PeopleSoft Payroll for NA SIG Meeting

March 9, 2021

Presented by Nicole Apostola and Sandi White

Contact Info

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Agenda

- Housekeeping

- RECONNECT Envision Conference

- Quest Discovery Days

- My Oracle Support Community Changes

- Canadian Payroll: Open Discussion

- Component Lockdown **with special guest Rachael Butler!**

- US: Open Discussion

- **Future Topics:**
  - Fluid Tips, Tricks & Best Practices (April)
  - Extended Access for Terminated Employees (April)

Join us online!

2 great events, 1 great price

◆ ◆ ◆

Registration opens March 1st

Plan for the future	Get hands-on
Roadmaps, updates, enhancements	How to's, workshops, demos

PeopleSoft
RECONNECT
ENVISION

April 26 – 29, 2021

With a **focus on planning ahead**, RECONNECT Envision is where IT leaders, decision-makers and end users learn about what's coming from PeopleSoft and how to plan for the next few years: product extensions to consider, and how to leverage technology investments to drive their business forward.

PeopleSoft
RECONNECT
DIVE DEEP

October 4 - 7, 2021

Providing **practical digital learning**, RECONNECT Dive Deep is where PeopleSoft users of all levels can dig into new releases, dive deep into practical learning, get new ideas from best practices, and hone their core PeopleSoft skills.

SAVE BIG with Corporate Pass Event Bundles

questoraclecommunity.org/reconnect

Quest Discovery Days: **PS is March 15!**

Morning (10am-1:30pm Eastern) sessions

- Quest Community Engagement News

- Use Notifications for a More Efficient User Interface

- Value of Quest

- How Long Has THAT Been There?? – Respond Faster with Personalized Analytics Notifications

- Higher Education Technology SIG Roundtable

- AT LAST! Delete Unwanted Run Control Using PeopleSoft Run Control Framework!

Quest Discovery Days: **PS is March 15!**

Afternoon (1:30pm-5:30pm Eastern) sessions

• Public Sector SIG Roundtable

• Deploy a PSFT Chatbot in Less Than 20 Minutes

• RECONNECT Envision Sneak Peak

• Micro Focus COBOL: The Time for Change is Now

• Create a Navigation Collection in 15 Minutes!

• PeopleSoft Health & Safety Overview

• Quest Community Engagement News

• UC Berkeley Simplifies Payments Business Practices with PeopleSoft eBill Payment

My Oracle Support Community

Changes

MOSC Consoliation

- Advanced Benefits - PSFT (MOSC)
- Global Payroll & Absence Management - PSFT (MOSC)
- Human Resources & ELM - PSFT (MOSC)
- Payroll for NA and Time & Labor PSFT (MOSC)

                              --are now--

Human Capital Management - PSFT (MOSC)

MOSC: How to "Follow" a Category
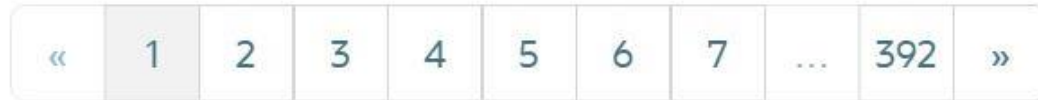
MOSC: Tracking followed categories

- **Recent Discussions** link on the left side of the page includes all your **_Following_** categories: https://community.oracle.com/mosc/discussions

MOSC Search Tips

Quest: Follow Payroll for NA Forum

Quest: Join Payroll for NA SIG (Group)

Quest Oracle Community Notifications
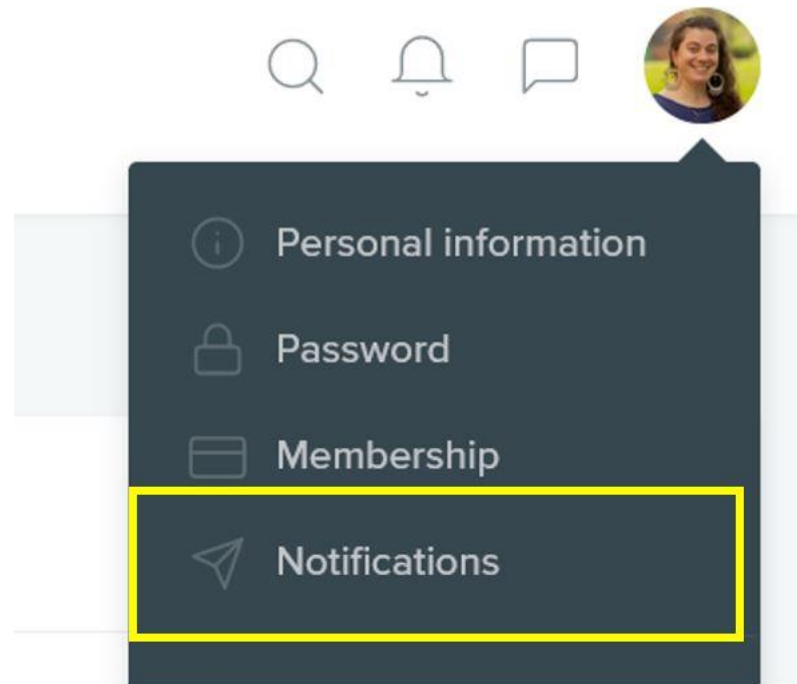
Quest Forum Notifications

Forum Notifications   Reset to defaults

Receive immediate on-site notifications and emails about forum related activities.

When someone posts a new topic in a category you follow
Notification & Email   ⌄

When someone you follow posts a topic
Notification & Email   ⌄

When a new reply is posted in a topic you are watching
Notification & Email   ⌄

When someone starts following you
Notification & Email   ⌄

When someone mentions you
Notification & Email   ⌄

When someone upvotes your post
Notification & Email   ⌄

Canadian Payroll

Open Discussion

Quest Oracle Community

Payroll Component Lockdown

Rachael Butler

Navy Federal Credit Union

Component Lockdown

- Component Lockdown Types
  - General- Self Service Tax Withholding and Direct Deposit Updates plus paysheets during T&L load
    - By Role
  - Payroll-automatically locks paysheets during any calc or confirm
    - By Paygroup

- Component Lockdown Set up Steps
  - Enable the Component for Lockdown (some pages already enabled by PS)
    - See Red Paper for additional details
  - Configure the lockdowns you want to use

Component Lockdown (Setup HCM> Product Related>PNA>Component Lockdown>Component Lockdown Table)

- Component Lockdown Table allows you see what is already enabled and what can be enabled.
  - Payroll lockdown pages are all under ePay

Component Lockdown Table

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

▼ **Search Criteria**

Product Name: [begins with ▼] [epay]

☐ Case Sensitive

[Search] [Clear] Basic Search 🔳 Save Search Criteria

Search Results

| View All | I◄ | ◄ | 1-2 of 2 ▼ | ► | ►I |

Product Name
ePay – Global Payroll Core
ePay – Payroll for North Ameri

These pages are delivered as enable by PeopleSoft; to see what other pages are available select the Load/Refresh Components button (on next slide for reference).

Component Lockdown Table

Product Name   ePay - Payroll for North Ameri

[Load/Refresh Components]

Components ⑦

🔍   1-5 of 5 ∨

Component Name	Market	Description	Eligible for Payroll Lockdown	Enabled for Lockdown	Enabled By	
PY_IC_DIR_DEP	GBL	Direct Deposit	☑	☑	PeopleSoft	
PY_IC_DIR_DEP_FL	GBL	Fluid SS Direct Deposit	☑	☑	PeopleSoft	
PY_IC_VOL_DEDS	GBL	Self Service Voluntary Deds	☑	☑	PeopleSoft	
PY_IC_W4	USA	Self Service W4 Update	☑	☑	PeopleSoft	
PY_IC_W4_FL	GBL	Tax Withholding	☑	☑	PeopleSoft	

Additional Pages available, see Red Paper for additional details about enabling other pages for lockdown.

Component Lockdown Table

Product Name ePay - Payroll for North Ameri   [Load/Refresh Components]

Components ⓘ

1-22 of 22

Component Name	Market	Description	Eligible for Payroll Lockdown	Enabled for Lockdown	Enabled By
PY_IC_DIR_DEP	GBL	Direct Deposit	☑	☑	PeopleSoft
PY_IC_DIR_DEP_FL	GBL	Fluid SS Direct Deposit	☑	☑	PeopleSoft
PY_IC_VOL_DEDS	GBL	Self Service Voluntary Deds	☑	☑	PeopleSoft
PY_IC_W4	USA	Self Service W4 Update	☑	☑	PeopleSoft
PY_IC_W4_FL	GBL	Tax Withholding	☑	☑	PeopleSoft
PY_IC_PAY_INQ	GBL	Pay Inquiry	☑	☐	
PY_IC_PAY_INQ_FLU	GBL	Pay	☑	☐	
PY_IC_W2	USA	Self Service W2 Rqst	☑	☐	
PY_IC_W2_WRKLST	USA	W-2 Reissue Request Worklist	☑	☐	
PY_MOD_SS_MODELER	GBL	Paycheck Modeling Self Service	☐	☐	
PY_RL_CONSENT_FL	GBL	RL Consent Component	☑	☐	
PY_SS_YE_CONS_CAN	GBL	Year-End Form Consent	☑	☐	
PY_SS_YE_CONS_MRQ	GBL	Year-End Form Consent	☑	☐	
PY_SS_YE_CONS_USA	GBL	Year-End Form Consent	☑	☐	
PY_SS_YE_FORM_CAN	GBL	View Year End Slips	☑	☐	
PY_SS_YE_FORM_MRQ	GBL	View Year End Slips	☑	☐	
PY_SS_YE_FORM_USA	GBL	Self Service Year-End Forms	☑	☐	
PY_SS_YE_RL_VW_FL	GBL	RL View Forms	☑	☐	
PY_T4_CONSENT_FL	GBL	Fluid T4/T4A Consent	☑	☐	
PY_T4_YE_FORM_FL	GBL	View Year End Slips	☑	☐	
PY_W2_CONSENT_FL	GBL	Fluid W-2/W-2c Consent	☑	☐	
PY_W2_YE_FORM_FL	GBL	W-2/W-2c Fluid View Forms	☑	☐	

Configuring Component Lockdown (Setup HCM> Product Related> PNA>Component Lockdown>Component Group)

Add a Component Group ID for each page you want to lockdown through a General Lockdown Type

Component Group

Find an Existing Value | Add a New Value

Component Group ID: [ ]

Add

Find an Existing Value | Add a New Value

Component Group

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value | Add a New Value

▼ Search Criteria

Component Group ID: begins with [v] [   ]

Description: begins with [v] [   ]

☐ Case Sensitive

Search | Clear | Basic Search | Save Search Criteria

Search Results

View All	|◄ ◄	1-3 of 3 [v]	►	►|

Component Group ID	Description
1	Paysheet
2	Direct Deposit
3	Tax Withholding

Configuring Component Lockdown (Setup HCM> Product Related> PNA>Component Lockdown>Component Group)

Paysheet Component Group 1

Components

*Component Name	*Market	Description	Eligible for Payroll Lockdown		
PAY_SHEET_ADD	USA	PaySheet	☑	＋	－
PAY_SHEET_ADD_PAGE	USA	Paysheet Add Page	☑	＋	－
PAY_SHEET_LINE	USA	Payline	☑	＋	－
PAY_SHEET_LINE_S	USA	Payline Earnings (Account)	☑	＋	－
PAY_SHEET_LN	USA	Payline	☑	＋	－
PAY_SHEET_LN_S	USA	Payline Earns (Acct) Security	☑	＋	－
PAY_SHEET_MULT	USA	Paysheet Earnings (Short Form)	☑	＋	－

1-7 of 7 | View All

Configuring Component Lockdown (Setup HCM> Product Related> PNA>Component Lockdown>Component Group)

Direct Deposit Component Group 2:
Direct Deposit-Admin View
PY_IC_DIR_DEP_FL- ESS View

Components

				1-2 of 2	View All

*Component Name	*Market	Description	Eligible for Payroll Lockdown		
DIRECT_DEPOSIT	USA	Direct Deposit	☑	✚	➖
PY_IC_DIR_DEP_FL	GBL	Fluid SS Direct Deposit	☑	✚	➖

Configuring Component Lockdown (Setup HCM> Product Related> PNA>Component Lockdown>Component Group)

Tax Withholding Component Group 3

Components

*Component Name	***Market**	**Description**		**Eligible for Payroll Lockdown**		
PY_IC_W4	USA	Self Service W4 Update		☑	+	−

Configuring Component Lockdown (Setup HCM> Product Related> PNA>Component Lockdown>Group Access Definitions

Group Access Definitions

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value | Add a New Value

▼ Search Criteria

Lockdown Type: = [▼] [▼]

Company: begins with [▼] [🔍]

Pay Group: begins with [▼] [🔍]

Role Name: begins with [▼] [🔍]

☐ Case Sensitive

[Search] [Clear]   Basic Search 📑 Save Search Criteria

Search Results

View All |◄ ◄   1-9 of 9 [▼] ► ►|

Lockdown Type	Company	Pay Group	Role Name
General	(blank)	(blank)	N_Employee
Payroll	NFC	FC1	(blank)
Payroll	NFC	FC2	(blank)
Payroll	NFC	FC3	(blank)
Payroll	NFC	FC5	(blank)
Payroll	NFG	FG1	(blank)
Payroll	NFG	FG2	(blank)
Payroll	NFG	FG3	(blank)
Payroll	NFG	FG4	(blank)

Add a new value:
For Payroll you will need to add each Payrgroup
For General you will just need to add the security role for those you want to lock out.

Configuring Component Lockdown (Setup HCM> Product Related> PNA>Component Lockdown>Group Access Definitions)

Group Access Definitions

Lockdown Type   Payroll

Company   NFC   Navy Federal Credit Union   Pay Group   FC1   Executive Biweekly

Component Group Access Definitions ⓘ   🔍 | |◄ ◄ | 1 of 1 ▾ | ► ►| | View All

➕ ➖

*Component Group ID [1 🔍]   Paysheet   *Status [Active ▾]

*Disable During Payroll Run [Calculation & Confirmation ▾]   Update Component Group

Lockout Message

| Message Catalog |
| Text |

Message Type   Message Set [   ]   Number [   ]

Message Text [Payroll Calculation or Confirm is running. You have view only access during this time.   ]

Access Options

| ⦿ Enable   ○ Disable Fully   ○ Disable Temporarily |

Disabled Periods

🔍 |◄ ◄ | 1-1 of 1 ▾ | ► ►| | View All

Start Date	Start Time	End Date	End Time		

Lockdown Type: Payroll
Pay Group (Set up for all paygroups)
Component Group ID value for the Paysheet group
Status: Active
Disable During Payroll Run: Calculation & Confirmation
Lockout Message:
Message Catalog or Text
Access Options:
Enable: Should be selected for payroll lockdowns. Will only disable during calc and confirm

*If you ever need to make a payline adjustment because the calc failed, you can inactive the lockdown for the paygroup the payline is in, make your update, and then select activate again.

Configuring Component Lockdown (Setup HCM> Product Related> PNA>Component Lockdown>Group Access Definitions)

Group Access Definitions

Lockdown Type   General   Role Name   N_Employee

Component Group Access Definitions ⓘ   🔍 | |◄ ◄ 3 of 3 ▼ ► ►| | View All

*Component Group ID 3 🔍   Tax Withholding   *Status Active ▼   ➕ ➖

Update Component Group

Lockout Message

Message Type   Message Catalog
                    Text   Message Set ▢   Number ▢

Message Text   Payroll is being processed. Updates to your tax withholding forms are not allowed at this time.

Access Options

○ Enable   ◉ Disable Fully   ○ Disable Temporarily

Disabled Periods

🔍 |◄ ◄ 1-1 of 1 ▼ ► ►| | View All

Start Date	Start Time	End Date	End Time		

Lockdown Type: General
Role Name: Role for all employees
Component Group ID: Number for each lockdown component
Status: Active
Lockout Message: Message Catalog or Text
Access Options:
  Enable: Gives back access (component is not locked down)
  Disable Fully: Takes away access, locks down the component
  Disable Temporarily: Enter Start Date and Time and End Date and Time to take away access

Configuring Component Lockdown (Setup HCM> Product Related> PNA>Component Lockdown>Group Access Definitions)

Group Access Definitions

Lockdown Type   General   Role Name   N_Employee

| Component Group Access Definitions ⑦ | | 🔍 | ◁ | ◀ | 2 of 3 ▼ | ▶ | ▷▷ | | View All |

＋ －

*Component Group ID 2 🔍   Direct Deposit   *Status Active ▼

Update Component Group

Lockout Message

Message Type Text ▼   Message Set ▢   Number ▢

Message Text Payroll is being processed. Updates to your Direct Deposit are not allowed at this time.

Access Options

○ Enable   ◉ Disable Fully   ○ Disable Temporarily

Disabled Periods

| | | | ◁ | ◀ | 1-1 of 1 ▼ | ▶ | ▷▷ | | View All |

Start Date	Start Time	End Date	End Time		

Lockdown Type: General
Role Name: Role for all employees
Component Group ID: Number for each lockdown component
Status: Active
Lockout Message: Message Catalog or Text
Access Options:
>**Enable:** Gives back access (component is not locked down)
>**Disable Fully:** Takes away access, locks down the component
>**Disable Temporarily:** Enter Start Date and Time and End Date and Time to take away access

Configuring Component Lockdown (Setup HCM> Product Related> PNA>Component Lockdown>Group Access Definitions)

Group Access Definitions

Lockdown Type   General

Role Name   N_Employee

Component Group Access Definitions ⓘ   🔍 | |◀ ◀ 1 of 3 ▾ ▶ ▶| | View All

＋ －

*Component Group ID 1 🔍   Paysheet   *Status Active ▾

Update Component Group

Lockout Message

Message Type Text ▾   Message Set   Number

Message Text Time and Labor is running. You have view only access during this time.

Access Options

○ Enable   ◉ Disable Fully   ○ Disable Temporarily

Disabled Periods

▤ 🔍 |◀ ◀ 1-1 of 1 ▾ ▶ ▶| | View All

Start Date	Start Time	End Date	End Time		

Lockdown Type: General
Role Name: Role for all employees
Component Group ID: Number for each lockdown component
Status: Active
Lockout Message: Message Catalog or Text
Access Options:
> **Enable:** Gives back access (component is not locked down)
> **Disable Fully:** Takes away access, locks down the component
> **Disable Temporarily:** Enter Start Date and Time and End Date and Time to take away access

Component Lockdown: Self-Service Pages with lockdown in place
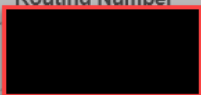
Direct Deposit

IMPORTANT!!!!
Please read the instructions before updating the direct deposit information.

Click here for Instructions
Learn More about Emergency Savings

Accounts

Order	Nickname	Payment Method	Routing Number	Account Number	Account Type	Amount/ Percent
Last	Checking999	Direct Deposit	■■■■■	■■■■■	Checking	Remaining Balance

Payroll is being processed. Updates to your Direct Deposit are not allowed at this time.

OK

Component Lockdown: Self-Service Pages with lockdown in place

Component Lockdown: Self-Service Pages with lockdown in place

Component Lockdown Additional Info

- Red Paper Doc Id [2292445.1](2292445.1)
- Bug 29052723 Doc Id [2570741.1](2570741.1)
- Bug 27153386 Doc Id [2449703.1](2449703.1) (Delivered in Image27)

US Payroll

Open Discussion

PDF Withholding Forms

- Are you using this?
- Would you be willing to present at a future meeting?

Anita would like to work with a fellow customer who uses this

Anita.Pennington@sanjoseca.gov

Guided Self-Service

- Are you using this?
- Would you be willing to present at a future meeting?

Mary would like to work with a fellow customer who uses this

 mmalmin@fastenal.com

Absence Management Questions

- Have you set up Absence Mgmt where you can submit two different absences on the same day?

- Unapproved retro that made it to the trigger table

- Unprocessed CYM (country) entries on trigger table

Denise would like to work with a fellow customer who uses Absence Management

DArnaud@ta-petro.com

Future Payroll for NA SIG Topics

- Fluid Tips/Tricks – *if you want to share YOUR tips at the April 13 meeting, please let me know!!*
- Extended Access for Terminated Employees– *if you want to share what your organization does with extended access at the April 13 meeting, please let me know as well*
- Guided Self-Service

Next Meeting – April 13
Bring your
Fluid Tips & Tricks
and
Information about Extended Access

https://register.gotowebinar.com/register/1335711324969603083