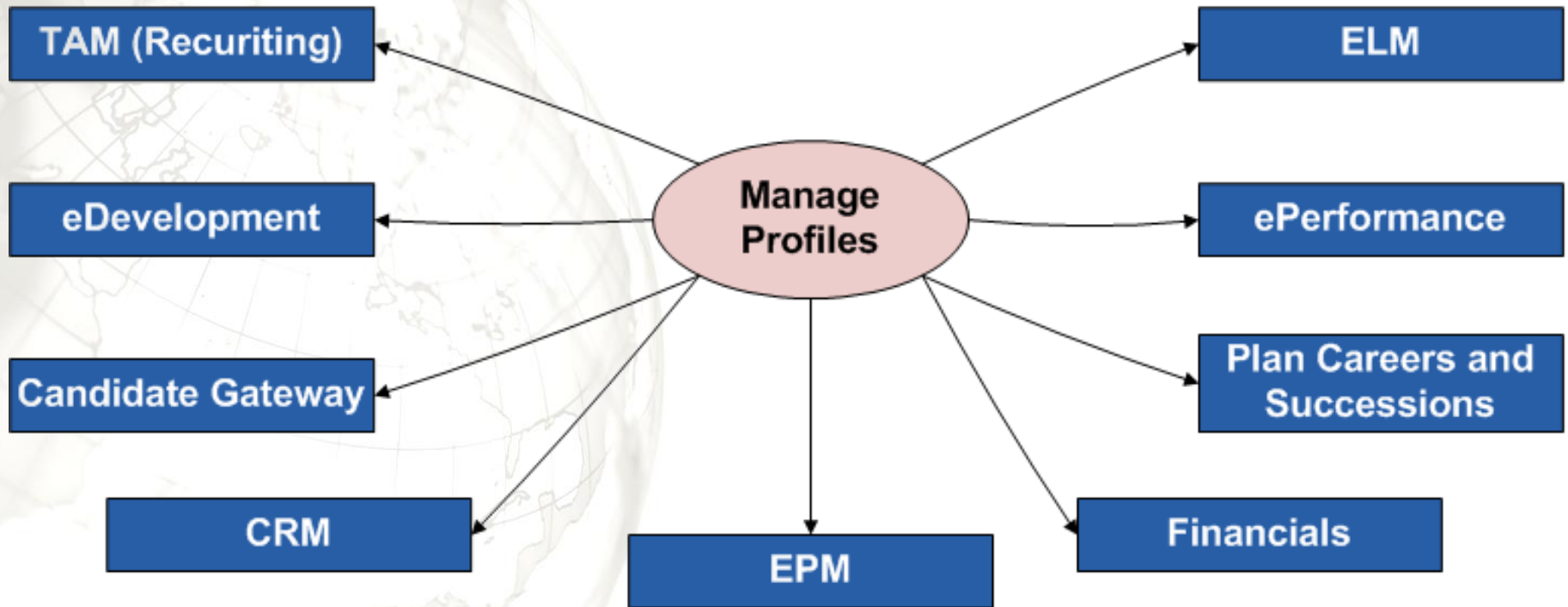
Accomplishments

Goals

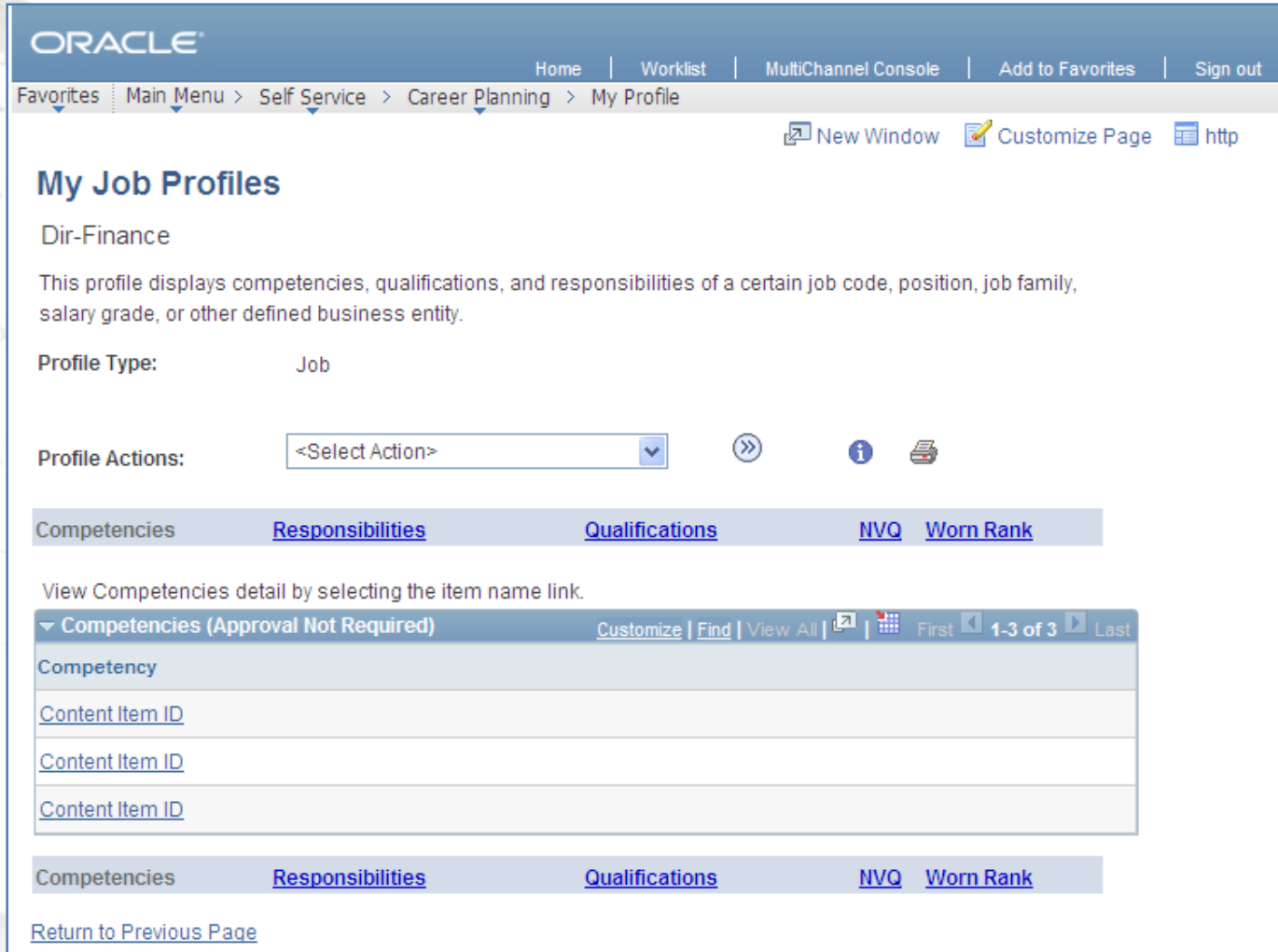
Certifications

Profile Management

Profile Management Integrations



Self Service Profile Mgt



The screenshot displays the Oracle Self Service Profile Management interface. At the top, the Oracle logo is on the left, and navigation links for Home, Worklist, MultiChannel Console, Add to Favorites, and Sign out are on the right. Below this is a breadcrumb trail: Favorites > Main Menu > Self Service > Career Planning > My Profile. Utility icons for New Window, Customize Page, and http are also present.

My Job Profiles

Dir-Finance

This profile displays competencies, qualifications, and responsibilities of a certain job code, position, job family, salary grade, or other defined business entity.

Profile Type: Job

Profile Actions: <Select Action> [dropdown] [refresh] [info] [print]

Navigation tabs: Competencies | **Responsibilities** | Qualifications | NVQ | Worn Rank

View Competencies detail by selecting the item name link.

Competencies (Approval Not Required)
Competency
Content Item ID
Content Item ID
Content Item ID

Navigation tabs: Competencies | **Responsibilities** | Qualifications | NVQ | Worn Rank

[Return to Previous Page](#)

Manager Self Service Profile Mgt

ORACLE®

Home | Worklist | MultiChannel Console | Add to Favorites

Main Menu > Manager Self Service > Career Planning > Manage Career Plans

Manage Career Plans

Select the employee to review and update the employee's career path.

Instructions

Select the employee to review and update the employee's career path. You will be able to review and update only those employees that report to you as of the date entered on the first page.

Once you have finished select *Continue* to review and update the employee's career path.

[Return to Previous Page](#)

Select Employees

Reports To: **Betty Locherty** As Of: 06/15/2010

Select Employee Customize | Find | First 1-7 of 7 Last

	Name	Empl ID	Empl Record	Pay Status	HR Status	Position	+
<input type="radio"/>	Cynthia Adams	KU0101	0	Active	Active	19000074	
<input type="radio"/>	Jill Chancellor	KUL702	0	Active	Active		
<input type="radio"/>	Rosanna Channing	KU0046	0	Active	Active		
<input type="radio"/>	Susan Hoinck	KU0119	0	Active	Active		
<input type="radio"/>	Netty Owyang	KU0055	0	Active	Active		
<input type="radio"/>	Tina Palisco	KU0071	0	Active	Active		
<input type="radio"/>	Diane Palmer	K0MTX005	0	Active	Active		

Career Planning

ORACLE

[Favorites](#) | [Main Menu](#) > [Self Service](#) > [Career Planning](#) > [My Internal Resume](#)

My Internal Resume

You can select information to be included in your Internal Resume. Only rows with the check-box selected will be included in the Internal Resume. You can update the job title, department, and/or location descriptions just for your Internal Resume without changing actual job data. You can view and print your Internal Resume.

Betty Locherty

My Personal Information

Phone Numbers			
Phone Type	Phone Number	Extension	Preferred
<input checked="" type="checkbox"/> Home	555/123-4567		<input type="checkbox"/>
<input checked="" type="checkbox"/> Main	555/123-4567		<input checked="" type="checkbox"/>

Email Addresses		
Email Type	Email Address	Preferred
<input checked="" type="checkbox"/> Home	HCMGENUser1@ap6023fems.us.oracle.com	<input checked="" type="checkbox"/>

Addresses				
Address Type	Status	As Of	Country	Address
<input checked="" type="checkbox"/> Home	Current	04/07/1979	USA	643 Robinson St Buffalo, NY 74940
<input checked="" type="checkbox"/> Mailing	Current	04/07/1979	USA	643 Robinson St Buffalo, NY 74940

My Job Information

Internal Work Experience				
Begin Date	End Date	Job Title	Department	Location
<input checked="" type="checkbox"/> 04/07/1989	03/25/2010	Director-Finance	Corporate Finance	Corporation Headquarters

My Profile Information

ORACLE

[Favorites](#) | [Main Menu](#) > [Self Service](#) > [Career Planning](#) > [Career Path](#)

Career Path

You can view your career path details. You can add movements to or delete movements from your personal career path. You can select one or more career move rows to update your career development plan with your career development area for one for more career move rows.

Betty Locherty

Department: Corporate Finance **Job Title:** [Director-Finance](#)

Position: Director-Finance

Official Path

Move Details								
Previous Option	Career Move	Job Option	Position	Business Unit	Department	Job Title	Details	
<input type="checkbox"/>	1 1st Move	1		GBIBU		Senior Vice President Finance		

Personal Path

Go to: [My Profile](#) | [My Interest List](#) | [Job Search](#) | [My Internal Resume](#) | [Career Progression Chart](#)

Succession Planning

**Optimally Align,
Develop &
Deploy
Resources**

Favorites | Main Menu > Organizational Development > Succession Planning > Succession 360°

Succession 360°

*Search For: **Persons** Name: Last Name: Empl ID: Search Return to Search

☀ Key Person ◆ Ready Now ◻ 1-2 Yrs ◻ 3-5 Yrs ▲ Emergency

Jean Parsons
Senior Vice President-Finance
Impact of Loss:
Risk of Leaving:

Gee
Assistant-Administrative
Impact of Loss:
Risk of Leaving:

Betty Locherty
Director-Finance
Impact of Loss: High
Risk of Leaving: High
Successors (3)

Patrick Seto
Vice President-Corp Legal
Impact of Loss:
Risk of Leaving:


Belor
Controller
Impact of Loss: Medium
Risk of Leaving: Low

Netty Owyang
Manager-Accounting
Impact of Loss: Medium
Risk of Leaving: Medium

Rosanna Channing
Senior Manager-Accounting
Impact of Loss: High
Risk of Leaving: High
Successors (3)

Betty Locherty - Director-Finance

Person Details Compare To Role Career



Betty Locherty
Director-Finance

Person ID: KU0007 Department: Corporate Finance
Location: Corporation Headquarters Years of Service: 20.6
Business Address: Talent Category: Top Performer ★★★★★
Telephone: Business: Mobile:

Go To: Person Profile

Successor Details - Betty Locherty

Successors Compare to Incumbent Ratings Box

Plan ID: KUSPLAN01 Plan for Betty Locherty
Plan Type: Person Plan Effective Date: 02/05/2009
Plan Status: Draft Active Successors: 3

Succession Candidates

Succession Order	Name	Status	Succession Readiness	Impact of Loss	Risk of Leaving
1	Rosanna Channing	Active	◆	High	High
2	Daryl Reese	Active	◆	High	High
3	Christelle Stevenson	Active	◻	High	Medium

◆ Ready Now ◻ 1-2 Yrs ◻ 3-5 Yrs ▲ Emergency

Save (Date change takes effect: 11/17/2009)

Go To: View Succession Plan History Manage Succession Plan

Related Succession Plans

Related Plans as of 11/17/2009

Plan Type	Plan ID	Plan Description
Position	KUSPLAN04	Plan for Director of Finance

TAM Processes

- Create and manage job openings.
- Enter and manage applicant information.
- Manage job postings.
- Search for job openings and applicants.
- Screen applicants.
- Route Applicant & Manage interviews.
- Manage offers.
- Prepare applicants for hire.
- Recruiting metrics for AA reporting.

Template Based Hire

- Smart Hire.

Template-Based Hire

Enter Hire Details

The following information is required before hiring, rehiring, adding, or renewing a Person.

Hire Details

Template:	USA HR user hires EMP into IT dept
*EmpID:	<input type="text" value="NEW"/>
*Job Effective Date:	<input type="text" value="03/30/2009"/> 
*Action:	<input type="text" value="Hire"/> ▼
*Reason Code:	<input type="text" value="New Position"/> ▼
Name Format:	English
Address Format:	United States


Next

Cancel

* Required Field

Template Based Hire

- Smart Hire.

Person National ID United States			
National ID Type:	PR	*National ID:	<input type="text" value="265-78-9754"/>
Person Address 01 - United States			
Address Type:	Home		
*Address Line 1:	<input type="text" value="343 Lencic St"/>		
Address Line 2:	<input type="text"/>		
Address Line 3:	<input type="text"/>		
*City:	<input type="text" value="Hayward"/>		
*State:	<input type="text" value="CA"/> 		
*Postal Code:	<input type="text" value="94664"/>		
Person Phone Number 01			
*Phone Type:	<input type="text" value="Home"/> ▼	Telephone:	<input type="text" value="925-745-3345"/>
Phone Extension:	<input type="text"/>		
Person Email Address 01			
*Email Type:	<input type="text" value="Home"/> ▼	Email Address:	<input type="text"/>

Template Based Hire

Work Location - Job Fields			
Business Unit:	GBIBU	Department:	11000
Location Code:	KUNY00		
Job Information - Job Code			
*Job Code:	<input type="text" value="680005"/>		
Job - Payroll System			
Payroll System:	Payroll for North America		
Job Compensation - Pay Components			
Comp Rate Code:	NAANNL	*Compensation Rate:	<input type="text" value="57,000"/>
Currency Code:	USD	Compensation Frequency:	A
Comments			
Comments:	<input type="text"/>		

* Required Field

Payroll

- Flexible Contract Pay Solutions.
- New ChartFields for Project Costing (Commitment Acct)
- Enhanced Load PaySheets functionality
- New Garnishments Rule-Based Engine
- Chart Field integration has been expanded
- Enhanced Retro Pay system

Load Salary Updates and Awards

Load Salary Updates and Awards

Run Control ID: HXCMPOPN4_2008-01-01 [Report Manager](#) [Process Monitor](#)

Report Request Parameters

Cycle ID:	<input type="text" value="HXCMPOPN4"/> 🔍		
Funding Period Begin:	<input type="text" value="01/01/2008"/> 🔍	Status:	Opened

Benefits

- New Plan Support
 - Long-Term Care
 - Wellness
 - Legal and Health Spending Plans
- Flexible Premium Options & Calculations
 - Formula-based Calculations
 - Split premiums by tax class for employees and employers
- Dependent Management
 - Effective Dating of Dependent Records
 - Over-Age Dependents Retain Coverage
- Enhanced Plan Management
 - Movement between plans now allowed while retaining dependents
 - Hardship withdrawal management for all savings plans

Security Enhancements

- New Row Level Security tables – SJT tables .
- Configurable row-level security
- Increased options for assigning row security to a user.
- New Web Libs for Portal

Other Features

- Approvals Framework (AWE)
- Group Build: Security, Mass Updates
- Integration with Outlook
- Rich Text Editor
- XML Publisher: Plug in for Word & Excel
- New Rules Engine

9.1 UpGrade Gotcha's

- Custom Garnishment Rules: Compare your Source to Target.
- Benefits – Verify no data in BEN_DEFN_COST for Waive Option or Benefits Maintenance will fail.
- Coverage Formula Table & Benefit Rate Table
- Retro Pay Triggers
- Ethnicity : you now have choice of 1 or more. Lot more of them.
- Recruiting Solutions – Reapplying Customizations.
- PeopleTools App Designer C++ libraries.
- Upgrade Requires App & Batch Scheduler.
- Windows 2008 R2 not supported, Yet! (cobol)
- Date Bugs; 9999/99/99 will not work in SQL SVR
- No SETID for PM Content Items
- Content Item Conversion may require re-engineering

Demo Time



Questions?

