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PeopleSoft Human Resources

The **Heart** of PeopleSoft HCM

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COLLABORATE 19



Human Resources - The **Heart** Of PeopleSoft HCM

 **Legislative/Regulatory Update**

 **Self Service**

 **Profile Management**

 **Position Management**

 **Human Resources**

PeopleSoft Global HR Support

HR Supports 22 Country Extensions



PeopleSoft Human Resources (HR) is.....

*Health & Safety Analytics Profile Mgmt Personal Data
Company Directory Contract Pay Global Assignments
Onboarding Dotted Line Guided Self Service Training
Legislative Reporting Total Rewards Employee Snapshot
Matrix Teams Self Service Smart HR Org Chart Job Data
Contingent Workers Position Mgmt Commitment Acct
Labor Admin Data Privacy Faculty Events Mass Updates*

Human Resources - The **Heart** Of PeopleSoft HCM

 **Legislative/Regulatory Update**

 Self Service

 Profile Management

 Position Management

 Human Resources

ORACLE

PeopleSoft Legislative Updates



Legislative Update for PeopleSoft Global Payroll France

The French Government has announced a legislative change necessitating an increase in the RSA amount for Garnishments. This new amount is effective from 1st of April 2018. Details of this legislative announcement is available on [My Oracle Support](#) under document ID 2347863.1. Le gouvernement français a annoncé une augmentation du montant forfaitaire du RSA, pris en compte en matière de saisies sur salaire. Ce nouveau montant est effectif depuis le 1^{er} avril 2018. Le détail de...

WEDNESDAY, APRIL 4, 2018 | HUMAN CAPITAL MANAGEMENT | [→ Read More](#)

Legislative Update for PeopleSoft HCM Global Payroll China

Changes to 2018 medical insurance contribution rate for Tianjin region have been announced and the solution posting timelines for this change has been updated in our position statement. Oracle has published the position statement on [My Oracle Support](#), Document ID 2381885.1. We request customers to review the position statement to keep up-to-date. Chinese Version - 有关2018年的天津市医疗保险费率已公布。甲骨文的中国版本的信息声明已经根据最新的法律法规的公布而修改了。我们建议客户及时从[My Oracle Support](#)上去查看最新修改的信息声明，文档编号: 2381885.1.

WEDNESDAY, APRIL 4, 2018 | HUMAN CAPITAL MANAGEMENT | [→ Read More](#)

Legislative Update for PeopleSoft HCM Global Payroll New Zealand

The Inland Revenue Department of New Zealand has released amendments to EMS (IR 348) reporting for fiscal year effective 1st of April 2018. Our Position Statement has been revised to include these legislative updates. The document is made available on [My Oracle Support](#), Document ID 2357692.1. We advise customers to review the latest statement to keep up-to-date.

TUESDAY, MARCH 27, 2018 | HUMAN CAPITAL MANAGEMENT | [→ Read More](#)

Legislative Update for U.S. Form W-4 Online PDF Templates

2018 Templates to support the 2018 Federal Form W-4 and those states that use the Federal form have been posted to Patches & Updates. See Payroll Hot Topics, [Document 1348833.1](#) for a link to the patch. States that follow the federal form are: Delaware Idaho Montana North Dakota New Mexico Oregon South Carolina Also, as part of this fix, the English version of Form W-4 is delivered as the Spanish template, since the Spanish version of the form has not been published by the IRS yet....

PeopleSoft HR Newsletter

Email – julie.alonso@oracle.com to be added

Subject: FW: March 2018 PeopleSoft HR Newsletter

- [HIUG](#) (Healthcare)- June 17 – 20; Phoenix, AZ
- EMEA Roadshow – June 14 – 21; Netherlands, U.K. France & Spain
- [RECONNECT](#) July 17 – 19; Chicago, IL
- [Oracle Open World](#) October 22-25; San Francisco, CA

Customer Corner - I want to highlight the great accomplishments our **HR Focus Group Customers** have done in January & February ☺. If your organization has done something great (upgraded, deployed fluid/new functionality) [please let me know](#) so you can get your well deserved recognition.

- Congratulations to [Alaska Airlines](#) for upgrading to 9.2 **and** PTools 8.55
- Congratulations to [School District of Palm Beach County](#) for upgrading to 9.2 **and** deploying Fluid
- Congratulations to [University of North Carolina at Chapel Hill](#) for upgrading to 9.2 **and** PTools 8.56
- Congratulations to [CRU Global](#) for upgrading to PTools 8.56
- Congratulations to [Grand Rapids Community College](#) for upgrading to PTools 8.56
- Congratulations to [Greene King](#) for upgrading to PTools 8.55
- Congratulations to [Gallaudet University](#) for deploying Absence Management

Special Congratulations to our 'PeopleSoft Trifecta' customer

Congratulations to [Men's Wearhouse](#) for upgrading to 9.2 **and** PTools 8.55 **and** deploying Fluid



HR Focus Group Updates: Thank you to all the customers who volunteered to participate in the focus group

- **Global HR** – Posted additional enhancements for Data Privacy (to assist with GDPR requirements) – see below Legs/Regs section for more details.
- **Onboarding** - Development is currently working on enhancing the document steps to allow for document splits across multiple steps. We are also working through enhancements in the rehire process. Requirements are under way for off-boarding and should have high level designs in the next few months. Our April focus group meeting will be April 19th. If you want to be a part of the focus group, contact Jeremy (jeremy.pelley@oracle.com)
- **ePerformance** – Working on ePerformance notifications and document transfer enhancement. Our next meeting will be in May. If you want to be a part of the focus group, contact Jeremy (jeremy.pelley@oracle.com)
- **Employee Snapshot** – The next big enhancement for Employee Snapshot is the Administrative View coming very soon and we are working on integration with PeopleSoft ELM. Let us know what you like and what you would like to see us add in to future functionality. If you want to be a part of the focus group, contact Jeremy (jeremy.pelley@oracle.com)
- **Profile Management** - Development is currently working on the attachment feature and enhancements to MSS. Our next meeting will be in May, if you want to be a part of the focus group, contact Jeremy (jeremy.pelley@oracle.com)
- **Position Management** – If you want to be a part of the focus group contact Jeremy (jeremy.pelley@oracle.com)

USA/Global Legislative Updates – <https://blogs.oracle.com/PsftLegUpdates/>

- **ALL COUNTRIES** – Data Privacy Update. <https://blogs.oracle.com/psftlegupdates/managing-data-privacy-within-peoplesoft-hcm>
- **Singapore** – IRAS has made an announcement about Foreign Workers Levy in Budget 2018. The FWL will remain unchanged for all sectors, the levy increase effective from 01 July 2018 that was announced last year, is now deferred by a year
- **France** - The French Government in the early 2017 rolled out a new law necessitating employers to withhold taxes when the income is paid to the tax payers
- **United States** - 2018 Templates to support the 2018 Federal Form W-4 and those states that use the Federal form have been posted
- **United States** - 2018 Annual Vietnam Era Veterans' Readjustment Assistance Act (VEVRAA) hiring benchmark was updated, effective on March 31, 2018, the **new benchmark is 6.4%**. (Note: 2017 benchmark was 7%).
- **New Zealand** - The Inland Revenue Department of New Zealand has released amendments to EMS (IR 348) reporting for fiscal year effective 1st of April 2018

PeopleSoft Update – tentative dates

- **HCM Image #26/Tax 18-B** – Targeted for April 20, 2018
- **CRM Image 15** – Targeted for April 20, 2018

Safe Harbor Statement

The following is intended to outline our general product direction. It is intended for information purposes only, and may not be incorporated into any contract. It is not a commitment to deliver any material, code, or functionality, and should not be relied upon in making purchasing decisions. The development, release, and timing of any features or functionality described for Oracle's products remains at the sole discretion of Oracle. Not all technologies identified are available for all cloud services.

Disclaimer

The information in this document may not be construed or used as legal advice about the content, interpretation or application of any law, regulation or regulatory guideline. Customers and prospective customers must seek their own legal counsel to understand the applicability of any law or regulation on their processing of personal data, including through the use of any vendor's products or services.

Human Resources Legislative Updates (USA)

- **EEO-1 Reporting Change** - <https://www.eeoc.gov/eeoc/newsroom/release/9-29-16.cfm>
 - EEOC will collect summary employee pay data – **ON HOLD, OVERTURNED, MAYBE 9/2019**
 - EEOC will collect hours worked – **ON HOLD, OVERTURNED, MAYBE 9/2019**
 - Use existing EEO-1 report, **DEADLINE** Extended to **May 31, 2019**
- **EEO-4 - No Expected** reporting change, **deadline September 2019**
- **VETS4212 – No Expected** reporting change (expiration date of March 2021) – **deadline September 2019**
- **OSHA Reporting Change** - <https://www.osha.gov/Publications/OSHA3862.pdf>
 - Employers submit 2018 300A by **March 2, 2019**
- **Form I-9** <https://www.uscis.gov/i-9>
 - Form I-9 **expires August 2019**
 - Dept Homeland Security has not posted proposed change yet
 - Integration with eVerify and PeopleSoft Form I-9 - **ROADMAP**

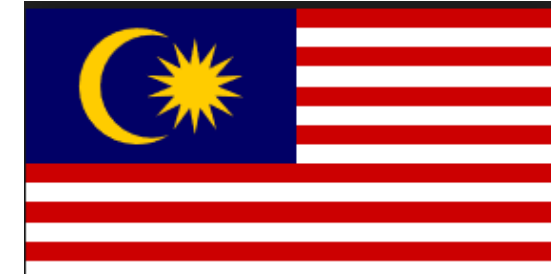
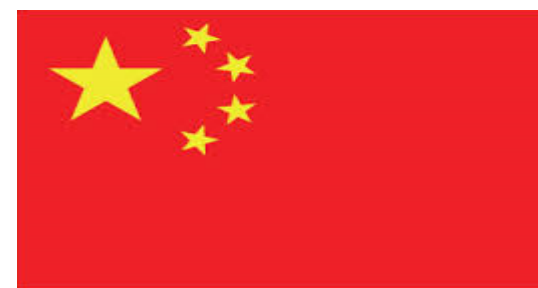


Data Privacy

Global Initiatives



Updated and New Initiatives around the World...



General Data Protection Regulation (GDPR)

Is your organization affected?



The GDPR regulates the “processing” of data for EU individuals, which includes collection, storage, transfer, or use. Any organization that processes **personal data** of EU individuals is within the scope of the law, *regardless of whether the organization has a physical presence in the EU (European Union)*

High Level Summary of GDPR

What **YOU** need to know



Request for Consent – Employees be given in an *intelligible and easily* accessible form, with the purpose for data processing attached to that consent

Right to Access – Employees can request to obtain from the organization confirmation as *to whether or not personal data concerning them is being processed, where and for what purpose*

Right to be Forgotten - Entitles employee/applicant to have the organization *erase their personal data*, cease further dissemination of the data, and potentially have third parties halt processing of the data

GDPR is Effective – May 25, 2018

Penalties - Under GDPR, organizations in breach of GDPR can be fined up to *4% of annual global revenue* or **€20 Million** (whichever is greater).

California Consumer Privacy Act of 2018 (AB378)

What **YOU** need to know



Request for Consent – The new law grants consumers the right to know what information companies are collecting about them, why they are collecting that data and with whom (3rd parties) they are sharing it.

Right to be Forgotten - Gives consumers the right to tell companies to delete their information as well as to not sell or share their data.

Children's Right - Makes it more difficult to share or sell data on children younger than 16.

Who has to Comply – Organizations around the world have to comply *if* they receive personal data from California residents and if they — or their parent company/subsidiary — exceed one of three thresholds: (a) **annual gross revenues of \$25 million**; (b) obtains personal information of 50,000 or more California residents, households or devices annually; or (c) 50% or more annual revenue from selling California residents' personal information.

AB378 is Effective – **January 1, 2020**

Penalties – up to \$7,500 per violation (action taken by State Attorney General)

Personal and Sensitive Data – New Feature

Available Now

- Most common requested fields
 - Date of Birth
 - Bank Account Number
 - National ID
 - Passport Number
 - Driver License
- Masking features:
 - Birth date entire date *or* just year
 - Bank Acct Nbr masking all but last 4 digits
 - National ID masking format defined at NID Type level

The screenshot displays the Oracle Personal and Sensitive Data interface for a person named Douglas Lewis (Person ID: KU0001). The interface is divided into several sections:

- Biographical Details:** Shows the person's name, effective date (01/01/1980), format type (English), and display name (Douglas Lewis). A "View Name" button is present.
- Biographic Information:** Contains fields for Date of Birth (06/29/XXXX, highlighted with a red box), Date of Death, Birth Country (USA), Birth State, and Birth Location. There is also a "Waive Data Protection" checkbox.
- Biographical History:** A table showing historical data with columns for *Effective Date, *Gender, *Highest Education Level, *Marital Status, Language Code, and Alternate ID. The current record shows *Effective Date: 01/01/1980, *Gender: Male, *Highest Education Level: A-Not Indicated, *Marital Status: Married, and an "As of" date of 01/01/1980.
- National ID:** A table showing national identification information. The first row is highlighted with a red box and contains: *Country: USA, *National ID Type: Social Security Number, National ID: XXX-XX-2799, and Primary ID: [checked].

Acknowledgement Framework – New Feature

Available Now

Acknowledgement Configuration

Acknowledgement ID OB1

Acknowledgement Details

1 of 1

View All

***Effective Date**

01/01/2000

***Status**

Active

***Description**

Acknowledgement for OnBoarding

Short Description

Long Description

Create an Acknowledgement step for Onboarding process. Employee will not be able to review or edit sensitive details without providing the Acknowledgement.

Preview

+

-

Acknowledgement Fields ?


1-3 of 3

Sequence Number	*Field Name	*Field Label	Edit Text	Field Alignment	Required	Validation		
10	TEXT_BOX1	Text Area 1			<input type="checkbox"/>	<input type="checkbox"/>	<div>+</div>	<div>-</div>
20	TERMS_HYPERLINK	Terms and Conditions		Center	<input type="checkbox"/>	<input type="checkbox"/>	<div>+</div>	<div>-</div>
30	AGREE_CHECKBOX	I Agree		Center	<input type="checkbox"/>	<input type="checkbox"/>	<div>+</div>	<div>-</div>

Requires PeopleTools 8.55 or Higher

✕ Exit

Activity Guide Composer



< Previous

Next >

⋮

Template: OBDGBL1

Effective Date: 2018-02-27

✕ Exit

Day 1 OnBoarding

< Previous

Next >

Before to start video

☐ Visited

Welcome Video

☐ Visited

✕ Acknowledgement

☒ Complete

Company Handbook

☐ Visited

Company Documents

☐ Not Started

Attachments

☐ Not Started

▶ Personal Details

☐ Not Started

Ethnic Groups

☐ Not Started

▶ Talent Profile

☐ Not Started

Banking

☐ Not Started

Summary

☐ Not Started

Acknowledgement

During the Onboarding process we will collect personal information for a variety of purposes related to your employment, including administering payroll and benefits, travel, training, and general employment management, and compliance with legal and regulatory requirements.

Please read the Information Protection Policy carefully using the View Terms and Conditions link. By selecting the "I agree to the Terms and Conditions" checkbox you indicate that you have read and understood these Terms and Conditions and acknowledge your agreement with them. If you do not agree, you will not be able to continue and should select the Exit button and contact your local Human Resources department.

[View Terms and Conditions](#)

☒ I Agree to the Terms and Conditions

Updated By

User ID	BLOCHERTY	Name	Betty Locherty
Date/Time Stamp	03/26/2018 12:26:27PM	IP Address	10.159.XXX.XX

Save

Person Data Delete Processes - New Feature

Data Erasure

- Enhanced Person and Employment Delete (HCM)
 - Allow Exclusion of Records
 - Allow Validation Override
- New Applicant Delete (HCM)
- New Learner Delete (ELM)

The screenshot shows the 'ERN Delete Process' web interface. At the top, there's a navigation bar with 'Manager Self Service' and 'ERN Delete Process'. Below this, the title 'ERN Delete Process' is displayed. To the right of the title, there are links for 'New Window' and 'Personalize Page'. Below the title, there's a section for 'Run Control ID' with the value 'CPAY'. To the right of this, there are links for 'Report Manager' and 'Process Monitor', and a 'Run' button. Below this, there's a section for 'Control Parameters' with two checkboxes: 'Skip Control Record/Field Check' and 'Skip Record Exclusion Check'. Below this, there's a section for 'Person Record Numbers to be processed' with a search bar and a table. The table has columns for '*Person ID', 'Empl Record', 'Company', 'Department', and 'Job Code'. The first row of the table shows a search bar for '*Person ID' and a search bar for 'Empl Record' with the value '0'. To the right of the table, there are navigation controls for '1-1 of 1' and a 'View All' link.

Manager Self Service | ERN Delete Process

ERN Delete Process

Run Control ID CPAY | Report Manager | Process Monitor | Run

Control Parameters ?

- ☐ Skip Control Record/Field Check
- ☐ Skip Record Exclusion Check

Person Record Numbers to be processed

*Person ID	Empl Record	Company	Department	Job Code
<input type="text"/>	<input type="text" value="0"/>			

1-1 of 1 | View All

Data Privacy Resources and Information

Knowledge Documents on [MyOracleSupport](#):

- PeopleSoft HCM 9.2 - Personally Identifiable and Sensitive Data (Doc ID 2313438.1)
- PeopleSoft HCM 9.2 - Implementing Sensitive Data Masking (Doc ID 2375376.1)
- PeopleSoft HCM Acknowledgement Framework Red Paper (Doc ID 2377140.1)
- PeopleSoft ELM 9.2 - Personally Identifiable and Sensitive Data (Doc ID 2415109.1)
- PeopleSoft FSCM 9.2 - Personally Identifiable and Sensitive Data (For HCM sourced data in FSCM (Doc ID 2415089.1)
- [Privacy and Security Feature Guidance for Oracle Peoplesoft](#) (Doc ID 113.1)

Legislative Blog

[Managing Data Privacy within PeopleSoft HCM](#)

[Legislative Update for PeopleSoft HCM – California Data Privacy Update](#)

Available thru: <https://blogs.oracle.com/psftlegupdates/>

Video Feature Overviews

- PeopleSoft Acknowledgement Framework - <https://www.youtube.com/watch?v=LctB-qFg-Q8>
- Applicant Data Security - <https://www.youtube.com/watch?v=sJBeqK8gJ0A>

Quest Webinar – May 2018

(<http://nnf.questdirect.org/questmediaviewer.aspx?video=268654237>)

Human Resources - The **Heart** Of PeopleSoft HCM

 1 Legislative/Regulatory Update

 2 **Self Service**

 3 Profile Management

 4 Position Management

 5 Human Resources

Self Service Announcement Tile

Available Now

▼ Employee Self Service

Announcements



Welcome to the PeopleSoft HR Session!!!

5 Unread

Company Directory



Payroll



Last Pay Date **02/28/2019**

Personal Details



Talent Profile

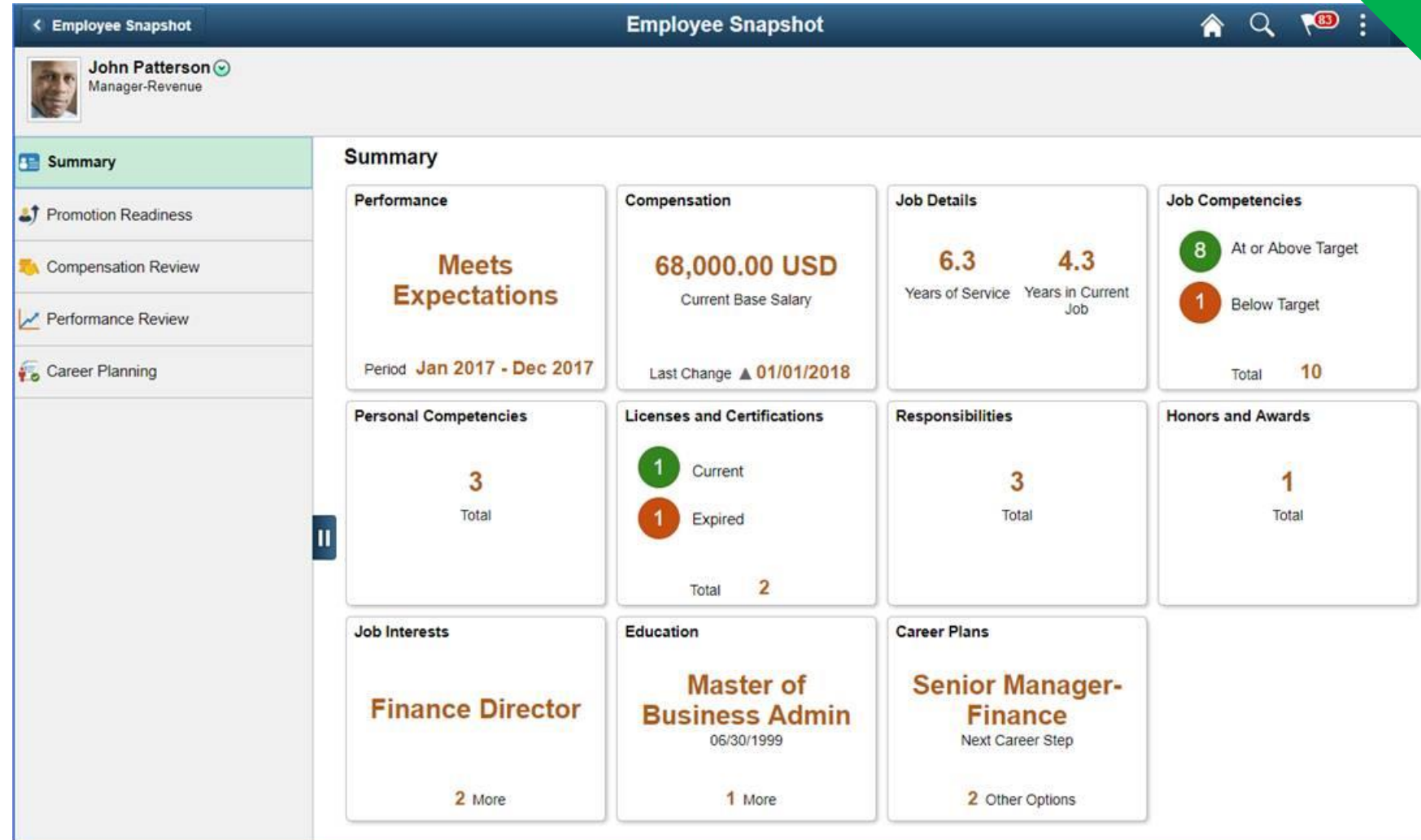


See Everything...about your Talented Employees

Employee Snapshot



Available Now


- 360 View of Talent Information
- Manager and Admin View
- View Employee Data for:
 - Promotion Readiness
 - Compensation Review
 - Performance Review
 - Career Planning
 - Learning (ELM)




Manager Self Service

Employee Snapshot





John Patterson 
Manager-Revenue
[Select Different Employee](#)

Summary

Promotion Readiness

Compensation Review

Summary

Meets Expectations

68,000.00 USD
Current Base Salary


6.5
Years of Service

4.5
Years in Current Job

8
At or Above Target

1
Below Target

Licenses and Certifications

Alert	License or Certification	Issue Date	Expiration Date	
 Expired	Assoc Chartered Certif Acctnt	01/01/2015	07/01/2018	>
	Procurement Management	01/01/2016		>

Job Interests

Finance Director

2 More

Education

Master of Business Admin

06/30/1999

1 More

Career Plans

Senior Manager-Finance

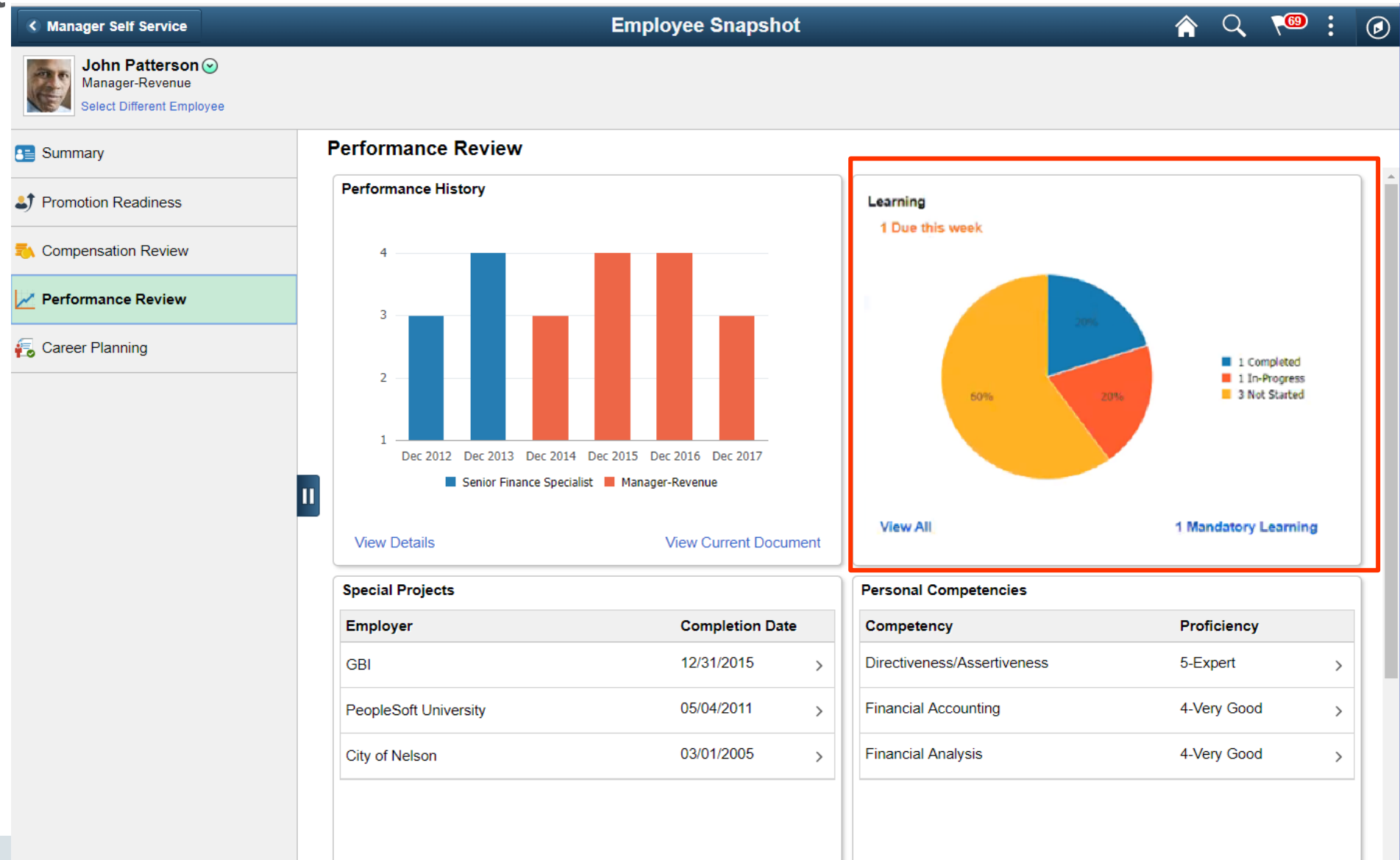
Next Career Step

2 Other Options

See Everything...about your Talented Employees

Employee Snapshot

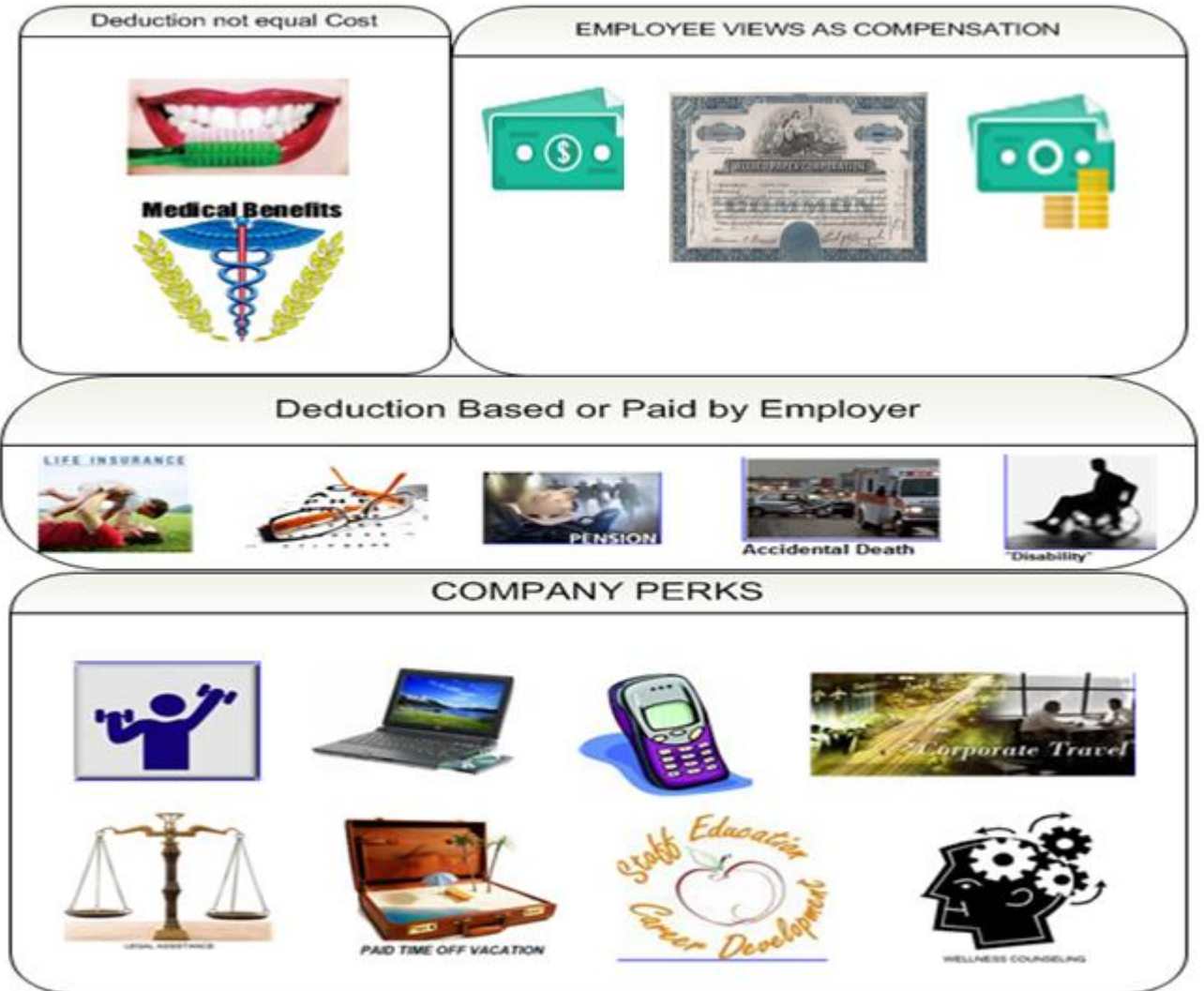
- ELM Integration



Employee Total Rewards

How much AM I worth?

- Compensation
- Employer Provided Benefits
- Health & Life Insurance
- Retirement
- Stock
- Allowances
- Time Off
- Tuition Reimbursement
- Training
- Employer Paid Taxes
- Company Provided Perks, such as a Gym



Employee Self Service Access

Available Now

▼ Employee Self Service

Company Directory



Time



Payroll



Last Pay Date **12/31/2018**

Personal Details



Talent Profile



Benefit Details



Performance



4 Current Documents

Total Rewards



Total Rewards Statement 2018

Viewing the Online Statement

View current **and** historical statements

Employee Self Service

Total Rewards



Rosanna Channing
Senior Accounting Manager

Rewards Period 01 January 2017 - 31 December 2017

Printer View

Summary

Compensation

Allowances

Health

Life and Disability

Retirement

Vacation

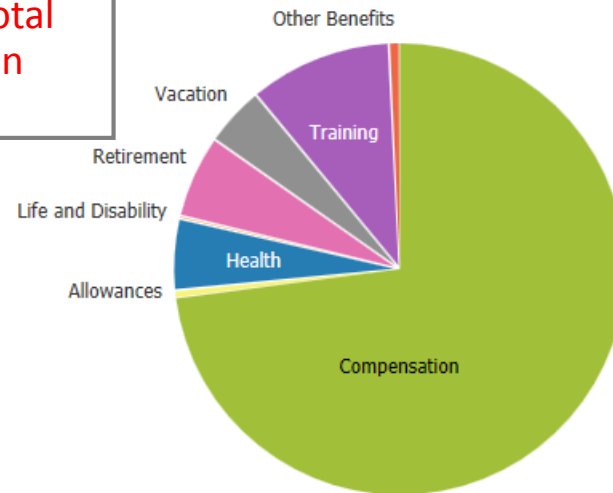
Training

Other Benefits

View Summary Chart

Total Value \$122,473.12

Configurable Total Compensation Amount



Configurable Content



Personalize the Statement

Welcome to Your Reward Statement

Rosanna - we are pleased to provide you with a personalized **Total Rewards statement**. It is our sincere hope that the protection and security of these benefits will make life better today as well as provide you with a more secure future.

Your employee benefits contribute greatly to your annual compensation and to your personal well being. This statement not only gives you a brief summary of your personal benefit elections, but also provides "cost of benefits" information, which is important when considering your total compensation.

We are constantly working to provide you with a benefits

The following is a summary of all your Reward Items for the period selected.

Reward Item	Employer Paid	Employer Provided	Employer Total	Employee Contribution	Percent of Total Reward
Compensation	89,309.90	0.00	89,309.90	0.00	72.92
Allowances	720.00	0.00	720.00	0.00	0.59

Fluid Guided Self Service

Put Your Managers in Control with Guided Self-Service

Available Now

Questionnaire

What else do you want to change besides Job Code?

Are you changing Work Location details? ☒ Yes

Is a new Supervisor required? ☒ Yes

Is a Salary change required? ☒ Yes

Review and Submit

New Information		Current Information	
Location	Corporation Headquarters KUNY00	Corporation Headquarters	KUNY00
Job Title	Director Financial Services 940062	Director - Planning & Analysis	LEJ001
Full/Part Time	Full-Time	Full-Time	
Standard Hours	40.00	40.00	
Supervisor Name	Rosanna Channing KU0046	Rosanna Channing	KU0046
Monthly Salary	62,498.68 USD	5,156.66	USD
Annual Rate	62,498.68 USD	61,879.88	USD

Comments

Changes Made
* Required Field

- Guide managers through submitting transactions
- Compound transactions into one process
- Decision support assistance
- Configurability by transaction

Guided Self Service Transactions

- Promote Employee
- Transfer Employee
- Request Ad Hoc Salary Change
- Request Supervisor Change
- Request Location Change
- Retire Employee
- Terminate Employee
- Request Reports To Change *
- Change Full/Part Time & FTE*
- Request Demotion*
- Request Leave of Absence*
- Request Unpaid Leave*
- Request Clone Position*
- Multi-Select Employees *

The screenshot displays the Oracle Guided Self Service (GSS) interface. At the top, there is a blue header bar with a back arrow and the text "Manager Self Service". Below this, the profile of "Rosanna Channing" is shown, with the title "Senior Accounting Manager" and a link to "Change Team". The main content area has a tabbed interface with "Summary" selected. Below the tabs, there are two icons: a person icon and a calendar icon. The "Name / Title" section lists two employees: "Christelle Stevenson" (Manager-Accounting) and "Daryl Reese" (Financial Analyst). A dropdown menu is open over the "Christelle Stevenson" entry, showing a list of actions: "Request Reporting Change", "Transfer Employee", "Promote Employee", "Request Location Change", "View Employee Personal Info", "Change Full/Part Time or Hours", "Request Leave of Absence", and "Request Paid Leave of Absence". The background shows a table with columns for "Department / Location" and "Accounts Receivable", with rows for "Corporation Headquarters" and "Corporate Accounting".

Employee Self Termination

Roadmap

Employee Self Service

Company Directory

Talent Profile

Employee Self Service

Antonio Santos
Administrative Assistant

Addresses

Contact Details

Social Media

Marital Status

Name

Ethnic Groups

Emergency Contacts

Additional Information

Form I-9

Job

Submit Resignation

Submit Retirement

Personal Details

Home Address

4689 Z Street
Sacramento, CA 94246
Current

Mailing Address

4689 Z Street
Sacramento, CA 94246
Current

Employee with One Job Submits Resignation Request

< Person Details

Resignation

Home

Search

Flag

More

Refresh

Enter the resignation details and Submit the request.

Submit

Job Information

Job Title

Administrative Assistant

Department

Human Resources

Location

Corporation Headquarters

Reports To

Manager - Compensation/Benefits

Resignation Details

*Last Working Day

Reason

Comments

Attachments

You have not added any Attachments.

Add Attachments

< Person Details

Resignation

Home

Search

Flag

More

Refresh

✓ You have successfully submitted your resignation request for approval.

Job Information

Job Title

Administrative Assistant

Department

Human Resources

Location

Corporation Headquarters

Reports To

Manager - Compensation/Benefits

Resignation Details

Reason

Resignation

Last Working Day

03/31/2019

Comments

I am resigning as I am going for higher studies

Status

Pending approval

Attachments

You have not added any Attachments.

Approval Details

Approval Chain

>

Company Directory







Find Your Friends

Available Now

[← Manager Self Service](#)Company Directory

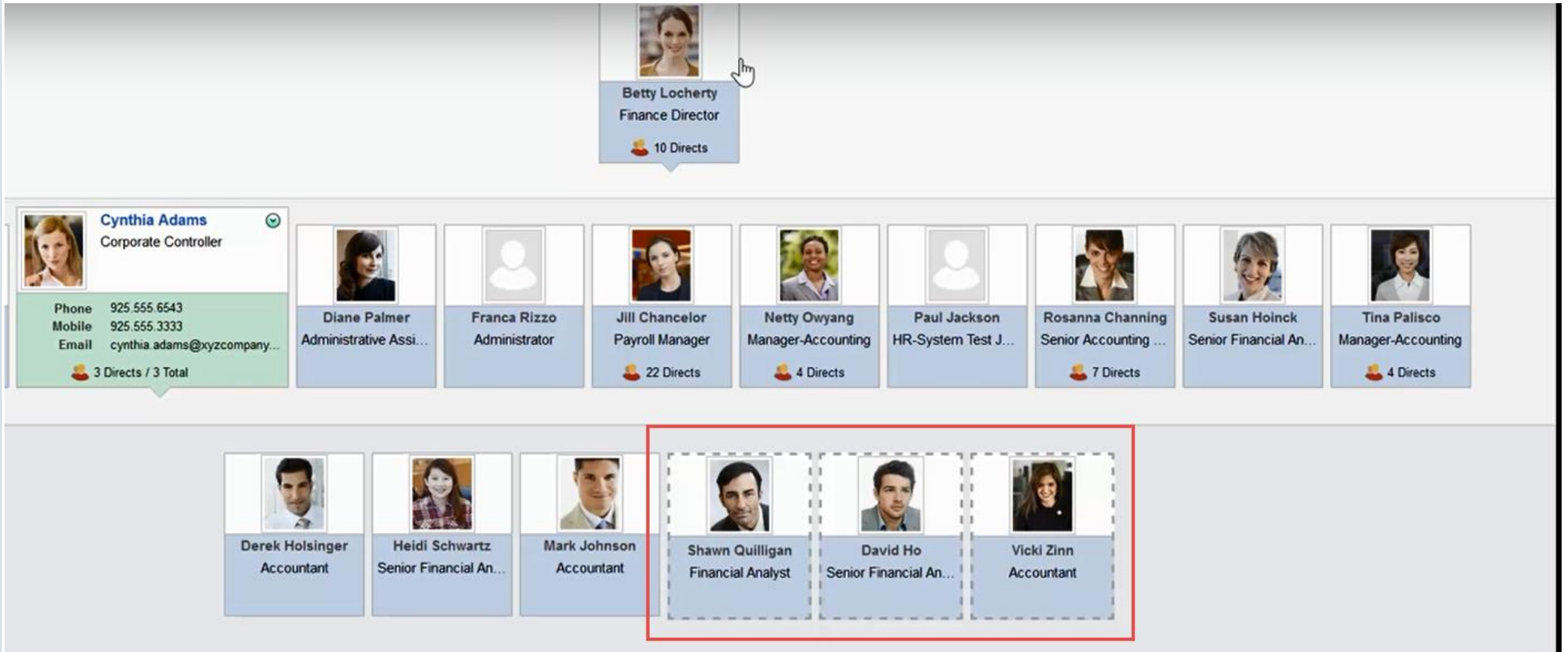
Search Company Directory [»](#)

▼ Recently Viewed (7)

Name / Title	Email / Phone	Department / Location
 Rosanna Channing Senior Accounting Manager	Rosanna.Channing@PeopleSoft.c... 925.555.1234	Corporate Accounting Corporation Headquarters >
 Shawn Quilligan Financial Analyst	Shawn.Quilligan@PeopleSoft.com 925.555.9856	Corporate Accounting Corporation Headquarters >
 Cynthia Adams Corporate Controller	cynthia.adams@xyzcompany.com 925/694-7901	Corporate Accounting Corporation Headquarters >
 Vicki Zinn Accountant	Vicky.Zinn@PeopleSoft.com 925.694.7959	Corporate Accounting Corporation Headquarters >
 Mei Lee Accountant	Mei.Lee@PeopleSoft.com 925.694.7976	Corporate Accounting Corporation Headquarters >
 Christelle Stevenson Manager-Accounting	Christelle.Stevenson@PeopleSoft... 925.694.7920	Accounts Receivable Corporation Headquarters >

Org Chart

Dotted Line Reporting



Customer Focus Group Enhancement Requests

- Ability to Export and Print Org Chart – *Delivered Image 27*
- Show Peer Option - *Delivered Image 27*
- More User-Friendly View - *Delivered Image 27*
- Increased Search Return Results Number - *Delivered Image 27*
- Ability to display different fields on Org Chart & Profile of CD - *Delivered Image 27*
- Ability to Show Empty Position in Org Chart – *Delivered Image 28*
- Ability for Admin to Export Entire Directory – *Delivered Image 28*
- Ability to Show Job Title in Company Directory – *Roadmap*



Show

Company Directory Home

View My Profile

Export to Excel

Export to Visio


Print Organization Chart

My Preferences

Sign Out



Jean Parsons
Chief Finance Officer


 8 Directs



Betty Locherty
Finance Director



Phone 925.694.0025
Mobile
Email betty@xyzcompany.com

 12 Directs / 119 Total

Empty Position

19000036



CDETosanna
Champion

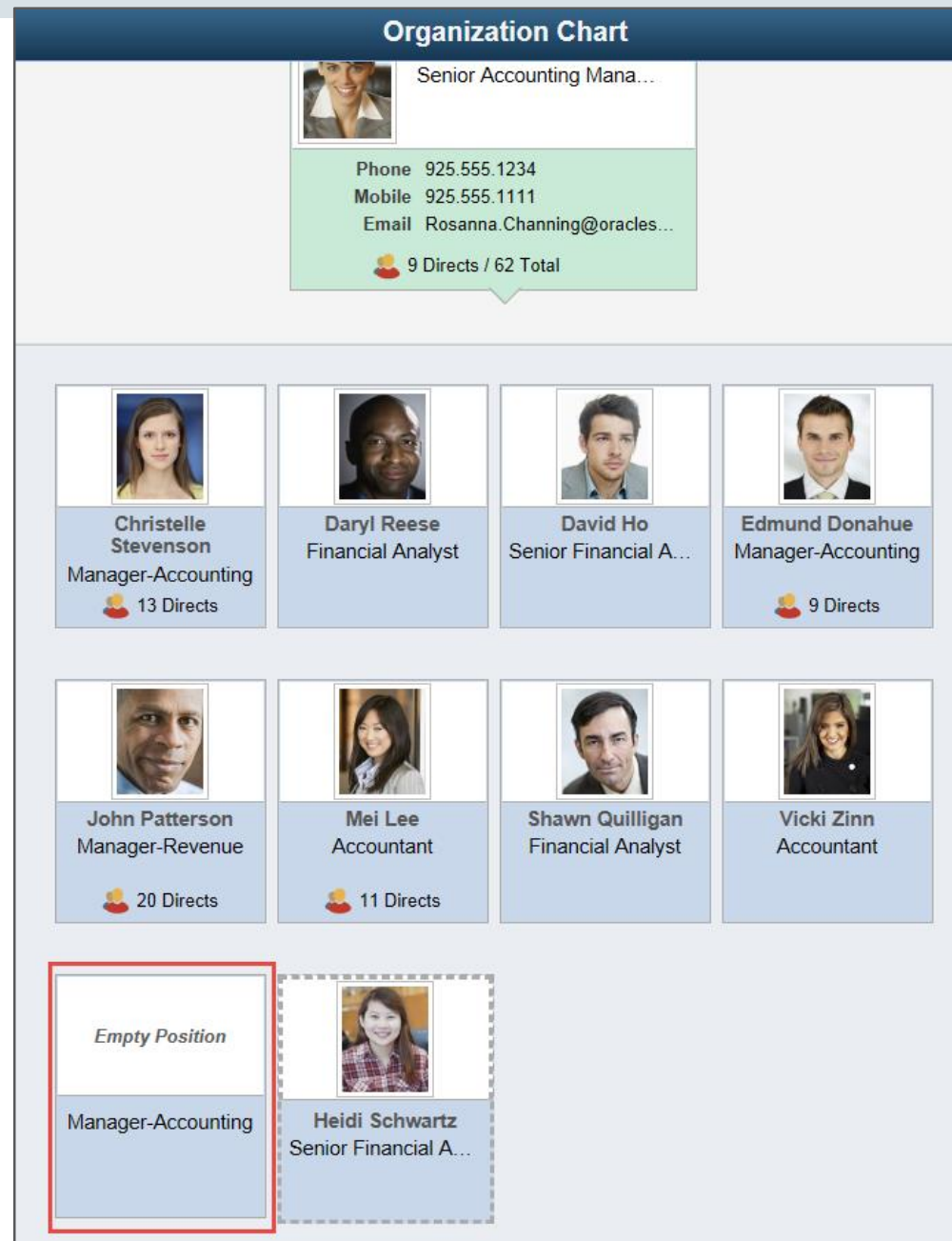


Cynthia Adams



Diane Palmer

Ability to Display *Empty Positions* on Org Chart



Ability for HR Admin to Export Entire Org Chart

The screenshot shows the 'Export Org Chart' page in the Oracle HR Administration interface. The left sidebar contains a menu with the following items: Job Information, Headcount, Labor Administration, HR Configuration, OnBoarding, Dotted Line, and Export Org Chart (which is highlighted). The main content area has a header 'Export Org Chart' and a descriptive paragraph: 'Export functionality allows HR Administrators to download a large amount of data into an Excel or a Visio file. Select the employee whose organization needs to be exported and the type of output file that is desired. Selecting run would trigger a program and generate the file. The file can be retrieved using the link to process monitor.' Below this, there is a 'Parameters' section with two input fields: 'Empl ID' and 'Empl Record' (set to 0). At the bottom, there are two radio buttons: 'Export to Excel' (selected) and 'Export to Visio'. On the right side of the main area, there is a 'Process Monitor' link and a green 'Run' button.

Workforce Administrator HR Administration

Job Information

Headcount

Labor Administration

HR Configuration

OnBoarding

Dotted Line

Export Org Chart

Export Org Chart

Export functionality allows HR Administrators to download a large amount of data into an Excel or a Visio file. Select the employee whose organization needs to be exported and the type of output file that is desired. Selecting run would trigger a program and generate the file. The file can be retrieved using the link to process monitor.

Process Monitor Run

Parameters

Empl ID

Empl Record 0


☒ Export to Excel

☐ Export to Visio

Ability to Display Job/Working Title

Roadmap

Company Directory

Betty Locherty  
Finance Director
Finance and Administration - Delaware Operations

★ Add to Favorite Profiles

Contact Information

Reporting Structure

Manage Dotted Line

Directs 10

Work Phone 925.6

Manager Self Service

Installation Table

Products HCM Options Product Specific Country Specific Last ID Assigned Third Party/System >

HCM Defaults

Company Global Business Institute

Standard Hours

Min Standard Hours

Max Standard Hours

*Default Standard Hours

Work Period Weekly


Position Management Option

☐ Full Position Management

☒ Partial Position Management

☐ No Position Management

Online Update Incumbent Limit

Display title 

Compensation Rate Codes

*Default Comp Frequency Monthly

☒ Use Rate Code Groups

☒ Use Salary Points

☒ Multi-Step Grade

Currency

☒ Multi-Currency

*Base Currency

Rate Type

Human Resources - The **Heart** Of PeopleSoft HCM

1 Legislative/Regulatory Update

2 Self Service

3 **Profile Management**

4 Position Management

5 Human Resources

Profile Management

Enhanced Security

- Define Profile Security by PeopleTools roles
- Greater flexibility
- Optional uptake

Enhanced Compare Tool

- Modern look and feel
- Intuitive design
- Ability to choose attributes to compare
- Ability to provide and/or scenarios

Modernization

- Mobile friendly actions
- Intuitive

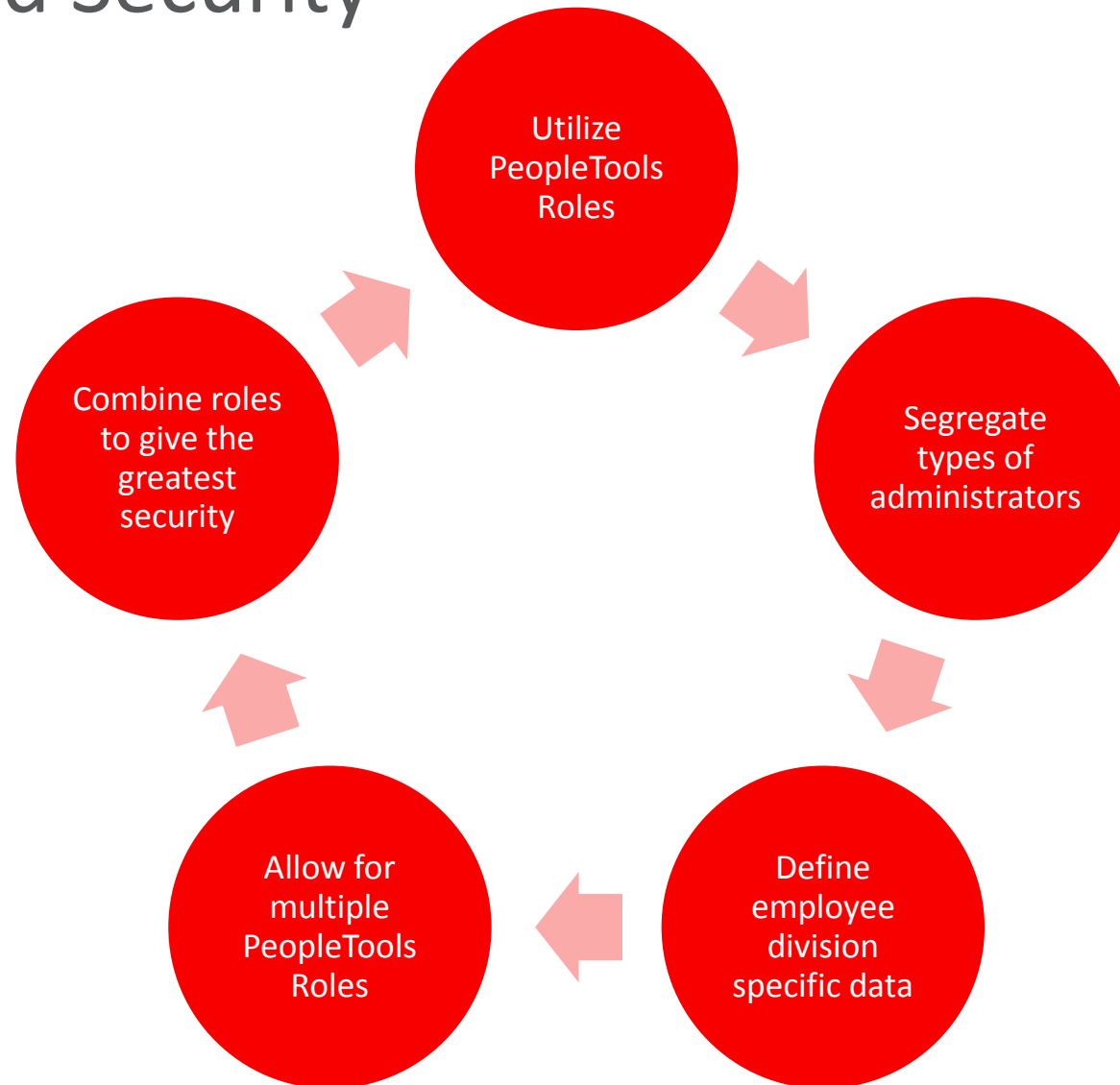
Add ROLENAME to Content Security - New

Role Security

*Profile Role	Rolename	Allow Update	Approval Required	*Enable Attachments
Administrator	Search	<input checked="" type="checkbox"/>	<input type="checkbox"/>	No Attachments
Employee	Search	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	No Attachments
Manager	Search	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	No Attachments

+ Add Role

Profile Enhanced Security



Human Resources - The **Heart** Of PeopleSoft HCM

- 1 Legislative/Regulatory Update
- 2 Self Service
- 3 Profile Management
- 4 Position Management**
- 5 Human Resources

Key Advantages of Position Management


- Create and track position data and its history
- Maintain incumbent data
- Less data entry in Job Data
- Budget for positions by department
- Maintain headcount info
- Maintain organizational structures
- Positions can be created with a status of Approved, Proposed or Frozen

Request Clone Position

Available Now

Exit

Clone Position



Cynthia Adams
Corporate Controller

1

Position Details

2

Review and Submit

*Business Unit

GBIBU

Global Business Institute BU

*Job Code

600165

Corporate Controller

*Title

Sr. Corporate Controller

*Reg/Temp

Regular

*Regular Shift

Not Applicable

*Full/Part Time

Full-Time

Short Title

Controller

Long Description

Senior Corporate Controller

Max Head Count

1

Union Code

ork Location

*Department

13110

Corporate Accounting

*Location

KUAL00

Alabama Operations

Reports To

19000230

Finance Director

*Regulatory Region

USA

United States

Company

GBI

Global Business Institute

Supervisor Level

ork Information

*Standard Hours

40.00

Work Period

W

Weekly

Mon

8.00

Tue

8.00

Wed

8.00

Thu

8.00

Fri

8.00

Sat

Sun

Guided Self Service

End to End Integration

Available Now

< My Team

Request Location Change

Calvin Roth ✓
Finance Director

1. Work and Job Information

2. Review and Submit

< Clone Transactions

Transaction Configuration

Configuration

Questionnaire

Transaction ID HR_REPORTING_CHANGE

Regulatory Region

Transaction Details

Find | View All

Effective Date 01/01/1900

Status Active

Title Request Reporting Change

Questionnaire ?

Personalize | Find | [Icon] | [Icon]

Questions

Actions

Pages

Form Factor [Icon]

Sequence

Small Form Factor Text ID

View/Edit Text

10

View/Edit Text

Position Data Options

Save

Return to Search

Previous in List

Next in List

Add

Configuration | Questionnaire

Transaction Configuration

Position Data Options ?

☒ Update Position Data

Reason Reports To Change

Position Data Fields

Page Field Name






Reports To

OK

Cancel




Display Empty Position on My Team


















Available Now

[Manager Self Service](#) **My Team**     

Betty Locherty [Change Team](#)
Finance Director

Summary Performance Compensation Leave Balances

Name / Title	Directs / Total	Department / Location	Email / Phone	Today's Status
 Jill Chancelor  Payroll Manager	 22/24	Payroll Corporation Headquarters	jill.chancelor@xyzcompany.com 555.555.3344	
 Netty Owyang  Manager-Accounting	 4/23	International Accounting Corporation Headquarters	netty.owyang@xyzcompany.com 925.555.6547	
 Paul Jackson  HR-System Test Job Code		HRMS Division HR-System Test Location		
 Rosanna Channing  Senior Accounting Manager	 10/65	Corporate Accounting Corporation Headquarters	Rosanna.Channing@oraclesample.com 925.555.1234	
 Susan Hoinck  Senior Financial Analyst		Corporate Finance Corporation Headquarters	susan.hoinck@xyzcompany.com 925.555.3654	
 Tina Palisco  Manager-Accounting	 4/4	Corporate Consolidations Corporation Headquarters	tina.palisco@xyzcompany.com 925/694-7971	
 Empty Position 19000036 System's Analyst		Finance and Administration Delaware Operations		

javascript:submitAction_windo(document.windo,DERIVED_HK_MSEL_HK_MSEL_SELECT_LNK);

Idea space

ALL CONTENT (75) DOCUMENTS (0) DISCUSSIONS (48) IDEAS (27)



All stages ▾

☐ Filter by shared content

Type to filter by text

FILTER BY TAG

Sort by date created: newest first ▾

1 2 < >

TITLE	AUTHOR	LATEST ACTIVITY	VIEWS	👍	🔖	💬	
 Add effective sequence to Position Management 880 ACTIVE	Rick DeLaney-Oracle	April 14, 2018 1:26:26 AM	489	-	4	9	⚙️ ▾
 Show empty positions in company directory 480 ACTIVE	Jeremy Pelley -Oracle	May 7, 2018 3:22:05 PM	198	-	1	11	⚙️ ▾
 Improve data integration by removing 30-character description length limit 330 ACTIVE	user3236082	April 11, 2018 3:30:17 AM	155	-	0	7	⚙️ ▾
 Ability to choose fields displayed in Company Directory 260 ACTIVE	Steve Howe	November 20, 2017 2:54:08 PM	82	-	3	5	⚙️ ▾
 FLUID My Team - Show Vacant Positions 230 DELIVERED	NatashaG-Oracle	October 14, 2016 7:13:37 PM	119	-	0	1	⚙️ ▾
 Approval Workflow Engine (AWE) Functionality For Template Based Hire ("Smart HR" or "Smart Hire" Transaction) 210 ACTIVE	ktur	June 5, 2018 8:35:30 PM	69	-	1	0	⚙️ ▾
 Enhance Approval Framework (AWE) to work with MicroSoft Outlook Calendar 140 ACTIVE	Laurie.Thomas-Oracle	June 2, 2017 7:50:54 PM	97	-	0	4	⚙️ ▾
 Delete multiple items at a time from non-person (Job) profile 130 ACTIVE	NatashaG-Oracle	October 23, 2017 10:04:33 PM	43	-	0	3	⚙️ ▾
 Create Talent Summary Page for HR admin EE's 130 DELIVERED	NatashaG-Oracle	May 1, 2018 7:32:05 PM	88	-	2	2	⚙️ ▾

Features Delivered in HCM Image 29

Requirements	Priority	Requirement Specification
Effective Sequence	High	Why Effective Sequence: Decentralized Work, Corrections to Pool Funding Information, Simultaneous GSS transactions, Limited Correction Access
Fluid Position Management	High	<ul style="list-style-type: none"> • Improved navigation and search capabilities • Guided process: Creating Position, Clone from Position and Maintain Position Data • Ability to configure page and page fields by Reason • Quick Summary Page: To review Position History and take allowed actions • Attachments • Transaction Summary (Review Step) • Related Content
Layout and Usability Improvements	High	<ul style="list-style-type: none"> • Functional grouping of fields. • Display Update Incumbents CI Exceptions online.
Approvals		Approvals for Creating a Position, Cloning from Position and Changing Position Data

Benefits of Using Effective Sequence with Fluid Position Management

Enhanced Data Entry

Enter multiple transactions of same effective date.

Minimize loss of data while using Correct History

Avoid correcting existing position data, instead track changes using effective sequence

Ease of Access to Functionality

Always available similar to Job Data.
No need for enabling switch and thus no complexity of switching back.
Will always be set to '0'

Proper History Maintenance and Better Audit of Changes

Maximum Effective Date and Effective Sequence information is used for any processing and thus current views, integrations will not be impacted.

Better Usability

Comes with Fluid User Interface that will make data entry more intuitive.
Harness new and useful capabilities like Better Search , Summary of Changes, Attachments, Approvals and Configurable Fields Functionality

Future Enhancements

Roadmap:

- Reports To Field functionality improvement
- Enable Drop Zones for Position Management
- Ability to maintain more Job Data fields from Position Data
(Pay Group, Ben Partic, Holiday Schedule...)
- Improve Update Incumbents Functionality: More Options to Include fields during Jobdata update

Other Features for Future:

- Save as Draft
- Increase Position Title Field Length
- Better Clone Functionality
- A Guided approach to moving to Position Management

Human Resources - The **Heart** Of PeopleSoft HCM

- 1 Legislative/Regulatory Update
- 2 Self Service
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- 5 **Human Resources**

HR Analytics for the HR Admin

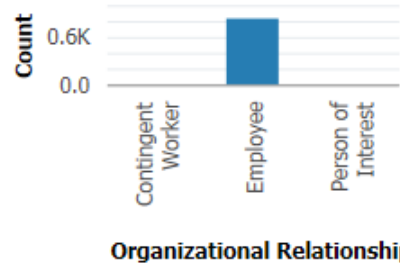
YES!!!!!!

Available Now

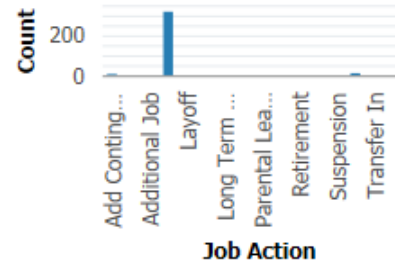


Workforce Insight

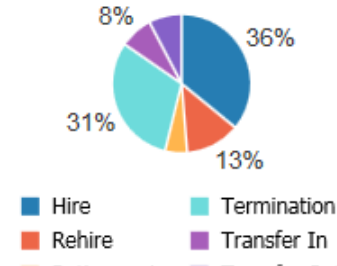
Current Headcount



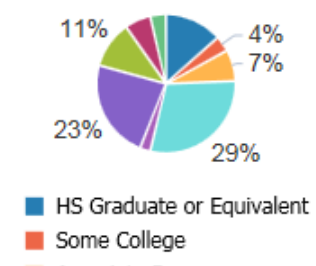
Headcount Movement



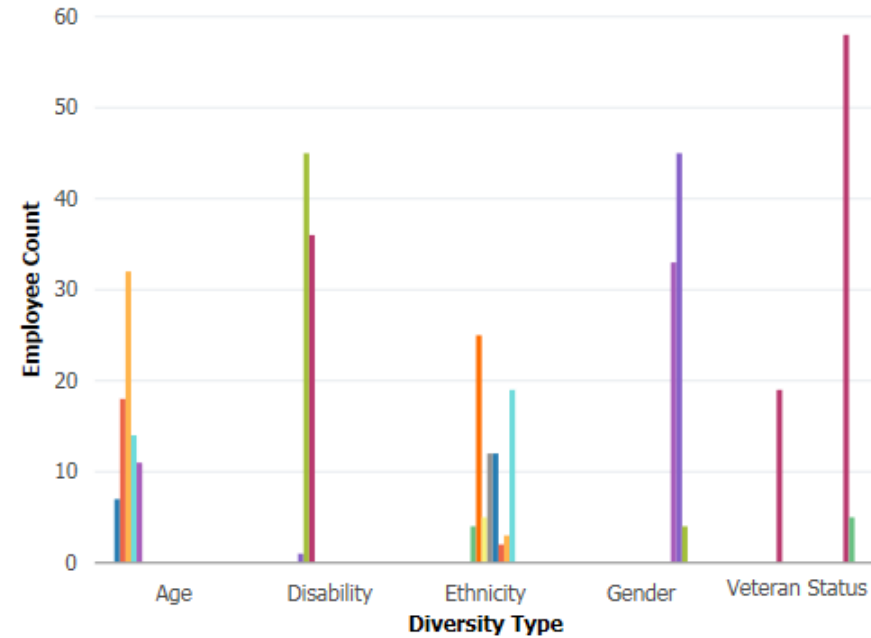
Workforce Turnover



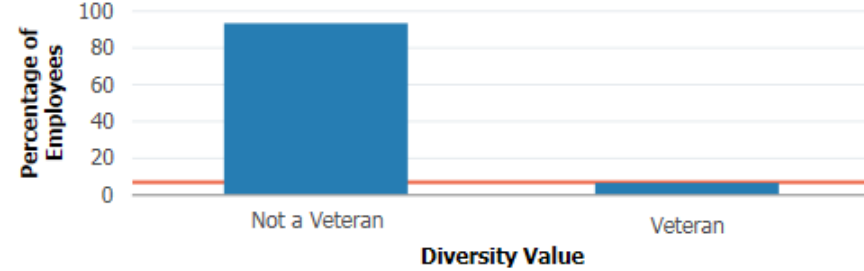
Highest Education Level



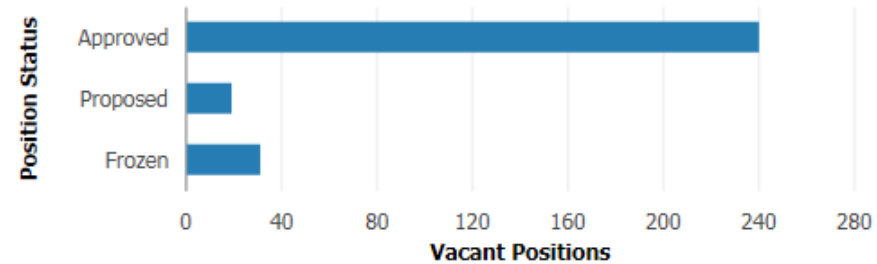
Diversity Overview



Diversity Analysis



Position Status



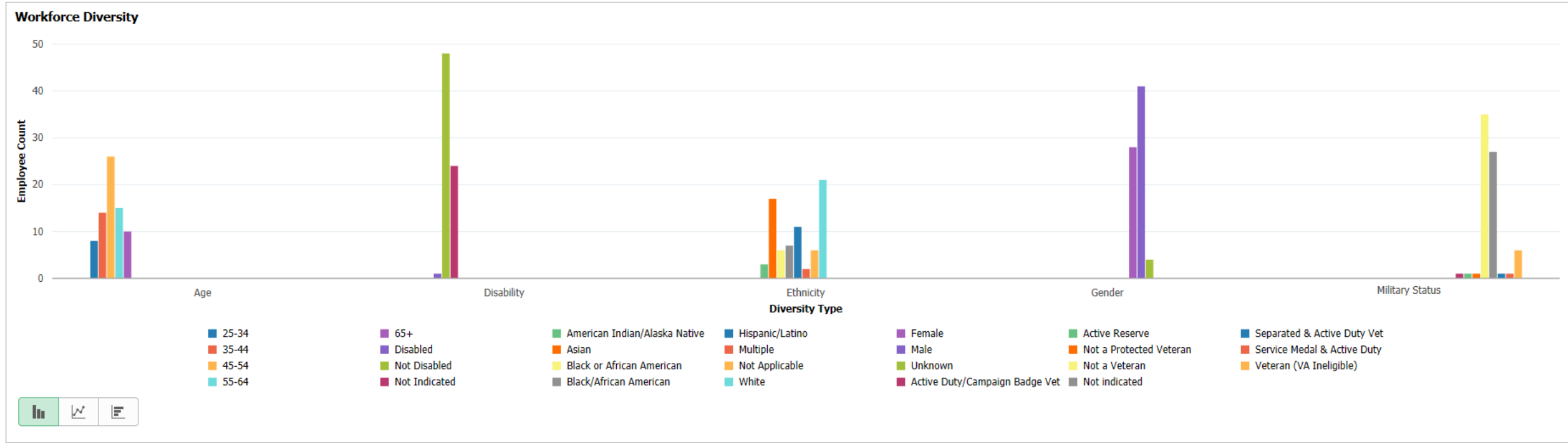
Rows

Diversity Type

Diversity Value

Columns

Empl ID



100 rows

Empl ID	Employee Name	Diversity Type	Diversity Value	Company	Location	Department	Job Code	Regular/Temporary	Full/Part Time	Employee Type
K0G018	Josephine Bonds	Age	35-44	Global Business Institute	Kentucky Operations	Marketing	Representative-Sales	Regular	Full-Time	Not Applicable

Personalized Alerts and Notifications

Delivered in
PTools 8.57

Workforce Insight

Diversity Analysis

Global Business Institute

Rows Diversity Value

Columns Empl ID

Diversity Type

Veteran Status

Regulatory Region

USA

Business Unit

GBIBU

From Date

01/01/2017

To Date

01/01/2018

Search

Clear

Company

☒ Global Bus

☐ Department

Department

☐ Information

Diversity Analysis

Age of Employees

100

80

60

40

70

Cancel

Threshold Personalization

Apply

1 row

Columns	Threshold Type	Threshold Value	Lower Limit	Higher Limit	Color	Threshold Criteria	Alert Type	Recurrence Name
Empl ID	Distinct	7			Red	Less Than	Both	Daily

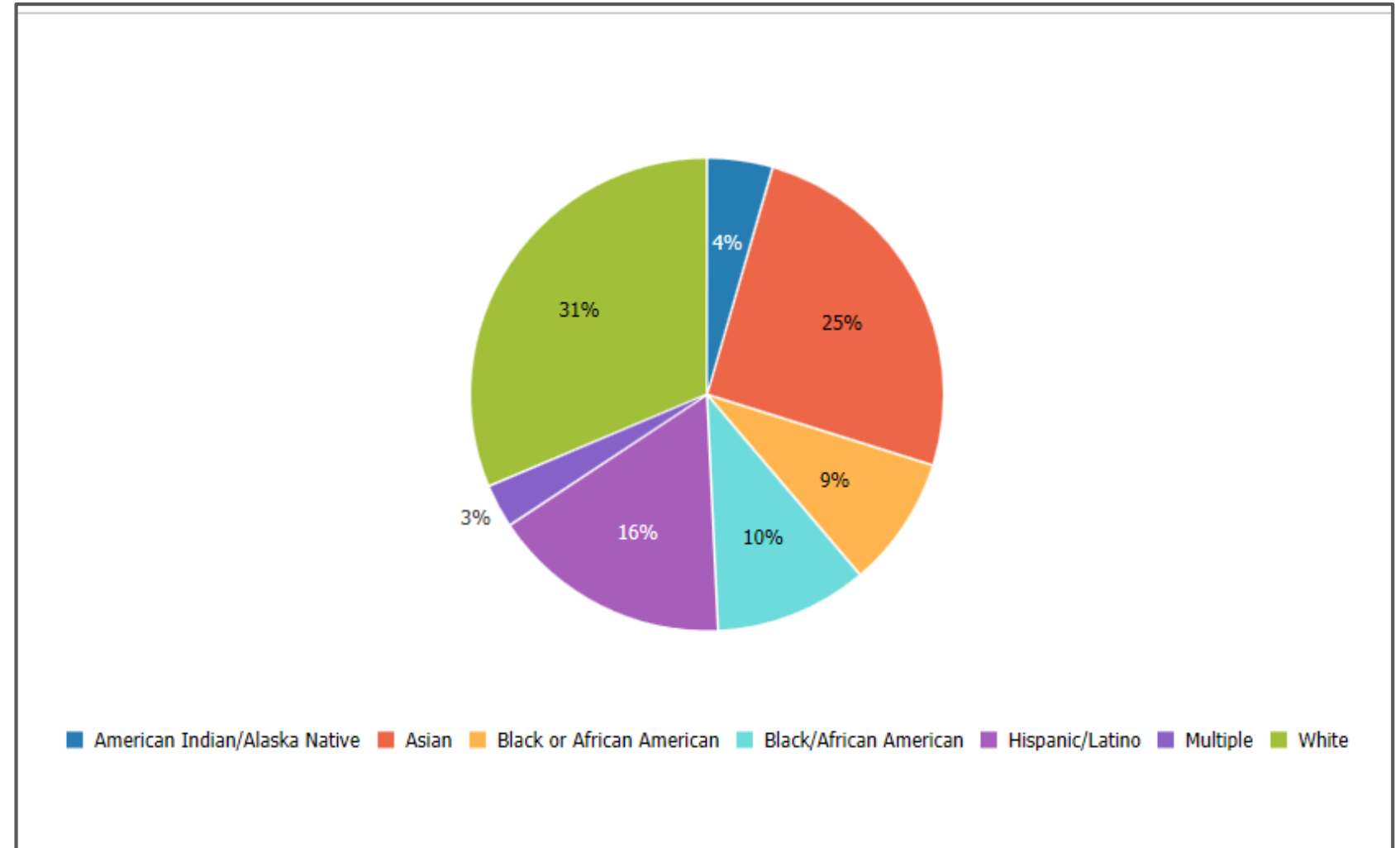


Make Informed Decisions

Workforce Analysis

HR Analytics:

- Workforce Diversity
- Workforce Diversity by Type
- Highest Education
- Vacate Position Analysis
- Turnover Analysis
- Headcount Movement



What are the *benefits* to Job 'Modernization'?

- Streamlining HR Data Entry Processes
- Modern User Experience
- Leverage PeopleSoft Technology
- Reduce Customizations





Manage Human Resources

Roadmap

Manage Job



Manage Person



HR Administration



HR Analytics



Search by First Name, Last name or Employee ID

>>

► **My Saved Searches**





Name / Title	ID /Record	Business Unit / Department	HR Status/Job Indicator	Actions
 Suzanne Channing Senior Accounting Manager	KU0001 0	Corporate Accounting Corporation Headquarters	Active Primary	 <input type="button" value="Initiate"/> <input type="button" value="Next"/>
 Suzanne Betty Locherty Finance Director	KU0022 0	Finance and Administration Corporation Headquarters	Active Primary	<input type="button" value="Initiate"/> <input type="button" value="Next"/>
 Suzanne Mei Lee Corporate Controller	KU3011 0	Corporate Accounting Corporation Headquarters	Active Primary	<input type="button" value="Initiate"/> <input type="button" value="Next"/>

- New Fluid Search Page
- Advanced Search
- Save Search Criteria
- Filter and Sort on Search Results
- Initiate Button: Initiate Jobdata change
- Configure and Personalize Search
- View Job History

Initiate Job Action

< SearchInitiate Job ActionHomeFlagMenuHelp



Suzanne Channing
KU0001 - 0
Senior Account Manager

*Effective Date24/01/ 2019

Effective Sequence 0

Preferred Actions ☒ Yes

ActionData Change

ReasonDepartment Correction

Continue

Exit

Data Change

Next >

1

Work Location

In Progress

2

Attachments

Not Started

3

Review and Submit

Not Started

Step 1 of 3 : Work Location

Effective Date

24/01/ 2019

Effective Sequence

0

Action

Data Change

Action Reason

Department Correction

Details

Position Number

19000210

Director-Human Resources

Use Position Data

Position Entry Date

03/22/1985

☐ Position Management Record

*Regulatory Region

USA

United States

Company

GBI

Global Business Institute

*Business Unit

GBIBU

Global Business Institute BU

*Department

10000

Human Resources

Department Entry Date

03/22/1985

What's New:

- Guided Process using Activity Guide Component with required steps
- Leverages Page and Field Configuration to hide/unhide steps and page fields

Exit

Data Change

3

1

Work Location
Complete

2

Attachments
In Progress

3

Review and Submit
Not Started

Step 2 of 3 : Attachments

Effective Date24/01/ 2019

Effective Sequence0

ActionData Change

Action ReasonDepartment Correction

Attachments

Add Attachment

Attachments

Description

Attached By

Attached

Status

View_Position_Page.JPG

Supporting Document

Betty Locherty

24/01/19 12:30:17 AM

Active

1 row

What's New:

Attachments

- Ability to add by Action/Action Reason
- Ability to delete attachments
- Ability to disable Attachments step from data entry, if not applicable

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64

Exit

Data Change



Suzzanne Channing
KU0001 - 0
Senior Account Manager

Previous

Submit

1

Work Location
Complete

2

Attachments
Complete

3

Review and Submit
In Progress

Step 3 of 3: Review and Submit

Effective Date24/01/ 2019

Effective Sequence0

ActionData Change

Action ReasonDepartment Correction

Summary of changes

Details	Proposed Information	Current Information
Department ●	Corporate Legal (16000)	Corporate Operations (171)

Related Information

Reference Links

[View Job details](#)

What's New:

- Review the Jobdata changes Proposed vs. Current format
- Leverage Related Information to enable any useful content for decision support
- Submit button to finalize the change and submit for approval
- Ability to View Job History

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65

Confirmation

Data Change for Suzanne Channing has been successfully submitted for approval



Employee Name

Suzanne Channing

Employee ID

KU0001 - 0

Job Title

Senior Account Manager

Approval Status

Data Change

Data Change

Pending

Routed

Katty Smith

Human Resources Admin

Pending

Franklin Smith

Human Resources Admin

Search Another Employee

Go to Job Actions Summary

What's New:

- Confirmation page
- View Approval Status and Approval Chain -AWE

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66

Questions and Answers



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