

PeopleSoft HCM Update and Roadmap

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 @islander33

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HCM Image 31

AVAILABLE
NOW

- Employee Self Service Termination
 - ✓ Tracking of HR Business Partners
 - Development Documents for Employee Snapshot
 - ePerformance Auto Document Transfer for Employee Transfers
 - Activity Guide Composer
 - Multi User Capability
 - Move to Enterprise Components
- Enhanced Security for Profile Management
 - Compensation Cycle for Variable Compensation
 - Acknowledgement Framework in Candidate Gateway
 - Drop Zones for Guided Self Service and Mobile Paycheck/Paycheque
 - Global Payroll Expands GL Chartfields to 21
- Absence Request Attachments – Uptake in GP Brazil, Mexico, GP UK
 - ✓ Absence Management Chatbot
 - Fluid Extended Absence Self Service
 - Leave and Compensation Balances
 - Fluid Reported Time Audit
 - Archive Reported Time Including Approvals
 - Attendance Violations

Features Targeted for Image 32

COMING
SOON

- Offboarding Activity Guide Category, Template, & Trigger
- Fluidization of Benefits Summary pages for ESS
- Current Pay Period Timesheet Lockdown during Pay Calculation
- Deferred Reported Time update on Timesheet
- Ability to view all HCM attachments

- PNA Year-End Consent Reset for inactive/terminated employees
- Configurable Profile Content for Employee Snapshot
- Business Partner Enhancements (approvals, overlap report, links to additional info)
- Automatic transfer of performance documents when employee changes manager

- GP Core – store Run Control for automated scheduling
- GP Brazil – uptake attachment framework for absence requests
- Open Enrollment Activity Guide enhancements
- Recruiting Alerts Performance Improvements
- Federal – uptake attachment framework for Guided PAR

HR Business Partner

Overview

- Liaison between HR and the Business
- Administration and Compliance
- Manage Talent
- Identify Personnel Gaps
- Business Partners can be Generalists or Subject Matter Experts
- *“Organizations that build high-performing HR Business Partners improve employee performance by up to 22%, employee retention by up to 24%, revenue by up to 7%, and profit by up to 9%” – Gartner*

(<https://www.gartner.com/en/human-resources/role/hr-business-partners>)

Manage Business Partners



HR Business Partners

Feature Highlights





- Build your Business Partner Assignments based on simple or complex criteria
- Configure actions that Business Partners can perform for employees
- Define Business Partners Types (HR, Payroll, Benefits, etc.)
- Setup Alternate Contact Information and Business Partner Teams
- View Business Partners on Company Directory
- Accessible through Workforce Administration Home Page


Manage Business Partners




Employee Self Service


Personal Details








Ma. de Lourdes Hernández Peña
Consultant


 Addresses


 Contact Details


 Social Media


 Marital Status


 Name

 Ethnic Groups

 Emergency Contacts

 Additional Information

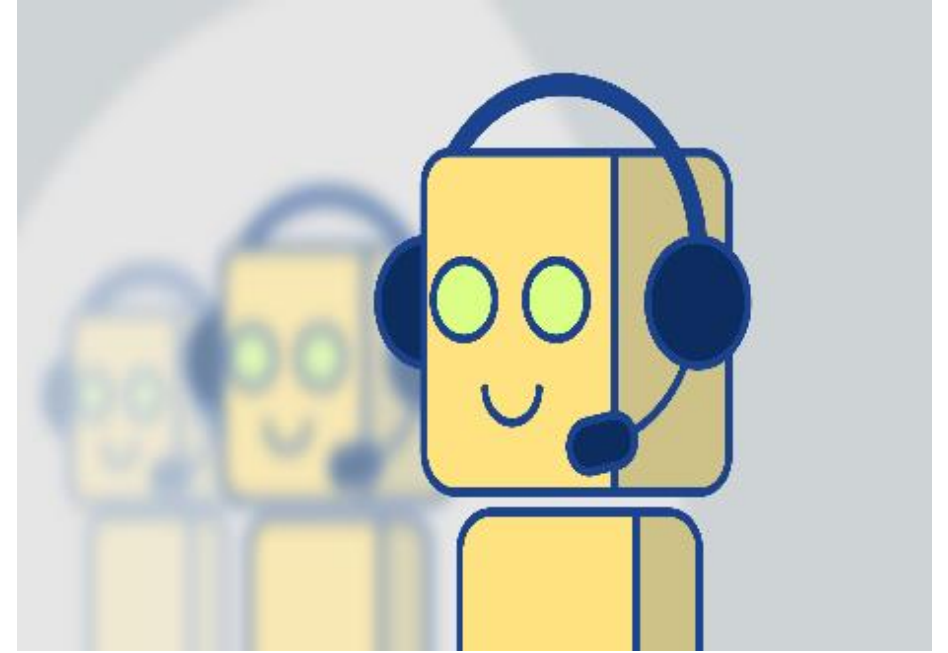
 **Business Partners**

 Form I-9

Business Partners

Name/Business Partner Title	Email/Phone	Department/Location
Betty Locherty	HCMGENUser1@ap6023fems.us.oracle.com	Finance and Administration
Finance Director	555/123-4567	Delaware Operations

Chatbot





Strategic Investment:
Simplification and Modernization

I'd like to request time
off on October 1

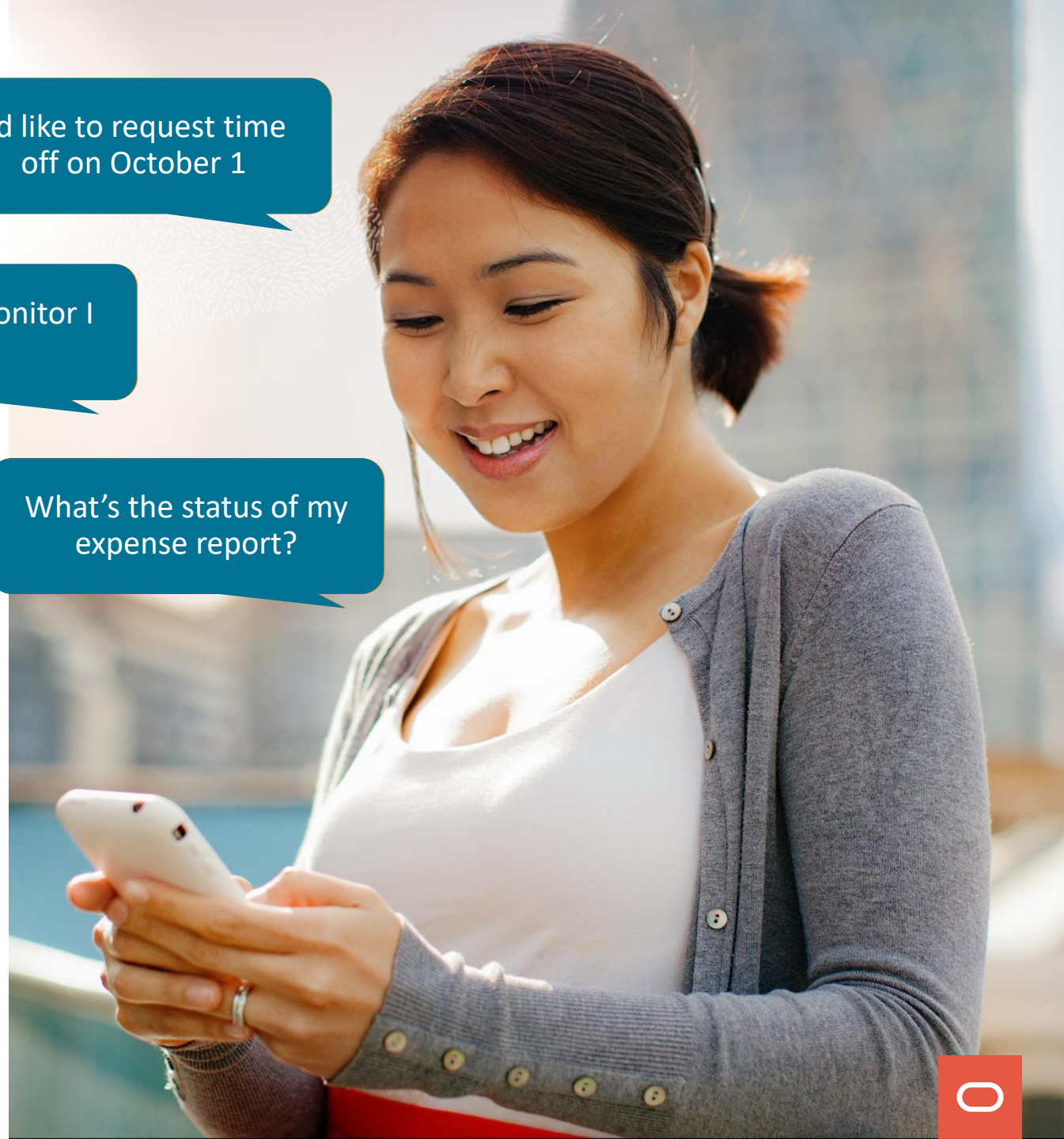
Where is the monitor I
ordered?

What's the status of my
expense report?

Conversational Interfaces

People are using chatbots more often in everyday life.

They should be able to use the same familiar interfaces at work, too.





Summary

Activity

Send & Request

Wallet

Offers

Help



LOG OUT

Help Center

Ask a question or search by keyword

Personal Help

Technical Help

Recommended for you

PayPal Mobile App

Payments

Products and Services

Recommended for you

Why am I receiving an error message when I try to complete the Get your money for service or virtual product flow?

What are the fees for PayPal accounts?

What is the Resolution Center?



Chat



Robbin Velayedam 09:30 AM

Yes



PayPal Virtual Agent 09:30 AM

What type of issue would you like to report

- **Item Not Received** – You bought something but didn't receive it.
- **Significantly Not as Described** – You received an item but it was significantly different from the seller's original description.
- **Unauthorized Activity** – Report transactions you didn't authorize.

Item Not Received

Significantly Not as Described

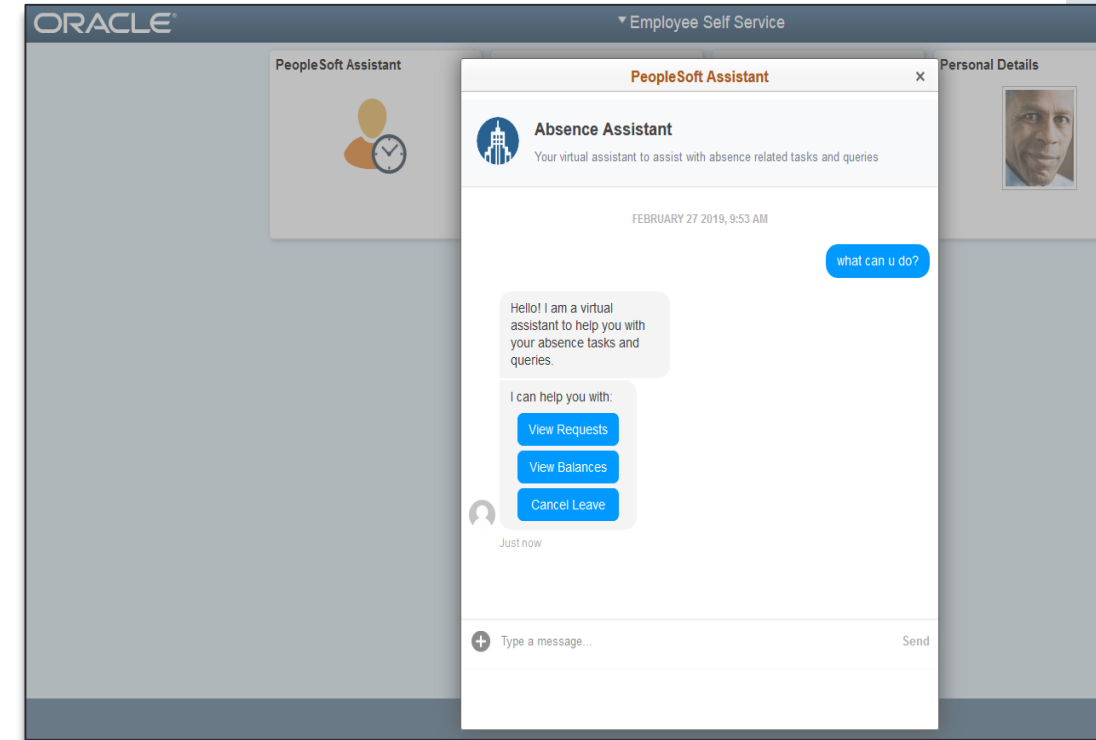
Unauthorized Activity

Other

Chatbot for Absence Management

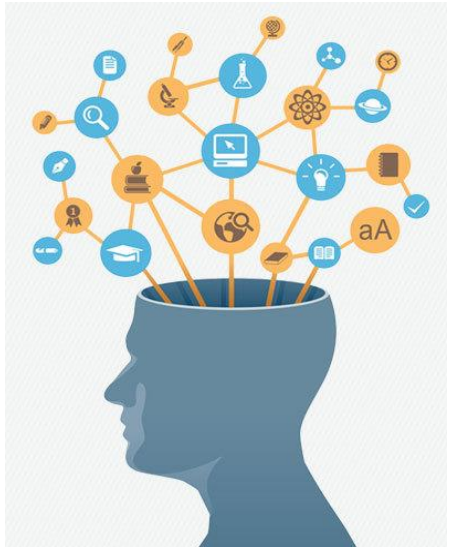


- Oracle Digital Assistant (ODA)*
 - Separate Oracle Application
 - Identifies Entities and Intents
 - Enables Chatbot User Interface within PSFT
- PeopleTools 8.57
 - Manages integration b/w PeopleSoft and ODA
- PeopleSoft Absence Management
 - Request or Cancel an Absence Request
 - View Current or Forecast Absence Balance
 - Check Status of Absence Requests



* Requires a separate subscription, cloud-based application, can be used with any application – not just PSFT

Chatbot Roadmap



EMPLOYEE
BENEFITS



	This Pay	Year
Gross Pay	388.27	
Pension	0.00	
AVC's	0.00	
Taxable Pay	388.27	
Tax	0.00	
NI	0.00	
Ssp	0.00	
p	0.00	

Company Directory



Change of Address

Fill out the change of address form

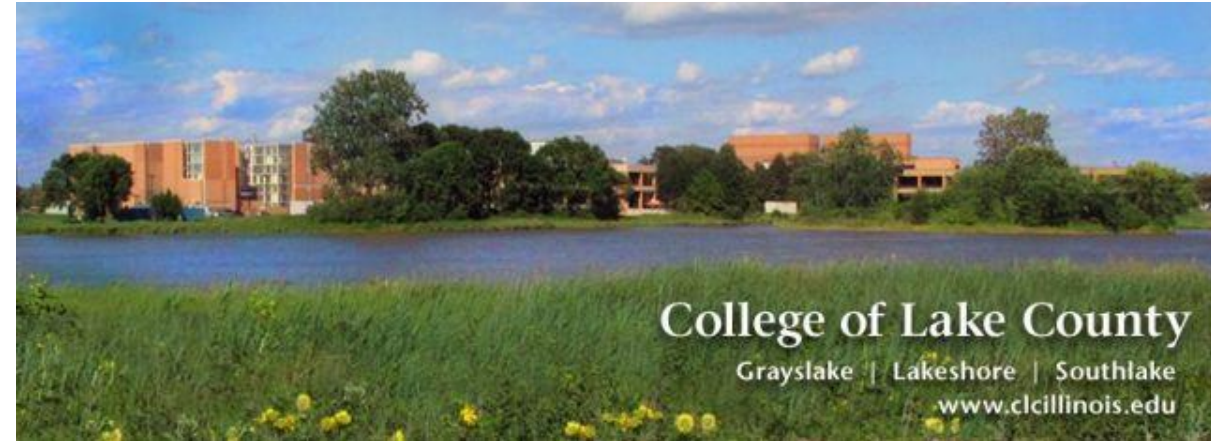
Fluid Benefits Open Enrollment

EMPLOYEE
BENEFITS



College of Lake County (CLC)

- Located in Grayslake, Illinois
- Employs:
 - Over 2,000 Employees
 - 663 Eligible for Open Enrollment
- On PeopleSoft since 1998
- Currently:
 - HCM 9.2, PUM29
 - PeopleTools 8.55.12 (yes, we are outdated 😊)
 - DB2 Database
 - No delivered security roles in PRD
 - Use Benefits Administration Open Enrollment, but not Life Events at this time

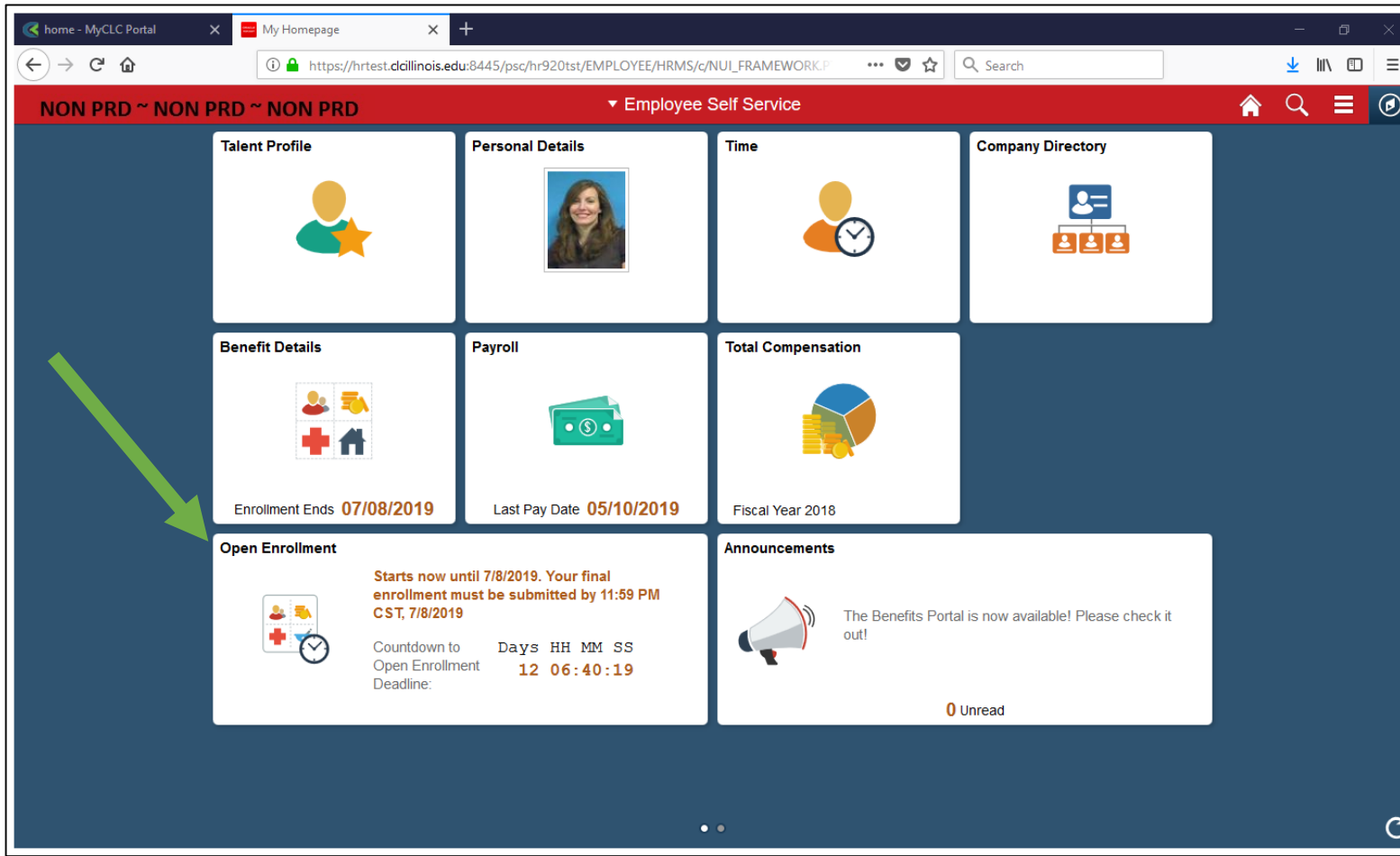


The Case for Fluid Open Enrollment

- Benefits of Fluid OE and Statements
 - Activity Guide Composer and Template allow flexibility during setup
 - Can be personalized to employee and institution
 - Clear steps/easy to follow
 - Employees can access anywhere (phone, tablet etc.)
 - Receive PDF statements of benefit choices
- Implementation
 - 1.5 months – Build/Test/Implementation
 - 75% of each day spent on fluid OE
 - Dedicated IT resource



What it Looks Like for CLC...



- OE Tile very informative
- Information derived from Enrollment Begin and End Dates on the Open Enrollment Definition page

Open Enrollment Activity Guide

The screenshot shows a web browser window with the title 'Open Enrollment'. The address bar shows a URL from 'hrtest.dillinois.edu'. The page has a red header with 'Open Enrollment' and a 'Next >' button. Below the header, it says 'Enrollment Period 5/2/2019 - 7/8/2019' and 'Kim Landmann'. On the left is a sidebar with a list of steps: 'Welcome' (Visited), 'Acknowledgement' (Not Started), 'Personal Information' (Not Started), 'Dependent/Beneficiary Info' (Not Started), 'Benefits Summary' (Not Started), 'Benefits Enrollment' (Not Started), 'Benefits Statements' (Not Started), and 'Summary' (Not Started). The main content area is titled 'Welcome' and contains a message from the Human Resources Benefits Team, signed 'Sincerely, Human Resources Benefits Team'. The message mentions that it's time for annual benefits Open Enrollment and provides a link to the Benefits Portal.

- Welcome statement personalized to employee
 - AG Template setup
 - No video due to update of Service ID in AG Category
- All steps shown are delivered in AG template
- Added in Acknowledgement step



Open Enrollment Activity Guide

The screenshot shows a web browser window with the URL `https://hrtest.dcllinois.edu:8445/psc/hr920tst/EMPLOYEE/HRMS/c/NUI_FRAMEWORK.P`. The page title is "Open Enrollment". The user is logged in as "Kim Landmann" and the enrollment period is "5/2/2019 - 7/8/2019".

Left Sidebar:

- Welcome (Visited)
- Acknowledgement** (Not Started)
- Personal Information (Not Started)
- Dependent/Beneficiary Info (Not Started)
- Benefits Summary (Not Started)
- Benefits Enrollment (Not Started)
- Benefits Statements (Not Started)
- Summary (Not Started)

Main Content Area:

Acknowledgement

By checking Agree you understand the following:

- CLC is authorized to make the changes you have requested to your benefits, and CLC can make the applicable payroll deductions for those benefits.
- You cannot change your benefit elections until the next Open Enrollment period, unless you have a qualified family status change.
- Your information is private, but CLC can provide your relevant information to authorized persons and organizations, such as health care providers, insurance carriers, and other approved internal and external entities.
- The information in this Open Enrollment submission is complete and accurate.

☐ I Agree

Save

☒ I Agree

Updated By

User ID	[Redacted]	Name	Kim Landmann
---------	------------	------	--------------

Date/Time Stamp 07/01/2019 10:14:47AM

Save

- What finished Acknowledgement Framework looks like
- Once 'I agree' is checked and saved the date/time stamp and other information will display
- All configurable on Acknowledgement Framework setup page
- Employee does NOT need to 'agree' to move on to a new step

Open Enrollment Guide

home - MyCLC Portal

Open Enrollment

https://hrtest.clcillinois.edu:8445/psc/hr920tst/EMPLOYEE/HRMS/c/NUL_FRAMEWORK.P

Exit

Open Enrollment

Previous

Next

Enrollment Period 5/2/2019 - 7/8/2019

Kim Landmann

Welcome

Visited

Acknowledgement

Not Started

Personal Information

Not Started

Dependent/Beneficiary Info

Not Started

Benefits Summary

Not Started

Benefits Enrollment

Visited

Benefits Statements

Not Started

Summary

Not Started

Benefits Enrollment

The Enrollment Overview displays which benefit options are open for edits. All of your benefit changes will be effective the date of the

Enrollment Summary

Your Pay Period Cost \$22.32

Status Pending Review

Full Cost \$22.32

Employer Cost \$442.89

Review Enrollment

Contact Information

Phone 847-643-2065

Email hr.ask@clcillinois.edu

Resources

CLC Open Enrollment Page

Benefit Plans

Medical Plan

Current Medical - PPO Standard

New Medical - PPO Standard

Status Pending Review

0 Dependents

Pay Period Cost \$22.32

Dental Plan

Current Dental - PPO

New Dental - PPO

Status Pending Review

0 Dependents

Pay Period Cost \$0.00

Vision Plan

Current Vision - PPO

New Vision - PPO

Status Pending Review

0 Dependents

Pay Period Cost \$0.00

Submit Enrollment

Date of the open enrollment event.

- Submit button is behind Supplemental Panel
- Employer cost displays
- Only chosen Benefit Plans display

Open Enrollment Guide

The screenshot displays the 'Open Enrollment' portal for the College of Lake County. The browser address bar shows the URL: https://hrtest.clcillinois.edu:8445/psc/hr920tst/EMPLOYEE/HRMS/c/NUI_FRAMEWORK.P. The page title is 'Open Enrollment'. The enrollment period is '5/2/2019 - 7/8/2019' for 'Kim Landmann'. The sidebar on the left contains links: 'Welcome' (Visited), 'Acknowledgement' (Not Started), 'Personal Information' (Not Started), 'Dependent/Beneficiary Info' (Not Started), 'Benefits Summary' (Not Started), 'Benefits Enrollment' (Visited), 'Benefits Statements' (Not Started), and 'Summary' (Not Started). The main content area is titled 'Benefits Enrollment' and includes a 'Submit Enrollment' button. Below this is an 'Enrollment Summary' section showing 'Your Pay Period Cost' of \$73.69, 'Full Cost' of \$73.69, and 'Employer Cost' of \$322.84. A pie chart shows the breakdown: Medical (blue) and Med FSA (orange). A 'Review Enrollment' button is also present. The 'Benefit Plans' section lists three plans: Medical Plan, Dental Plan, and Vision Plan. The Medical Plan shows a 'Status' of 'Changed' and a 'Pay Period Cost' of \$16.00. The Dental Plan and Vision Plan both show a 'Status' of 'Pending Review' and a 'Pay Period Cost' of \$0.00.

Plan Type	Current Plan	New Plan	Status	Dependents	Pay Period Cost
Medical Plan	Medical - PPO Standard	Medical - HMOI Network Only	Changed	0	\$16.00
Dental Plan	Dental - PPO	Dental - PPO	Pending Review	0	\$0.00
Vision Plan	Vision - Core	Vision - Core	Pending Review	0	\$0.00

Submit button now visible

Supplemental Panel is closed

Open Enrollment Guide

[Cancel](#)

Medical Plan

▼ Enroll Your Dependents

Dependents that the employee has registered are listed here. To add a new dependent, go to the Dependent/Beneficiary Information.

You have no dependent registered

Add Dependent

▼ Enroll in Your Plan

The Employee Only Cost showing is based on the dependents enrolled. Plans that do not offer coverage for the dependents enrolled are not available to select. To see other coverage cost, select the help icon next to each plan option.

	Plan Name		Cost (Before Tax)	Cost (After Tax)	Employer Cost	Pay Period Cost
Select	Medical - HMOI Network Only	i	\$16.00		\$304.08	\$16.00
✓	Medical - PPO Standard	i	\$22.32		\$424.13	\$22.32
Select	Waive					\$0.00

Overview of All Plans

Contact Information

Phone

847/543-2065

Email

hr.ask@clcollinois.edu

Resources

[CLC Open Enrollment Page](#)

Open Enrollment Guide

Benefit Plans

Medical Plan

Current Medical - PPO Standard

New Medical - HMOI Network Only

Status ✓ Changed

0 Dependents

Pay Period Cost

\$16.00

Review

Dental Plan

Current Dental - PPO

New Dental - PPO

Status **Pending Review**

0 Dependents

Pay Period Cost

\$0.00

Review

Vision Plan

Current Vision - Core

New Vision - Core

Status **Pending Review**

0 Dependents

Pay Period Cost

\$0.00

Review

Medical Reimbursement (FSA)

Current Medical Reimbursement Account

New Medical Reimbursement Account \$1,500

Status ✓ Changed

Pay Period Cost

\$57.69

Review

Dependent Care Reimbursement

Current Waive

New Waive

Status **Pending Review**

Pay Period Cost

\$0.00

Review

- Which Benefit Plans (cards) display is controlled on the Benefit Program with the 'Show if no Choice' checkbox

College  Lake County
Connect to Your Future

#PSRECONNECT

Open Enrollment Guide

Employer Cost

Benefits Alerts

Done **View**

Your benefit choices have been successfully submitted to the Benefits Department.

Select View to review your Election Preview statement, Done to return to the Benefits Enrollment Summary

- Click Submit and then View, to see Enrollment Preview.
- Enrollment Preview form can be reviewed prior to submit though

College of Lake County
Specialist Exempt

ELECTIONS PREVIEW
OPEN ENROLLMENT 2019 (FY2020)
Event Date: 07/01/2019

Kim Landmann
Specialist

Employee ID [REDACTED]

This election preview records your benefit selections, costs, dependent information, and beneficiary information as of the time you review this statement. If you have not submitted your election, you can return to this event before the enrollment period ends. Contact your benefits administrator if you have further questions. Please keep a copy of this form for your records.

PERSONAL INFORMATION

Home Address [REDACTED]
Email Address [REDACTED]
Birthdate [REDACTED]
Company Seniority Date [REDACTED]

COST SUMMARY

	AMOUNT
Total Pay Period Deduction from Pay	\$ 73.69
Total Pay Period Cost	\$ 73.69
Total Pay Period Employer Cost	\$ 322.84
Credit Rollover to	Cash

ELECTION SUMMARY

Benefit	Coverage	Category Base	Your Cost Per Pay Period
Medical - HMOI Network Only	Empl Only		\$ 16.00
Dental - PPO	Empl Only		
Vision - Core	Empl Only		
Medical Reimbursement Account		\$ 1,500.00	\$ 57.69
Dependent Care Reimbursement			

Benefits Statements

home - MyCLC Portal Open Enrollment

https://hrtest.dclillinois.edu:8445/psc/hr920tst/EMPLOYEE/HRMS/c/NUI_FRAMEWORK.P

Open Enrollment < Previous Next >

College Lake County **Enrollment Period 5/2/2019 - 7/8/2019**
Kim Landmann

Welcome
○ Visited

★ **Acknowledgement**
○ Not Started

▶ **Personal Information**
○ Not Started

Dependent/Beneficiary Info
○ Not Started

Benefits Summary
○ Not Started

Benefits Enrollment
✔ Complete

Benefits Statements
○ Visited

Summary
○ Not Started

Benefits Statements

Statement Type

1 row

Event Date	Issue Date	Job Title	Enrollment Event	Statement Type
07/01/2019	06/27/2019	Specialist - C43	Open Enrollment 2019 (FY2020)	Enrollment Preview >

javascript:submitAction_win0(document.win0,'LFF_SUBMIT_BTN');

- Enrollment Preview also available on Benefits Statements step in Online or PDF format

Benefits Statements – Online Version

home - MyCLC Portal

Open Enrollment

https://hrtest.dcllinois.edu:8445/psc/hr920tst/EMPLOYEE/HRMS/c/NUI_FRAMEWORK.P

Search

Benefits Statement

Cost Summary

This is a summary of the cost of your benefits. Details are in the Election Summary section.

Your Cost Per Pay Period

\$ 73.69

Full Cost

\$ 73.69

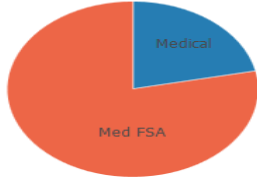
General Credits

Employer Cost

\$ 322.84

Excess Credit Rollover To

Cash



Election Summary


The following is a summary of your elections. Select the Dependent or Beneficiary hyperlink to view the information associated with each benefit.

Remember: These coverages will remain in effect until the next Benefits Open Enrollment or if you experience a change in family status or employment situation.

Benefit Plan	Coverage Base	Dependents or Beneficiaries	Your Cost Per Pay Period
Medical - HMOI Network Only	Empl Only	0 Dependents	\$ 16.00
Dental - PPO	Empl Only	0 Dependents	
Vision - Core	Empl Only	0 Dependents	
Medical Reimbursement Account	\$ 1,500.00		\$ 57.69
Dependent Care Reimbursement	Waive		

Print View

Print View
button
available in
upper right
hand corner

College  Lake County
Connect to Your Future

#PSRECONNECT

Summary Step

The screenshot shows a web browser window with the URL `https://hrtest.dcllinois.edu:8445/psc/hr920tst/EMPLOYEE/HRMS/c/NUI_FRAMEWORK.P`. The page title is "Open Enrollment" and the user is "Kim Landmann". The enrollment period is "5/2/2019 - 7/8/2019".

Left Sidebar:

- Welcome (Visited)
- Acknowledgement (Not Started)
- Personal Information (Not Started)
- Dependent/Beneficiary Info (Not Started)
- Benefits Summary (Not Started)
- Benefits Enrollment (Complete)
- Benefits Statements (Visited)
- Summary (Visited)**

Main Content:

Summary

If you have submitted your enrollment, review your elections on the Benefits Statements step and keep a copy of your elections as a record. If you have not completed your elections, go to the Benefits Enrollment step and complete your elections and select the Submit Enrollment button.

You can return to this event before 11:59PM PST, 7/8/2019 by selecting the Open Enrollment tile on Employee Self Service. Once the open enrollment period ends, your elections will be validated and finalized. If you did not submit your elections, your enrollment will be based on the default options. By default, all flexible spending accounts are waived for the new fiscal year. If you decide to enroll in a flexible spending account, you must indicate so during this Benefits Enrollment process. Contact the Human Resources Benefits Team if you have further questions.

Thank you!

Steps

Step	Status	Date Completed	Required	Go to Step
Welcome	Visited		No	Go to Step
Benefits Summary	Not Started		No	Go to Step
Benefits Enrollment	Complete	06/27/2019	No	Go to Step
Benefits Statements	Visited		No	Go to Step

- Can be personalized like the Welcome Statement
- Shows employee what they have visited and/or completed

Feedback

- Very positive from all employee groups
- CIO even emailed the deployment team!

Subject: Wow! What a great enrollment site!

I just went through benefits enrollment last night and I've got to let you know how fantastic the experience was.

- The enrollment site was super easy to find
- The countdown clock anticipated my need to know how much time I had left to enroll, without the need to find the original note on the topic
- The steps to complete enrollment were clearly defined in the left hand navigation pane
- The "next" button guided me through all those steps
- The fluid design of the different choices not only made it clear what choices I *could* make, but also included the choices I *did* make right on the tile
- The access to supplemental information like costs and details were built right into each selection, right at the point I needed to have the info. Brilliant!
- The process made it clear when I had completed enrollment

Needless to say, I am very impressed and, in an action I suspect will become more common as we leverage the capabilities of PS, I actually shared the experience with colleagues outside of CLC as an example of a best practice.

Thanks so much for the hard work, testing, and other efforts that went into making this all such a wonderful experience!

Greg.

Greg Kozak

Chief Information Officer
College of Lake County



Takeaways

- Positives
 - Simple to set up
 - Positive feedback
 - Mobile capability
 - Employee receives detailed benefit forms
 - No training needed
 - Emailed a simple 'How to Enroll' document
- Opportunity for Improvement
 - Submit button placement
 - Supplemental panel can block submit button
 - Oracle will send this to their UX (Usability Experience) team to review



www.peoplesoftinfo.com



PeopleSoft Fluid Benefits Enrollment

Highlights Videos

- Images 23, 26, 28, 29

Video Feature Overviews (VFO)

- Fluid Life Events
- Fluid Benefits Enrollment
- Activity Guide Composer
- Acknowledgement Framework
- Questionnaire Framework VFO

Spotlight Video

- Activity Guide Composer

Coming Soon

- Spotlight on Fluid Life Events

MOS Central Page for the Latest News

ORACLE[®] MY ORACLE SUPPORT

PowerView is Off

Tamara (Available)

(0)

Help

DashboardKnowledgeService RequestsPatches & UpdatesCommunityCertificationsManaged CloudCRM On DemandSystemsCollectorAdvanced Customer ServicesMore...

Give Feedback...

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★ **PeopleSoft HCM Fluid Benefits Enrollment Information (Doc ID 2527623.1)**

To Bottom

In this Document
[Details](#)
[Actions](#)
[Documentation is available with the following:](#)
[Fluid Benefits Enrollment Bugs & current status from Development:](#)
[Work is actively in progress, please open a Service Request and escalate if these issues are preventing your Open Enrollment:](#)
[Contacts](#)
[References](#)

Was this document helpful?
☐ Yes
☐ No

Document Details
Type: ANNOUNCEMENT
Status: PUBLISHED
Last Major Update: 31-May-2019
Last Update: 31-May-2019

Related Products
PeopleSoft Enterprise HCM Benefits Administration

Information Centers
Information Center: PeopleSoft Benefits Administration Overview [1395696.2]

Document References
No References available for this document.

Recently Viewed
Lifetime Support Summary for PeopleSoft Releases [2238983.2]
PeopleSoft Planned Features and Enhancements [1966243.2]
In which Image / Bug was Questionnaire Framework included? [2509547.1]
PeopleSoft HCM 9.2: Update Image Documentation

APPLIES TO:
PeopleSoft Enterprise HCM Benefits Administration - Version 9.2 to 9.2 [Release 9]
Information in this document applies to any platform.

DETAILS
Enhancements to the Fluid Benefits Enrollment are now available. This document provides a link to available documentation as well as a list of reported Bugs and associated resolutions.
This Document is dynamic and it is expected that it will be continually updated, as such, please monitor this knowledge article appropriately.

ACTIONS
Documentation is available with the following:

Feature	Documentation	Included in HCM 9.2 Image
Fluid Benefits Statement	Installation Document	Bug 28895997 - PUM 29

<https://support.oracle.com/epmos/faces/DocumentDisplay?id=2527623.1>

PeopleSoft HCM Strategic Initiatives



- **Enabling Compliance**

ACA, OFCCP, Family & Medical Leave, Payroll Regs/Legs Updates, OSHA, I-9, EEO-1, W4, Data Privacy, eSocial, Legislative Blog, Advisory Webcasts, Payroll Community on My Oracle Support...

- **Empowering Administrators**

Fluid Simplified Analytics, Related Actions, Related Content, Fluid Activity Guides for Job Data/Person Data and Position Management, Fluid WorkCenters...

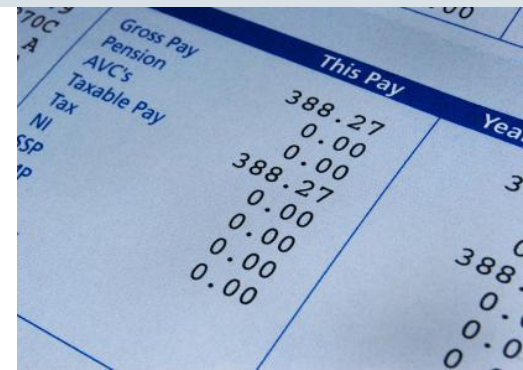
- **Configuration over Customization**

Activity Guides, Page Composer for Fluid Approvals, Page & Field Configurator, Event Mapping, Drop Zones, Attachment Framework, Consent Framework...

- **Employee Engagement**

Employee Self Service, Guided Self Service for Managers, Onboarding, Online PaySlip, PayCheck Modeler, Employee Surveys, Approvals & Delegation, Company Directory, Chatbots...

Compliance – Payroll Impact



	This Pay	Year
Gross Pay	388.27	
Pension	0.00	
AVC's	0.00	
Taxable Pay	388.27	
Tax	0.00	
NI	0.00	
SSP	0.00	
MP	0.00	

- ✓ DC Paid Family Leave
- ✓ Massachusetts Paid Family and Medical Leave
- ✓ Washington Paid Family and Medical Leave Quarterly Reporting
- 2020 W-4 Withholding Forms (late 2019*)
 - New form and calculation methods
 - Classic and PDF versions of Federal W4 updated for 9.2 (no Fluid version planned)
 - Classic Federal W4 only for 9.1, 9.0, 8.9
 - PDF versions of State W4s are still provided
 - Targeting for 19-E and Special Posting PRP
- EEO-1 Component 2 Reporting (Sept 2019*)

ORACLE [Check Payroll Hot Topics](#) for posting information and links (MOS ID =

Paysheet Update Load for Inactive Employees

- #1 on Ideas Space
- Proposed configurable setup allows customers to define their own parameters
 - Allowable employee inactive statuses
 - Define Paysheet sources for inactive employees
 - Define earnings that can be paid to inactive employees
 - Define allowable deductions that can be taken from inactive employees
 - Define company/paygroup eligible for program

Fluid Position Management

<https://www.youtube.com/watch?v=g08u63VkZO8>

Functionality Enhancements

- New Position Management dashboard
- Position Administration Navigation Collection
- Configurable Search
- Review changes before submit
- Leverage Related Content
- Quick Review of Position History

Effective Sequencing

- Multiple Updates on Same Effective Date
- Simultaneous Employee Transactions
- Minimize loss of data while using Correct History

**66%+ of You use
Position
Management**

Fluid Approvals (AWE)

- Route new position request or update position requests for approval
- Approve / Deny / Pushback the requests
- Configurable approval definitions
- Add one or more attachments
- Route attachments with approvals

Modern User Experience

- Fluid User Interface for searching a position
- Fluid guided process for creating, updating, and cloning positions
- Optimize data entry by using Activity Guide Composer Page and Field Configurator to limit steps and fields for data entry

Configuration Tools



Configuration vs. Customization – The Big 4

AVOID Customization

- **Page & Field Configurator**
 - Metadata captured to define common changes to pages
 - Generates AppClass PeopleCode assigned to Components through Event Mapping
 - Works with existing components
- **Approvals Page Composer**
 - PeopleTools provided utility used to allow end-user page design of a fluid component
 - Built specifically for Approvals
 - Will not work with any Classic or non-Page Composer based Fluid Component

ISOLATE Customizations

- **Drop Zones**
 - Area on Fluid Pages that will be bypassed by standard LCM compare process
 - Framework to add custom fields
 - Works on existing pages but is limited
 - Only used for customizations
- **Event Mapping**
 - AppClass methods run before or after built-in exit points
 - Complete access to Component Buffer
 - Assigned through existing Related Content Framework

What are Drop Zones?







- Delivered, pre-defined areas on Fluid pages
- Available on most delivered Fluid pages at Top & Bottom*
- Ability to embed custom content directly on a transaction Fluid page
- Managed as configuration, not as a traditional customization
- Potential Use Cases
 - Add text to a Fluid page (i.e., special instructions, text, reminders)
 - Add related information (i.e., institutional policies, additional links)
 - Add data entry (i.e., additional fields)


Drop Zone - Steps


Before


Employee Self Service


Personal Details








Betty Locherty 
Finance Director


 Addresses


 Contact Details


 Social Media


 Marital Status


 Name


 Ethnic Groups

 Emergency Contacts

 **Additional Information**

 Disability

 Veteran Status

 Form I-9

Additional Information

Gender

Female

Date of Birth

07/06/1945

Birth Country

United States

Birth State

Texas

Social Security Number

341-95-7245

Smoker

Date Entitled to Medicare

Original Start Date

04/07/1989

Last Start Date

04/07/1989

Highest Education Level

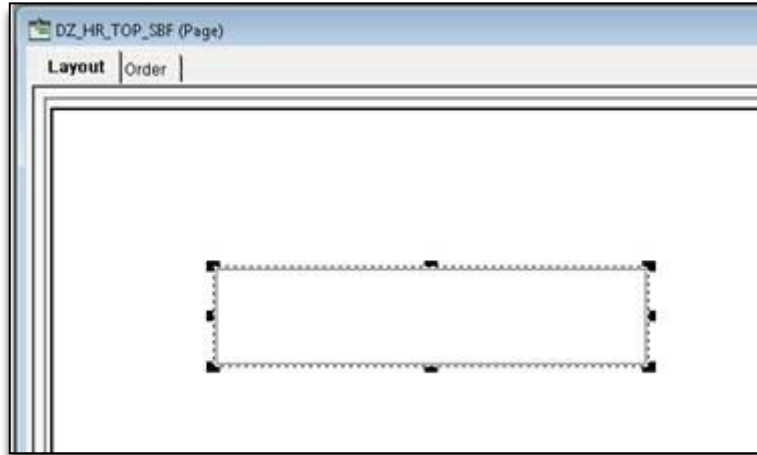
Not Indicated

Employee Information

Contact the Human Resources department if any of your Employee Information is incorrect.

Drop Zone - Steps

Use/Create a Subpage - TOP



The screenshot shows the same window as the previous image, but with the "Order" tab active. It displays a table with the following data:

Tab Order	Field ID	Lvl	Label	Type	Field	Record	Parent Field ID	Dis
1	1	0		Group Box			DZ_HR_TOP_SBF	<input type="checkbox"/>
2	27	0	Parameter	HTML Area	HRS_PARM_HTML	DZ_MIDDLE_WRK	DZ_HR_TOP_SBF\$0	<input type="checkbox"/>

Drop Zone - Steps

Use/Create a Subpage - MIDDLE

DZ_HR_SBF (Page)

Layout | Order

Empl ID

Blood Type NNI

Fire Safety certification Name

DZ_HR_SBF (Page)

Layout | Order

Tab Order	Field ID	Lvl	Label	Type	Field	Record	Parent Field ID	Display
1	1	0		Group Box			DZ_HR_SBF	<input type="checkbox"/>
2	21	0	Empl ID	Edit Box	EMPLID	PERS_DATA_DZ	DZ_HR_SBF\$0	<input type="checkbox"/>
3	22	0	Blood Type	Edit Box	BLOOD_TYPE	PERS_DATA_DZ	DZ_HR_SBF\$0	<input type="checkbox"/>
4	20	0	Fire Safety Certific	Edit Box	CERTIFICATION_NAME	PERS_DATA_DZ	DZ_HR_SBF\$0	<input type="checkbox"/>
5	25	0	Subject and Detail	HTML Area	HRS_NOTES_HTML	DZ_MIDDLE_WRK	DZ_HR_SBF\$0	<input type="checkbox"/>

Drop Zone - Steps

Use/Create a Subpage - BOTTOM

The image shows two overlapping screenshots of the Oracle APEX interface. The background screenshot shows a page titled 'DZ_HR_BTM_SBF (Page)' with a 'Layout' tab selected. A dashed box highlights a text area containing the message: 'The information above is updated every Friday, 11:59pm US Pacific Time'.

The foreground screenshot shows the same page with the 'Order' tab selected. It displays a table with the following data:

Tab Order	Field ID	Lvl	Label	Type	Field	Record	Parent Field ID	Display Control	Related Field	Co
1	1	0		Group Box			DZ_HR_BTM_SBF			
2	30	0	The information a	Text			DZ_HR_BTM_SBF\$0			

Below the table, the 'Static Text Properties' dialog is open, showing the configuration for the text field. The 'Text' radio button is selected under 'Label Text'. The 'Text' field contains the message: 'The information above is updated every F'. The 'Message Set/Number' is set to 18032 and 2070. The 'Style' is set to 'Use Default Style'. The 'Alignment' is set to 'Left'.

Drop Zone - Steps

Associate Subpage to Drop Zone within Component

Configure Drop Zones

Configure Drop Zones

Home

Search

1

Component

Component

HR_ADDTL_INFO_FL

Description

Additional Information

Drop Zones by Page

3 rows

Page Name	Tab Order	Drop Zone	Subpage Name
HR_ADDTL_INFO_FL	3	HR_DZ_DERIVED.HR_DZ_GB01	<div>DZ_HR_TOP_SBF</div>
HR_ADDTL_INFO_FL	27	HR_DZ_DERIVED.HR_DZ_GB02	<div>DZ_HR_SBF</div>
HR_ADDTL_INFO_FL	31	HR_DZ_DERIVED.HR_DZ_GB03	<div>DZ_HR_BTM_SBF</div>

Save

Return to Component Selector

Drop Zone - Steps

←

→

↺

🏠

slc11sgv.us.oracle.com:8000/psc/h92fi211x_25/EMPLOYEE/HRMS/c/EL_EMPLOYEE_FL.HR_ADDTL_INFO_FL.GP

90%

⋮

🔖

🔍 Search

DEP Bug NUI AWE Process JIRA-Marshals Marshalls Dashboard AG USF Policy Upgrades useful queries - Peopl... DET Links\ marshallsdaily

←


Additional Information

Personal Details

🔍

⋮

🔊



Betty Locherty

Finance Director

📍 Addresses

📞 Contact Details

🌐 Social Media

💑 Marital Status

🏠 Name

👥 Ethnic Groups

📞 Emergency Contacts

👤 Additional Information

🦿 Disability

👤 Veteran Status

📄 Form I-9

Additional Information

Personal Details as of 05/04/2019.

Click [here](#) to view the company's employee personal data confidentiality policy.

Gender

Female

Date of Birth

07/06/1945

Birth Country

United States

Birth State

Texas

Smoker

Date Entitled to Medicare

Original Start Date

04/07/1989

Last Start Date

04/07/1989

Highest Education Level

Not Indicated

Blood Type

A+

Fire Safety Certification

Certified Fire Protection Specialist (CFPS)

Contact the Human Resources department if any of your Employee Information is incorrect.

Employee Information

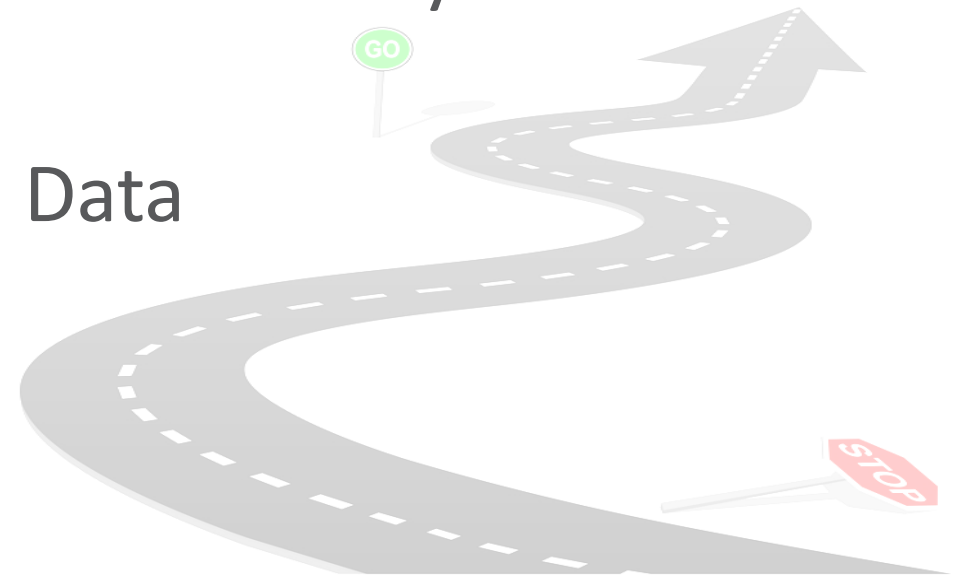
Contact the Human Resources department if any of your Employee Information is incorrect.

The information above is updated every Friday, 11:59pm US Pacific Time

43

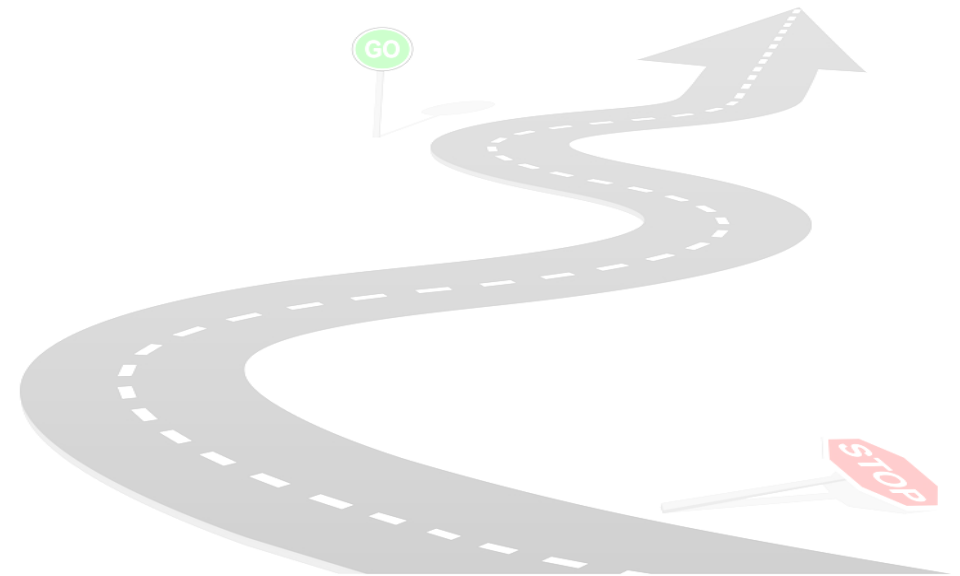
Notable HCM Roadmap Initiatives

- Chatbots
 - Company Directory, Employee Actions
 - Payroll
- Fluid Profile Management Search, Match & Compare
- Leverage Page & Field Configurator for Data Privacy
 - Data Privacy Officer Role
- Modernization of Job Data and Person Data
 - Fluid Activity Guide Based
 - New Search
 - Approvals



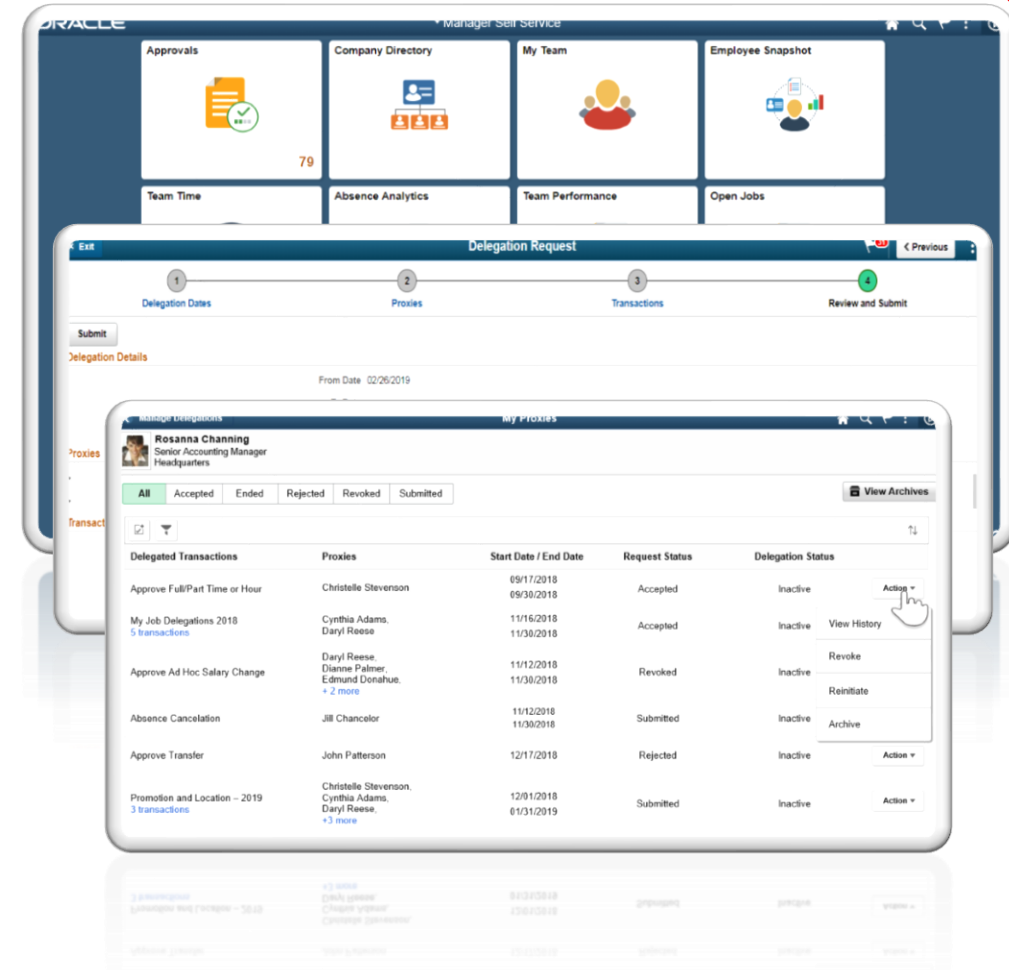
Notable HCM Roadmap Initiatives

- Text Notifications
- Updated Fluid Design
- Kibana Data Visualization (elastic.co/products/kibana)
- Fluid Delegations
- PeopleTools 8.58



New Delegation Framework

- Compatible Across Pillars (in a clustered environment)
- Quick Search Capabilities for Proxies
- Select Multiple Proxies and Transactions at Once to be delegated
- Provide Delegators visibility into the actions performed by Proxies
- Configurable Cascading Delegation Authority
- Support for existing classic delegation requests after moving to Fluid



New Delegation Framework

Roadmap

✕ Exit

Delegation Request

33

1

Delegation Dates

2

Proxies

3

Transactions

4

Review and Submit

< Previous

Submit

Delegation Details

From Date

08/05/2019

To Date

08/09/2019

Cover for me during my Summer Vacation

Proxies

- Cynthia Adams
- Jean Parsons

Transactions

- Approve Job Offer
- Approve Job Opening
- Approve Job Update for Group

Optimize the User Experience

- Focus on Analytics
 - Support for Kibana with the Elasticsearch Repository
 - Kibana Analytic rendered in PeopleSoft
 - Improved Chart capabilities
- Improved Data Privacy Support
 - Data masking API
 - Data masking in Query and Search results
- Notification Management
 - Single place for user configuration
 - Ability to send Text Messages (using Twillio)
- And more . . .
 - New window link
 - Incremental Activity Guide improvements

Isolate Customizations/Configuration

- Configuration Role and Homepage
 - Delivered by the applications
 - Access to PeopleTools and Enterprise Component Events
 - Pluggable AppEngine Steps to modify AppEngine programs without customization
 - Dropzones support for Classic Plus pages
- Event Mapping Enhancements
 - Field events FieldEdit, Field Default
 - Component Field Events SearchInit and SearchSave
 - Secondary pages and nested sub pages
 - Use a single AppClass ServiceID for multiple events

PeopleSoft Resources



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licensesales-naa_us@oracle.com

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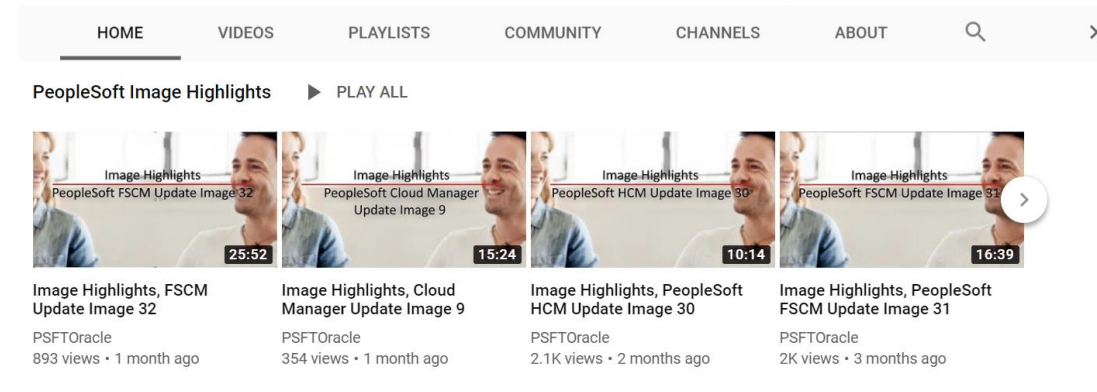
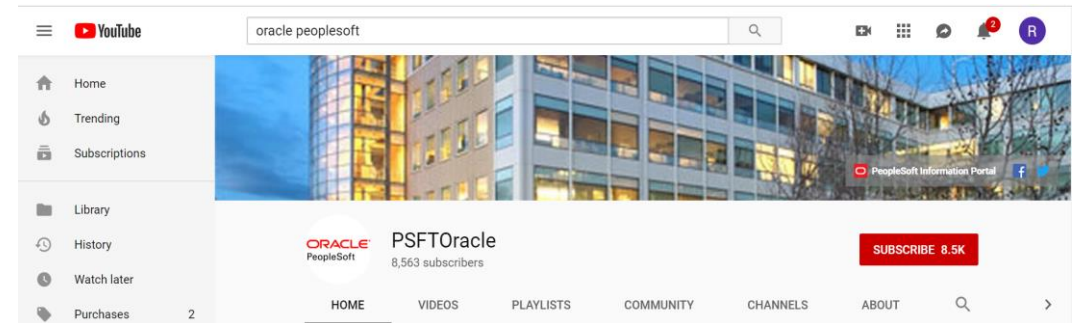
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- Customer 2 Cloud Sales
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