New Features of PeopleSoft 9.1 Core HR and Benefits

October 2010
17 years of experience with PeopleSoft Implementations, Upgrades, Integration

- HCM
- Financials
- SCM

Beta-Financials Implementation at Ontario Hydro

Cultivate GC niche for DCAA compliance and FAR/CAS Cost Accounting solutions

Leading Healthcare and BCBS Organizations Rely on BTRG to Implement FIN, SCM and HCM solutions

Leading Financial Services Firms to facilitate MA's, design HCM, FIN and Procurement solutions

Dec-10 The Business & Technology Resource Group (BTRG) Proprietary & Confidential
Session Agenda

About BTRG and Your Presenter

HCM 9.1 Core Human Resources Enhancements

PeopleTools 8.50 User Interface Enhancements

Q&A and General Discussion
Janet Martin, HCM Solutions Architect

- 15+ Years of PeopleSoft Consulting
- SME with HR, Benefits and Time & Labor Modules
- Secondary skills with Payroll, Self Service modules
- Typical role of functional lead or project management
Core HR 9.1 Enhancements

- Profile Management Enhancements
- Career Planning Enhancements
- Succession Planning Enhancements
- eCompensation Enhancements
- ePerformance Enhancements
Profile Management Enhancements

- Introduced in HCM 9.0, Profile Management is a highly configurable tool that enables your organization to capture critical talent information, such as education, languages, skills, abilities, experience, and any other attributes relevant to your organization. Replaced Competency Management.

- Profile Management in HCM 9.1 has been enhanced to provide many usability improvements. These include:
  - Printable Page icon
  - Summary of Changes page
  - Submit button for saved only changes
  - Update Allowed and Approval Required defined at content type/section level
  - New integration for termination of profiles
Profile Management Enhancements

- **Printable Page icon** –
  - Click the Printable Page icon to display the profile in a PDF file that you can print from Adobe Acrobat. **XML Publisher** technology generates the printable file using the same template and layout as the Person Profile batch report.
Profile Management Enhancements

- **Summary of Changes page**
  - When you save a profile that requires approval for a content item, the system now presents you with the *Summary of Changes* page instead of requiring you to click the Submit button.

- **Submit Button**
  - If you choose not to submit a change for approval, the profile page then displays the *Submit button* near the top of the page, where you can access the *Summary of Changes* page later to submit the item or items for approval.

- \*1 item(s) awaiting submission for approval\*

*Core HR 9.1 Enhancements*
Profile Management Enhancements

- **Update Allowed and Approval Required.**
  - You can now define which roles require approval to update items in a content section when defining a profile type. This enables you to require that a role, such as an employee, get approval before updating a content section in their profile, while the administrator can update the same content section of the profile without approval.

<table>
<thead>
<tr>
<th>Role</th>
<th>Allow Update</th>
<th>Approval Required</th>
</tr>
</thead>
<tbody>
<tr>
<td>Administrator</td>
<td>✓</td>
<td></td>
</tr>
<tr>
<td>Manager</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Employee</td>
<td>✓</td>
<td>✓</td>
</tr>
</tbody>
</table>

- **New Integration with Event Maintenance**
  - New integration that inactivates the person profile when you terminate the person’s employment.
The Plan Careers business process in Human Resources ensures that organizations use employee talents to the fullest and provides important data for succession planning.

Supports employee-based career planning to help employees identify their career needs, plans, preferences, and interests.

Career Planning in HCM 9.1 has been enhanced to provide many additional benefits. These include:

- Manager and employee self-service access to career planning
- Ability to review career paths through a graphical user interface
- Ability to generate customized or personalized resumes
- Integration with ELM, Recruiting, Profile Manager and ePerformance
Career Planning Enhancements

- **Employee self-service** access to career planning, including defining and developing career paths.
  - **My Profile** – employees view and update their own profile data.
  - **Career Path** – define career path; modify a default career path; configure a job progression.
  - **Career Goals** – employees enter short and long-term goals.
  - **Career Mentoring** – used to assign career mentors.
  - **Career Development Areas** – record and evaluate career strengths and developmental areas.
  - **Career Training Plan** – enter or update a training program; use or modify the default training program for your job code.
  - **Career Development Plan** – record developmental areas for improvement before your next performance review or career planning session.
  - **My Internal Resume** – select specific items to be included in an internal resume and create a personal resume for internal use.
  - **Career Progression Chart** – used to view career paths and non-person profile summaries in order to perform a competency gap/fit analysis.
Manager self-service access to manage career plans for direct reports.

- Mobility
- Career Path
- Ranking/Potential
- Goals
- Mentoring
- Strength/Development
- Training Plan
- Development Plan

- Request Training
- Search for Learning
- Career Progression Chart
Manager self-service access to career progression chart.

The career progression chart page enables users to see a graphical representation of an employee's career path and perform a profile comparison between the employee and any role selected in the career path.
Career Planning Enhancements

- Ability to generate personalized resumes to apply for open jobs or positions within the organization.
- Click View Internal Resume to view or download the internal resume created from the selections made on this page. The system saves the internal resume using the Rich Text file format.
Career Planning Enhancements

Career Planning in HRMS 9.1 provides new and enhanced integration points to exchange data with Profile Management, Recruiting Solutions, ePerformance, and Enterprise Learning Management. These are the specific integration points:

- Integration with ELM to review learning needs and enroll in related courses.
- Integration with ePerformance to review development plans.
- Integration with Profile Management to support the matching and identification of skill gaps between potential job code or position profiles and employee or current job profiles.
- Integration with Recruiting Solutions to support the identification of skill gaps between open jobs or positions and employee or current job profiles.
Succession Planning Enhancements

- Succession Planning is the process of identifying long-range needs and cultivating a supply of internal talent to meet those future needs.
- Succession Planning assists in finding, assessing, and developing the human capital necessary to successfully carry out the strategy of the organization.
- Succession Planning in HCM 9.1 has been enhanced to provide many additional benefits. These include:
  - Develop Succession Plans for employees, jobcodes and positions
  - Configurable X-Y grids
  - Ability to identify, track, and manage employees in talent pools
  - Hierarchical visualization of incumbents and successors
  - Intuitive, graphical user interface with drag-and-drop capabilities
  - Enhanced Integrations
  - Ability to search internal and external candidate pools
Succession Planning Enhancements

- Ability to develop succession plans with and without position management and to create plans for individual employees, job codes, and positions.
Succession Planning Enhancements

- Ability to search **internal** and **external** candidate pools.

<table>
<thead>
<tr>
<th>Succession Plan</th>
<th>Candidates</th>
<th>Ratings Box</th>
<th>Slate</th>
</tr>
</thead>
<tbody>
<tr>
<td>Plan ID: NEW</td>
<td>Plan Type: Job Code</td>
<td>Key Job Code: LEJ001</td>
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</tr>
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</table>

- Plan Incumbent

<table>
<thead>
<tr>
<th>Effective Date: 04/13/2010</th>
<th>Next Succession Plan Date:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Plan Status: Draft</td>
<td>Projected Vacancy Date:</td>
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</tbody>
</table>

- Candidate Selection

<table>
<thead>
<tr>
<th>Search Method:</th>
<th>&lt;Select From List&gt;</th>
</tr>
</thead>
</table>

- Candidates

<table>
<thead>
<tr>
<th>Succession Details</th>
<th>Add Person</th>
<th>Delete Selected</th>
</tr>
</thead>
<tbody>
<tr>
<td>Select</td>
<td>Add Applicant</td>
<td></td>
</tr>
<tr>
<td>Order</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Person ID</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

- Additional Criteria:
  - Add-Hoc Criteria
  - Job Code in Career Plan
  - Job Code in Interest List
  - Overall Performance Rating
  - Qualification Matches Job Code

- Status:
  - Active

- Notes
Succession Planning Enhancements

- Configurable X-Y grids for rating box, or 9-box, which tracks user-defined criteria such as performance, potential, readiness, and so on, and to rate talent pool members or successors.
Succession Planning Enhancements

- Ability to identify, track, and manage employees in **talent pools**. **Talent pools** provide flexibility in the selection process for a leadership team. Creating a talent pool rather than choosing one employee with key competencies is more effective and efficient for an organization.
The **Succession 360°** page enables you to visually review and manage a person or role within the context of the organization. Real-time hierarchical visualization of incumbents and successors, including relevant profile data.
Succession Planning Enhancements

- Intuitive, graphical user interface with drag-and-drop capabilities.
Succession Planning in HRMS 9.1 provides new and enhanced integration points to exchange data with Profile Management, Recruiting Solutions, ePerformance, and Enterprise Learning Management. These are the specific integration points:

- Integration with ELM enables you to review learning needs and enroll in related courses, plus associate learning programs with talent pool members.
- Integration with ePerformance enables you to review development plans.
- Integration with Profile Management supports the matching and identification of skills gaps between potential job code or position profiles and employee or current job profiles.
- Integration with eDevelopment enables you to review additional items such as mobility preferences, career plans, and experiences.
Enhancements available in eCompensation 9.1 are:

- Streamlined Administration of Compensation Cycles
- Automated Rounding and Proration Rules for compensation plan funding
- Automated updates to Job and Variable Compensation for approved changes
- Manager alerts page providing notification of critical activities
- Multiple pay proposals easily entered in a grid like table
- Decision support through embedded metrics
- Utilization of Common Functionality:
  - Group Build
  - Tree Builder Utility
  - Configurable Matrix
  - Approval Workflow Engine (AWE)
  - Delegation of Authority
- Integration with ePerformance and Variable Compensation
- **Streamlined Administration of Compensation Cycles**
  - eCompensation provides you with the tools to streamline the administration of compensation cycles including process monitoring and automated status updates for compensation cycles, group proposals, and individual proposals.
  - The main purpose of the Administer Cycle component is to provide a single point from which an administrator can manage all phases of a compensation cycle and to provide summary analytics to monitor the progress of managers.

- You track the phases (build, open, load, close, cancel) of a compensation cycle using the cycle status code. As the compensation cycle proceeds, the administrator performs the tasks illustrated in the process flow diagram shown.
Streamlined Administration of Compensation Cycles

- Use this page to set the time periods in which managers can review, update, and be notified of changes in the compensation cycle.

- Use this page to view a summary of the cycle, including funding period, status, currency, funding amounts, funding percentages, headcounts, and calculated total salaries.
Automated Rounding Rules for compensation plan funding

- Another configurable aspect is the ability for the system to round input amounts to user-defined increments, or accept them in increments of .01. These increments can be defined by currency.

The rounding rule is applied uniformly throughout the application at a number of critical spots in the process:

- During the budget build process
- During the funding adjustment phase
- During the manager self-service phase proposed values need to be rounded in accordance with the appropriate rule
- During the load process posted proposed amounts are rounded in accordance with the appropriate rule
Automated **Proration Rules** for compensation plan funding

- A prorate rule is used to apply a formula to calculate a percent value that represents the employee's eligibility for the compensation cycle.

Use this page to set up rules for proration analysis and factor calculation. The system calculates the proration factor by reviewing the employee's job history for the eligible period and accumulating the number of periods that meet the specified proration rule formula.
Automated updates to Job and Variable Compensation for approved changes. Load Salary Updates and Awards process.

- Managers should have entered and submitted their proposals through the Allocate Compensation page. After the compensation administrator has confirmed the accuracy of the proposals or they have been approved through the AWE process, the compensation administrator has to mark the group Ready to Load.

- This process loads award updates back to the PeopleSoft Variable Compensation application and salary updates to the Job and Compensation History records of employees. The system applies the updates and integrates the information with payroll.
Manager alerts page providing notification of critical activities

- eCompensation Manager Desktop enables you to define and configure compensation alerts for use within the eCompensation Manager Self Service functionality. You can access the Maintain Text Catalog page to update the alerts sent to notify managers of critical activities.

- 18 predefined alerts are delivered.

- The system displays an alert entry with basic information such as a task name, a task description, or other instructional text. It can also include an attachment.

- The alert is viewed and acted upon by a participant when a manager accesses the Allocate Compensation page.
Multiplie pay proposals easily entered in a grid like table
- PeopleSoft eCompensation enables managers to view budgets and manage the allocation of multiple pay components.
Multiple pay proposals easily entered in a grid like table

- Use this page to enter changes to the proposed compensation amounts allocated to your direct reports. You can also navigate into any of your indirect groups to review their proposals.

<table>
<thead>
<tr>
<th>Name</th>
<th>Exclude</th>
<th>Current Salary</th>
<th>Prorate Factor</th>
<th>Funded Amount</th>
<th>Funded Percent</th>
<th>Change Amount</th>
<th>Proposed Percent</th>
<th>Other Changes</th>
<th>Funding Balance</th>
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<td>0.00</td>
<td>5,000.00</td>
</tr>
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</table>
**eCompensation Manager Desktop Enhancements**

- **Decision support** through embedded metrics
  - Compensation metrics provide managers with a **graphical depiction** of the underlying compensation data for their group as well as historical salary and variable compensation information.

- These metrics provide managers with the critical information needed to make informed compensation change recommendations for their employees and help ensure a more efficient, equitable process.

- Managers can personalize their eCompensation desktop by configuring, previewing, and selecting the compensation chart pagelet format in which they prefer to view compensation data.
eCompensation Integration with ePerformance

To incorporate performance data into the compensation process, eCompensation provides a tighter integration with ePerformance.

Source Data: If you are integrating information from eCompensation with a Performance application, select the appropriate application. You can choose

- PS ePerformance
- Other
- None

If you select Other, it is your responsibility to populate the PS_WCS_EP_APPR table.
eCompensation Enhancements

- eCompensation **Integration** with Variable Compensation
  
  - eCompensation provides an integrated compensation solution including the allocation of bonus, equity, and noncash bonuses, in addition to modification of base pay. Variable Compensation plans and their payout periods are fully supported in eCompensation.

  - Once the manager recommendations have been submitted and approved, eCompensation loads this data into job and Variable Compensation tables for a seamless data exchange between enterprise applications.
Utilization of Common Functionality:

- **Group Build**
  - Eligible participants for a compensation cycle are primarily determined by the group ID that you specify on the Compensation Cycle Definition page.

- **Tree Manager /Tree Builder Utility**
  - Create an organizational basis for your compensation processes (example: supervisor id)

- **Configurable Matrix**
  - A matrix can be used for validation of a manager’s recommended entries against minimum and maximum values. This can be based on criteria such as performance rating, salary plan, business unit, etc.

- **Approval Workflow Engine (AWE)**
  - You can configure approval transactions, events, email templates, and registry using the Approval Workflow Engine (AWE) components and pages. If you use the AWE framework for approvals for the compensation cycle you must configure it for each cycle.

- **Delegation of Authority**
  - Provides delegation of transactions that can be implemented to allow an individual to specify a proxy to act on their behalf.
Core HR 9.1 Enhancements

ePerformance Enhancements

- Enhancements available in ePerformance 9.1 are:
  - Simplified ePerformance Document Creation Processes
  - Additional Document Configuration Options
  - Support for File Attachments
  - Electronic Document Sign-off
  - Document Archival Template
  - Targeted Performance Notes
Simplified ePerformance Document Creation Processes. Ability to create ad-hoc individual performance documents based on the following:

- By Manager ID is a new option that allows you to specify the manager ID in the Manager ID field
- By Employee ID is a new option that allows you to specify an individual employee for which to create the document
- Additional Document Configuration Options. Allows additional employee data to be defined on a document template.
  - Available header content includes Employee ID, Department ID, and Description; Work Location and Description; Salary Grade and Step, Years of Service, Time in Job, Compensation History, and Rating History.
  - You can define unique header content for various document types that can also be based upon the role of the document user.
ePerformance Enhancements

Additional Document Configuration Options. Display Evaluator Names in Manager Documents.

- Users elect whether to display participant evaluator names in the manager’s version of a performance document, providing managers with a quick overview of all participants in the evaluation process.
- The current option to maintain anonymity for additional review participants continues to be available as well.
Support for File Attachments. Administrators can now enable or disable document attachment capability within the manager document.

- The attachment section is visible to any user having access to the manager document; however, only managers can add or delete attachments.
- Managers can also determine whether the attachment is accessible to both the employee and the manager, or available to the manager only. If you select the manager only option, only the manager, his or her superiors, and performance administrators can view the attachments.
ePerformance Enhancements

- Electronic Document Sign-off. New eSignature section that enables employees and managers to sign off electronically on performance and development documents:
  - Allows organizations to capture document acknowledgements without needing to generate paper copies.
  - For those wanting to generate paper copies, eSignature information is added to the signature block on any printed versions of the document that are generated.
Document Archival Template. Organizations can select from six queries to define the documents that they want to archive.

- The delivered queries define archive populations based on combinations of country, document type, document usage, document end date, and employee ID.

- Once populations are defined, organizations can use the Data Archive Manager to archive performance documents and all associated pages or components, such as evaluation criteria, employee self-evaluation, and manager evaluation.
Targeted Performance Notes.

Performance Notes created by managers and employees can now be associated with a specific item within a performance document rather than simply associated with the performance section in general.
PeopleTools 8.50 Enhancements

User Interface Enhancements

- **Modal Prompt Pages and Alert Dialog Boxes**
  - All Look Up (prompt) pages and alert dialog boxes are modal and appear in front of the primary page, which is grayed out while the prompt page is active.

- **Modal Grids and Long Edit Boxes**
  - When you click the “Zoom” icon in a grid or on a long edit box, the control appears in its own modal page where you can continue to work with the control as though it were on the main page.

- **Floating Drop Down Navigation**
  - As you mouse over any section of the menu, the menu cascades to the right, revealing more components that you have access to view. You can also:
    - Sort the menu
    - Scroll the menu
    - Search the menu
    - View your Breadcrumbs
PeopleTools 8.50 Enhancements

User Interface Enhancements

- **Favorites Enhancements**
  - Includes a “Most Recently Used” list. The Favorites menu also includes the primary key as part of any Favorite that you save.

- **Type Ahead**
  - As you type, the system searches in the background and matches entries in the record to the text you enter. Type ahead is configurable through User Personalizations, and appears on search pages and in prompt dialog boxes.

- **Processing Icon Changes**
  - Processing… and Saved icons have changed to:

![Saving...]

![Saved]
PeopleTools 8.50 Enhancements

User Interface Enhancements

- **Search Page Enhancements**
  - Search pages now include a Maximum number of rows to return field. The maximum value and the default value are set in the Search Settings on the PeopleTools Options page.
    - You can limit the number of rows returned by entering a lower value.
    - The Search Results grid displays the total results possible.

- **Style Sheet Modifications**
  - **PSSTYLEDEF**
    - If only upgrading to 8.5 tools
  - **PSSTYLEDEF_SWAN**
    - 9.1 application default
Discussion

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http://www.btrgroup.com/blog/