

# PeopleSoft HCM Update & Roadmap

ORACLE

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#### Forward Looking statement Safe Harbor

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## Covid Challenged us to Re-think our Roadmap

- Increased awareness of health & well being
- Humanize work and working conditions
- Define a new normal of operations
- Enable and adapt to the workforce
- Value agility over predictability
- Enable diversity & inclusion



## Building your PeopleSoft Roadmap

- Stay Current with application images within 1 year
- Stay Current with PeopleTools within 1 release
- Selectively deploy new features twice per year
- Deploy and Configure Fluid pages for all users
- Deploy Analytics for Power Users and Leaders
- Identify where emerging technologies and new configurations can help your organization

Target new features to deploy



PeopleSoft Technology Roadmap and Update In-Person Session (107580)





#### Target New Features Human Resources

- Job Data Modernization
- Person Data Modernization
- Remote Worker
- Employee Health & Safety, Wellness
- Non-binary Gender Identification
- Profile Management
  - Configurable Order of Fields
  - Employee Self Service Acknowledge Profiles
- Onboarding/Offboarding
  - Simplified, Fluid checklist
  - Support for pre-boarding activities
  - Kibana analytics for status and tracking step completions
  - Fluid I-9 form with supporting documentation





On Boarding, Off Boarding, and next to come preboarding. How to ensure smooth and consistent transitions for your workforce.

In-Person Session (107810)



### Fluid Job Data Support for Classic Job Data Ends 12/31/2022

- Redesign using Fluid
- New Configurable Search
- Drop Zones
- Activity Guide
- Configurable steps, fields
- Add Attachments
- Summary of Changes
- Validation Step
- Approvals (optional)

s 12/31/20 × Exit Vicki Zinn KU0059 - 0 - Employee Accountant	)22	Tio ya Niew C C	row cannot be added Effective Date / Sequ W/16/2021 ) 11/01/2010	rows, access this page in Correct History mode (select access moo after an in-Progress row	Create Job A     Create Job A	a will not be processed until next payroll. effective date correctly on this page.	Reports To Actions France Director Berly Locherty © France Director Berly Locherty ©	Create Job Actor Termination In Participation Next >
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Cynthia Davidson KU0101 - 0 - Employe





- Tested and deployed Fluid Job Data within 1 week
- Helped Administrators with new user experience
- Stay current with job data features and functionality
- Leverage new configurable search
- Hide, mask, and grey out fields by transaction

# Getty Museum

"When we first implemented PeopleSoft HCM at The Getty, for various reasons, we set it up so that Payroll handled the majority of the Job transaction data entry based on paper forms submitted and approved by HR. With Fluid Job, we felt it was time to turn that responsibility back over to HR. With Approval Workflow, we are able to mimic the approvals the paper form used to document and with HR submitting the transactions, *issues can be resolved before the transaction gets to Payroll*..."

- 1/3 of transactions thru Fluid
- Pilot phase





- Like that we now have search filters available in Job Data (ie. payroll status, dept, company etc,)
- Like that [Fluid Job Data] tells you what changes you made <u>before</u> submitting.
- Seeing the history of changes and who made them at the summary level in Fluid Job Data are very helpful for resolving issues.





With the rollout of Fluid Job Data, Evergy was able to streamline the data entry process for managers using Page and Field Configurator by limiting the fields required for data entry

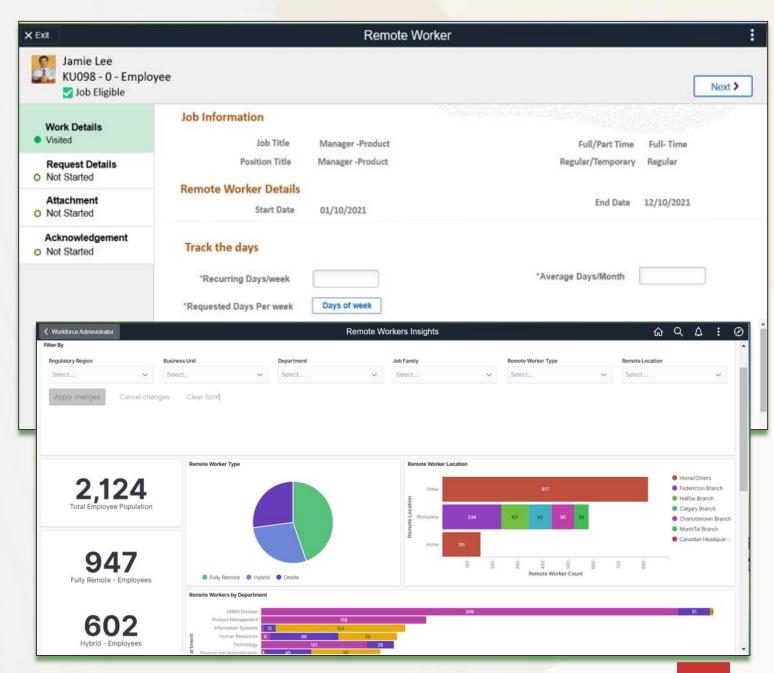
Managers liked seeing the employee's photo and the current and proposed changes side-by-side before submitting the transaction for approval.

Deploying Fluid Job Data has given Evergy an opportunity to take advantage of the new configurable search and the ability to hide, mask, and grey out fields by transactions using Page & Field Configurator

#### Target New Features Remote Worker Tracking

- Employee Self Service
- Configurable
  - Acknowledgments
  - Attachments
  - Approvals
- View employee remote status on multiple Peoplesoft pages
- Remote Worker Analytics Dashboard
- Image 40 & 42





### Roadmap for Remote Worker



() 09:00 AM - 10:00 AM

Ø Room 202

00 AM 🛗 June 8, 2022

Where are your employees? The Remote Worker feature can assist in tracking, approvals, and insights into your staff's location. In-Person Session (107630)

CPE Eligibl

In-Person Session

Insights Talk

#### More Visualizations

- State and Postal Maps
- Reason for Remote
   Working
- Timeline of Remote Worker Request
- Eligibility vs Remote Worker Status

#### View Remote Worker Status

- Company Directory
- My Teams

#### Easily Change Home Address

 Ability for employee to link to Personal Data Home Address from Remote Worker page

# Integration with NA Payroll

- Notification to Payroll
   Admin
- Auto Enroll into State W4
- Auto Update of Tax
   Distribution



PeopleSoft Payroll Update and Roadmap In-Person Session (107670)

# • 0 4:00 PM - 05:00 PM m June 7, 2022 • Room 202 PeopleSoft Tools & Technology CPE Eligible Oracle Session CPE Eligible CPE Eligible

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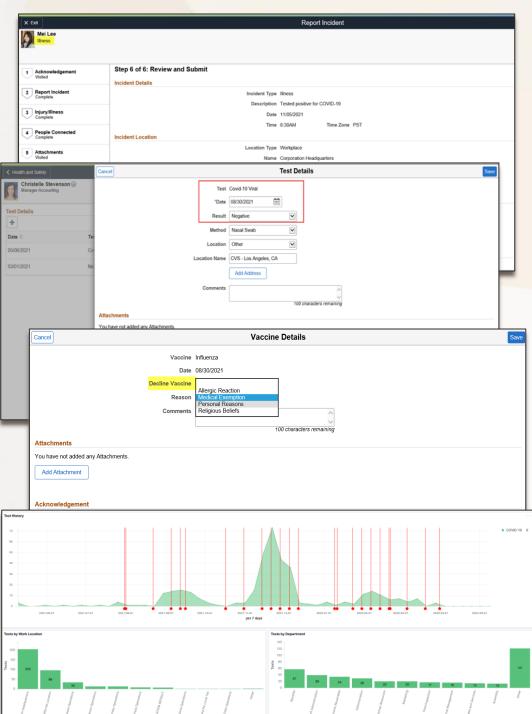
Insights Talk

In-Person Session

#### Target New Features Employee Health, Safety, & Wellness

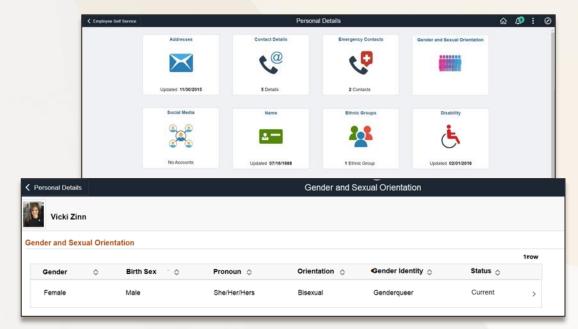
- Employee Self Service
  - view and update health & wellness related information
  - report on health & safety incidents
- Helps to foster a safe work environment and determine work assignments, office openings, event planning
- Track vaccinations, allergies, test results for employees
- Employee Acknowledgement, Approvals, & Attachments
- Administrator level analytics for vaccination and test results
- Images 40, 41
- Roadmap Item: Manager Self Service to enter Health & Safety incidents





#### Target New Features Gender Identity & Employee Self-Identification

- Capture & Track Employee Birth Gender, Current Gender, and Gender Identity
- Configuration available by region
- Allow for Preferred Pronoun(s)



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	Sexual Orientation	Lesbian Q 0		
	Gender Identity	Female Q 0		
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	By clicking on I agree to self identify check box you confirm the	t the sex and orientation details provided by you are true and you identify yourself with the mentioned attributes.		
	I agree to self identify			

## Target New Features - Benefits

#### **Available Features**

- Benefits Plan Utilization
- <u>ChatBot for Benefits</u>
- Life Event Document Upload and Approval
- Open Enrollment Tile Visibility
- Dependent Data Document Upload and Approval
- <u>Configuration of Dependent Data for Life Plans</u>

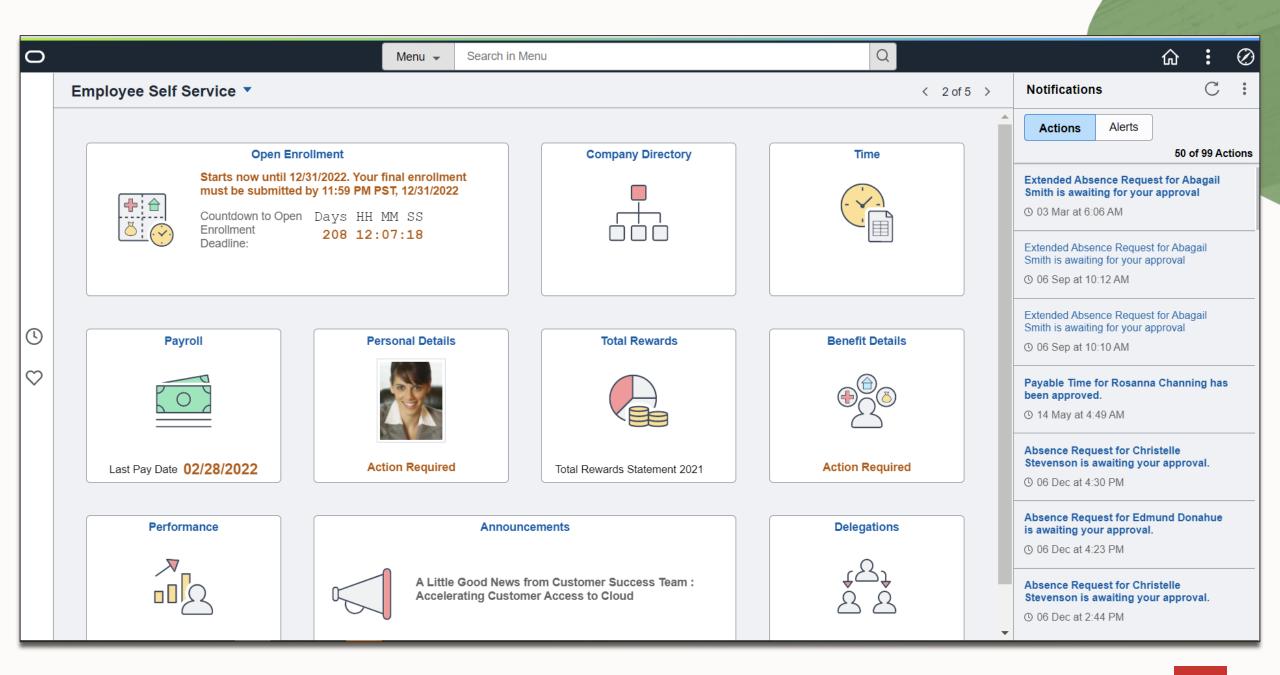


#### **Roadmap Items**

- Add a Dependent Rule to Dependent Relationship for Life Plans
- Benefit Plan Comparison
- Configurable Benefit Statement Setup
- Benefits Enrollment Analytics
- Continued Improvement of Accessibility in Self Service
- ESS Assist in Preventing Duplicate Dependents
- ESS Health Savings Account Worksheet

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## Benefits Plan Comparison



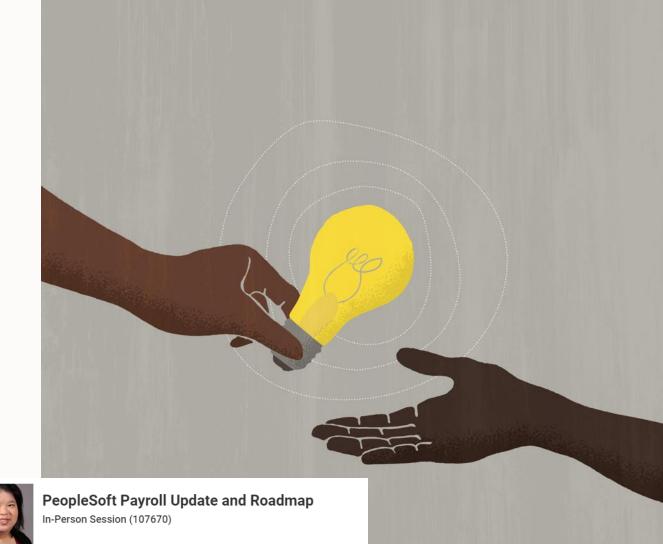
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Dependent/Beneficiary Info O Not Started	Submit Enrollment		-Vi	Benefits Administrator 500 George Washington Pkway New York, NY 07666
Benefits Enrollment <ul> <li>Visited</li> </ul>	Benefit Plans			Resources
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Benefit Survey O Not Started Summary	Current No Coverage New No Coverage Status Pending Review	Current Enhanced Medical Plan New Enhanced Medical Plan Status Pending Review	Current Enhanced Dental Plan New Enhanced Dental Plan Status Pending Review 21 Dependents	
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Office Visit	\$25 non-specialist \$40 specialist	\$20 non-specialist \$35 specialist	20% coinsurance <sup>2</sup>	
Emergency Room	\$150	\$100	20% coinsurance <sup>2</sup>	
Urgent Care	\$35	\$25	20% coinsurance <sup>2</sup>	
Out-of-Pocket Maximum     Once the medical OOF		A charges for the remainder of the calendar year.		ın
Coverage				Improving your Employee's PeopleSoft Benefit Open Enrollment user experience
Individual	\$2500	\$1500	\$4000	In-Person Session (107840)
Family	\$6000	\$4000	\$8000	
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Emergency Room	\$150 copay	\$100 copay	20% coinsurance <sup>2</sup>	Oracle Session
Inpatient Services	\$150 per admit	\$100 per admit	20% coinsurance <sup>2</sup>	*

### Target New Features Notable Payroll Features

- On Demand Calculation for On Cycle
   Paysheets
- Remote Worker Payroll Auto Enrollment for Tax Distribution
- Paid Family Leave framework
- Enhanced Options for Direct Deposit
- File Creation to allow Employees to download their W2s into Intuit Turbo Tax
- Fluid Paycheck Modeler



Insights Talk

In-Person Session

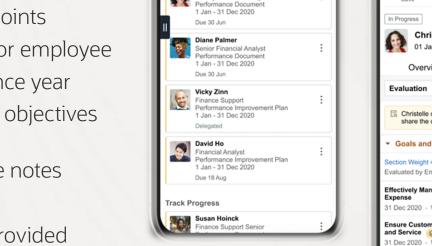


④ 04:00 PM - 05:00 PM

🛱 June 7, 2022

#### **Target New Features Performance Management Modernization**

- New Fluid design to improve usability
- Optimized for casual and mobile users
- Enhancements include:
  - Ratings and progress during checkpoints
  - Peer feedback request by manager or employee
  - Peer feedback during the performance year
  - Easier corporate goals and business objectives that can be aligned and cascaded
  - Quickly review and use performance notes
  - At a glance ratings
  - Easy tracking of positive feedback provided throughout the year (i.e., recognition, accomplishments)
  - Ability to exclude goal ratings in performance rating calculation
  - View Fluid version of the employee's career path



Team Performance

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**Christelle Stevenson** 

Manager - Accounting

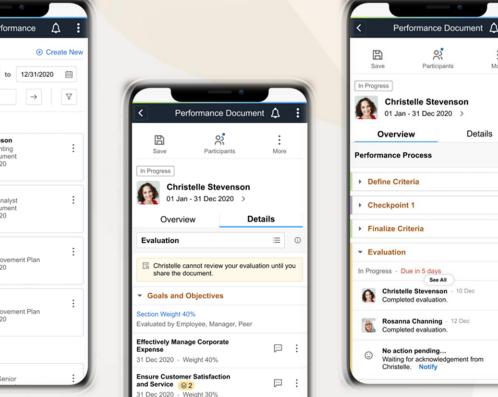
Documents

01/01/2020

Search By Name.

**Define Criteria** 

From



More

Details



Get ready for the modernization of PeopleSoft **Performance Management and Profile Management** 

In-Person Session (107750)

🛗 June 7, 2022 ④ 02:00 PM - 03:00 PM In-Person Session Insights Talk PeopleSoft Human Capital Management **CPE Eliaible**  Room 205
 Room 205
 Oracle Session

# Target New Features

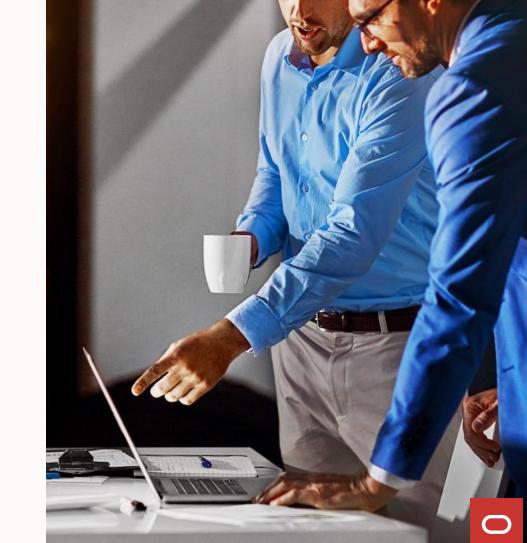
Notification Composer Framework

- Provide a consistent, meaningful approach to handle all ad hoc, event based, and scheduled notification types across PeopleSoft
- Configurability to make each notification mandatory and/or personalizable by the end user
- Address any limitations to the existing notification architecture
- Single place for updating user email addresses and phone numbers for notifications
- Enable text messaging support for any notification



#### Target New Features Notable T&L and Absence Features

- Absence Forecasting Enhancements
- Absence Self Service update
- Improved Payable Time Approvals Creation
- New Team Calendar for Managers & Employees



#### Target New Features PeopleSoft Time & Attendance – Team Calendar

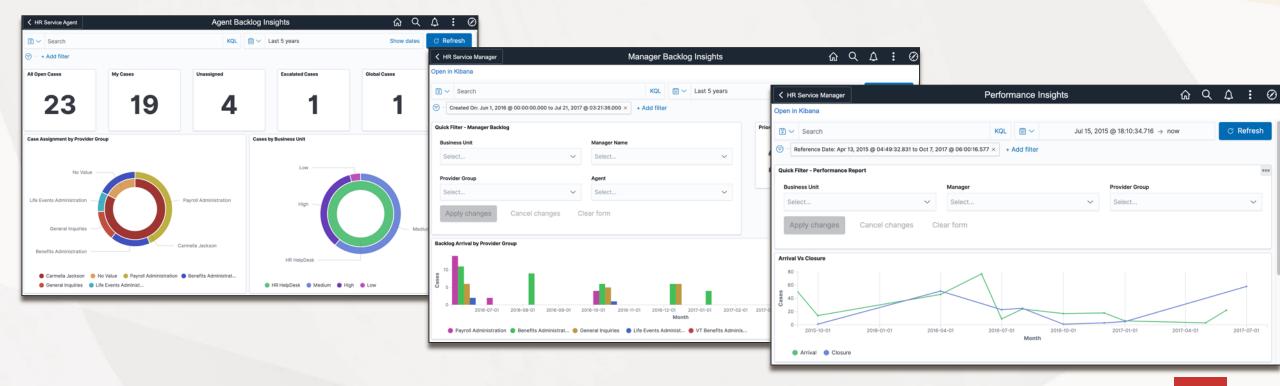
PeopleSoft Time & Absence Update and Roadmap In-Person Session (107850)

- Manager & Employee Self Service views
- Configuration for displaying custom events, such as Absences, Training, and Performance Review deadlines
- Display general events such as birthdays, work anniversaries, and schedules
- Managers can view Direct and
   Indirect reports on one page
- Users may personalize what they see, as well as the colors for the events
- Available on any device

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#### Target New Features HR HelpDesk

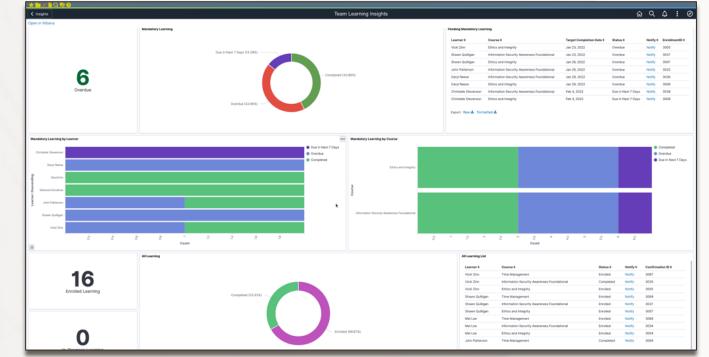
- Adding Approvals for Authoring/Posting Solutions
- Analytics for Agent Backlog, Manager Backlog, Performance Insights



#### Target New Features Enterprise Learning Management (ELM)

 Learning Insights Dashboard - allow managers to review their teams' learning and certifications in a single dashboard, including mandatory learning

- Fluidize Manager Self Service
  - Objectives
  - Learning Plans
  - Supplemental Learning



## Future Roadmap Items Under Evaluation

#### Self Service

- Fluid Leave Donations
- HSA Worksheet for Open Enrollment
- ESS Employee Snapshot
- ESS Request Accommodations
- Configurable T&L Multi-Job Selector
- Bi-weekly View of Fluid Elasped Timesheet
- Updatable PDF for Canadian TD1
- HRHD Solution Lookup and Create Case for PICASO

#### Administrator

- Direct Reports Fluid Time Pages
- Preboarding
- Citizenship/VISA enhancements
- Manage Hires Enhancement
- Create Electronic EE0-4 File for Transmission
- Combine Fluid Job Data Actions into one Transaction
- Savings Account Limits
- Additional Applicant Data Collection with Recruiting
- Pay Me Now Payroll

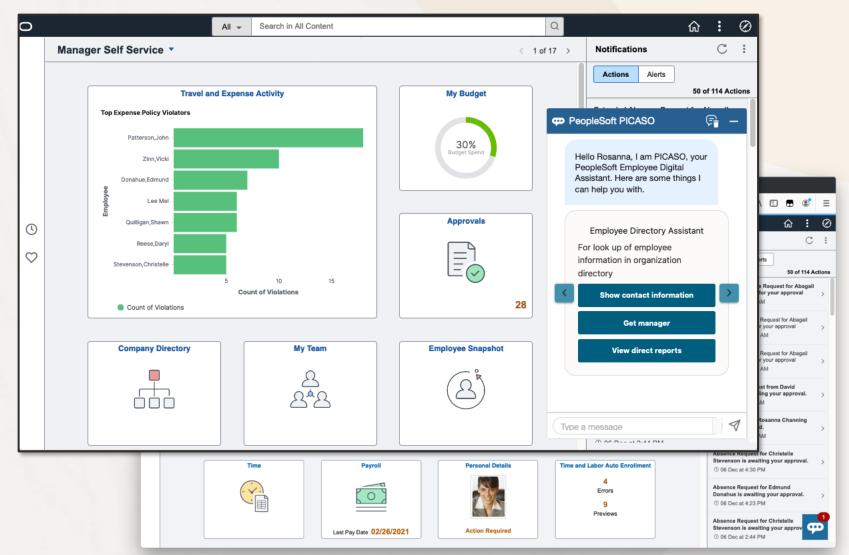


# Learn about New Technologies

Fluid Navigation – PTools

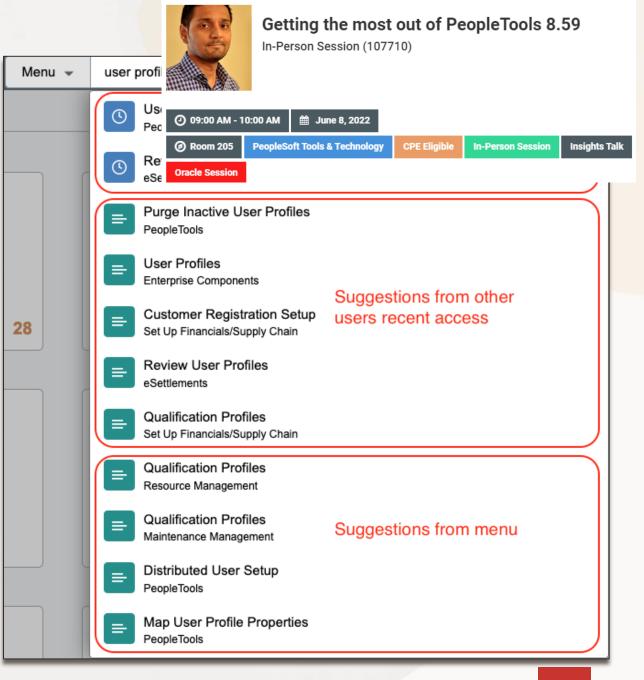
Improved use of and/or navigation to

- Notifications
- Alerts
- Favorites
- Recent
- Homepages
- Menu Items
- Digital Assistant
- Enterprise Search



#### Learn about New Technologies Fluid Enterprise Search – PTools

- Search is the primary means of navigation
  - Menu/Contextual
  - Custom/Personalized
  - Weighted
  - Secure
  - Fast
  - Real-time
  - Synonyms
- Suggestions are ranked based on the previous navigation history, with recently accessed at the top



#### Learn about New Technologies Analytics – Administrators and Leaders

- Modern palette of data visualizations
- Available from tiles and related content
   within PeopleSoft
- Better performance
- Real-time Indexing
- Security handled within PeopleSoft
- Easy to Use for Strategic Decisions
- No additional licenses required



## **Kibana Dashboards that are Generally Available**

#### HCM

- Workforce Equity
- Workforce Composition
- Application Details
- Incident Analytics
- Absence Event Insights
- Reported Time Insight
- **Benefits Plan Utilization**

- Global Payroll Operations

- Canada Operations Analytics

- Vaccination Analytics

- Recruiter Admin
- US Operations Analytics

- Early Detection and Monitoring
- Trend Analysis

ERP

- Financial Position Trending
- Financial Performance Analysis
- Operation Insights via Journals
- Collection Analysis and Monitoring
- Collector Performance
- Procurement Contracts
- Purchasing Effectiveness
- Purchasing Operations
- Active Contracts

- Work Order Labor Assignments
- Work Order Asset Maintenance History

- My Proxy Expense Activity

- Billing Operations Analytics
- Billing Analytics Dashboard
- Non-Viable Item Lot Analytics
- Item Lots Approaching Expiration



#### Available Now: **43** Dashboards **361** Visualizations

#### Ο

In-Person Session

CPE Eliai

## **Planned Kibana Dashboards**

#### Deploying Kibana Analytics: A PeopleSoft Customer Success Story

CPE Eligible

() 04:00 PM - 05:00 PM 🛗 June 8, 2022

Ø Room 205

PeopleSoft Tools & Technology



Insights Talk

In-Person Session

#### Kibana Analytics for PeopleSoft HCM In-Person Session (107720)

🋗 June 9, 2022

PeopleSoft Human Capital Mana

① 11:30 AM - 12:30 PM

Room 205

Oracle Sessi

#### HCM

#### Job and Personal Data Analytics

- Remote Worker Manager
   Analytics
- Remote Worker Admin Analytics
- US Payroll Trend Analytics
- Benefits Enrollment Insights
- Performance Document Insights

- Canada Payroll Trend Analytics
- Learning Insights
- Certification Insights
- Performance Insights
- Manager Backlog Insights
- Agent Backlog Insights
- Solutions Effectiveness
- Onboarding Insights

- Project Costing Analytics
- AR Aging Analysis for the Collector
- AR Aging Analysis for the Collections Manager
- Match Exceptions Analysis Dashboard
- AP Payment Focused Analysis Dashboard
- PO vs Non-PO Spend
- Analytic Dashboard for Lease Administrators
- Commitment Control Analysis Dashboard



() 04:00 PM - 05:00 PM

#### Unveiling the Secrets Behind PeopleSoft's Conversational Interface PICASO

In-Person Session (107650)

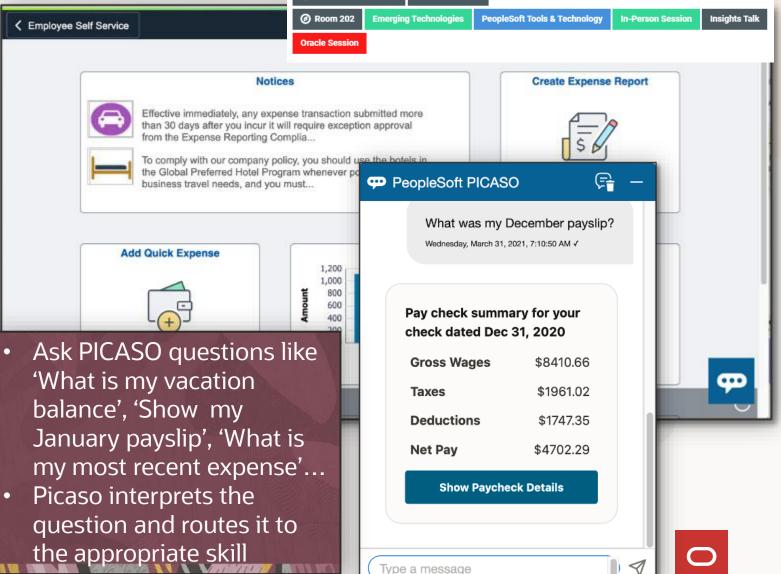
🛗 June 8, 2022

# Learn about New Technologies

PICASO (PeopleSoft Intelligent Chat Assistant from Oracle)

### With PICASO . . .

- Universal bot capable of addressing cross pillar PeopleSoft inquiries
- Single conversational interface
   across all PeopleSoft applications
- Combines our delivered skills into a single digital assistant
- Extend delivered skills or create your own
- Add corporate FAQ and other non-PeopleSoft applications
- 24 X 7 online access to data, processes and other apps



Learn about New Technologies Predictive – Intelligent - Visual

Supplement PSFT data with external data for intelligence and reporting

Integrate valuable data for machine learning

**HCM Specific Solutions** 

- Identifying Payroll Anomalies
- Predict Employee Risk of Flight



## Leverage about Configurations

Retire, reduce, or avoid customizations | Improve the user experience | Automate manual functions

- Page & Field Configurator
- Drop Zones
- Event Mapping
- Activity Guide Composer
- Acknowledgement
   Framework
- Attachment Framework
- Questionnaire Framework
- Page Composer
- Delegation Framework

- Approvals Workflow Engine
- Fluid Simplified Analytics
- Kibana Analytics for Elastic
- Navigation Collections
- Fluid Tile & Dashboard
- Fluid Branding
- Fluid Workcenters

- File Integration Framework
- Chatbot Integration Framework
- HR Notifications
- Forms & Approval Builder
- Related Content & Actions

#### Learn about New Technologies Oracle Cloud HCM Applications

- Shift your PeopleSoft environment to Oracle Cloud Infrastructure (OCI)
- Transition to Oracle Cloud HCM Applications
- Extend your PeopleSoft with Oracle Cloud Solutions

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PeopleSoft	Q Products Cloud Customers and Innovation Resources	
Oracle Fusion Cloud Applications Transition from PeopleSoft to Oracle Fusion Cloud Applications to leverage the latest cloud technology and innovations.	PeopleSoft on Oracle Cloud Infrastructure (OCI)      Reduce operational costs and increase automation, speed, and aglify with PeopleSoft on OCI.      PeopleSoft Cloud Manager      Policy Manager      Contract Cloud Subject Structure      Contract Cloud Subject Structure      Contract Cloud Subject Structure      Contract      Contra	

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#### Idea Spaces

## User & Focus Groups

## 1:1 Interactions

Advisory Board





# Participate in the Process peoplesoftinfo.com

#### For More Information...

PeopleSoft Social Media

Get the latest updates on PeopleSoft

## twitter

https://twitter.com/PeopleSoft\_Info

PeopleSoft Video Channel

oracle.com/peoplesoftvfo

# Linked in

Group: Oracle PeopleSoft Development

BLOGS

https://blogs.oracle.com/peoplesoft/

#### **Delivered Features**

oracle.com/peoplesoftcfotool

**Product Roadmap** 

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Submit your Questions for the Burning Questions session here:



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Thank You

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