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

Presented by Vishal Rao
Senior Director – Enterprise Solutions
Hexaware Technologies Inc.
Date : 16th July 2019

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

- 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 20

Alert Definitions

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*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
1	☑	Expiring Memberships	10	30	90	30	☑
3	☑	eCompensation					
4	☑	Expiring Licenses/Certificates	10	30	90	30	☑
5	☑	ePerformance	10	30	90	30	☑
6	☑	Scheduled Training	10	30	90	30	☑
9	☑	Birthday Alerts	1	3	7	7	☑
10	☑	Anniversary Alerts	1	3	7	7	☑

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 [50]

Warnings

Display Warnings Based On [Transaction Effective Date ▼]

☑ Display Overdue Warnings (🛑) Display Overdue Warnings [1] days before Transaction Effective Date

☑ Display Standard Warnings (⚠) Display Standard Warnings [3] days before Transaction Effective Date

Approval Workflow Engine (AWE) Transactions

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	*Sequence	*Transaction Description	Include		
1	10	Compensation Proposal ▼	☑	➕	➖
2	20	Military Rank Change ▼	☑	➕	➖
3	30	Nonperson Profile ▼	☑	➕	➖
4	40	Performance Document ▼	☑	➕	➖
5	50	Person Profile ▼	☑	➕	➖
6	60	Promotion ▼	☑	➕	➖
7	70	Reporting Change ▼	☑	➕	➖
8	80	Transfer ▼	☑	➕	➖

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	Summary	
Second Tab	Job Details	
Third Tab	Contact	
Fourth Tab	Career Plan	

Fifth Tab	Compensation	
Sixth Tab	Performance	
Seventh Tab	Time	
Eighth Tab	Succession	

Columns

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

Using Manager Dashboard

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.

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
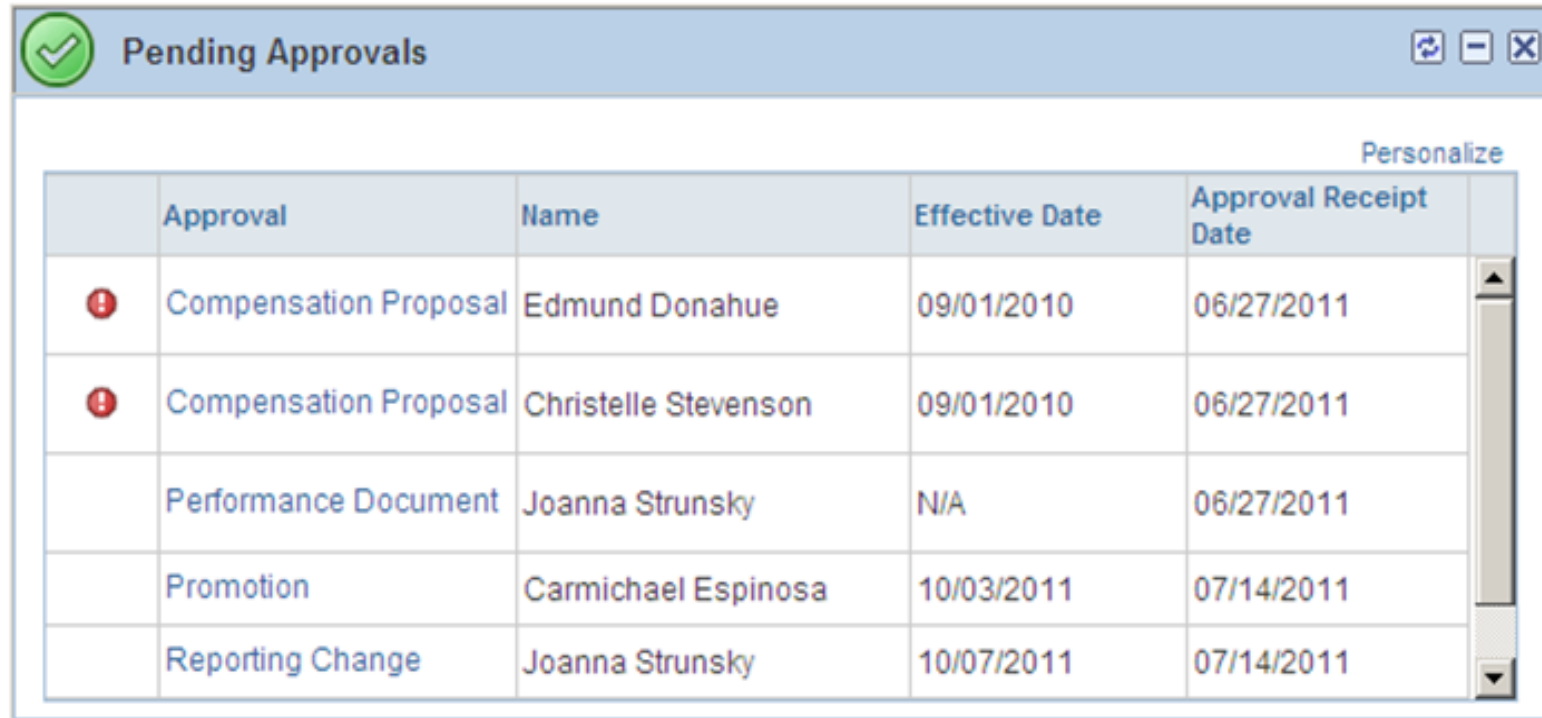
Viewing the Alerts Pagelet

There are seven alert types delivered for the Alerts pagelet:

- ePerformance
- eCompensation
- Expiring Licenses/Certificates
- Expiring Memberships
- Scheduled Training
- Birthday Alerts
- Anniversary Alerts
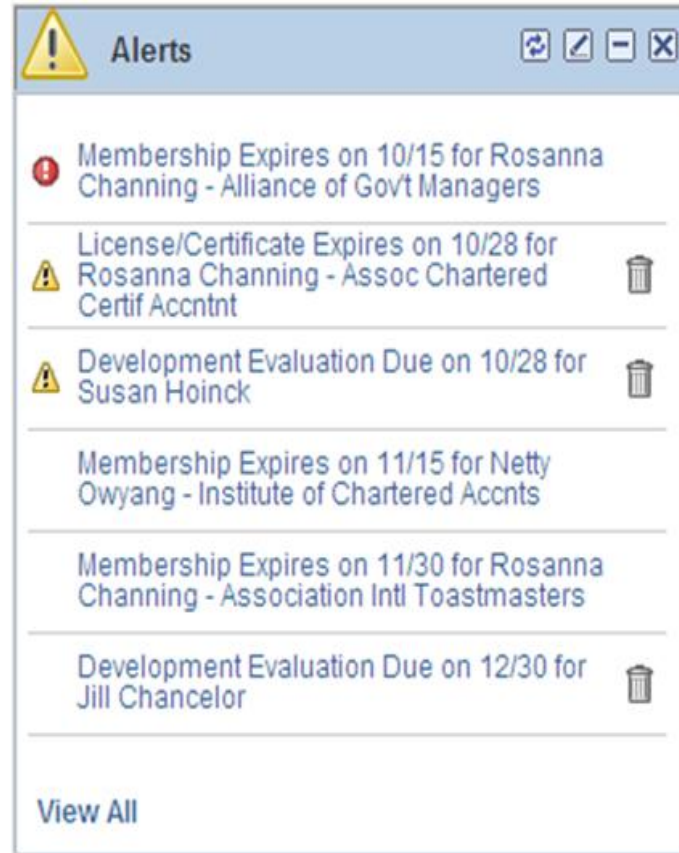
Viewing the Pending Approvals Pagelet

Viewing the My Job Openings Pagelet

Viewing the Learning Pagelet

Viewing the Direct Line Reports Pagelet

Fluid Interface - Manager Self Service

Manager Self Service

Manager Self Service

Manager Self Service

Manager Self Service

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

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

Talent Summary page

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**

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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

Career History & Planning Pagelet

- **Viewing the Career History Pagelet**

- **Viewing the Career Planning Pagelet**

Education & Awards Pagelet

- **Viewing the Education Pagelet**

- **Viewing Honors and Awards Pagelet**

Competencies Pagelet

- **Viewing the Job Related Competencies Pagelet**
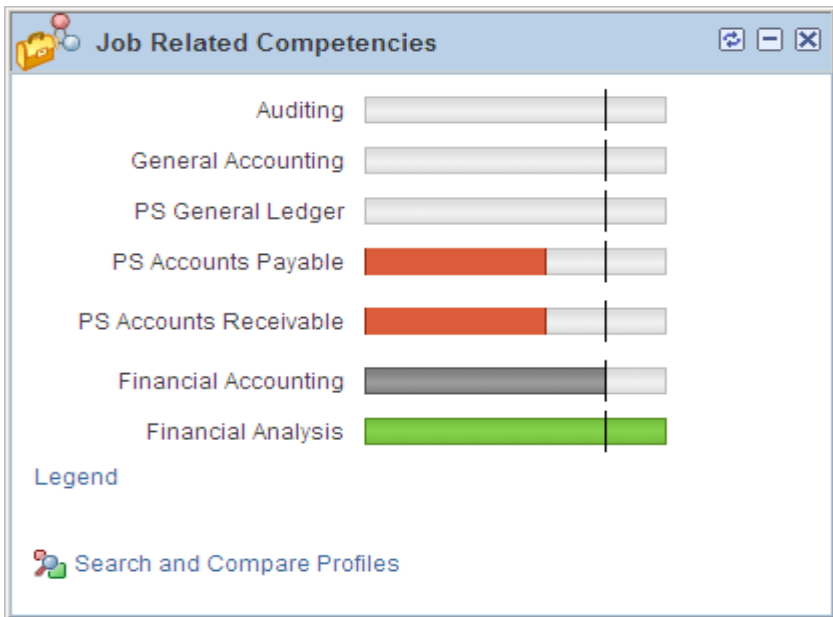
- **Viewing the Personal Competencies Pagelet**

Salary Pagelet

- **Viewing Salary Pagelet**
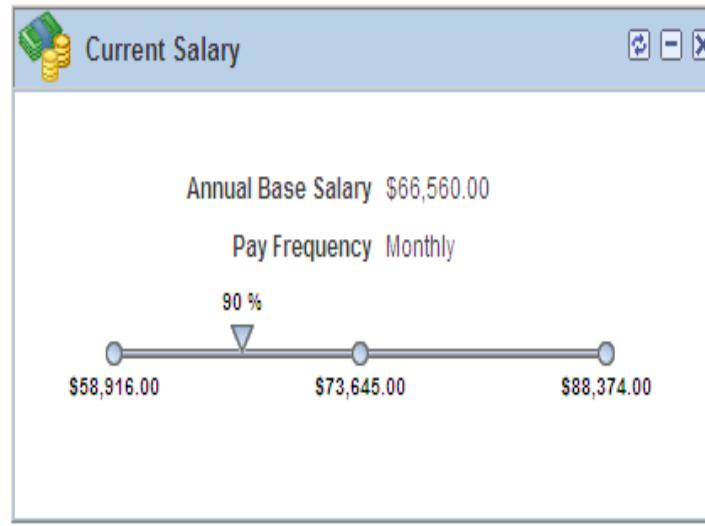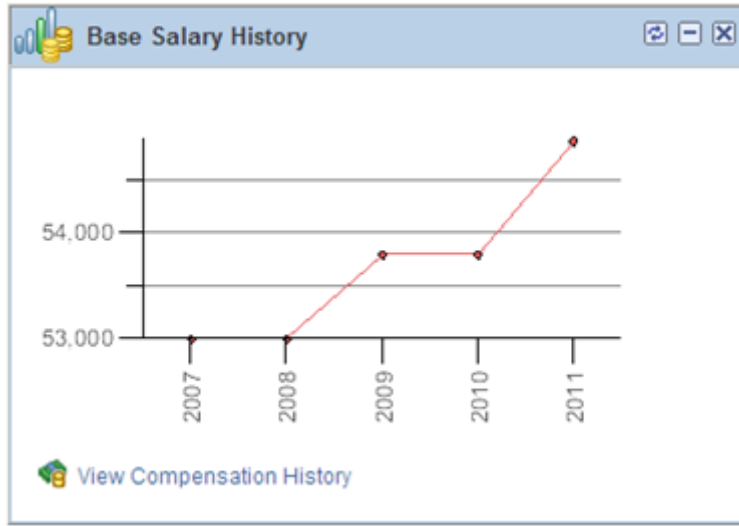
Thank You

Please complete a session evaluation

Session ID: 101920

Contact Info:

vishalr@hexaware.com

Tel: 856-275-0753

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