

work: strategy



# PeopleSoft HCM 9.2 Series

## Fluid Manager and Employee Self Service

May 19, 2021

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## Firm Profile

- HR Technology Firm Based in Maryland
- Staff of HR Practitioners and HCM Specialists
- Oracle Gold Level Implementation Partner
- Established in 2003
- Over 400+ Successful HR Technology Projects
- Focus on Process Improvement and Best Practices
- Expertise in Talent Management and Self Service
- Certified HCM Cloud Implementation Specialists

## Strategic Services

- HR Technology Roadmap – *HCM Needs Assessment, Vendor Selection, Budget Planning*
- PeopleSoft HCM – *Patches, PUMs, and Upgrades, Simplified Analytics, Kibana, Fluid UI, Talent Management, Process Improvement*
- Cloud Services – *Project Management, Configuration, Migration, Integration*
- Oracle HCM Cloud Apps – *Performance, Goals, Succession, Talent Reviews, Compensation, Onboarding, Reporting/OTBI*

- Recent News / Customer Feedback
- PeopleSoft Updates and Features
- Recent [PUM 34-38](#) Enhancements
- PeopleTools [8.58](#) Look & Feel
- Fluid Navigation
  - Tiles, Notifications, Personalizations
- Analytics, Kibana Data Visualization
- Employee Self Service
  - Talent Profiles, Payroll, Benefits OE, Life Events
- Manager Self Service
  - My Team, Employee Snapshot, Update Team Info
  - Approvals, Delegation, Simplified Analytics
- OnBoarding
- Benefits Enrollment and Life Events
- Activity Guide Composer



# Current Customer Projects

- ▶ Implement Fluid Benefits Open Enrollment, Life Events
- ▶ Migrate Classic Pages to Fluid Pages
- ▶ Re-configure Employee Snapshot
- ▶ Design Simplified Analytics and Kibana Strategy
- ▶ Migrate 3<sup>rd</sup> Party Talent (Performance and Succession) to PeopleSoft HCM
- ▶ Create New Custom Fluid Tiles
- ▶ Create Fluid OnBoarding Templates
- ▶ Deploy New Diversity Simplified Analytics
- ▶ Upgrade PS HCM to PUM 8.58 and PUM 38
- ▶ Implement Talent Profiles and ePerformance Design
- ▶ Implement eComp Manager Desktop
- ▶ Redesign Employee Snapshot
- ▶ Apply Critical Patches to PeopleSoft/PeopleTools Environments
- ▶ Assess Impact of New PUM Enhancements
- ▶ Implement WorkStrategy eComp+ Bolt-on and Comp Statements



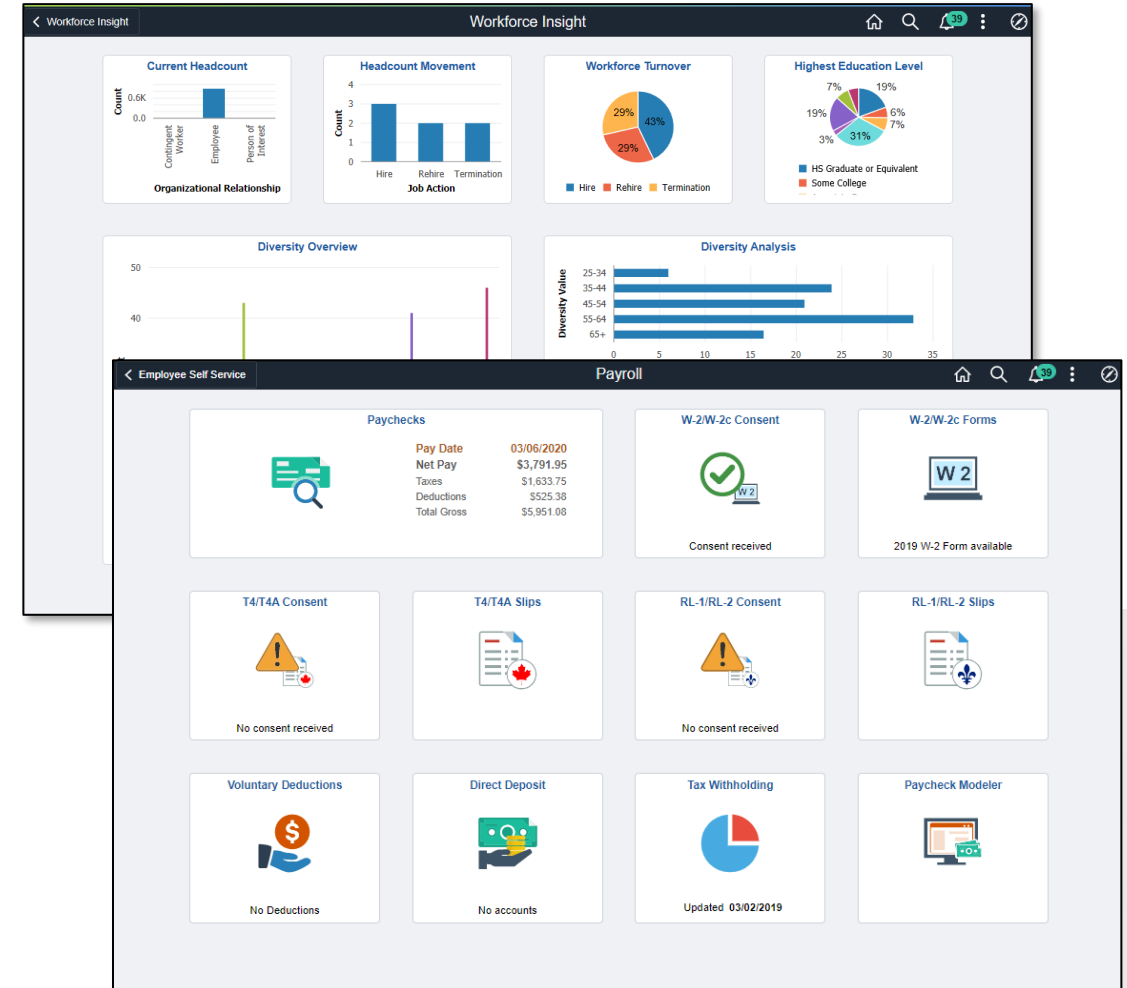


## PUM Schedule

- ✓ HCM PUM 37 – January 22, 2021
- ✓ HCM PUM 38 – April 16, 2021
- HCM PUM 39 – July 30, 2021
- HCM PUM 40 – October 14, 2021
- PeopleTools 8.59 (OCI customers first)

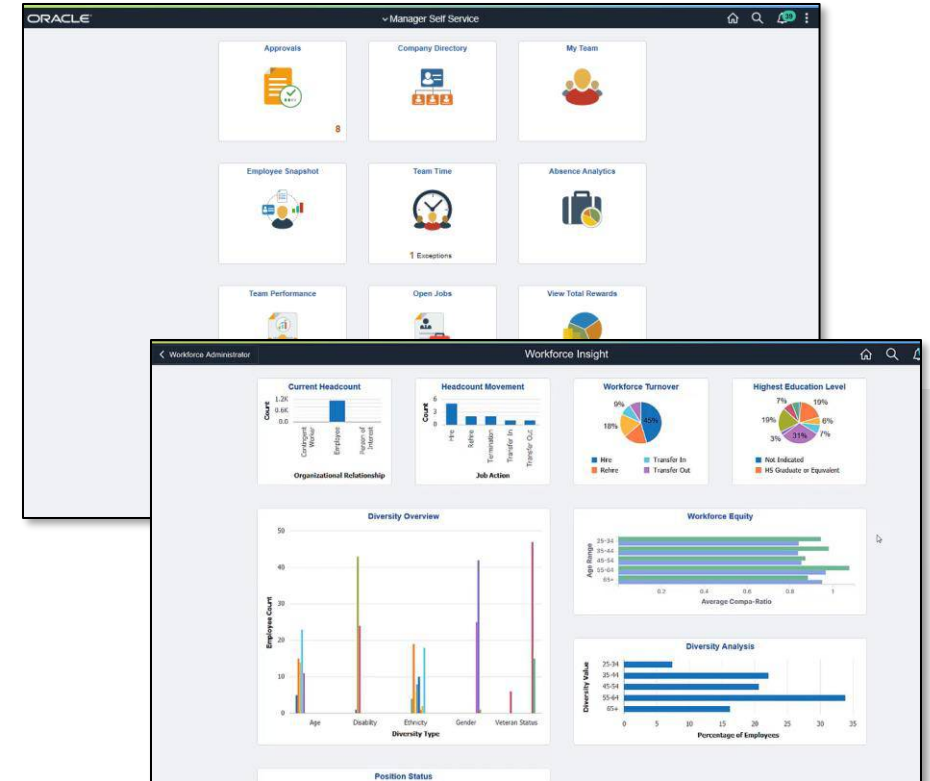
## Recent Enhancements

- PT 8.58 Look & Feel
- PICASO (PS Intelligent Chat Assistant from Oracle)
- Kibana Analytics / Data Visualization
- Updated Dashboards: Personal Details, Benefits Details, Payroll
- Benefits WorkCenter
- Fluid Delegation
- Fluid Benefits Open Enrollment
- Workforce Admin Insight Analytics
- Fluid Position Management
- OnBoarding, OffBoarding
- Data Privacy Enhancements
- Position Management Enhancements
- Recruiting Candidate Categories Status



# Recent Enhancements

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



# Customer Implementation Strategy

Phase 1	Phase 2	Phase 3	Phase 3	Phase 4
Human Resources	Employee Self Service	Manager Self Service	Administrator	Talent Management
Workforce Administration	OnBoarding (F)	Update Team Info (F)	Job Actions (F)	OnBoarding / OffBoarding (F)
Base Benefits	Benefits Details (F)	My Team (F)	Workforce Insight (F)	Profile Management (F)
Variable Compensation	Total Rewards (F)	Team Performance (F/C)	Kibana Data Visualization	Succession / Talent Pools (F/C)
Salary Planning	Personal Details (F)	Employee Snapshot (F)	Compensation (F)	Employee Snapshot (F)
Position Management	eCompensation (F)	Talent Profiles (F)	Absence (F)	Career Planning (F/C)
International Assignments	My Profiles (F)	Company Directory (F)	Payroll (F)	ePerformance (F/C)
Labor Relations	Company Directory (F)	Approvals/Delegations (F)	Time (F)	eComp MD (F/C)
Regulatory Requirements	Total Rewards (F)	Simplified Analytics (F)	Health & Safety (F)	ELM (F/C)
Benefits Administration	Benefits Enroll/Life Events (F)	Recruiting (F)	Manage HR (F)	Recruiting (F/C)
Health & Safety	Health & Safety (F)	Team Time (F)	Ben Admin (F)	ODA Chatbots (F)
COBRA/Benefits Billing	Time (F)	Absence (F)	Benefits Workcenter (F)	Profile Search & Compare (F)
FSA Claims Administration	Absence (F)	Custom Activity Guides (F)	Talent Admin (F/C)	
NA Payroll	ePay (F)	Kibana Data Visualization	Profile Search & Compare (F)	
Global Payroll	Business Partners (F)			
Payroll Interface	<u>Other</u>			
Time & Labor	Smart HR			
Absence Management	Forms and Approval			



# New Fluid Interface

## Employee Self-Service

OnBoarding, Company Directory, Time, Payroll, Payslips, Personal Details, Talent Profile, Benefit Details, **Open Enrollment**, Life Events, Banking, Performance, **Comp History**, Total Rewards

## Manager Self-Service

Company Directory, Approvals, My Team, **Employee Snapshot**, Team Time, Absence Analytics, Team Performance, Open Jobs, View Total Rewards

## Workforce Administrator

**Workforce Insight**, Benefits Administrator, Compensation Administration, HR Administration, OnBoarding, Absence Administration, **Position Management**, Time and Labor WorkCenter, New Hire Tasks, Global Payroll Administration, Canadian Payroll WorkCenter, US Payroll WorkCenter

## Talent Administrator

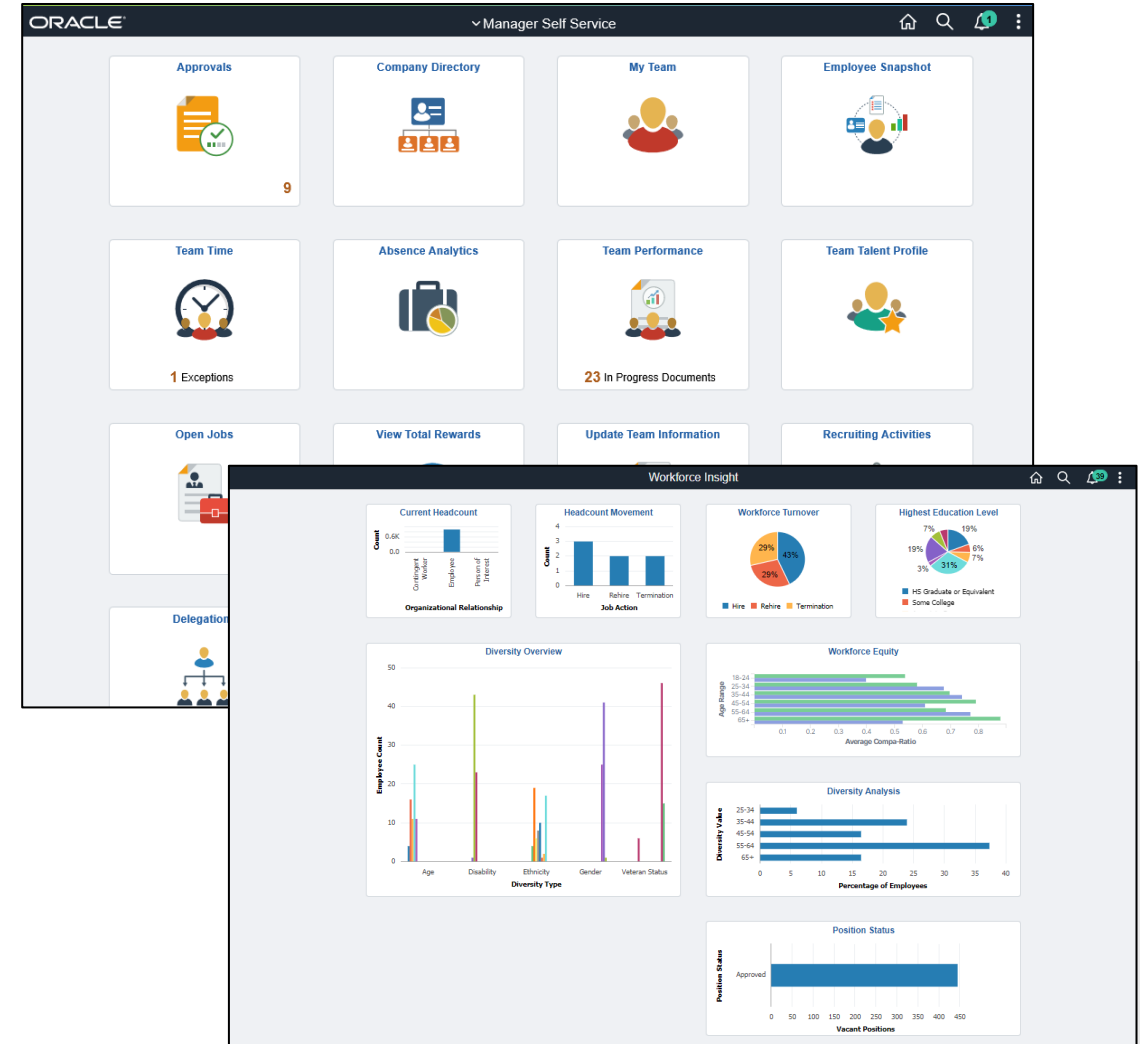
Career and Succession Planning, Recruiting Home, Performance Administration, **Configure Employee Snapshot**

## PeopleSoft Developer

Security, Portal, Utilities, Lifecycle Tools, Reporting, Batch and Integration

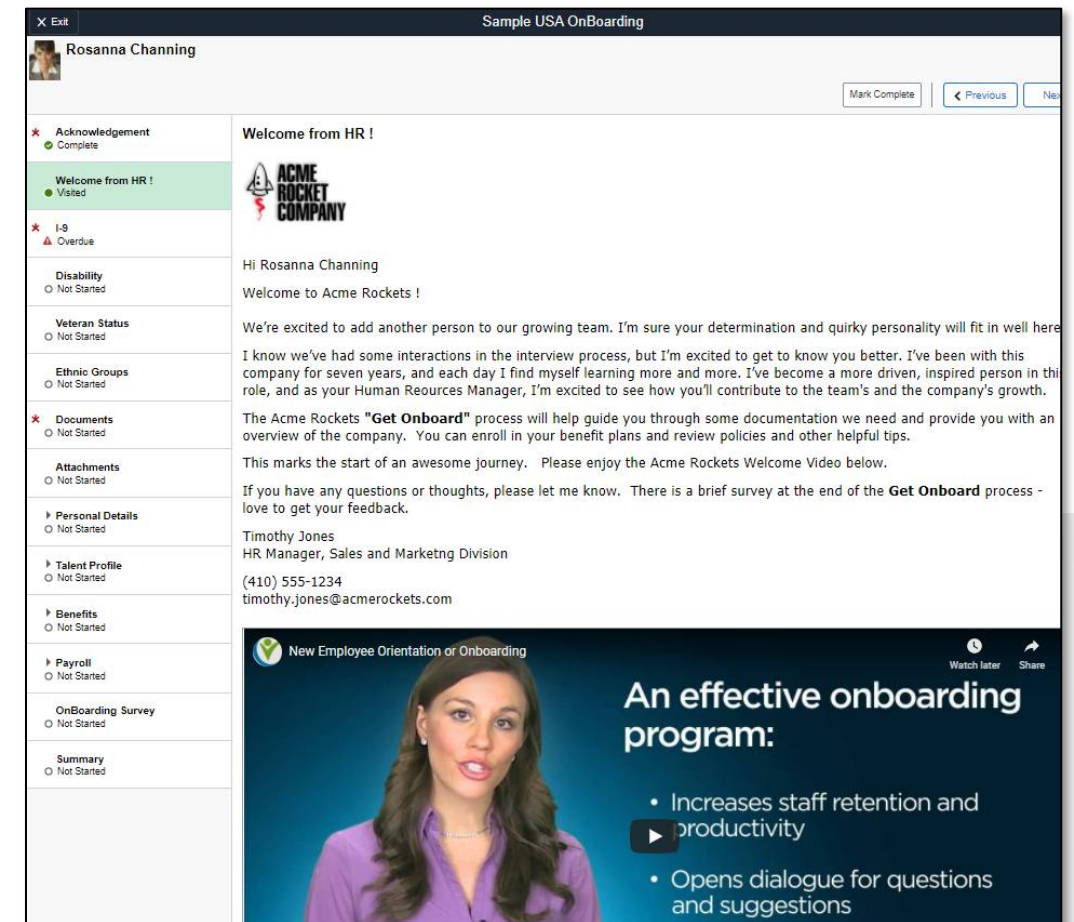
## Recruiting

Job Openings, Alerts, Recruiting Activities, Interview Schedule, Recruiting Insight (Analytics), Approvals

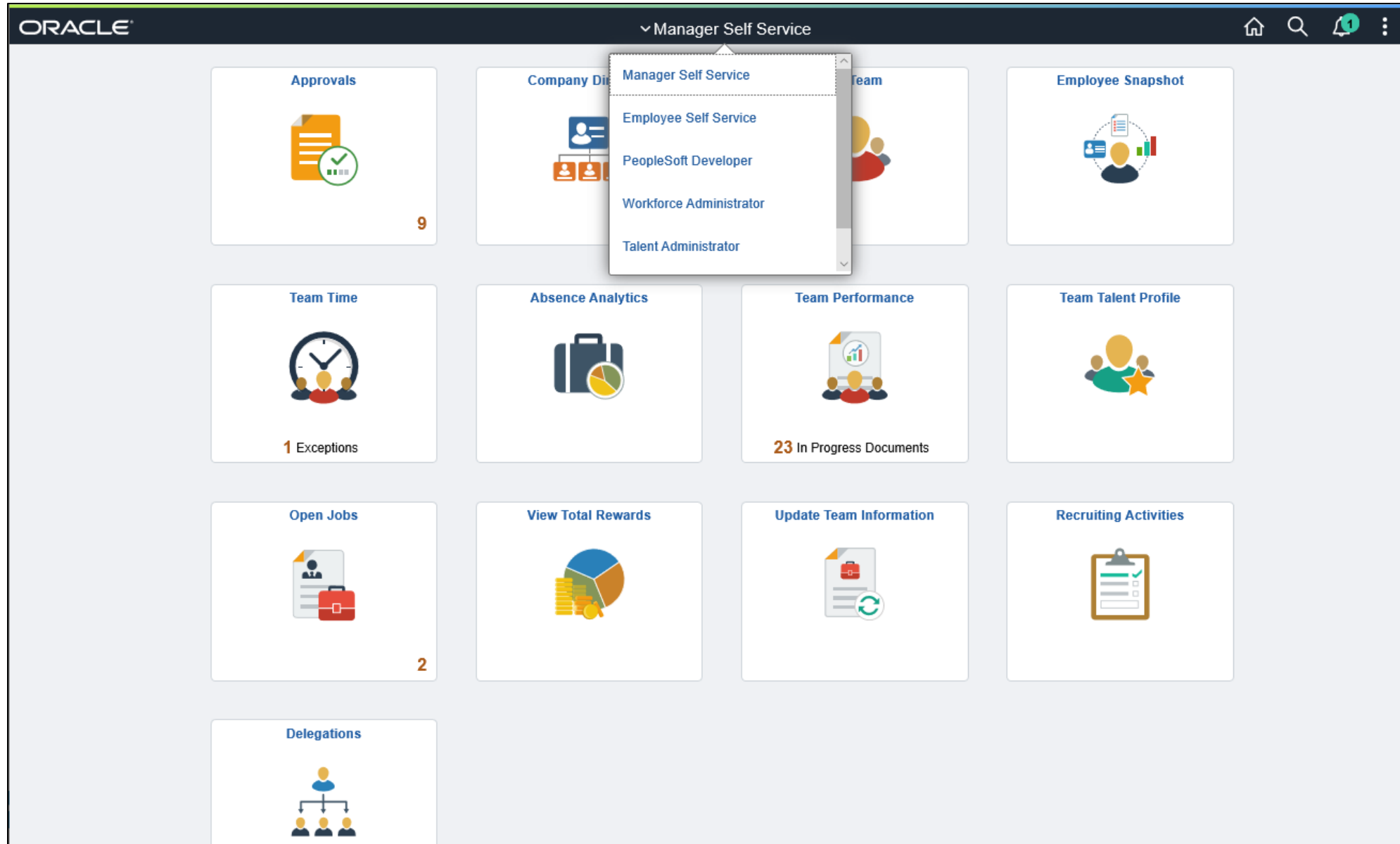


# Activity Guide Technology

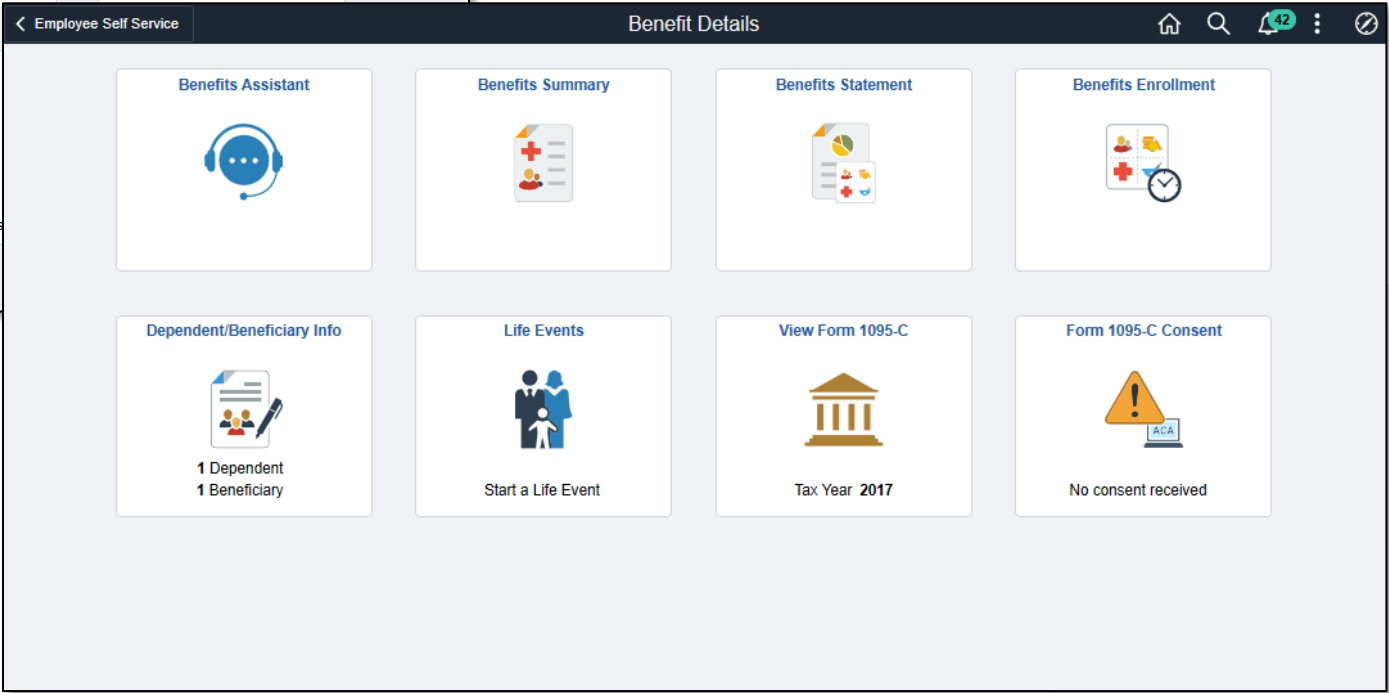
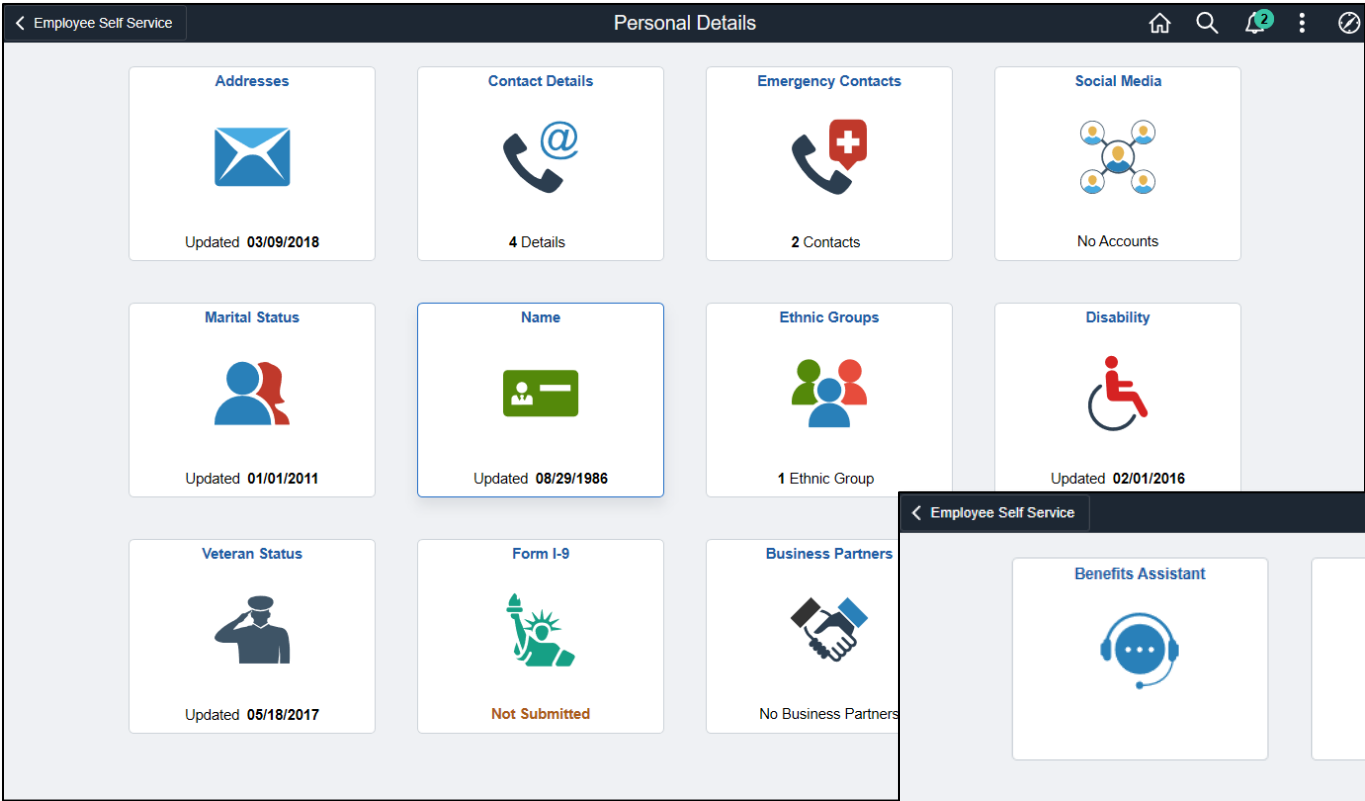
- Used in many Fluid self service functions and navigation
- Benefits of Activity Guides
  - Improve user experience and guidance
  - Streamline workflow
  - Reduce hardcopy documentation
  - Remove bottlenecks
- Activity Guides found in OnBoarding & OffBoarding, Benefits Enrollments, Life Events, Recruiting, Positions, Job Actions, Health & Safety, Absence
- Fluid Activity Guide Composer provides template design and configuration support for custom steps, sequence, notifications, general layout and branding, and administration
- Default functional process steps are provided as Categories
- PUM releases may update/add Categories and Templates



# 6 Fluid Roles / Dashboards

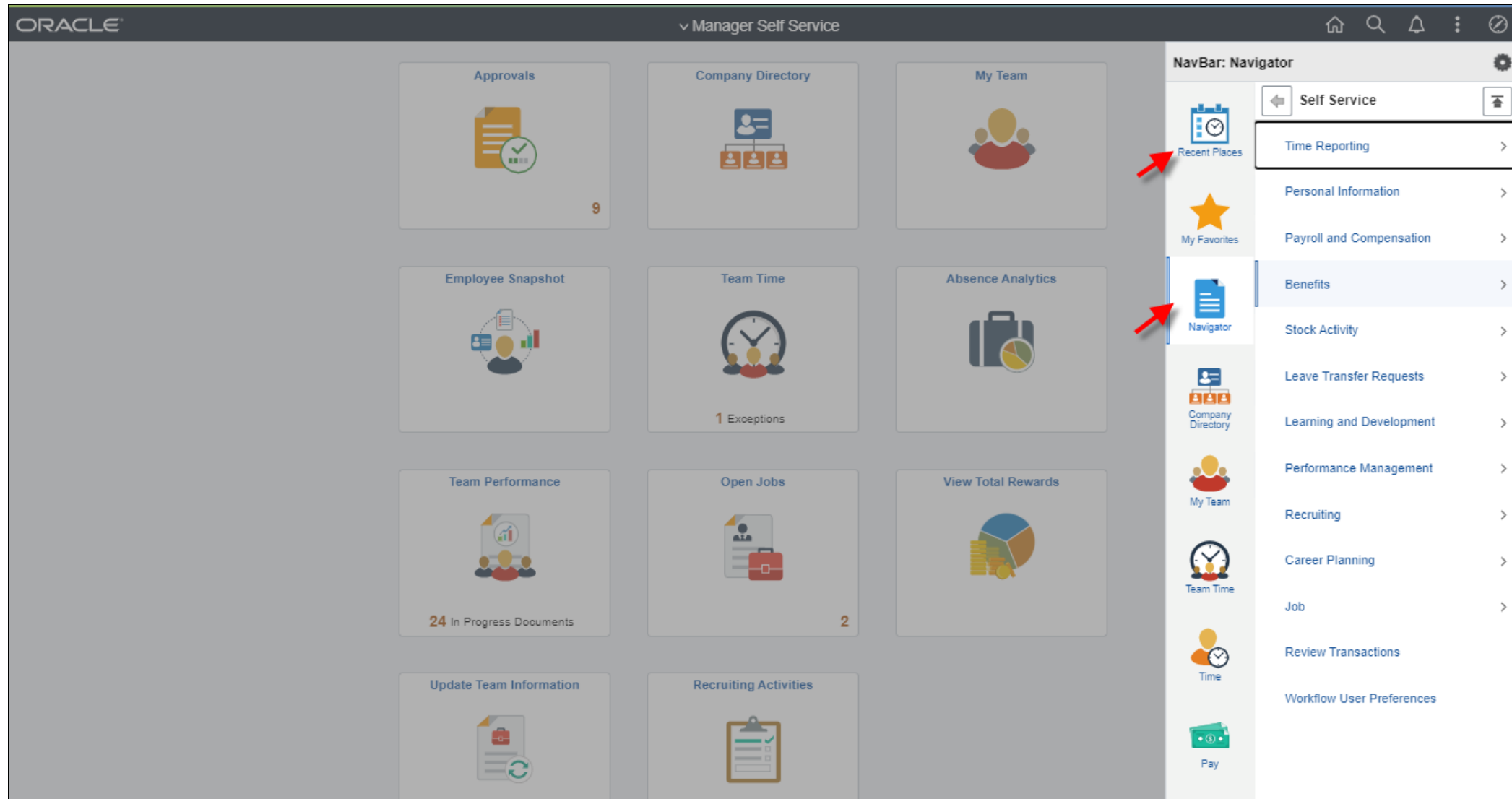


# New Dashboard Tiles (PUM 34)





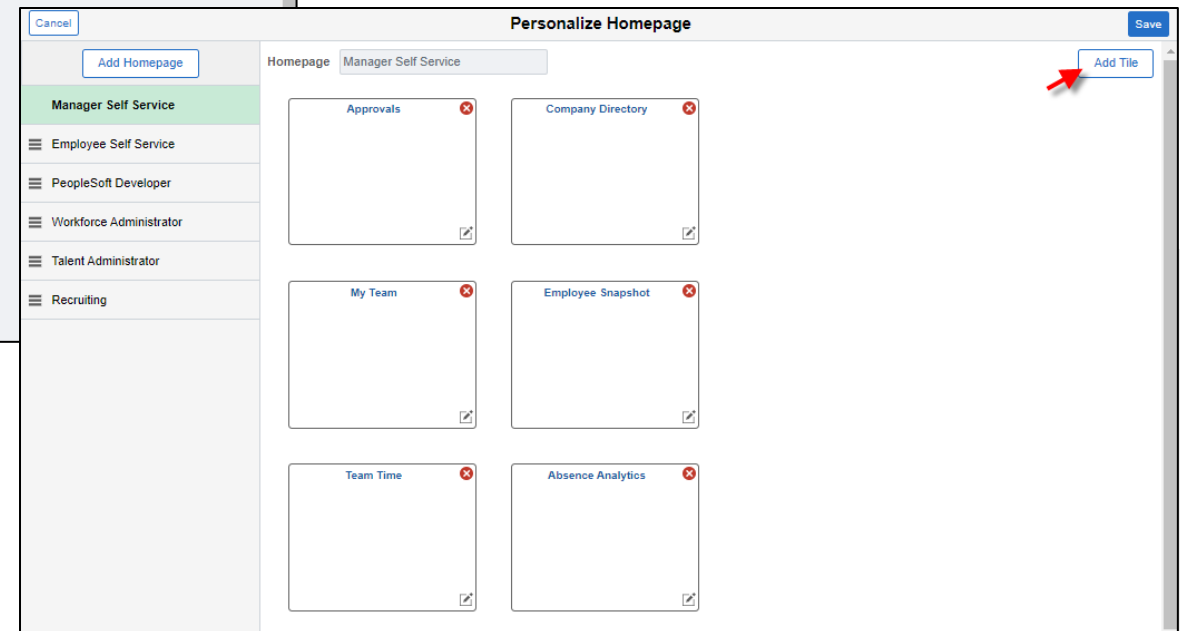
# Fluid Navigator / Favs, Menu, Quick Links



# Dashboard Tiles Launch Fluid and Classic Plus Pages



# Personalization Options



# Alerts and Notifications

The screenshot displays the Oracle Manager Self Service interface. The main dashboard features a grid of modules: Approvals (8), Company Directory, My Team, Employee Snapshot, Team Time (51 Exceptions), Absence Analytics, Team Performance (23 In Progress Documents), Team Profiles, Open Jobs (2), View Total Rewards, Update Team Information, and Recruiting Acti. A red arrow points to the notification bell icon in the top right corner, which shows a count of 43.

An expanded alerts panel is shown in the bottom right, titled "Manager Self Service". It has tabs for "Actions" and "Alerts (3)". The "Alerts (3)" tab is selected, and a red arrow points to the first alert: "Benefits Confirmation Statement Available". The other two alerts are "Time Sheets need to be submitted by Friday 5PM." and "Time Sheets are due on Friday". Each alert has a close button (X) on the right.

**Alerts (3)**

- Benefits Confirmation Statement Available
- Time Sheets need to be submitted by Friday 5PM.
- Time Sheets are due on Friday

ORACLE

Manager Self Service

Home

Search

43

Approvals

8

Company Directory

Total Rewards

channing

All

Navigator

Company Directory

Job Data

Compensation History

Total Rewards

Performance Documents

Career Plan

Succession Plan

Job Posting

Applicant Time

Absence Request

Absence Balance

Health Benefits

Payroll for North America

HR Discussions

Person

Team Time

51 Exceptions

Absence Analytics

Team

23 In Progress Documents

Open Jobs

2

View Total Rewards

Update Team Information

Manager Self Service

New Search

My Association

- Direct Reports (1)

Department

- Corporate Accounting (1)

Position Title

- Senior Accounting Manager (1)

Section

- Allowances (1)
- Compensation (1)
- Health (1)
- Life and Disability (1)
- Retirement (1)
- Summary (1)
- Training (1)
- Vacation (1)

Period

- 1-2010 - 12-2010 (1)
- 1-2011 - 12-2011 (1)
- 1-2013 - 12-2013 (1)
- 1-2014 - 12-2014 (1)

Search Results

View Search Results

1 results for keyword: "channing"

Total rewards- Rosanna Channing: Employee ID: KU0046

Department Title: Corporate Accounting | Job Title: Senior Accounting Manager

HR Sesh Complauch

Rosanna Channing

Senior Accounting Manager

Total Rewards

Rewards Period: 01 January 2020 - 31 December 2020

Print View

Summary

Compensation

Allowances

Health

Life and Disability

Retirement

Vacation

Training

Other Benefits

Summary

This is your Total Rewards Statement for the period selected.

All amounts are shown in US Dollar currency.

View Summary Chart

Total Value \$132,765.56

Other Benefits

Training

Vacation

Retirement

Life and Disability

Allowances

Health

Compensation

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.

This is the Summary section of your statement where you will find earnings and benefits summary amounts.

Reward Item	Employer Paid	Employer Provided	Employer Total	Employee Contribution	Percent of Total Reward
Compensation	96,757.93	0.00	96,757.93	0.00	74.39
Allowances	720.00	0.00	720.00	0.00	0.54
Health	6,092.79	0.00	6,092.79	1,843.77	4.59
Life and Disability	323.88	0.00	323.88	1,159.44	0.24

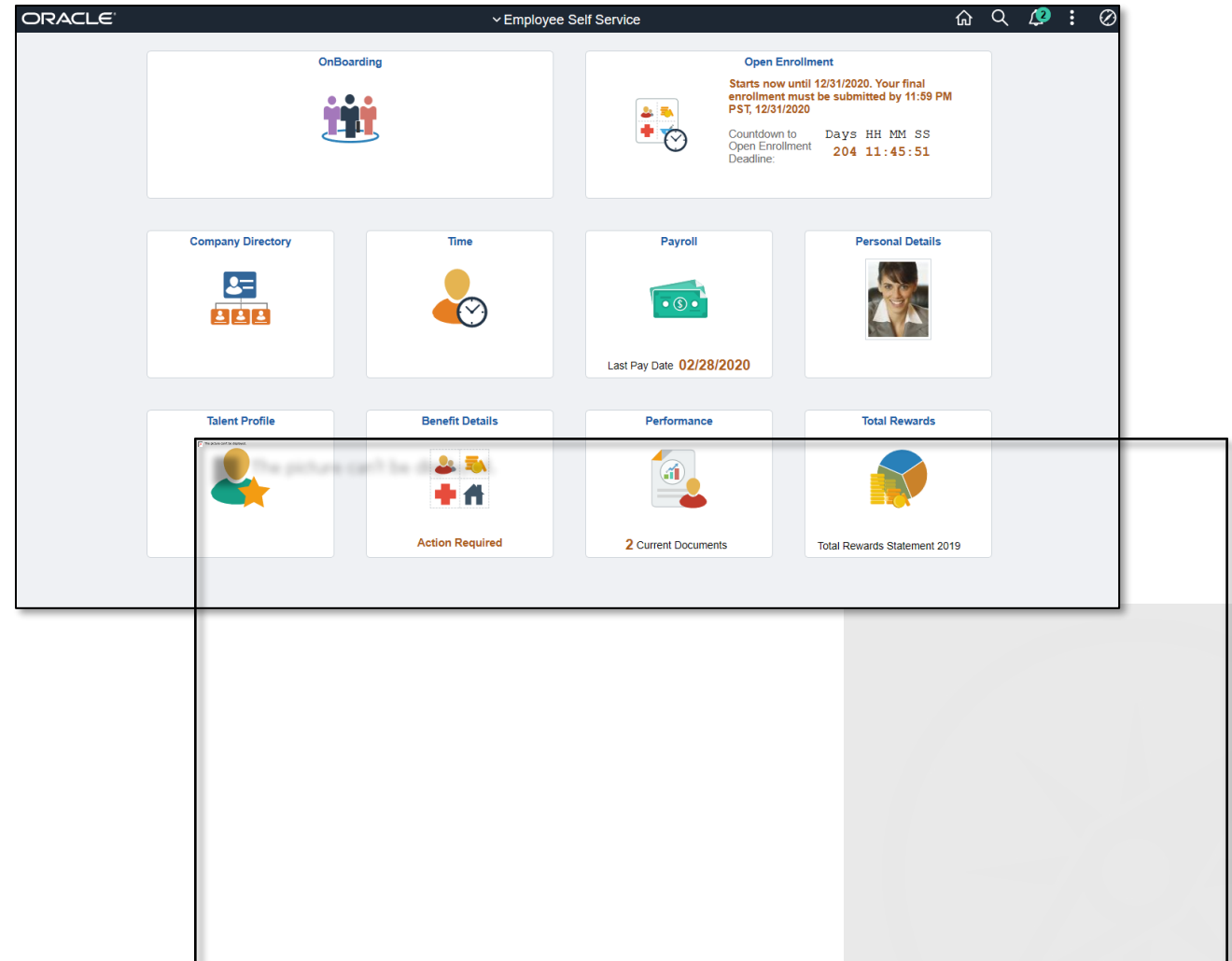
Your employee benefits contribute greatly to your annual compensation and to your personal well being. This statement not only gives you a brief summary of your personal benefit elections, but also provides "cost of benefits" information, which is important when considering your total compensation.

We are constantly working to provide you with a benefits package that is competitive and progressive within our industry and community.

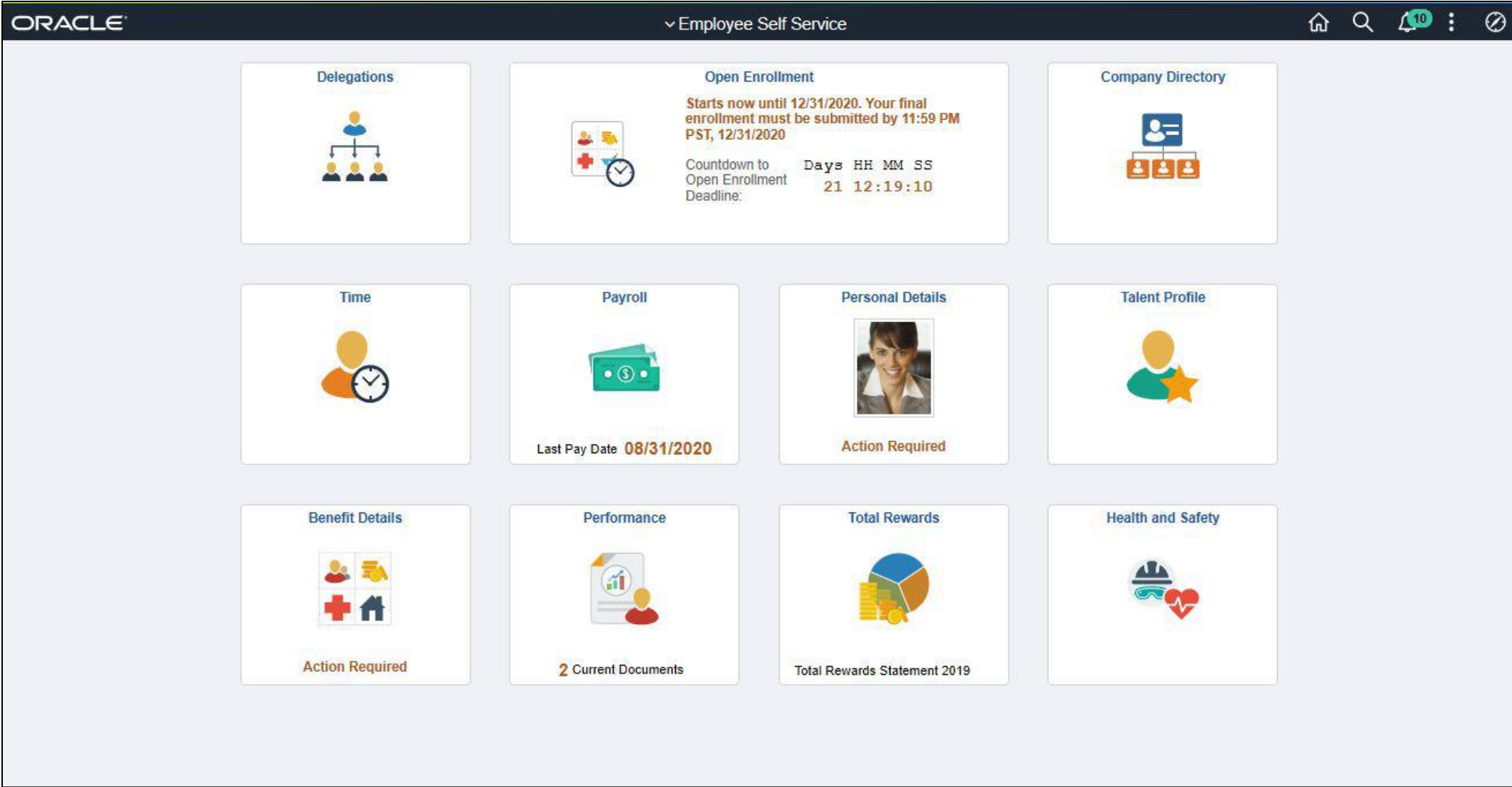
## Employee Self Service

# Employee Self Service

- Personal Details (PUM 34)
- Benefit Details (PUM 34)
- New Benefits WorkCenter (PUM 34)
- Fluid Benefits Preview Statement for Submitted Elections (PUM35)
- Alert and Actions Notification for Birth & Adoption (PUM35)
- Open Enrollment
- Company Directory
- Payroll (ePay)
- Time (Time & Labor)
- Talent Profile
- OnBoarding/OffBoarding
- Performance
- Total Rewards
- Banking
- Healthy & Safety (PUM 36)
- Search & Compare Profiles (PUM 36)
- Benefits/Payroll/Absence/OrgChart Chatbots (PUM 36)







# Personal Details Dashboard

[Employee Self Service](#)

Personal Details

Addresses

Updated 03/09/2018

Contact Details

4 Details

Emergency Contacts

2 Contacts

Social Media

No Accounts

Marital Status

Updated 01/01/2011

Name

Updated 08/29/1986

Ethnic Groups

1 Ethnic Group

Disability

Updated 02/01/2016

Veteran Status

Updated 05/18/2017

Form I-9

Not Submitted


Business Partners

No Business Partners

Additional Information

Personal Details

Addresses



Rosanna Channing

Senior Accounting Manager

Home Address

1430 North  
Apt B215  
Guttenberg

Mailing Address

1430 North  
Apt B215  
Guttenberg

Cancel

Save

Address

Employee Instruction

To save United States addresses at least one of the following fields must get populated: Address 1, Address 2, Address 3

Change As Of

06/10/2020

Address Type

Home

Country

United States

Address 1

1430 North West Blvd

Address 2

Apt B215

Address 3

City

Guttenberg

State

New Jersey

Postal

07093

County

Attachments


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< Personal Details

Contact Details









Rosanna Channing

Senior Accounting Manager

Phone

+

Number	Extension	Type	Preferred	
<a href="tel:925.555.1234">925.555.1234</a>		Business	✓	>
<a href="tel:925.555.1111">925.555.1111</a>		Mobile		>

Email

+

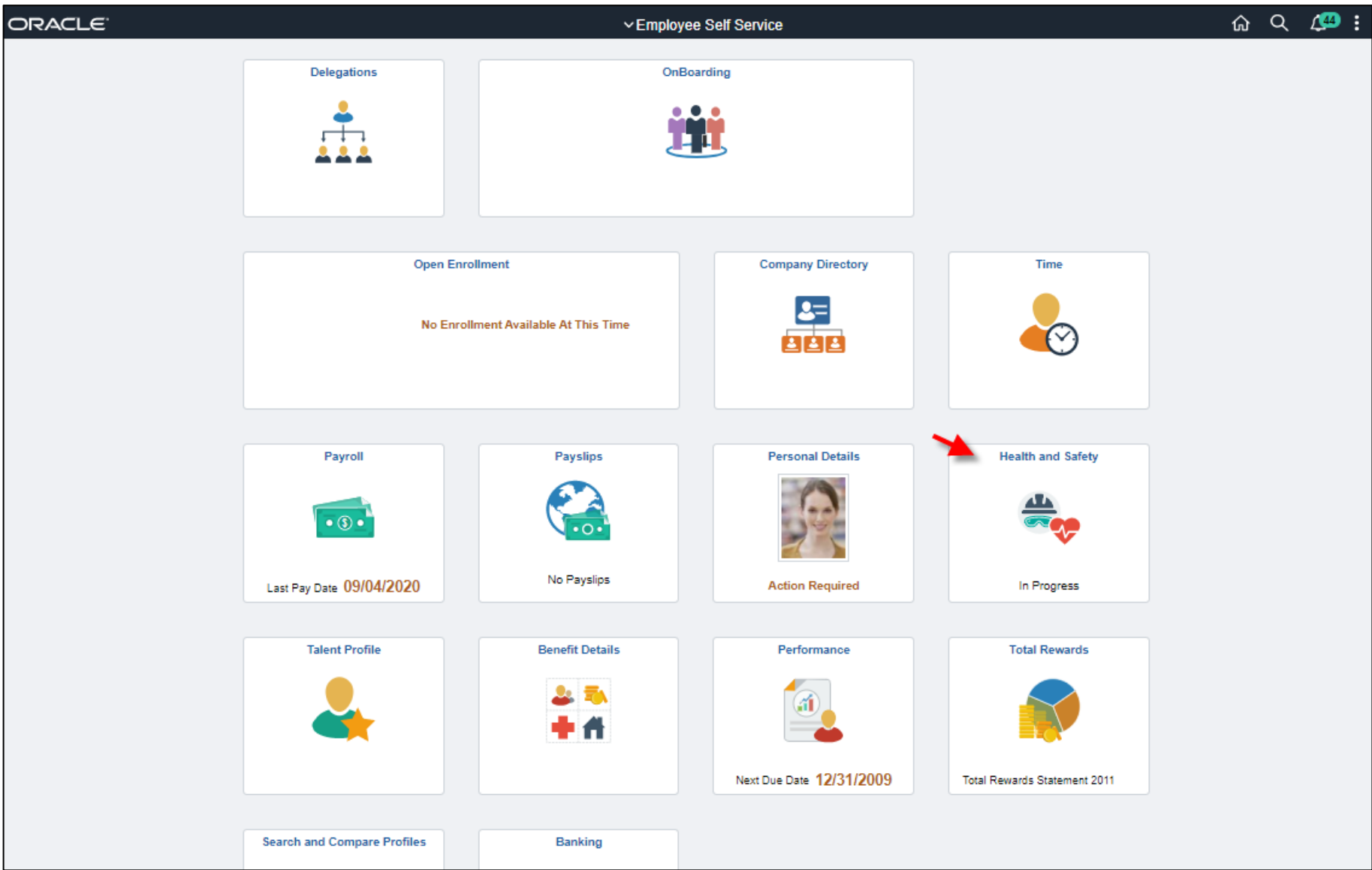
Email Address	Type	Preferred	
<a href="mailto:Rosanna.Channing@oraclesample.com">Rosanna.Channing@oraclesample.com</a>	Business		>
<a href="mailto:brian.mcintyre@workstrategy.com">brian.mcintyre@workstrategy.com</a>	Home	✓	>

Instant Message

+


ID	Protocol	Domain	Preferred	
RosannaChanning	YAHOO	YAHOO	✓	>

# New Fluid Health & Safety



# Report Incident

✕ ExitReport Incident⋮

**Betty Locherty**  
Incident

Next >Save

1 Report Incident  
Visited

2 Injury/Illness  
Not Started

3 People Connected  
Not Started

4 Attachments  
Not Started

5 Review and Submit  
Not Started

## Step 1 of 5: Report Incident

### Incident Details

Incident Type Incident

\*Description

\*Date 11/10/2020

Time Time Zone PST

### Incident Location

\*Location Type Workplace

Name Delaware Operations

Address 560 N. Market Street  
Wilmington, DE 21045

Exact Location

# HR Administrator Health & Safety Incidents

Manage Health and Safety

Obtain Incident Information

Incident Details

Vehicles/Equipment Involved

Injury Details

Open Claim

Create Employee Rehab Plan

Create Non-Employee Rehab Plan

Identify Corr/Prevent Actions

Review Employee Injury Summary

Incident Details BRA

Injury Details BRA

Review Injury Summary BRA

Vehicles/Equipment Involv MEX

Verify Persons Involved

Record Medical Exam Results

Track Details DEU

Manage Incidents

New Window | Personalize Page

Review Employee Injury Summary

Diane PalmerEmployeeEmpl ID K0MTX005Empl Record 0

Business Unit Global Business Institute BULast Start Date 01/01/2003

Department Corporate FinanceEmployee Status Active

Job Code Administrative Assistant

Location Corporation Headquarters

Employee Injury Summary

1-3 of 3

View All

	Incident Nbr	Incident Date	Incident Type	Primary Outcome	Injury Treatment	Show Details	Reportable Case
1	70000011			Injury	First Aid	Show Details	N
2	70000010			Illness	Medical Treatment	Show Details	Y
3	70000009			Injury	First Aid	Show Details	N

Return to Search

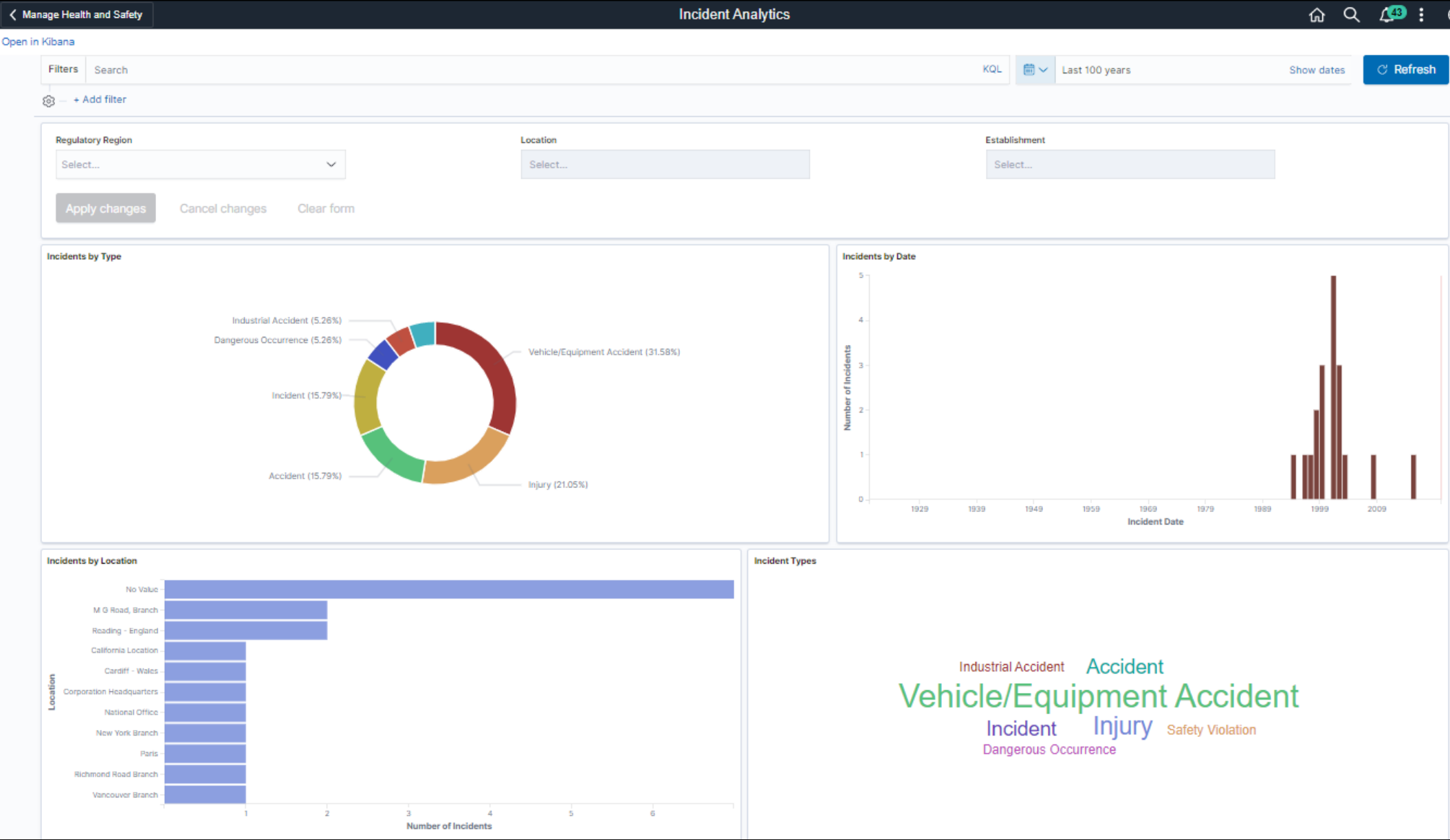
Previous in List

Next in List

Notify



# HR Administrator Health & Safety Kibana



# View Payroll Information

[Employee Self Service](#)

Payroll

Paychecks

Pay Date09/04/2020

Net Pay\$3,791.95

Taxes\$1,633.75

Deductions\$525.38

Total Gross\$5,951.08

Paycheques

Pay Date09/04/2020

Net Pay\$3,791.95

Taxes\$1,633.75

Deductions\$525.38

Total Gross\$5,951.08

W-2/W-2c Consent

Consent received

W-2/W-2c Forms

2019 W-2 Form available

T4/T4A Consent

No consent received

T4/T4A Slips

RL-1/RL-2 Consent

No consent received

RL-1/RL-2 Slips

Voluntary Deductions

No Deductions

Direct Deposit

No accounts

Tax Withholding

Updated 03/02/2019

Paycheck Modeler

<

Payroll

Pay

Paychecks

Check Date	Company	Pay Begin Date / Pay End Date	Net Pay	Paycheck Number
02/28/2020	Global Business Institute	02/01/2020 02/29/2020	\$5019.03	68171
01/31/2020	Global Business Institute	01/01/2020 01/31/2020		
12/31/2019	Global Business Institute	12/01/2019 12/31/2019		
11/29/2019	Global Business Institute	11/01/2019 11/30/2019		

Global Business Institute  
500 George Washington Pkway  
New York,NY 07666  
646/950-1111

Pay Group: KU4-US Monthly  
Pay Begin Date: 02/01/2020  
Pay End Date: 02/29/2020

Business Unit: GBIBU  
Check #: 000000000068171  
Check Date: 02/28/2020

Rosanna Channing  
1430 North West Blvd  
Apt B215  
Guttenberg NJ 07093

Employee ID: KU0046  
Department: 13110-Corporate Accounting  
Location: Corporation Headquarters  
Job Title: Senior Accounting Manager  
Pay Rate: \$7,833.33 Monthly

TAX DATA:  
Tax Status: Married  
Allowances: N/A  
Addl. Percent: N/A  
Addl. Amount:

HOURS AND EARNINGS

Description	Rate	Current	Hours	Earnings	YTD
Regular					
Holiday (Statutory)	45.192308	16.00	723.08	312.00	14,220.50
Regular	45.192308	-8.00	-361.54	0.25	1,446.16
Automobile Allowance			75.00	150.00	150.00
Entertainment Allowance			55.00	110.00	110.00
General Credits			275.00	550.00	550.00
Medical Credits			65.00	130.00	130.00
Dental Credits			4.00	8.00	8.00
TOTAL:		8.00	8,307.33	344.00	16,614.66

BEFORE-TAX DEDUCTIONS

Description	Current	YTD
Medical Deductions	123.48	246.96
Dental Plan	17.88	35.76
Vision Plan	11.50	23.00
401(k) Savings	626.67	1,253.34
Health Care - FSA	166.67	333.34
Dependent Care FSA	100.00	200.00
Standard US Pension	195.83	391.66
TOTAL:	1,242.03	2,484.06

AFTER-TAX DEDUCTIONS

Description	Current	YTD
Supplemental Life (SLX)	62.04	124.08
Accidental Death & Dismemberment	0.25	0.50
Short-Term Disability (High)	3.13	6.26
Long Term Disability	31.20	62.40
401(k) Savings	156.66	313.32
Employee Stock Purchase Ded	235.00	470.00
TOTAL:	488.28	976.56

EMPLOYER PAID BENEFITS

Description	Current	YTD
Medical Deductions	500.52	1,001.04
Dental Plan	4.00	8.00
Vision Plan	4.00	8.00
Basic Life Premiums	11.00	22.00
Basic Life Premiums*	2.82	2.82
Supplemental Life (SLX)	2.82	5.64
Accidental Death & Dismemberment	2.00	4.00
Short-Term Disability (High)	7.84	15.68
401(k) Savings	470.00	940.00
Standard US Pension	195.83	391.66
Supplemental Life (SLX)*	0.00	2.82
TOTAL:	1,557.99	3,116.21

TOTAL GROSS

	Current	YTD
TOTAL GROSS	8,307.33	16,614.66

FED TAXABLE GROSS

	Current	YTD
FED TAXABLE GROSS	6,993.12	13,986.24

TOTAL TAXES

	Current	YTD
TOTAL TAXES	1,557.99	3,116.21

TOTAL DEDUCTIONS

	Current	YTD
TOTAL DEDUCTIONS	1,730.31	3,460.62

NET PAY

	Current	YTD
NET PAY	5,019.03	10,037.83

YEAR-TO-DATE

	PAID TIME OFF	SICK LEAVE
Start Balance	120.0	40.0
+ Earned	14.0	8.0
+ Bought	0.0	0.0
- Taken	0.0	0.0
- Sold	0.0	0.0
+ Adjustments	0.0	0.0
End Balance	134.0	48.0

NET PAY DISTRIBUTION

Payment Type	Account Type	Account Number	Amount
Check #000000000068171	Issue Chk		5,019.03
TOTAL:			5,019.03

MESSAGE:

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Payroll

W-2/W-2c Consent

W-2/W-2c Consent Form

You currently receive W-2 or W-2c paper forms by mail

You must complete this consent form to receive electronic W-2 or W-2c forms. If you do not submit a consent form or a withdrawal of consent form, the Payroll Department will process your year-end forms based on the information currently on file. After you submit your consent form, it will remain valid until you submit a withdrawal of consent form. The exception is when your employment is terminated or electronic access to forms is discontinued.

If you have any questions, please contact your Payroll Administrator.

☒ I consent to receive W-2 or W-2c forms electronically

Submit

Payroll

W-2/W-2c Consent

W-2/W-2c Consent Form

You currently receive W-2 or W-2c paper forms by mail

You must complete this consent form to receive electronic W-2 or W-2c forms. If you do not submit a consent form or a withdrawal of consent form, the Payroll Department will process your year-end forms based on the information currently on file. After you submit your consent form, it will remain valid until you submit a withdrawal of consent form. The exception is when your employment is terminated or electronic access to forms is discontinued.

If you have any questions, please contact your Payroll Administrator.

☒ I consent to receive W-2 or W-2c forms electronically

Submit

Verify Identity

To protect your privacy, verify your identity by typing your password. If you are not this user, click Cancel.

User ID RCHANNING

Password

••••••••

Continue

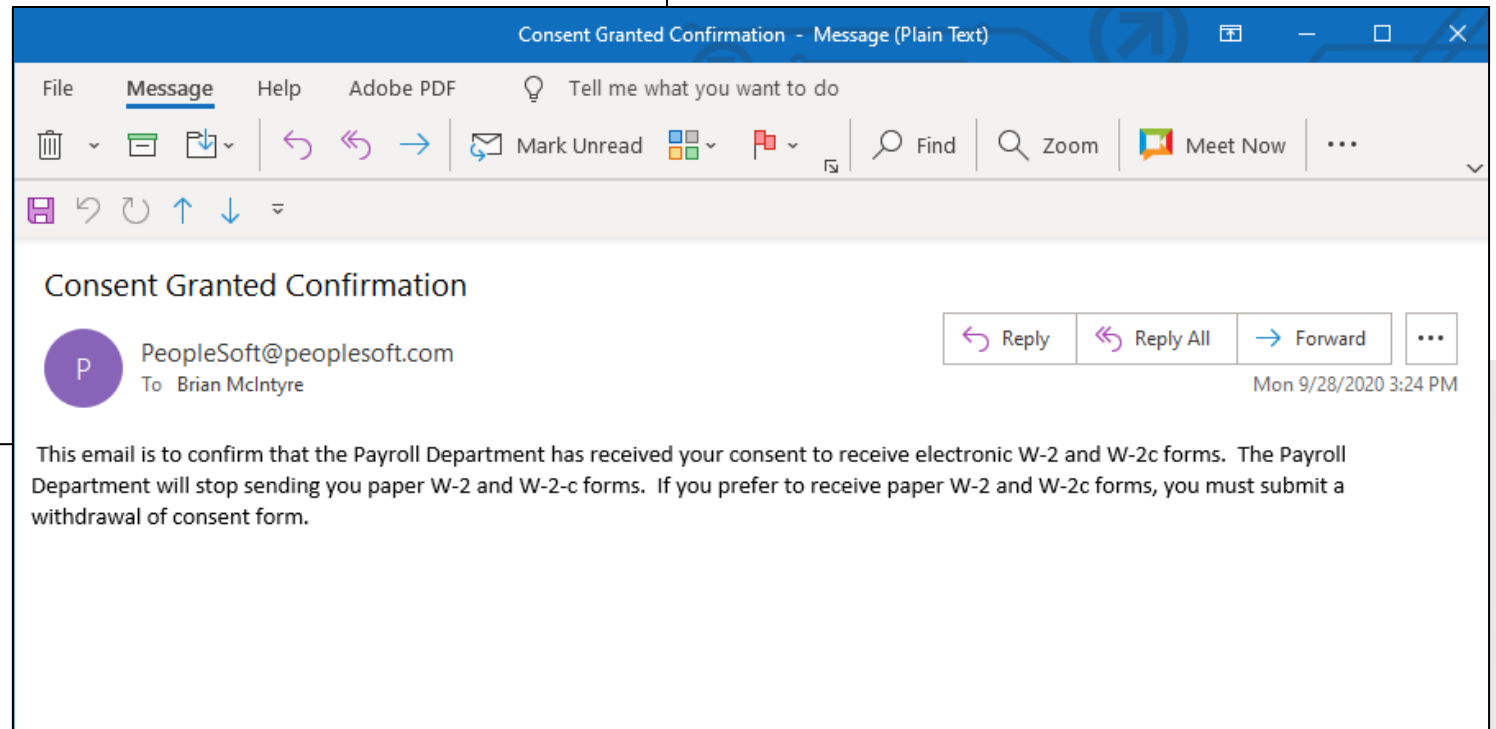
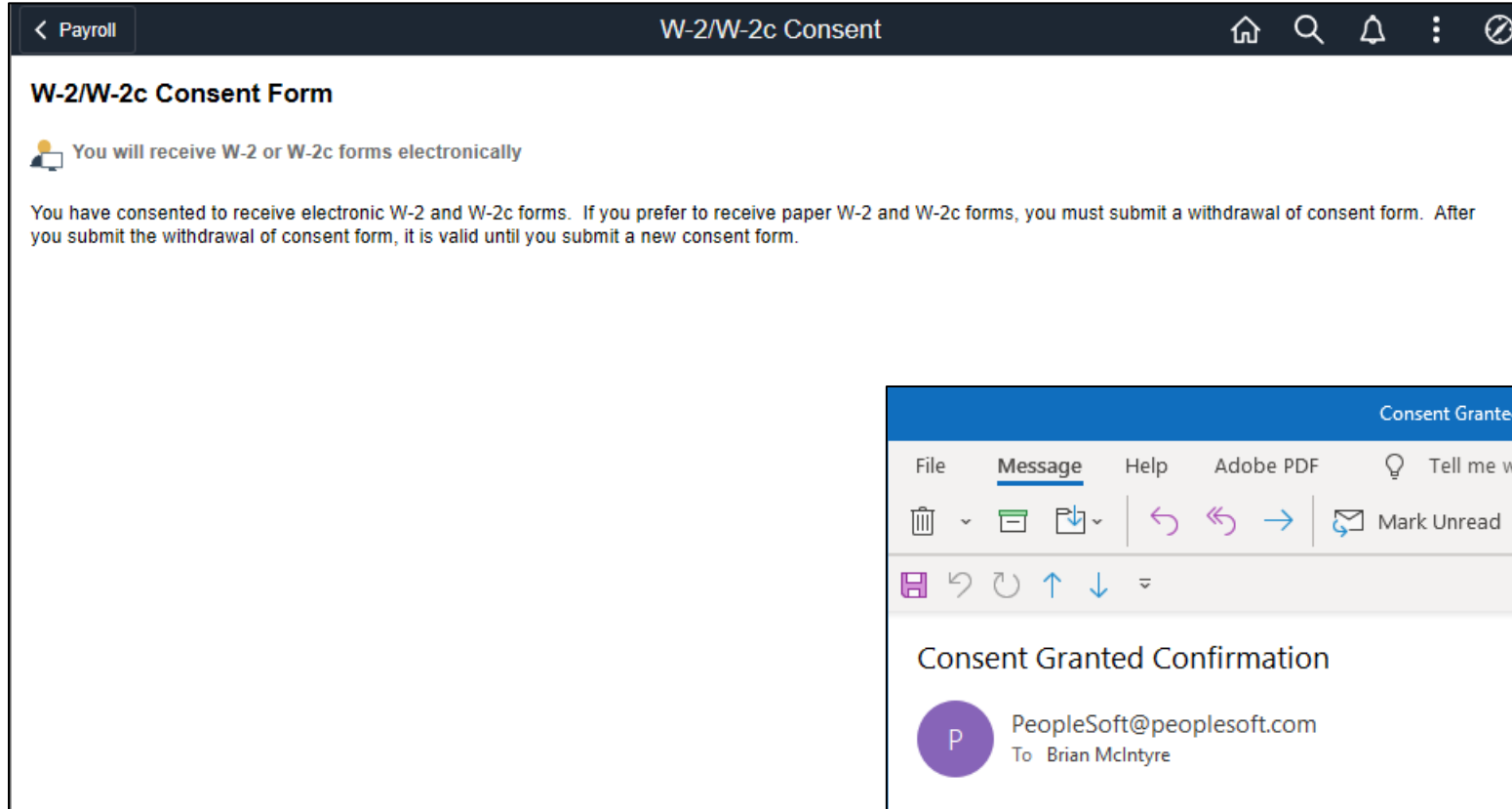
Cancel

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## W-2 Consent Submitted and Emailed to User



< Payroll

View W-2/W-2c Forms

🏠

🔍

🔔

⋮

🔒

View W-2/W-2c Forms

Tax Year

2019

Global Business Institute

Tax Form	Issue Date	Year End Form	Filing Instructions
W-2	03/04/2020	<div>View Form</div>	<div>📘</div>

Form W-2 Wage and Tax Statement 2019

1 Wages, tips, other compensation

2 Federal income tax withheld

3 Social security wages

4 Social security tax withheld

5 Medicare wages and tips

6 Medicare tax withheld

7 Social security tips

8 Allocated tips

9 Dependent care benefits

10 Dependent care benefits

11 Nonqualified plan

12 State income tax

13 State income tax

14 Other

15 State

16 State wages, tips, etc.

17 State income tax

18 Local wages, tips, etc.

19 Local income tax

20 Locality name

GLOBAL BUSINESS INSTITUTE  
500 GEORGE WASHINGTON PKWAY  
NEW YORK NY 07666

ROSANNA CHANNING  
1430 NORTH WEST BLVD  
APT B215  
GUTTENBERG NJ 07093

211-15-2591

Copy B-To Be Filed With Employee's FEDERAL Tax Return

Dept. of the Treasury - IRS

Form W-2 Wage and Tax Statement 2019

1 Wages, tips, other compensation

2 Federal income tax withheld

3 Social security wages

4 Social security tax withheld

5 Medicare wages and tips

6 Medicare tax withheld

7 Social security tips

8 Allocated tips

9 Dependent care benefits

10 Dependent care benefits

11 Nonqualified plan

12 State income tax

13 State income tax

14 Other

15 State

16 State wages, tips, etc.

17 State income tax

18 Local wages, tips, etc.

19 Local income tax

20 Locality name

GLOBAL BUSINESS INSTITUTE  
500 GEORGE WASHINGTON PKWAY  
NEW YORK NY 07666

ROSANNA CHANNING  
1430 NORTH WEST BLVD  
APT B215  
GUTTENBERG NJ 07093

211-15-2591

Copy C-For EMPLOYEE'S RECORDS (See Notice to Employee on the back of Copy B.)

Dept. of the Treasury - IRS

Form W-2 Wage and Tax Statement 2019

1 Wages, tips, other compensation

2 Federal income tax withheld

3 Social security wages

4 Social security tax withheld

5 Medicare wages and tips

6 Medicare tax withheld

7 Social security tips

8 Allocated tips

9 Dependent care benefits

10 Dependent care benefits

11 Nonqualified plan

12 State income tax

13 State income tax

14 Other

15 State

16 State wages, tips, etc.

17 State income tax

18 Local wages, tips, etc.

19 Local income tax

20 Locality name

GLOBAL BUSINESS INSTITUTE  
500 GEORGE WASHINGTON PKWAY  
NEW YORK NY 07666

ROSANNA CHANNING  
1430 NORTH WEST BLVD  
APT B215  
GUTTENBERG NJ 07093

211-15-2591

Copy 2-To Be Filed With Employee's State, City, or Local Income Tax Return

Dept. of the Treasury - IRS

Form W-2 Wage and Tax Statement 2019

1 Wages, tips, other compensation

2 Federal income tax withheld

3 Social security wages

4 Social security tax withheld

5 Medicare wages and tips

6 Medicare tax withheld

7 Social security tips

8 Allocated tips

9 Dependent care benefits

10 Dependent care benefits

11 Nonqualified plan

12 State income tax

13 State income tax

14 Other

15 State

16 State wages, tips, etc.

17 State income tax

18 Local wages, tips, etc.

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211-15-2591

Copy 2-To Be Filed With Employee's State, City, or Local Income Tax Return

Dept. of the Treasury - IRS

ORACLE

Employee Self Service

Home

Search

10

Delegations

Open Enrollment

Starts now until 12/31/2020. Your final enrollment must be submitted by 11:59 PM PST, 12/31/2020

Countdown to Open Enrollment Deadline:

Days HH MM SS

21 11:14:53

Company Directory

Time

Payroll

Last Pay Date 08/31/2020

Personal Details

Action Required

Talent Profile

Benefit Details

Action Required

Performance

2 Current Documents

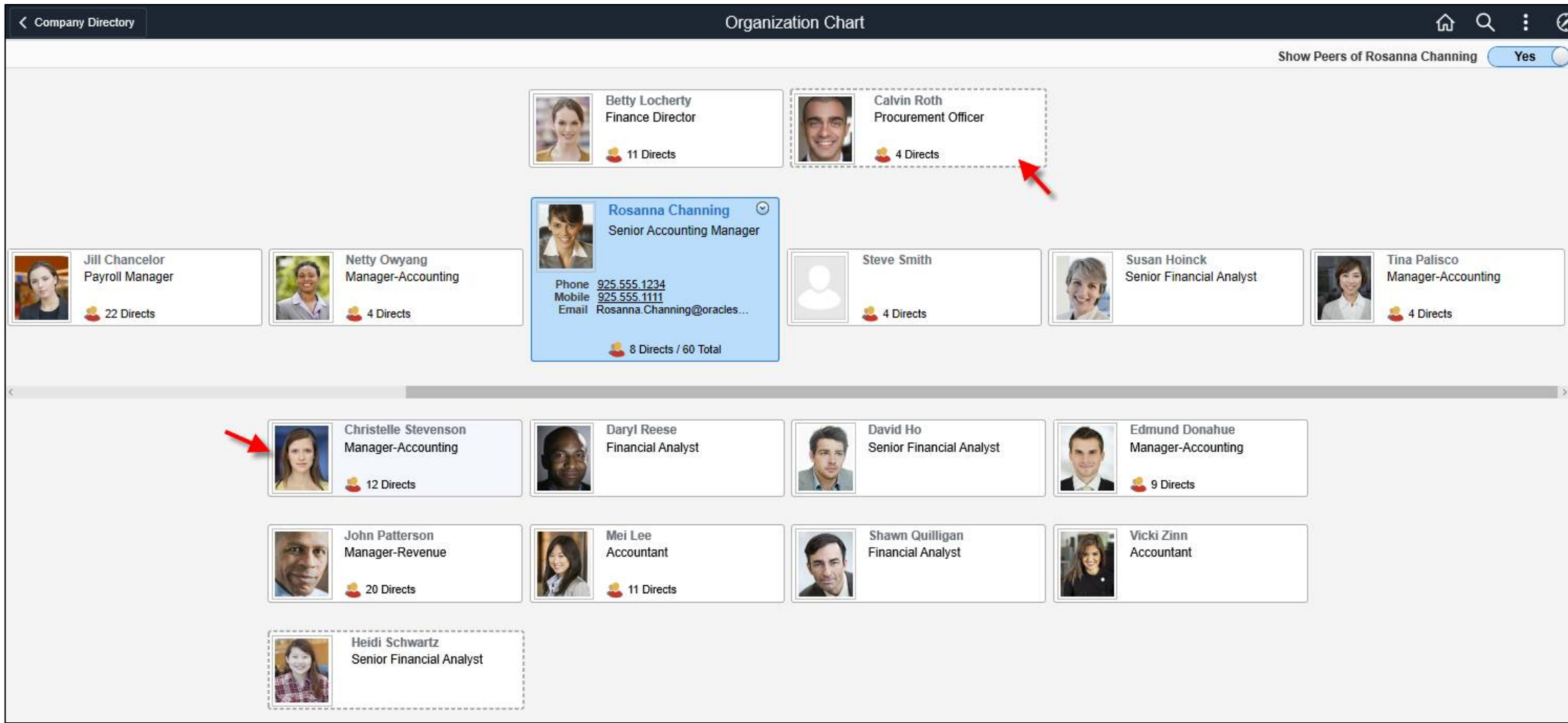
Total Rewards

Total Rewards Statement 2019

Health and Safety



# Org Chart with Dotted Line




# Related Items for My Directs

[Company Directory](#)


Organization Chart

[Show Peers of Christelle Stevenson](#) ☐ No



**Rosanna Channing**  
Senior Accounting Manager

8 Directs



**Christelle Stevenson**  
Manager-Accounting

Phone 925.555.8756  
Mobile 925.694.7920  
Email Christelle.Stevenson@oracle...

12 Directs / 12 Total

Actions

[Time Management](#)

[Job and Personal Information](#)

[Time Reporting](#)


[Compensation](#)

[Benefits](#)


[Development](#)

[Performance Management](#)


[View Employee Snapshot](#)




**Chase Calder**  
General Ledger Specialist




**David Michelson**  
Data Entry Operator




**Fiona Thompson**  
Data Entry Operator




**Heidi Dubas**  
Finance Specialist




**Jeff Backus**  
Finance Specialist




**Jennifer Michaels**  
File Clerk




**Jessica Livingstone**  
General Ledger Specialist




**Joanna Strunsky**  
Finance Specialist




**Melissa Caldwell**  
File Clerk



**Melissa Caldwell**  
Clerk



**Michael Knight**  
Accounting Clerk

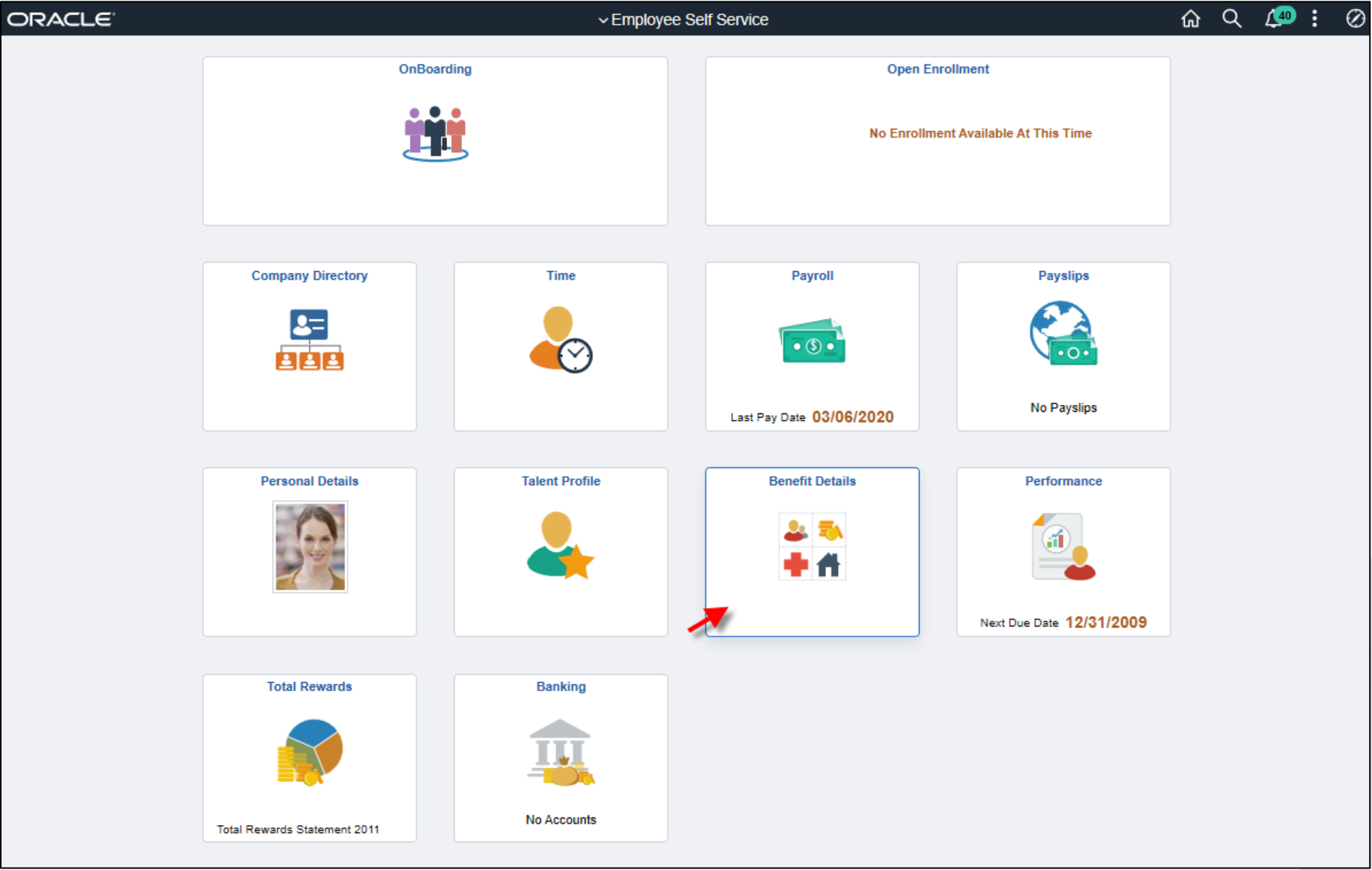


**Monica Baker**  
Senior Finance Specialist

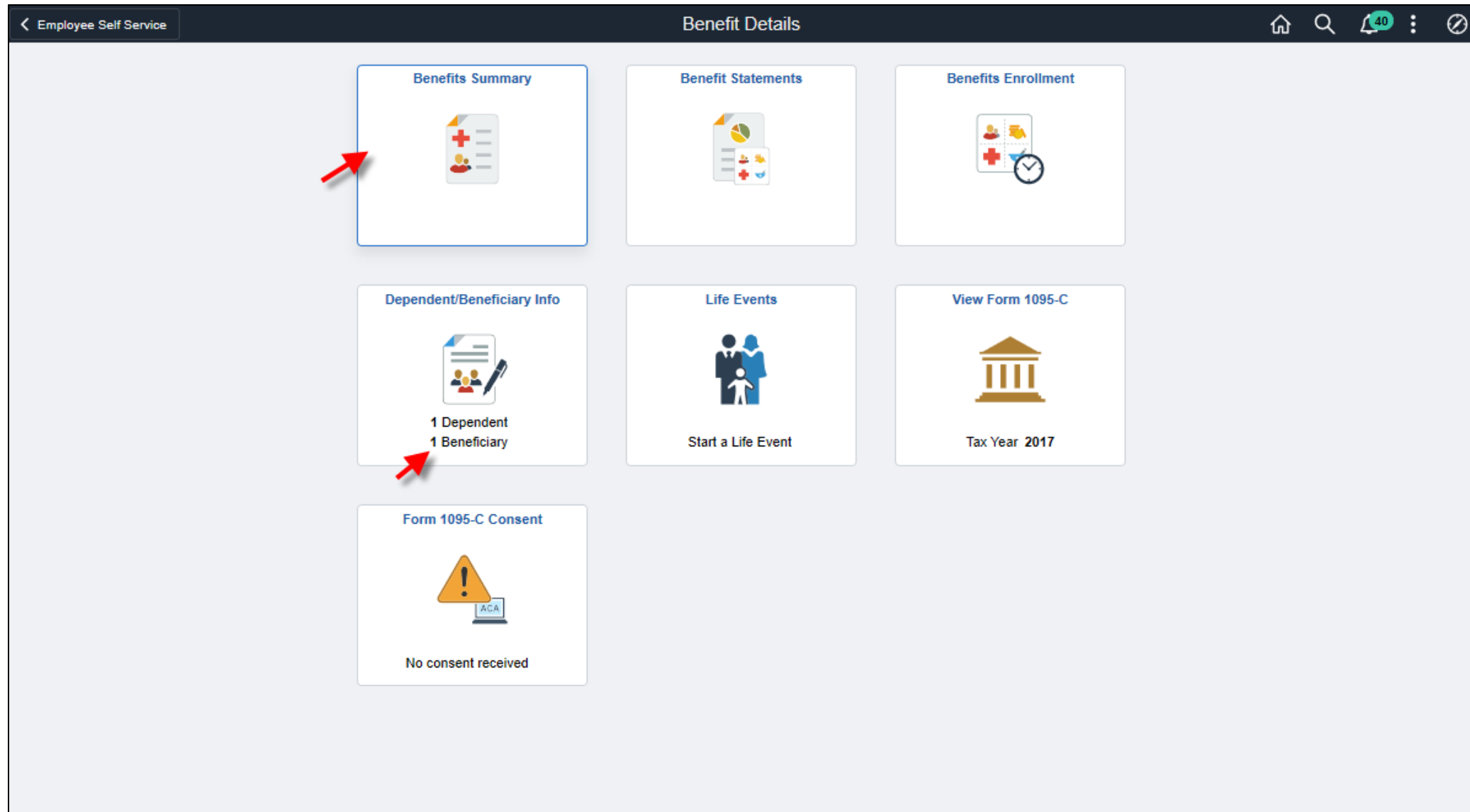
## Fluid Benefits

Benefits Details, Benefits Statements, Benefits Enrollment  
Life Events, Benefits Chatbot

# Benefit Details Dashboard



# Benefit Details Tiles and Dynamic Content



# Benefits Summary

Benefit Details

Benefits Summary

Betty Locherty

Finance Director

To view your benefits as of another date, enter the date and select Refresh.

My Benefits on

05/20/2020

Refresh

Benefit Plans

Medical

Plan Medical HMO Plan 2

Coverage Employee + Spouse

1 Dependents

Review

Dental

Plan Dental DMO

Coverage Employee + Spouse

1 Dependents

Review

Vision

Coverage Waived

Review

Life

Plan Basic Life Plan

Coverage \$50000

1 Beneficiaries

Review

Supplemental Life

Plan Suppl Group Life 1x

Coverage Salary X 1

1 Beneficiaries

Review

AD and D

Plan Flat 25K AD&D

Coverage \$25000

1 Beneficiaries

Review

Dependent AD and D

Coverage Waived

Review

Dependent Life

Coverage Waived

Review

Supplemental AD and D

Coverage Waived

Review

Contact Information

Phone

648/350-1111

Email

HCMGENUser1@ap8023fems.us.o

Address

Benefits Administrator

500 George Washington Pkway

New York, NY 07666

Resources

GBI Benefits Handbook

# Fluid Benefits Open Enrollment

ORACLE

Employee Self Service

Delegations

Open Enrollment

Starts now until 6/30/2021. Your final enrollment must be submitted by 11:59 PM PST, 6/30/2021

Countdown to Open Enrollment Deadline:

Days HH MM SS

154 06:29:30

Company Directory

Time

Payroll

Last Pay Date

08/31/2020

Personal Details

Action Required

Talent Profile

Benefit Details

Action Required

Performance

2 Current Documents

Total Rewards

Total Rewards Statement 2019

Health and Safety

## Welcome Message / Video

✕ Exit

Benefits Open Enrollment

ORACLE  
HUMAN CAPITAL

Enrollment Period 2/1/2020 - 12/31/2020  
Rosanna Channing

Next >

Welcome  
● Visited

Acknowledgement  
● Complete

Personal Information  
○ Not Started

Dependent/Beneficiary Info  
● Visited

Benefits Enrollment  
● Complete

Benefits Statements  
○ Not Started

Benefit Survey  
○ Not Started

Summary  
○ Not Started

Welcome

Open enrollment is your annual opportunity to modify your benefit choices. The video gives you step by step instruction on how to enroll your benefits.

You have the option of watching the video or selecting to view the video transcript.


View Video Transcript

ORACLE  
HUMAN CAPITAL

Benefits Welcome Video

Watch later

Share




▶

Grow Your Nest Egg



# Employee Acknowledgement

✕ ExitBenefits Open Enrollment

**Enrollment Period 2/1/2020 - 12/31/2020**  
Rosanna Channing

< PreviousNext >

Welcome  
● Visited

Acknowledgement  
✓ Complete

▶ Personal Information  
○ Not Started

Dependent/Beneficiary Info  
● Visited

Benefits Enrollment  
✓ Complete

Benefits Statements  
○ Not Started

Benefit Survey  
○ Not Started

Summary  
○ Not Started

## Acknowledgement

By checking Agree you understand the following:

- You understand that your employer is authorized to make the changes you have requested to your benefits, and that your employer can make the applicable payroll deductions for those benefits.
- You understand that you cannot change your benefit elections until the next Open Enrollment period, unless you have a qualified family status change.
- You understand that your information is private, but that your employer can provide your relevant information to authorized persons and organizations, such as health care providers, insurance carriers, and other approved internal and external entities.
- You are responsible for meeting all program and deadlines for your election.

You understand that this serves as a legal and binding agreement

[Terms and Conditions](#)

☒ I Agree

Save



☒ I Agree

Save

## Elect Benefits

X Exit

Enrollment Period 2/1/2020 - 12/31/2020  
Rosanna Channing

< Previous

Next >

Welcome Visited

Acknowledgement Complete

Personal Information Visited

Dependent/Beneficiary Info Visited

**Benefits Enrollment Complete**

Benefits Statements Not Started

Benefit Survey 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 open enrollment event.

▼ Enrollment Summary

Your Pay Period Cost \$88.67

Status Submitted 11/18/2020 3:24PM

\*Excess Credit Cash

Enrollment Preview Statement

Submit Enrollment

Full Cost \$436.00

General Credits \$-278.33

Plan Credits \$-69.00

LTD STD

Medical

Benefit Plans

Wellness Credit

Current No Coverage  
New No Coverage  
Status Pending Review

Pay Period Cost \$0.00

Review

Medical

Current Enhanced Medical Plan  
New Enhanced Medical Plan  
Status Pending Review  
2 Dependents

Pay Period Cost \$245.00

Review

Dental

Current Enhanced Dental Plan  
New Enhanced Dental Plan  
Status Pending Review  
2 Dependents

Pay Period Cost \$13.88

Review

Vision

Current Enhanced Vision Plan  
New Enhanced Vision Plan  
Status Pending Review  
2 Dependents

Pay Period Cost \$11.50

Review

Life

Current Basic Life Plan \$50,000  
New Basic Life Plan \$50,000  
Status Pending Review  
0 Beneficiaries

Pay Period Cost \$0.00

Review

Supplemental Life

Current Suppl Group Life 3x Salary X 3  
New Suppl Group Life 3x \$282,000  
Status Pending Review  
1 Beneficiaries

Pay Period Cost \$62.04

Review

Contact Information

Phone  
646/350-1111

Email  
HCMGUSER1@ap6023fems.us.o

Address  
Benefits Administrator  
500 George Washington Pkway  
New York, NY 07686

Resources

GBI Benefits Handbook

# Review “Submitted” Enrollment Statement

Statement Type Submitted Enrollment

Description Open Enrollment 2021

Enrollment Effective Date 01/01/2021

Statement Issue Date 04/20/2021 5:11PM

Print View

This statement records your submission of the Open Enrollment 2021 benefit selections and pay period costs, dependent information, and beneficiary information. If an error has been made in recording your elections, you can return to this event before the enrollment period ends. Contact your benefits administrator if you have further questions. Please keep the statement for your records.

Statement Sections

Collapse All

Personal Information

Cost Summary

Election Summary

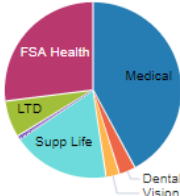
Your Cost Per Pay Period\$ 184.35

Full Cost\$ 531.68

General Credits\$ -278.33

Plan Credits\$ -69.00

Excess Credit Rollover ToSavings



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 Benficiaries
Wellness Credit		
Medical HMO Plan 2	Family	2 Dependents
Enhanced Dental Plan	Family	2 Dependents
Enhanced Vision Plan	Family	2 Dependents

Global Business Institute  
GBI US Fulltime Benefit Pgm

ELECTIONS PREVIEW  
OPEN ENROLLMENT 2021  
Event Date: 01/01/2021

Rosanna Channing  
Senior Accounting Manager

Employee ID: KU0046

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 Address1430 North West Blvd Apt B215, Guttenberg, NJ 07093

Mailing Address1430 North West Blvd Apt B215, Guttenberg, NJ 07093

Email Addressbrian.mcintyre@workstrategy.com

GenderFemale

Marital StatusMarried

Birthdate1967-01-04

Service Date1986-08-29

COST SUMMARY

AMOUNT

Total Pay Period Deduction from Pay\$ 184.35

Total Pay Period Cost\$ 531.68

Total Pay Period Credit\$ 347.33

Credit Rollover toSavings - 40

ELECTION SUMMARY

Benefit	Coverage	Category Base	Your Cost Per Pay Period
Wellness Credit			
Medical HMO Plan 2	Family		\$ 195.00
Enhanced Dental Plan	Family		\$ 13.88
Enhanced Vision Plan	Family		\$ 11.50
Basic Life Plan		\$ 50,000.00	
Suppl Group Life 4x		\$ 376,000.00	\$ 82.72
Flat 25K AD&D		\$ 25,000.00	\$ 0.25
Dependent AD and D			
Dependent Life			
Supplemental AD and D			
Short Term Disability - 80%		\$ 7,833.33	\$ 3.13
Standard Long-term Disability		\$ 7,800.00	\$ 31.20
Healthcare FSA		\$ 1,500.00	\$ 125.00
Flex Spending Dependent Care	No Coverage		
Vacation Buy	No Coverage		
Vacation Sell	No Coverage		

Benefit	Pre-Tax	After Tax	Voluntary Amount	Voluntary Percent
401(k) Employer Pct Match	8%	2%		
Profit Sharing Plan	\$ 0.00	\$ 0.00		
GBI Company ESPP Program	\$ 0.00	3%		
GBI Pension Plan			\$ 0.00	0%

Rosanna Channing

Page 1 of 2

4/20/2021 17:13 PM

# Fluid Life Events (Activity Guide Steps)

- Step by step design using Fluid Activity Guide Composer
- Contains helpful instructional information
- Life Event Welcome page text can be updated as necessary
- Activity Guide on left highlights required and optional steps for the life event
- Activity Guide includes icons to track the status of each step
- Action buttons in the top right also guide the user through the process

**Marriage Event**

Cancel | < Previous | Next > | Save

**Activity Guide Steps:**

- ★ **Welcome to Marital Event** (Complete)
- ★ **Marital Status** (In Progress)
- **Document Upload** (Not Started)
- **Benefits Summary** (Not Started)
- ▶ **Personal Information** (Not Started)
- **Dependent/Beneficiary Info** (Not Started)
- ▶ **Pay and Compensation** (Not Started)
- **Direct Deposit** (Not Started)
- **Benefit Enrollment** (Not Started)
- **Benefits Statements** (Not Started)
- **Summary** (Not Started)

**Marital Status**

Current Status: Married





\*New Status:


\*As Of: 05/02/2020

# Marriage Life Event

[< Benefit Details](#)

Life Events



**Rosanna Channing**   
Senior Accounting Manager


There are some events that involve you as the Employee or your family members.


Review the choices and select the appropriate Event. Then enter the date of your event.

**Employee**

- ☒ I got married
- ☐ I had a baby
- ☐ I adopted or gained legal custody/guardianship of a child
- ☐ I got divorced/legally separated

\*As Of

05/02/2020

 [Start Life Event](#)

The Life Event must be completed within 31 days of your qualifying event or you will not be eligible to change your Benefit elections.

# Document Upload Step

✕ Exit

Marriage Event

⋮

Cancel

< Previous

Next >

✱ Welcome to Marital Event

✔ Complete

✱ Marital Status

✔ Complete

Document Upload

✔ Complete

Benefits Summary

● Visited

▶ Personal Information

☐ Not Started

Dependent/Beneficiary Info

☐ Not Started

▶ Pay and Compensation

☐ Not Started

Direct Deposit

☐ Not Started

Benefit Enrollment

☐ Not Started

Benefits Statements

☐ Not Started

Summary

☐ Not Started

Life Events - Document Upload

▼ Instructions

You are required to submit the document(s) listed here. Select the Add Attachment button, enter a description of your document and upload the document.

▼ Life Event Documents

Marriage Certificate

Add Attachment

Add Note

Attachments

🗖

🔍

1-1 of 1

⏪ ⏩

Select	Sequence	Created	Author	Entry ID	Subject	Status
<input type="checkbox"/>	1	05/20/2020 12:34PM	Rosanna Channing	Marriage Certificate	Certificate	Submitted

Select All

Deselect All

Delete

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46

invest wisely. deliver more.

# Enrollment for Marriage Event

✕ Exit

Marriage Event

Cancel< PreviousNext >

★ Welcome to Marital Event  
✔ Complete

★ Marital Status  
✔ Complete

Document Upload  
✔ Complete

Benefits Summary  
● Visited

▶ Personal Information  
○ Not Started

Dependent/Beneficiary Info  
○ Not Started

▶ Pay and Compensation  
● Visited

Direct Deposit  
○ Not Started

Benefit Enrollment  
● Visited

Benefits Statements  
○ Not Started

Summary  
○ Not Started

## Benefit Enrollment

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

### ▼ Enrollment Summary

Your Pay Period Cost **\$88.67**

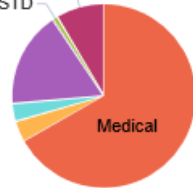
Full Cost **\$436.00**

Status **Pending Review**

General Credits **\$-278.33**

\*Excess Credit

Plan Credits **\$-69.00**



### Benefit Plans

**Wellness Credit**

Current No Coverage  
New No Coverage  
Status Pending Review

Pay Period Cost **\$0.00**

Review

**Medical**

Current Enhanced Medical Plan  
New Enhanced Medical Plan  
Status Pending Review  
👤 2 Dependents

Pay Period Cost **\$245.00**

Review

**Dental**

Current Enhanced Dental Plan  
New Enhanced Dental Plan  
Status Pending Review  
👤 2 Dependents

Pay Period Cost **\$13.88**

Review

**Vision**

Current Enhanced Vision Plan  
New Enhanced Vision Plan

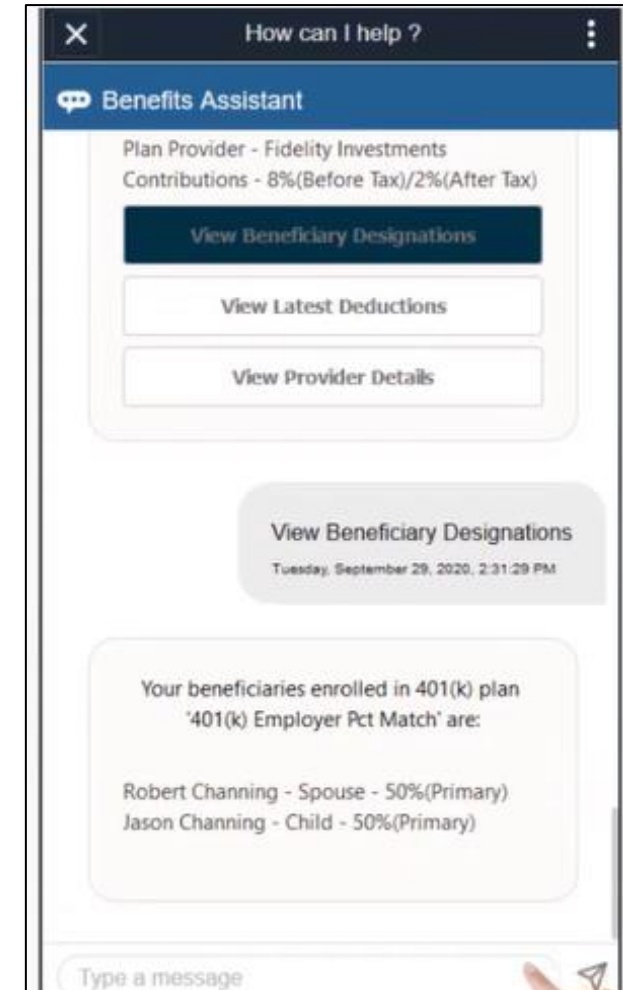
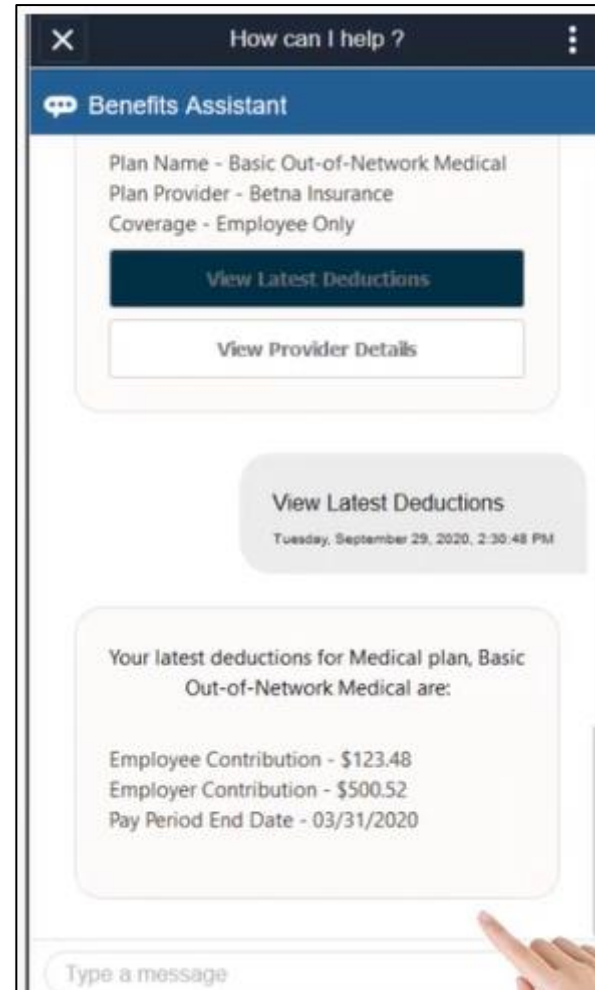
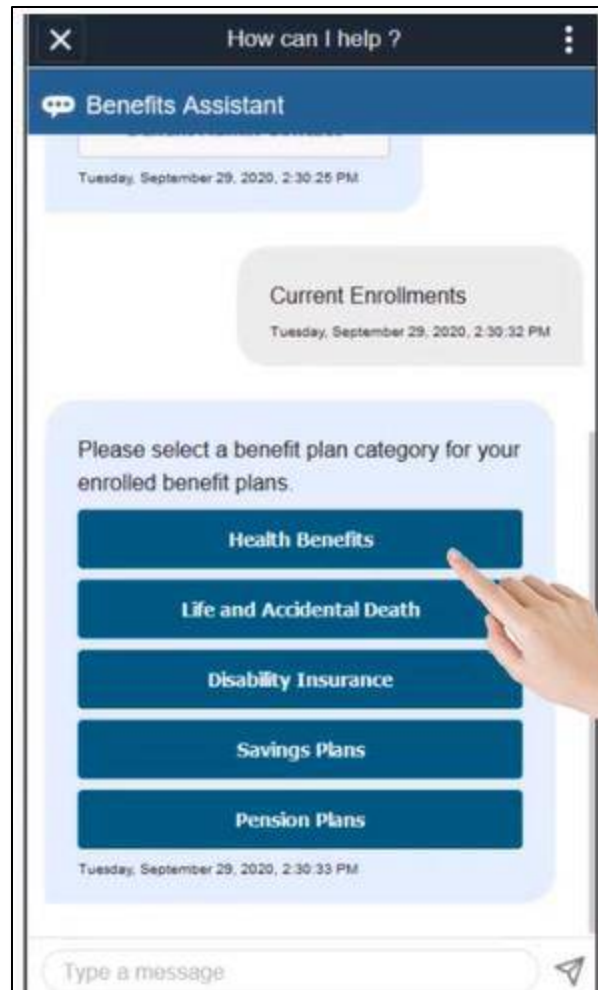
**Life**

Current Basic Life Plan \$50,000  
New Basic Life Plan \$50,000

**Supplemental Life**

Current Suppl Group Life 3x Salary X 3  
New Suppl Group Life 3x \$282,000

# New Chatbot Feature





# Talent Profile

## Employee Talent Profile

### Search and Compare (Employees, Managers)

# Profile Management Concepts

- Recently enhanced with Fluid user experience
- New Profile Search and Compare (PUM 36)
- Employee (Person) Profiles
- Job or Position (Non-Person) Profiles
- Employee Profiles are internal employee “resumes”
- Talent Profile content accessible by HR, OD, and Managers
- Profile Management provides integration between Talent modules
- Supports Employee and Manager Self Service
- Enables analytics and reporting
- Supports Fluid, Classic, and Classic Plus pages

The screenshot displays the 'Talent Profile' interface for Rosanna Channing, Senior Accounting Manager. The left sidebar lists various profile sections: Competencies, Responsibilities, Qualifications, Education, NVQ, Projects, Worn Rank, and Mobility. The main content area shows a table of competencies with columns for Competency, Evaluation Type, Reviewer ID, Proficiency, and Edit/View. Below this, a 'Search and Compare Profiles' window is open, showing search results for John Patterson, Christelle Stevenson, and Rosanna Channing. A red arrow points to the 'View' button for John Patterson. The search results window also displays job information, additional information, and match results for 'Sr. Mgr - Special Projects'.

Competency	Evaluation Type	Reviewer ID	Proficiency	Edit/View
Business Banking	Approved/Official		<div><div></div></div>	>
Develop & implement solutions	Approved/Official		<div><div></div></div>	>
Directiveness/Assertiveness	Approved/Official		<div><div></div></div>	>
Financial Accounting	Approved/Official		<div><div></div></div>	>
Financial Analysis	Approved/Official		<div><div></div></div>	>
Financial Planning	Approved/Official		<div><div></div></div>	>
Managerial Efficiency	Approved/Official		<div><div></div></div>	>

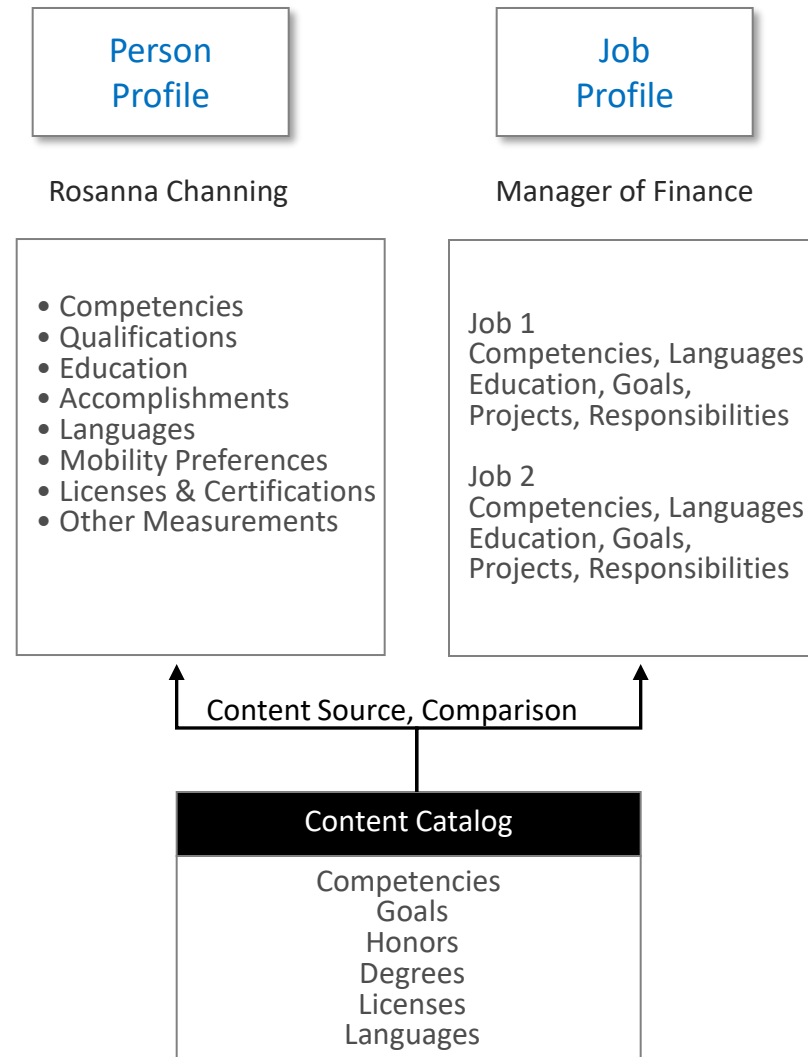
  

Job Information	John Patterson	Christelle Stevenson	Rosanna Channing
Years in Current Job	6.9	12.1	12.1
Review Rating	-	-	-

Match Results for "Sr. Mgr - Special Projects"	John Patterson	Christelle Stevenson	Rosanna Channing
Develop & implement solutions	91%	83%	91%
Proficiency	4-Very Good	3-Good	4-Very Good
Financial Accounting	100%	100%	100%
Proficiency	4-Very Good	4-Very Good	4-Very Good

# Profile Management and the Content Catalog



**Content Items**

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

[Find an Existing Value](#) [Add a New Value](#)

► **Search Criteria**

Search Results

Only the first 300 results can be displayed.


[View All](#) |< < 1-100 of 300 > >|

Content Type	Content Item ID	Description
COMPETENCY	0100	Abstract thinking
COMPETENCY	0101	Analytical thinking
COMPETENCY	0102	Conceptual thinking
COMPETENCY	0103	Mental flexibility
COMPETENCY	0110	Ability to manage own time
COMPETENCY	0111	Effectively manages own time
COMPETENCY	0150	Creative thinking
COMPETENCY	0151	Directiveness/Assertiveness
COMPETENCY	0152	Debates issues unabrasively
COMPETENCY	0153	Articulate & concise
COMPETENCY	0154	Organize & present ideas well

# Employee Talent Profile

**ORACLE**Employee Self Service🏠 🔍 🔔 ⋮ ⌚

### Open Enrollment




Starts now until 12/31/2020. Your final enrollment must be submitted by 11:59 PM PST, 12/31/2020


Countdown to Open Enrollment Deadline:

Days	HH	MM	SS
92	14	53	52


### Company Directory



### Time




### Payroll





Last Pay Date **02/28/2020**

### Personal Details




Action Required

### Talent Profile




### Benefit Details




Action Required

### Performance



4 Current Documents


### Total Rewards




Total Rewards Statement 2019

# Review or Update Profile Data

[< Employee Self Service](#)Talent Profile





**Rosanna Channing**   
Senior Accounting Manager

Profile Type: Person [View Another Profile](#)


**Competencies**

Responsibilities


Qualifications 

Education 


NVQ













Projects 

Worm Rank

Mobility 

**Competencies**



Competency	Evaluation Type	Reviewer ID	Proficiency	Edit/View
Business Banking	Approved/Official		<div><div></div></div>	
Develop & implement solutions	Approved/Official		<div><div></div></div>	
Directiveness/Assertiveness	Approved/Official		<div><div></div></div>	
Financial Accounting	Approved/Official		<div><div></div></div>	
Financial Analysis	Approved/Official		<div><div></div></div>	
Financial Planning	Approved/Official		<div><div></div></div>	
Managerial Efficiency	Approved/Official		<div><div></div></div>	
Organize people and goal tasks	Approved/Official		<div><div></div></div>	
Provides Direction	Approved/Official		<div><div></div></div>	
Resource Planning	Approved/Official		<div><div></div></div>	
Strategic Planning	Approved/Official		<div><div></div></div>	
Strategically influences	Self		<div><div></div></div>	

# Update Proficiency Level

Cancel

Competencies

Effective Date

07/24/2006

Add New Version

Competency

Strategically influences

Evaluation Type

Self

Reviewer ID

\*Status

0-None  
1-Little  
2-Fair  
3-Good  
4-Very Good  
5-Expert

\*Rating Model

\*Proficiency

Verified By

Employee Claim

Interest Level

3-Desirable

EmplID

Year Last Used

2006

Reviewer Is Approved

☐

Year Acquired

Years Of Experience

Review Active

☐

Review Date


Description

Reviewer

# Submit for Approval

[Employee Self Service](#)

Talent Profile



**Rosanna Channing**  
Senior Accounting Manager

Profile Type: Person [View Another Profile](#)

**Competencies**

Responsibilities

Qualifications

Education

NVQ

Projects

Worn Rank

Mobility

**Competencies**


Competency	Evaluation Type	Reviewer ID	Proficiency	Status	Edit/View
Business Banking	Approved/Official		<div></div>		>
Develop & implement solutions	Approved/Official		<div></div>		>
Directiveness/Assertiveness	Approved/Official		<div></div>		>
Financial Accounting	Approved/Official		<div></div>		>
Financial Analysis	Approved/Official		<div></div>		>
Financial Planning	Approved/Official		<div></div>		>
Managerial Efficiency	Approved/Official		<div></div>		>
Organize people and goal tasks	Approved/Official		<div></div>		>
Provides Direction	Approved/Official		<div></div>		>
Resource Planning	Approved/Official		<div></div>		>

Submit for Approval

# Add Notes for Manager

Employee Self Service

Talent Profile



Rosanna Channing

Senior Accounting Manager

Profile Type Person

View Another Profile

Competencies

Responsibilities

Qualifications

Education

NVQ

Projects

Worn Rank

Mobility

Competencies

Submit for Approval

+

Competency	Evaluation Type	Reviewer ID	Proficiency	Status	Edit/View
Business Banking					
Develop & implement					
Directiveness/Assertiveness					
Financial Accounting					
Financial Analysis					
Financial Planning					
Managerial Efficiency					
Organize people and resources					
Provides Direction					
Resource Planning					
Strategic Planning					
Strategically influences	Self			Update	

Request Approval

Cancel

Submit

Competencies

Competency	Evaluation Type	Status
Strategically influences	Self	Update

Comments

I completed my Strategic Planning course! Could you approve?

Strategically influences

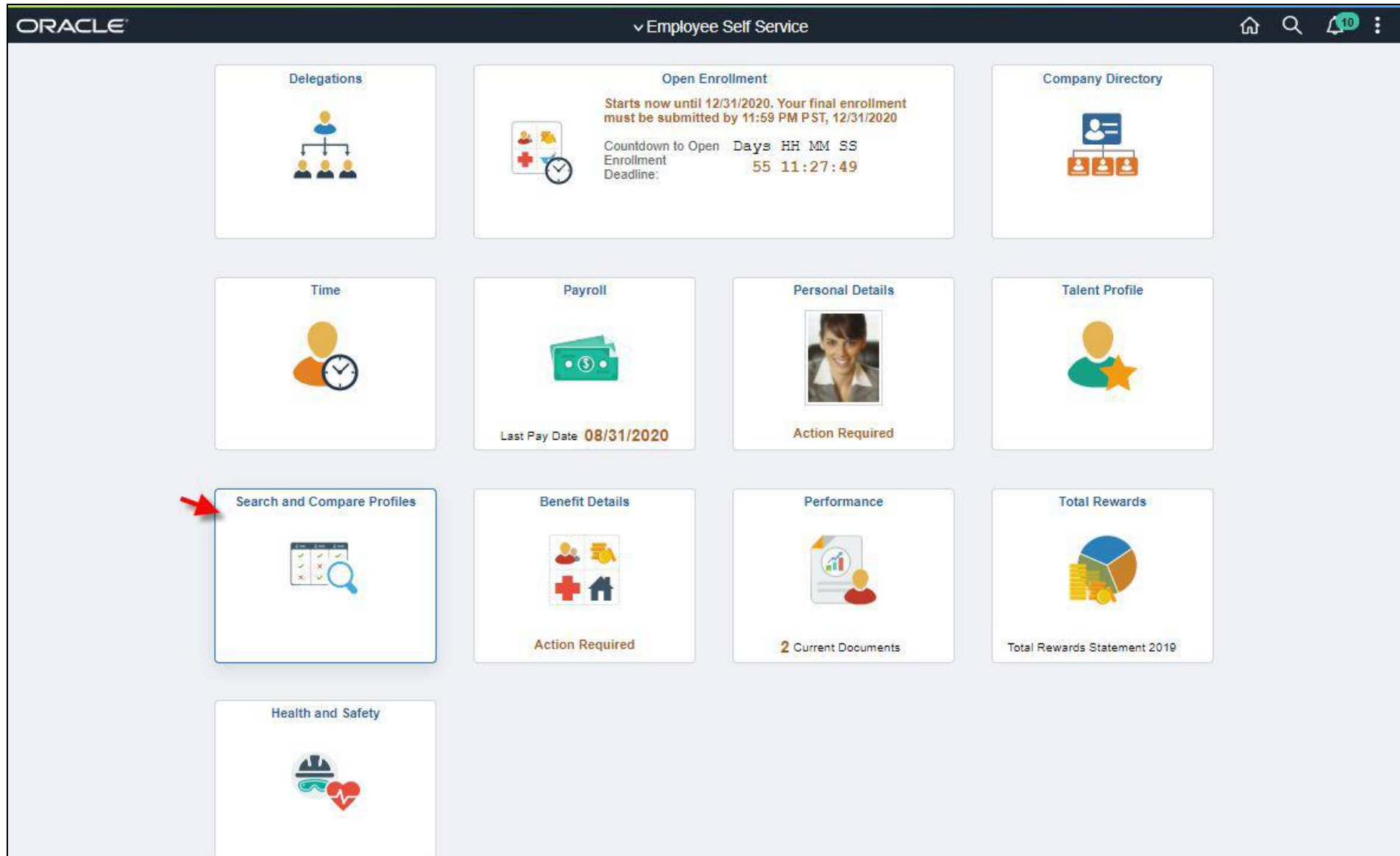
Self

Update

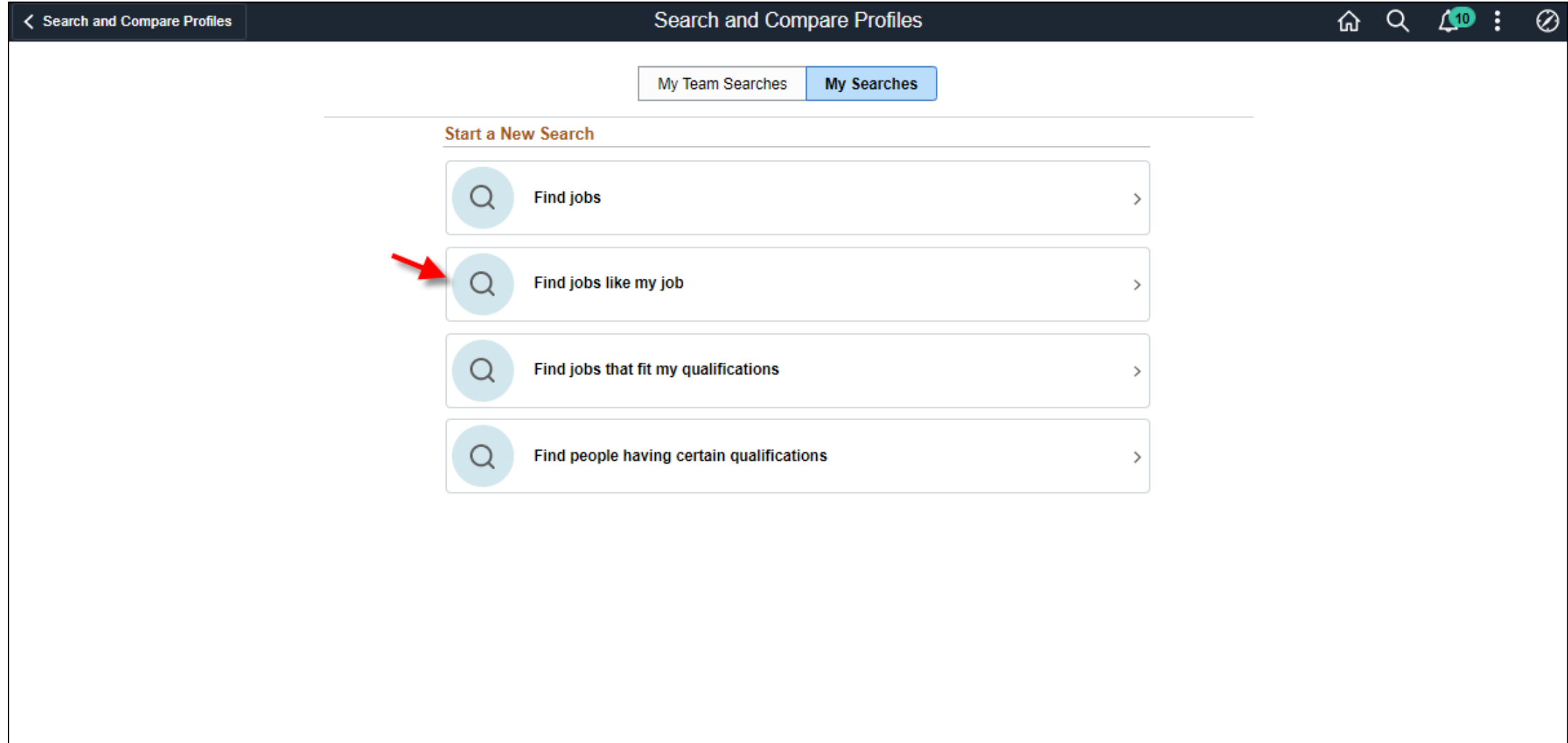
>



# Search and Compare Talent Profiles (PUM 36)



# Search and Compare Talent Profiles



# Search and Compare Talent Profiles

Search and Compare Profiles

Find jobs like my job

Home Search 10

Search Criteria

Compare Results

32 of 32 profiles returned

Add to Interest List

<input checked="" type="checkbox"/> Sr. Manager-Accounting	<a href="#">View &gt;</a>
<input checked="" type="checkbox"/> Manager-Accounting	<a href="#">View &gt;</a>
<input checked="" type="checkbox"/> Chief Finance Officer	<a href="#">View &gt;</a>
<input checked="" type="checkbox"/> Sr. Mgr - Special Projects	<a href="#">View &gt;</a>
<input type="checkbox"/> Accountant	<a href="#">View &gt;</a>
<input type="checkbox"/> Manager-Revenue	<a href="#">View &gt;</a>
<input type="checkbox"/> Finance Director	<a href="#">View &gt;</a>
<input type="checkbox"/> Mgr-Finance	<a href="#">View &gt;</a>
<input type="checkbox"/> Consultant-Jr	<a href="#">View &gt;</a>

# Search and Compare Talent Profiles

[Search and Compare Profiles](#)

Find jobs like my job

[Search Results](#)

**Sr. Manager-Accounting**

View >

⊖

**Manager-Accounting**

View >

⊖

**Chief Finance Officer**

View >

⊖

**Sr. Mgr - Special Projects**

View >

⊖

+

▼ Job Information

Job	Senior Accounting Manager	Manager-Accounting	Chief Finance Officer	Senior Manager-Finance
Job Family	Accounting	Accounting	-	Finance
Job Function	Finance and Accounting	Finance and Accounting	-	Finance and Accounting

Match Results for "Sr. Manager-Accounting"

Match percentage calculated based on "Closest Fit" [Show Profile Name](#)

▼ Competencies

<b>Analytical thinking</b>	100%	91%	0%	0%
Target Proficiency				
4-Very Good	4-Very Good	3-Good	-	-
<a href="#">Details ^</a>				
<b>Conceptual thinking</b>	100%	91%	0%	0%
Target Proficiency				
4-Very Good	4-Very Good	3-Good	-	-
<a href="#">Details ^</a>				
<b>Creative thinking</b>	100%	50%	0%	0%
Target Proficiency				
4-Very Good	4-Very Good	-	-	-
<a href="#">Details ^</a>				
<b>Develop &amp; implement solutions</b>	100%	91%	83%	83%
Target Proficiency				
3-Good	3-Good	4-Very Good	5-Expert	5-Expert
<a href="#">Details ^</a>				

# Search and Compare Talent Profiles

Search and Compare Profiles

Find jobs like my job

Home Search 10

Search Results

Sr. Manager-Accounting

Manager-Accounting

Chief Finance Officer

Sr. Mgr - Special

Job Information

Job

Job Family

Job Function

Match Results for "Sr. Manager-Accounting"

Match percentage calculated based on

Competencies

Analytical thinking

Target Proficiency

4-Very Good

Details ^

Conceptual thinking

Target Proficiency

4-Very Good

Details ^

Creative thinking

Target Proficiency

4-Very Good

Details ^

Job Profile

View Job Profile

This profile displays competencies, qualifications, and responsibilities of a certain job code, position, job family, salary grade, or other defined business entity.

Description

Chief Finance Officer

Status

Active

Competencies

Responsibilities

Qualifications

NVQ

Worn Rank

View Competencies detail by selecting the item name link.

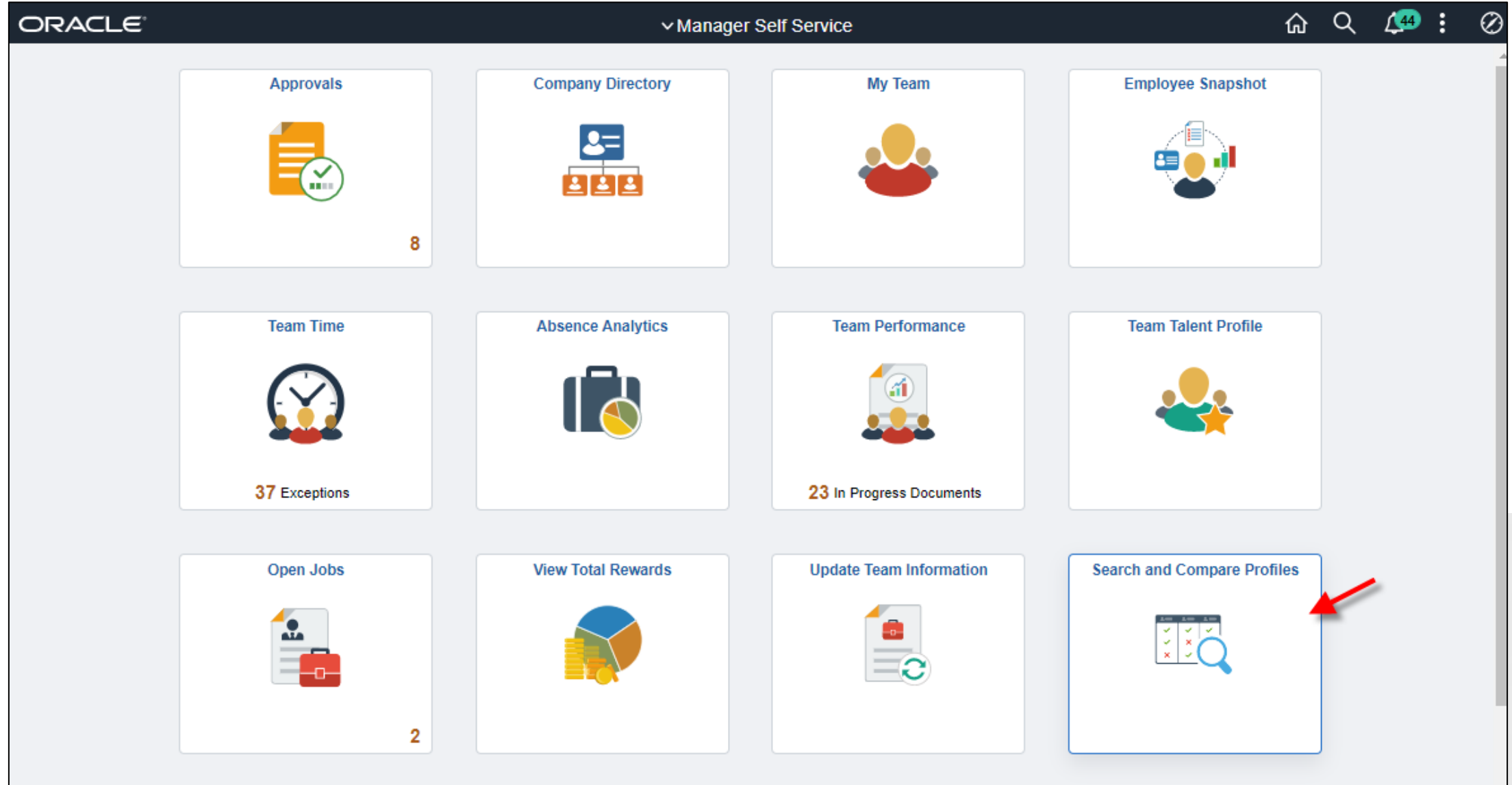
Competencies

16-19 of 19

View All

Competency
Certified Public Accountant
Financial Planning
Forecasting
Budgeting

# Manager Search and Compare Talent Profiles








Workforce Searches

My Team Searches

My Searches

### Start a New Search

-  Adhoc search >
-  Find jobs >
-  Find jobs for this person >
-  Find people having certain qualifications >
-  Find people that fit this job >

< All Searches

Search >

### Search Profiles

Type Job

sr. mgr

Search

[Advanced Search](#)

### Profile Search Results

1 row



Job / 210600  
● **Sr. Mgr - Special Projects**



Search and Compare Profiles

Find people that fit this job

Home

Search

42

Select a Profile

Search

Search Criteria

Advanced Filters

?

Your Search Criteria Groups

+

Add Group

Clear All Groups

▼

Group - 1

✎

Add / Remove Criteria

Show All Details

Competency

Organize people and goal tasks

✎

Edit

Exact Match

No

+ 1 More

Details

OR

Competency

Resource Planning

✎

Edit

Exact Match

No

+ 1 More

Details

OR

Competency

Leadership

✎

Edit

Exact Match

No

+ 1 More

Details

OR

Competency

Develop & implement solutions

✎

Edit

Exact Match

No

+ 1 More

Details

OR

Competency

Strategic Planning

✎

Edit

# Select Candidates for Comparison

[← Search and Compare Profiles](#)

Find team members for a specific job profile

[Home](#) [Search](#) [44](#) [More](#) [Refresh](#)

[← Search Criteria](#)[Compare Results >](#)

▼ Filters

▼ Business Unit

☐ Global Business Institute BU (18)  
☐ GBI BU for US004 (5)  
☐ GBI BU for US001 (2)  
☐ GBI BU for US006 (2)  
☐ GBI BU for US003 (1)  
☐ GBI BU for US005 (1)

▼ Department


☐ Human Resources (7)  
☐ Corporate Accounting (6)  
☐ Finance and Administration (5)  
☐ Accounts Payable (2)  
☐ Accounts Receivable (2)  
☐ Revenue Management (2)  
☐ Corporate Finance (1)  
☐ Customer Service (1)  
☐ Financial Services (1)  
☐ Information Systems (1)  
[More](#)

10 of 29 profiles returned

\*Sort By 

Person Rating with Closest Fit

☒



KU0131

John Patterson

Job Title

Manager-Revenue

Department


Revenue Management

Location

Kansas Operations

View >

☒



KU0020

Christelle Stevenson

Job Title

Manager-Accounting

Department


Accounts Receivable

Location

Corporation Headquarters

View >

☒



KU0046

Rosanna Channing

Job Title

Senior Accounting Manager

Department


Corporate Accounting

Location

Corporation Headquarters

View >

☐



KU0102

Edmund Donahue

Job Title

Manager-Accounting

Department

Accounts Payable

Location

Corporation Headquarters

View >

66

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invest wisely. deliver more.

Search and Compare Profiles

Find people that fit this job

Home

Search

Search Results

KU0131

John Patterson

View >

KU0020

Christelle Stevenson

View >

KU0046

Rosanna Channing

View >

Job Information

Additional Information

Years in Current Job	6.9	12.1	12.1
Review Rating	-	-	-

Match Results for "Sr. Mgr - Special Projects"

Match percentage calculated based on "Person Rating with Closest Fit" [Show Profile Name](#)

Competencies

Develop & implement solutions	91%	83%	91%
Proficiency			
5-Expert	4-Very Good	3-Good	4-Very Good
<a href="#">Details</a> ^			
Financial Accounting	100%	100%	100%
Proficiency			
4-Very Good	4-Very Good	4-Very Good	4-Very Good
<a href="#">Details</a> ^			
Financial Analysis	100%	91%	100%
Proficiency			
4-Very Good	4-Very Good	3-Good	4-Very Good
<a href="#">Details</a> ^			
Financial Planning	100%	91%	100%

# Review Detailed Talent Profile

Search and Compare Profiles

Search Results

Job Information

Additional Information

Years in Current Job

Review Rating

Match Results for "Sr. Manager"

Match percentage calculated

Competencies

Develop & implement solutions

Proficiency 5-Expert

Details ^

Financial Accounting


Proficiency 4-Very Good

Details ^

Financial Analysis

Proficiency

Person Profile



John Patterson

Manager-Revenue

Instructions

This profile displays your skills, competencies, and accomplishments as of the date 10 December 2020. Review content detail by navigating through the individual tabs and selecting the item description.

Competencies

Responsibilities

Qualifications

Education

NVQ

Projects

Worn Rank

Mobility

Select the Competencies link to view the item details.

Competencies

1-23 of 23

View All

Competency	Evaluation Type	Reviewer ID	Proficiency
Directiveness/Assertiveness	Approved/Official		5-Expert
Organize people and goal tasks	Approved/Official		4-Very Good
Organize people and goal tasks	Supervisor/Manager	Rosanna Channing	3-Good
Resource Planning	Approved/Official		5-Expert
Resource Planning	Supervisor/Manager	Rosanna Channing	3-Good
Strategically influences	Approved/Official		3-Good

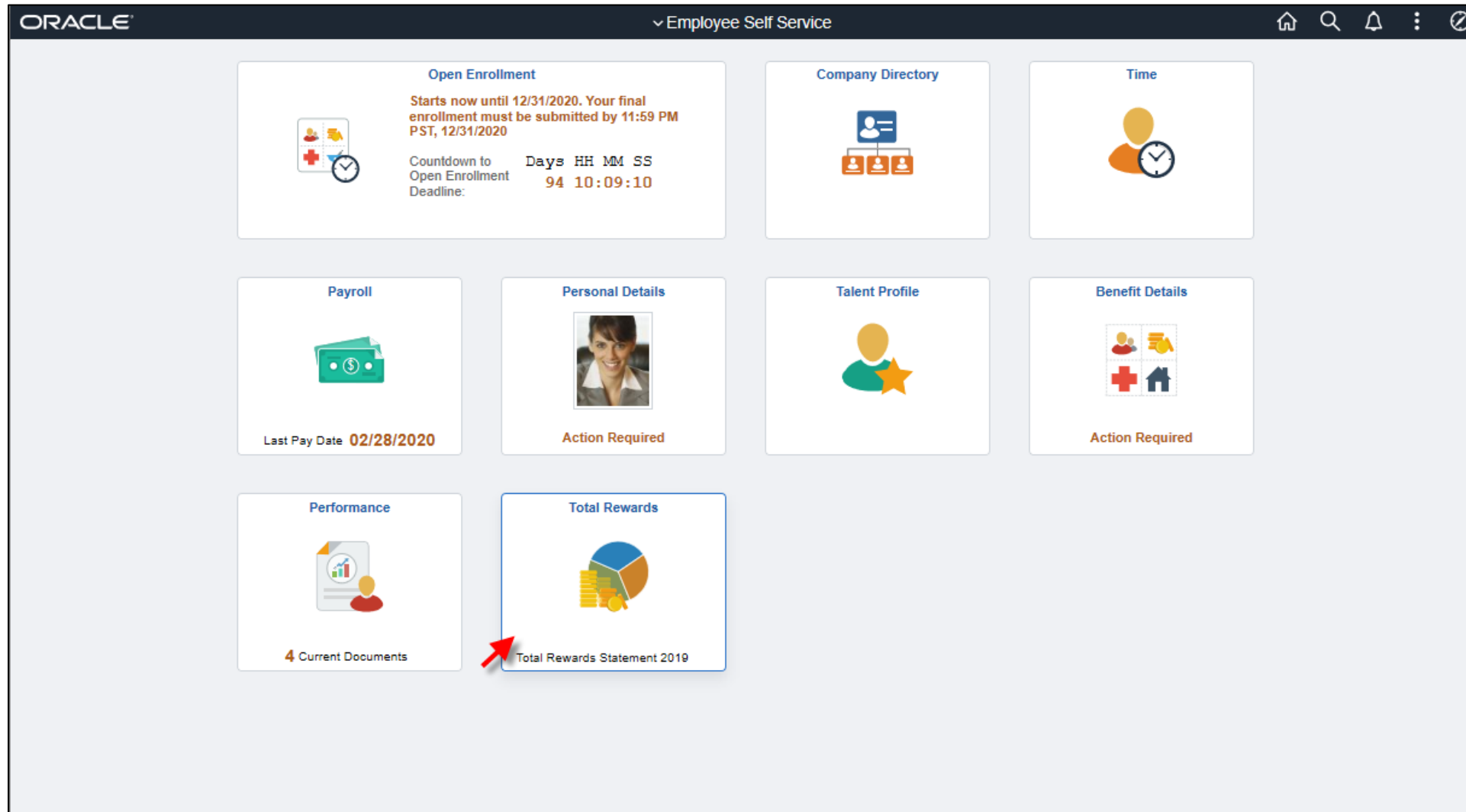
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# Total Rewards

## Total Compensation Statements



Employee Self Service
Total Rewards
Rosanna Channing
Senior Accounting Manager
Rewards Period: 01 January 2019 - 31 December 2019
Printer View

Summary
Compensation
Allowances
Health
Life and Disability
Retirement
Vacation
Training
Other Benefits

## Summary

This is your Total Rewards Statement for the period selected.

All amounts are shown in US Dollar currency.

[View Summary Chart](#)

Total Value \$91,735.64

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 package that is competitive and progressive within our industry and community.

Sincerely,  
Doug Lewis

Resources

Consult these resources for answers to common questions and concerns:

- Benefit Enrollment Guide
- Employee Handbook
- FAQs

This is the Summary section of your statement where you will find earnings and benefits summary amounts.

Reward Item	Employer Paid	Employer Provided	Employer Total	Employee Contribution	Percent of Total Reward
Compensation	62,752.00	0.00	62,752.00	0.00	68.41
Allowances	720.00	0.00	720.00	0.00	0.78
Health	4,108.08	0.00	4,108.08	1,182.98	4.48
Life and Disability	225.56	0.00	225.56	741.20	0.25
Retirement	5,100.00	0.00	5,100.00	7,500.00	5.56
Vacation	0.00	5,250.00	5,250.00	0.00	5.72
Training	10,000.00	2,500.00	12,500.00	0.00	13.83
Other Benefits	0.00	1,080.00	1,080.00	0.00	1.18
<b>Reward Summary Total</b>	<b>82,905.64</b>	<b>8,830.00</b>	<b>91,735.64</b>	<b>9,424.16</b>	<b>100.00</b>

[Employee Self Service](#)

Total Rewards

[Home](#)
[Search](#)
[Notifications](#)
[Menu](#)

Rosanna Channing
Senior Accounting Manager

Rewards Period
01 January 2019 - 31 December 2019

[Printer View](#)

Summary
Compensation
Allowances
Health
Life and Disability
Retirement
Vacation
Training
Other Benefits

## Health

All amounts are shown in US Dollar currency.

► [View Summary Chart](#)

In this Health and Wellness section of your Total Rewards statement, you'll find all of your and your employer's contributions to your health and life benefits.

Reward Item	Employer Total	Employer-Employee Contribution	Employee Contribution	Employer-Employee Total
Health Insurance	4,044.08	<div><div></div></div>	947.92	4,992.00 >
Dental Insurance	32.00	<div><div></div></div>	143.04	175.04 >
Vision Insurance	32.00	<div><div></div></div>	92.00	124.00 >
Health Benefits Total	4,108.08	<div><div></div></div>	1,182.96	5,291.04

### Health Benefits

Health insurance is a vital part of making sure all employees and their families have access to quality medical care. We support a substantial proportion of the cost of such insurance. For more information on health insurance options, please consult:

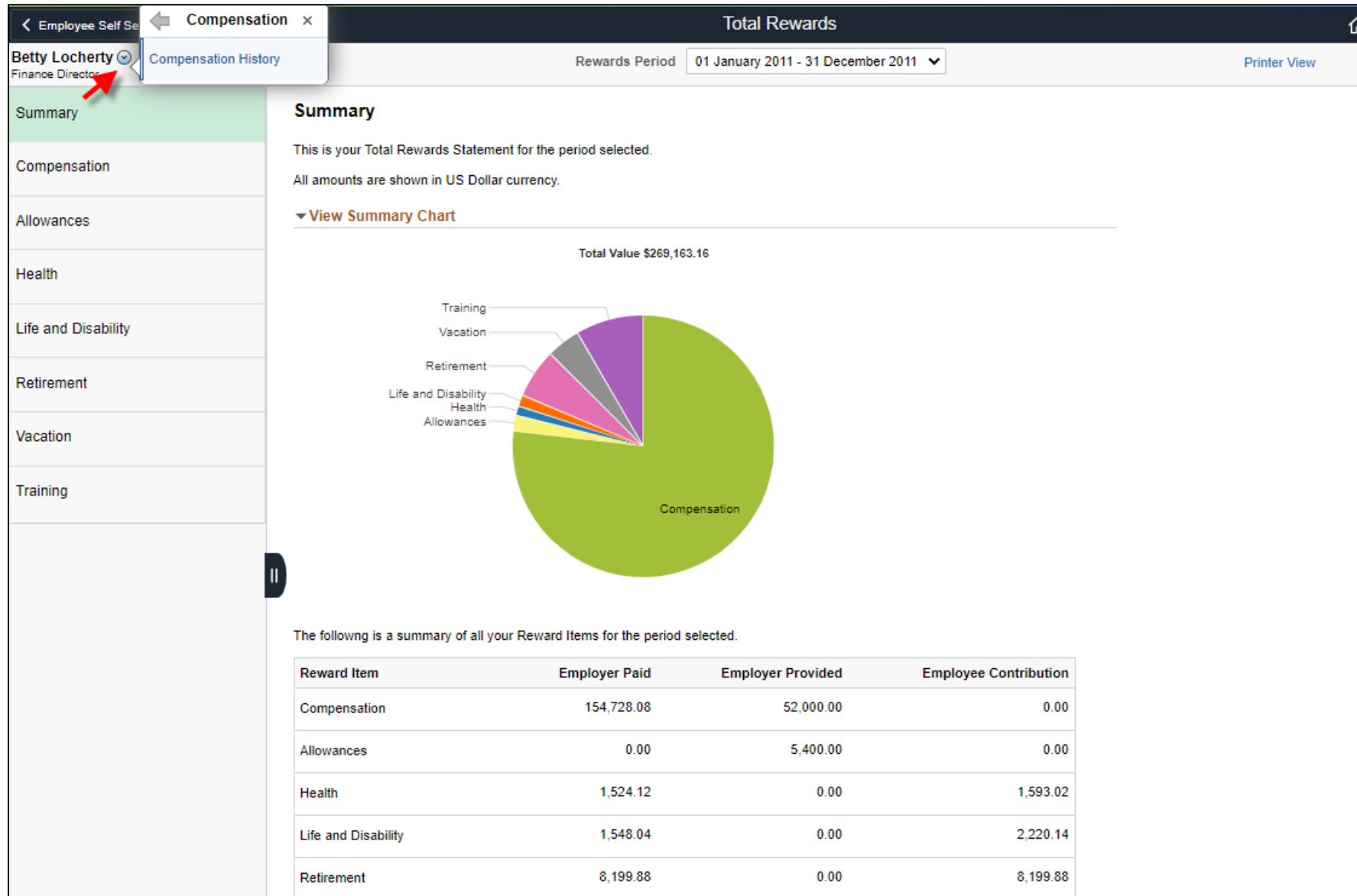
- [Employee Handbook: Health and Wellness](#)

Additionally, you may wish to review the plans offered by our providers:

- [All Shield Health](#)
- [United Medical Services Inc](#)
- [Med-Lan Dental Network](#)
- [VisPlus Vision Providers](#)



# Compensation History



# Compensation History

[< Total Rewards](#)

Compensation History

Betty Locherty

Finance Director

Apply

Reset

Grid Display Options

Salary Frequency

Annual

Annual

Daily

Hourly

Monthly

Filter Options

Source

Type

Job Title

Time Period

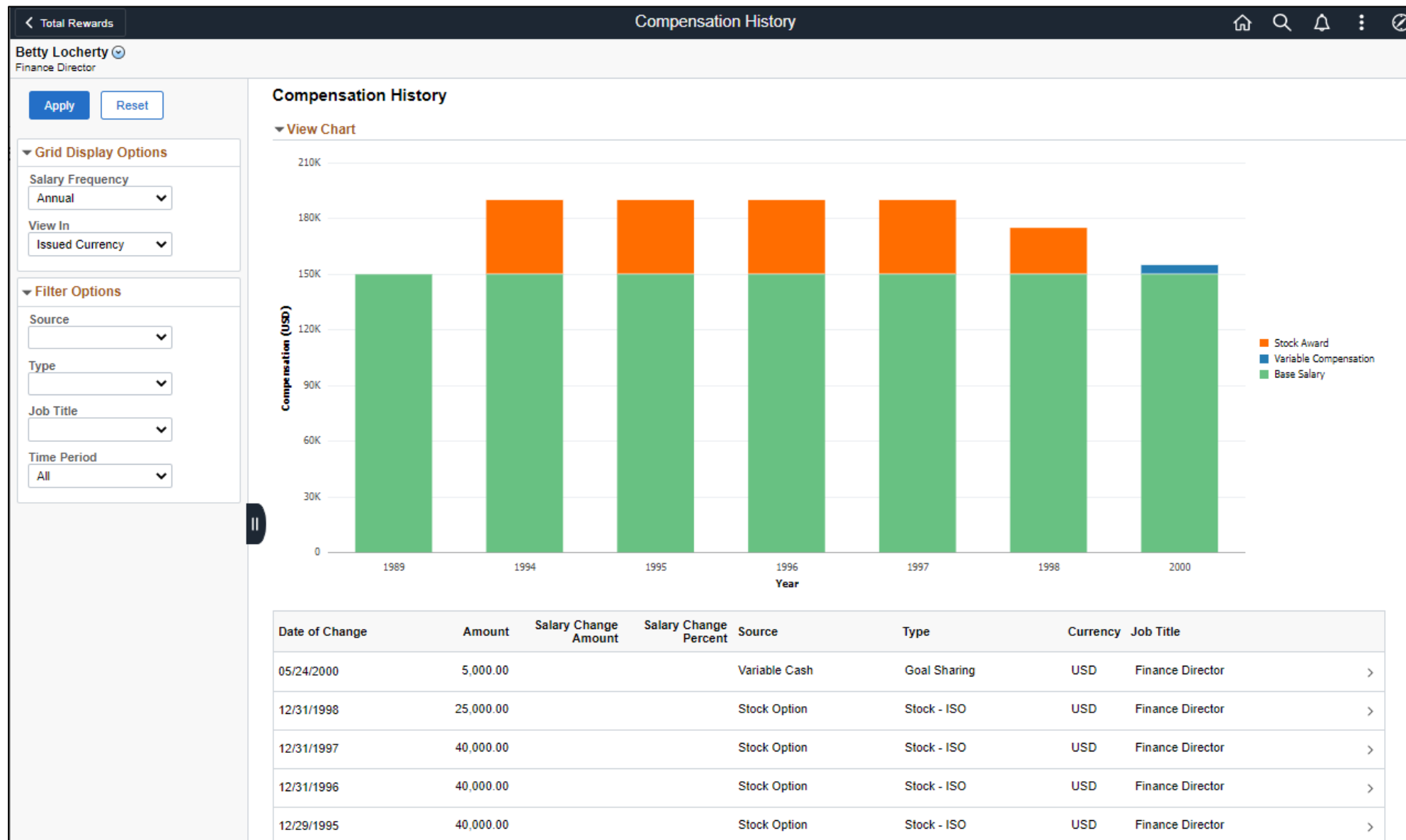
All

View Chart

Date of Change	Amount	Salary Change Amount	Salary Change Percent	Source	Type	Currency	Job Title	
05/24/2000	5,000.00			Variable Cash	Goal Sharing	USD	Finance Director	>
12/31/1998	25,000.00			Stock Option	Stock - ISO	USD	Finance Director	>
12/31/1997	40,000.00			Stock Option	Stock - ISO	USD	Finance Director	>
12/31/1996	40,000.00			Stock Option	Stock - ISO	USD	Finance Director	>
12/29/1995	40,000.00			Stock Option	Stock - ISO	USD	Finance Director	>
12/31/1994	40,000.00			Stock Option	Stock - ISO	USD	Finance Director	>
04/07/1989	150,000.00		0.0	Base Salary	Hire	USD	Finance Director	>



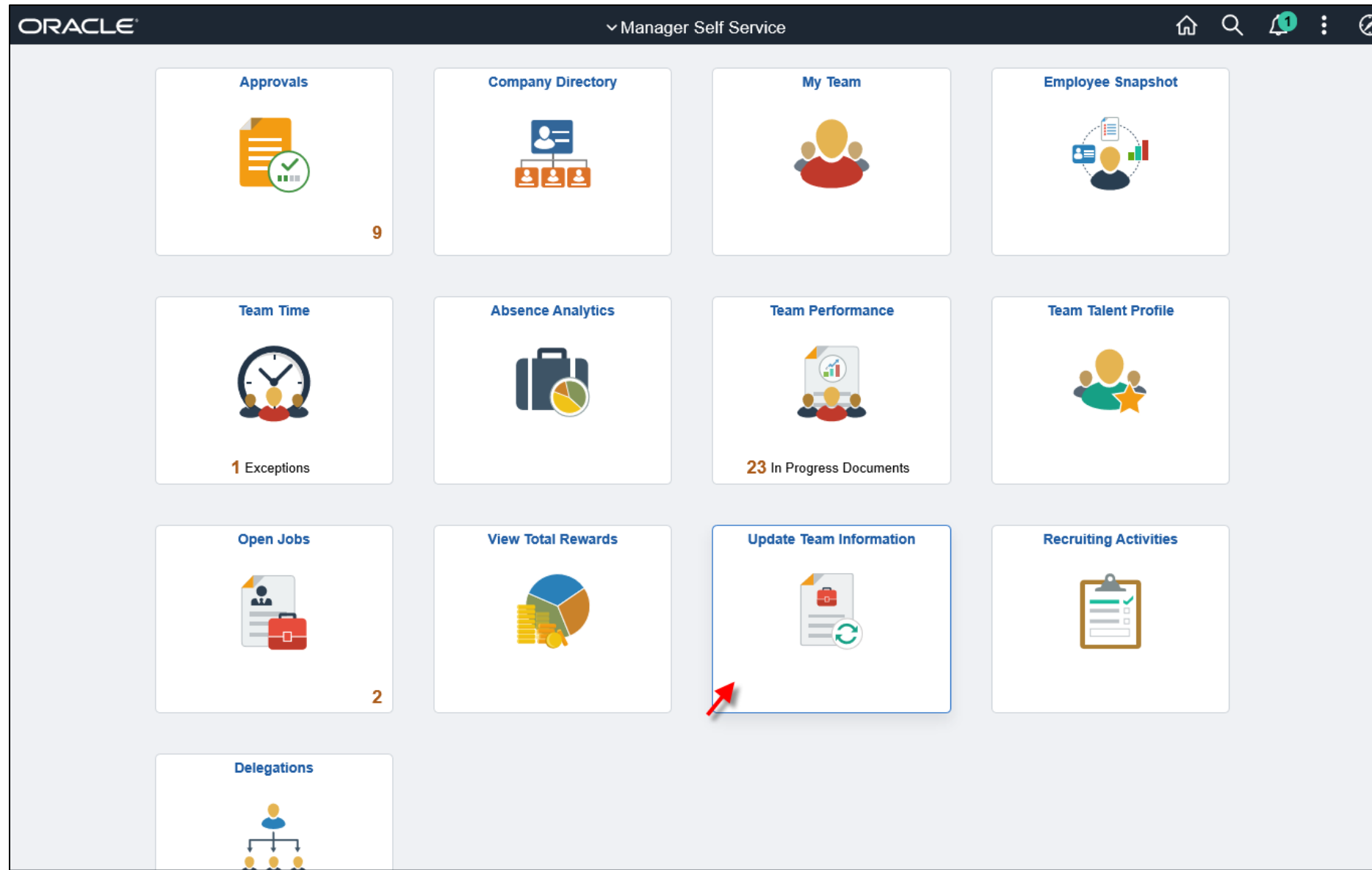
# Compensation History



## Manager Self Service

Update Team Information, Approvals and Delegation  
Employee Snapshot, My Team and Simplified Analytics

# Update Team Tile with Guided Self Service



# Update Team Info / Promote Employee

< Manager Self Service

Request Reporting Change

Transfer Employee

Promote Employee

Request Ad Hoc Salary Change

Request Location Change

Change Full/Part Time or Hours

Request Leave of Absence

Request Paid Leave of Absence

Retire Employee

Terminate Employee

Demote Employee

Position Clone

Update Job Details for Group

Update Team Information

Home

Search

Notifications

Menu











Refresh

Promote Employee

Search Options

Select Employee

9 rows

Name / Title / ID - Record	Directs / Total	Status / Type
 Cynthia Adams Corporate Controller KU0101 - 0	 2/2	Terminated Employee
 Diane Palmer Administrative Assistant K0MTX005 - 0		Active Employee >
 Jill Chancelor Payroll Manager KUL702 - 0	 23/25	Active Employee >
 Netty Owyang Manager-Accounting KU0055 - 0	 4/20	Active Employee >
 Pierre Potvin Senior Financial Analyst SI0008 - 0		Active Employee >
 Rosanna Channing Senior Accounting Manager KU0046 - 0	 8/66	Active Employee >



# Update Team Info / Promote Employee

Manager Self Service

Update Team Information

**Rosanna Channing**  
Senior Accounting Manager

Request Reporting Change

Transfer Employee

Promote Employee

Request Ad Hoc Salary Change

Request Location Change

Change Full/Part Time or Hours

Request Leave of Absence

Request Paid Leave of Absence

Retire Employee

Terminate Employee

Demote Employee

Position Clone

Update Job Details for Group

Questionnaire

What else do you want to change besides Job Title?

Are you changing Work Location details?

No

Are you changing the employee's Supervisor?

No

Are you changing Salary Information?

Yes

Next


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# Update Team Info / Promote Employee

✕ ExitPromote Employee1

**Rosanna Channing**  
Senior Accounting Manager

1

Job Detail

2

Compensation Detail

3

Review & Submit

Return to QuestionnaireNext >

### Work and Job Information

\*Transaction Date10/20/2020

\*ReasonOutstanding Performance

New Information

\*Position Title●Director Financial Services19000072

Job Title●Director Financial Services940062

Standard Hours40.00

FTE1.000000

Full/Part TimeFull-Time

Current Information

Senior Accounting Manager19360017

Senior Accounting Manager600135

40.00

1.000000

Full-Time

● Changes Made

\* Required Field

### Related Information

Add Analytics

Decision Support

Manager Resource Guide >

Compensation Guidelines >


Career Level Guidelines >

Promotion Approval Matrix >



# Update Team Info / Promote Employee

✕ ExitPromote Employee123

**Rosanna Channing**  
Senior Accounting Manager

Job Detail

Compensation Detail

Review & Submit

Return to Questionnaire< PreviousNext >

**Compensation Details**

Pay Component	Change Percent	Change Amount	New Amount	Current Amount	Currency Code	Type	Frequency
Default NA Annual	<input type="text" value="10.000"/>	<input type="text" value="9,400.00"/>	<input type="text" value="103,400.00"/>	94,000.00	USD	Flat Amount	Annual

103,400.00 Compa-Ratio:0.83

100,000.00  
Minimum

125,000.00  
Midpoint

175,000.00  
Maximum

**New Information**

Monthly Salary● 8,616.67 USD

Annual Rate● 103,400.00 USD

**Current Information**

7,833.33 USD

94,000.00 USD

● Changes Made

\* Required Field

# Promote Employee, Final Submit

✕ Exit


Promote Employee

1

2

3

1



**Rosanna Channing**  
Senior Accounting Manager

Job Detail

Compensation Detail

Review & Submit

Return to Questionnaire

< Previous

Submit

Review and Submit

Transaction Date10/20/2020

ReasonOutstanding Performance

New Information

Position Title ● Director Financial Services19000072

Job Title ● Director Financial Services940062

Standard Hours40.00

FTE1.000000

Full/Part TimeFull-Time

Monthly Salary ●8,616.67 USD

Annual Rate ●103,400.00 USD

Current Information

Senior Accounting Manager19360017

Senior Accounting Manager600135

40.00

1.000000

Full-Time

7,833.33 USD

94,000.00 USD

Comments

Please approve this promotion and increase.





● Changes Made


\* Required Field


# Update Team Information for a Group


< Manager Self Service


Update Team Information





 Request Reporting Change


 Transfer Employee


 Promote Employee


 Request Ad Hoc Salary Change


 Request Location Change


 Change Full/Part Time or Hours


 Request Leave of Absence


 Request Paid Leave of Absence

 Retire Employee

 Terminate Employee

 Demote Employee

 Position Clone











 Update Job Details for Group

### Update Job Details for Group

► Search Options

Select Employee

Continue

<input type="checkbox"/>	Name / Title / ID - Record	Directs / Total	Status / Type
<input type="checkbox"/>	 Cynthia Adams Corporate Controller KU0101 - 0	 2/2	Terminated Employee
<input type="checkbox"/>	 Diane Palmer Administrative Assistant K0MTX005 - 0		Active Employee
<input type="checkbox"/>	 Jill Chancelor Payroll Manager KUL702 - 0	 23/25	Active Employee
<input type="checkbox"/>	 Netty Owyang Manager-Accounting KU0055 - 0	 4/20	Active Employee
<input type="checkbox"/>	 Pierre Potvin Senior Financial Analyst SI0008 - 0		Active Employee
<input type="checkbox"/>	 Rosanna Channing Senior Accounting Manager KU0046 - 0	 8/66	Active Employee

# Update Team Information

< Manager Self Service

Request Reporting Change

Transfer Employee

Promote Employee

Request Ad Hoc Salary Change

Request Location Change

Change Full/Part Time or Hours

Request Leave of Absence

Request Paid Leave of Absence

Retire Employee

Terminate Employee

Demote Employee

Position Clone

Update Job Details for Group

Update Team Information

Home

Search











1

Update Job Details for Group

Search Options

Select Employee

Continue

<input type="checkbox"/>	Name / Title / ID - Record	Directs / Total	Status / Type
<input checked="" type="checkbox"/>	 Cynthia Adams Corporate Controller KU0101 - 0		Terminated Employee
<input checked="" type="checkbox"/>	 Diane Palmer Administrative Assistant K0MTX005 - 0		Active Employee
<input checked="" type="checkbox"/>	 Jill Chancelor Payroll Manager KUL702 - 0		Active Employee
<input type="checkbox"/>	 Netty Owyang Manager-Accounting KU0055 - 0		Active Employee
<input type="checkbox"/>	 Pierre Potvin Senior Financial Analyst SI0008 - 0		Active Employee
<input type="checkbox"/>	 Rosanna Channing Senior Accounting Manager KU0046 - 0		Active Employee



# Update Team Information

< Manager Self Service

Request Reporting Change

Transfer Employee

Promote Employee

Request Ad Hoc Salary Change

Request Location Change

Change Full/Part Time or Hours

Request Leave of Absence

Request Paid Leave of Absence

Retire Employee

Terminate Employee

Demote Employee

Position Clone

Update Job Details for Group












Update Team Information

Update Job Details for Group

Search Options

Select Employee

Continue

<input type="checkbox"/>	Name / Title / ID - Record	Directs / Total	Status / Type
<input checked="" type="checkbox"/>	 <b>Christelle Stevenson</b> Manager-Accounting KU0020 - 0	 14/14	Active Employee
<input checked="" type="checkbox"/>	 <b>Daryl Reese</b> Financial Analyst KU0044 - 0		Active Employee
<input type="checkbox"/>	 <b>David Ho</b> Senior Financial Analyst KU0121 - 0		Active Employee
<input type="checkbox"/>	 <b>Edmund Donahue</b> Manager-Accounting KU0102 - 0	 13/13	Active Employee
<input type="checkbox"/>	 <b>John Patterson</b> Manager-Revenue KU0131 - 0	 20/20	Active Employee
<input type="checkbox"/>	 <b>Mei Lee</b> Accountant KU0076 - 0	 11/11	Active Employee
<input type="checkbox"/>	 <b>Shawn Quilligan</b> Financial Analyst KU0039 - 0		Active Employee

# Update Team Information (Guided Self Service)

Manager Self Service

Request Reporting Change

Transfer Employee

Promote Employee

Request Ad Hoc Salary Change

Request Location Change

Change Full/Part Time or Hours

Request Leave of Absence

Request Paid Leave of Absence

Retire Employee

Terminate Employee

Demote Employee

Position Clone

Update Job Details for Group

Update Team Information

Home

Search

10

Next

Questionnaire

Are you changing the Department?

Yes

Are you changing Work Location details?





Yes

Are you changing the employee's Supervisor?

Yes

Selected Employees


2 rows

Name / Title	Business Unit	Department / Location	Supervisor	
 <b>Christelle Stevenson</b> Manager-Accounting	Global Business Institute BU	Accounts Receivable Corporation Headquarters	Rosanna Channing	
 <b>Daryl Reese</b> Financial Analyst	Global Business Institute BU	Corporate Accounting Corporation Headquarters	Rosanna Channing	



# Update Team Information (Guided Self Service)

✕ ExitUpdate Job Details for Group10

**Group Update**  
2 Employees

1

2

Job DetailReview & Submit

Return to QuestionnaireNext >

### Work and Job Information

\*Transaction Date

12/10/2020

New Information

\*Department●

Corporate Controller

11100

\*Location●

KUV LOCATION DEFAULT

KUV

Supervisor Name●

Irene Russell

KUV002

Current Information



Multiple Departments

Corporation Headquarters

Rosanna Channing

The selected supervisor does not have a position and cannot be automatically assigned as the manager for employees who are in positions. All position employees in your group will be sent to an administrator for processing.

▼ Selected Employees

Name / Title	Business Unit	Department / Location	Supervisor
 <b>Christelle Stevenson</b> Manager-Accounting	Global Business Institute BU	Accounts Receivable Corporation Headquarters	Rosanna Channing
 <b>Daryl Reese</b> Financial Analyst	Global Business Institute BU	Corporate Accounting Corporation Headquarters	Rosanna Channing

● Changes Made

\* Required Field

# Update Team Information (Guided Self Service)

✕ Exit

Update Job Details for Group

10

Group Update  
2 Employees

1

Job Detail

2

Review & Submit

Return to Questionnaire

< Previous

Submit

Review and Submit

Transaction Date 12/10/2020

New Information

Department Corporate Controller 11100

Location

Supervisor Name

Current Information

Multiple Departments

Related Information

Add Analytics

Decision Support

Comments

Selected Employees

Attachments

No documents have been attached.

Add Attachment

Changes Made

\* Required Field

File Attachment

✕

Choose From

My Device

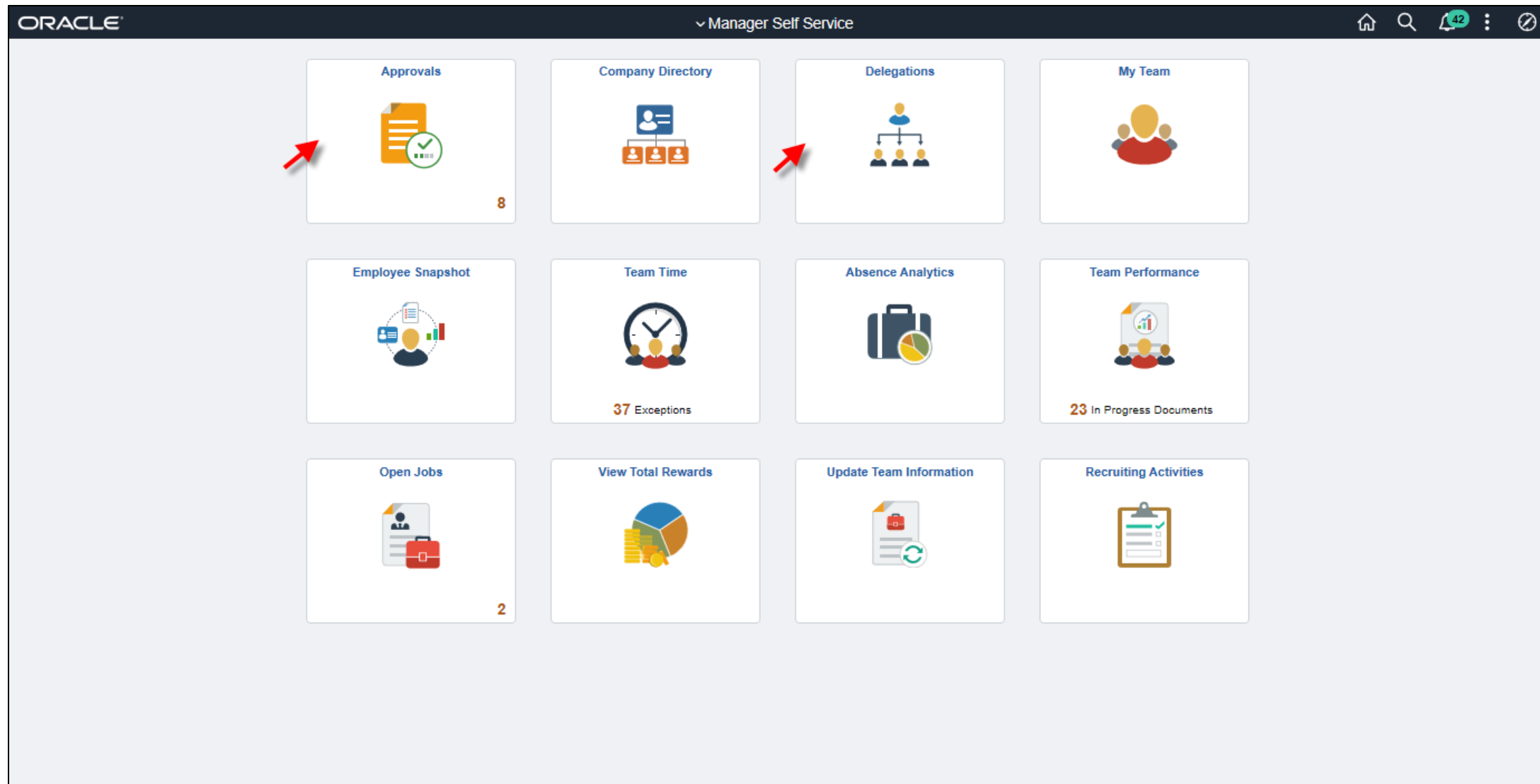
Upload Clear

ABC Corp Reorg Plan.pdf  
File Size: 254KB



## Approvals and Delegation






# Manager Approvals and Delegation




# Manager Approvals


< Manager Self Service


Pending Approvals





View By Type


 All 9


 Absence Request 4

 Cancel Absence 1

 Life Event 1

 MaritalStatusChange 2

 Performance 1



All






9 rows


<b>MaritalStatusChange</b> Vicki Zinn	To Single Effective 11/03/2016	Routed 11/03/2016	>
<b>MaritalStatusChange</b> Vicki Zinn	To Single Effective 11/03/2016	Routed 11/03/2016	>
<b>Performance</b> Chris Cameron	Meets Expectations 01/01/2018 To 12/31/2018	Routed 12/03/2017	>
<b>Absence Request</b> Christelle Stevenson	Vacation, 8 Hours - NA 12/26/2017	Routed 12/06/2017	>
<b>Absence Request</b> Christelle Stevenson	Vacation, 8 Hours - NA 12/12/2017	Routed 12/06/2017	>
<b>Absence Request</b> Christelle Stevenson	Vacation, 8 Hours - NA 03/01/2018	Routed 12/06/2017	>
<b>Cancel Absence</b> Fiona Thompson	Vacation, 8 Hours 01/04/2018	Routed 12/06/2017	>
<b>Absence Request</b> Christelle Stevenson	Vacation, 8 Hours - NA 01/12/2018	Routed 12/06/2017	>
<b>Life Event</b> Annie Mirzoyan	Marriage Certificate Effective 08/09/2020	Routed 08/13/2020	>

# Manager Approvals

[← Pending Approvals](#)

Performance





**Chris Cameron**  
Finance Specialist

Approve

Deny

**Performance Summary**

**Document Type** Annual Review

**Period Begin Date** 01/01/18

**Rating** Meets Expectations

**Manager** Edmund Donahue

**Period End Date** 12/31/18


[View Performance Detail](#)

**Approver Comments**

Approval Chain &gt;

# Manager Approvals

< Pending ApprovalsAbsence Request🏠🔍🔔 1⋮🔄



**Christelle Stevenson**  
Manager-Accounting

ApproveDenyPushback

### Absence Details

<b>Absence Name</b>	Vacation	<b>Reason</b>	Vacation
<b>Start Date</b>	12/26/2017	<b>End Date</b>	12/26/2017
<b>Partial Days</b>	None	<b>Duration</b>	8 Hours
<b>Current Balance</b>	622.00 Hours <a href="#">Disclaimer</a>	<span>Check Eligibility</span>	
		<a href="#">View Eligibility Details</a>	

▼ Requester Comments

There are no requester comments

Request History

>

Approver Comments






Approval Chain


>

# Manager Approvals

< Pending Approvals

Absence Request





**Christelle Stevenson**  
Manager-Accounting

Approve

Deny

Pushback

**Absence Details**

Absence Name

Vacation

Start Date


12/26/2017

Partial Days

None

Current Balance

622.00 Hours

 Discl

**Requester Comments**

There are no requester comments

Request History

>

**Approver Comments**

Approval Chain

>


**Approval Chain**

Abs Mgmt By Supervisor Id

▼ Absence Management


Pending

Abs Mgmt By Supervisor Id

 Skipped

No approvers found  
Absence By SupervisorId

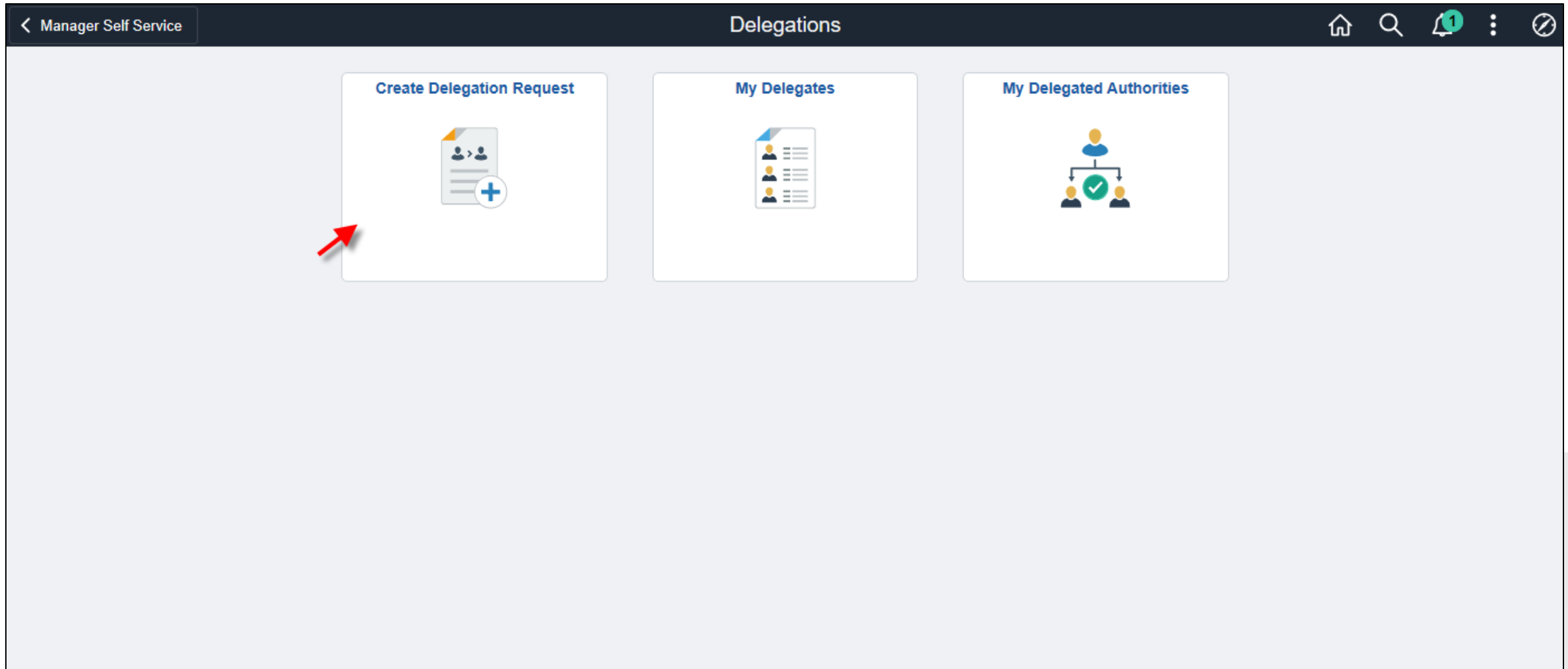
>

 Pending

Multiple Approvers  
Error Step

>

# Approval Delegation



# Approval Delegation

✕ Exit

Delegation Request

1

2

3

4

Delegation DatesDelegatesTransactionsReview and Submit

Next >

Step 1 of 4: Delegation Dates

\*Start Date09/30/2020

End Date10/09/2020

Leave blank for open-ended delegations

\*CommentPlease fill in for me while I am on vacation



# Approval Delegation

✕ ExitDelegation Request1⋮

1  
Delegation Dates

2  
Delegates

3  
Transactions







4  
Review and Submit

< PreviousNext >

Step 2 of 4: Delegates

6 rows

Select AllClear AllAdd Delegate

	Name	Email ID	Phone
<input type="checkbox"/>	 Jean Parsons	HCMGENUser1@ap6023fems.us.oracle.com	<a href="tel:8187282450">818/728-2450</a>
<input type="checkbox"/>	 May Gee		
<input type="checkbox"/>	 Netty Owyang	netty.owyang@xyzcompany.com	<a href="tel:9255556547">925.555.6547</a>
<input type="checkbox"/>	 Rebekah Jones		
<input checked="" type="checkbox"/>	 Rosanna Channing	brian.mcintyre@workstrategy.com	<a href="tel:9255551234">925.555.1234</a>
<input type="checkbox"/>	 Tina Palisco	tina.palisco@xyzcompany.com	<a href="tel:9256947971">925/694-7971</a>

# Approval Delegation

✕ ExitDelegation Request1:

1  
Delegation Dates

2  
Delegates

3  
Transactions

4  
Review and Submit

< PreviousNext >

**Step 3 of 4: Transactions**

AllApproveInitiate

67 rows

Select AllClear All

Description ▾

☐ Absence Cancellation

☒ Approve Ad Hoc Salary Change

☒ Approve Demotion

☐ Approve Full/Part Time or Hour

☐ Approve Job Offer

☐ Approve Job Opening

☐ Approve Job Update for Group

☐ Approve Life Event Documents

☐ Approve Location Change

☒ Approve Position Clone

☒ Approve Promotion

# Approval Delegation

✕ Exit

Delegation Request

1

1

2

3

4

Delegation Dates

Delegates

Transactions

Review and Submit

< Previous

Submit

Step 4 of 4: Review and Submit

Delegation Details

Start Date

09/30/2020

End Date

10/09/2020

Comment

Please fill in for me while I am on vacation

Delegates

Rosanna Channing

Transactions

Approve Ad Hoc Salary Change

Approve Demotion

Approve Position Clone

Approve Promotion

# My Delegates (Sent to Others)

< Delegations

My Delegates

Home

Search

1

Active

Accepted

Ended

Rejected

Revoked

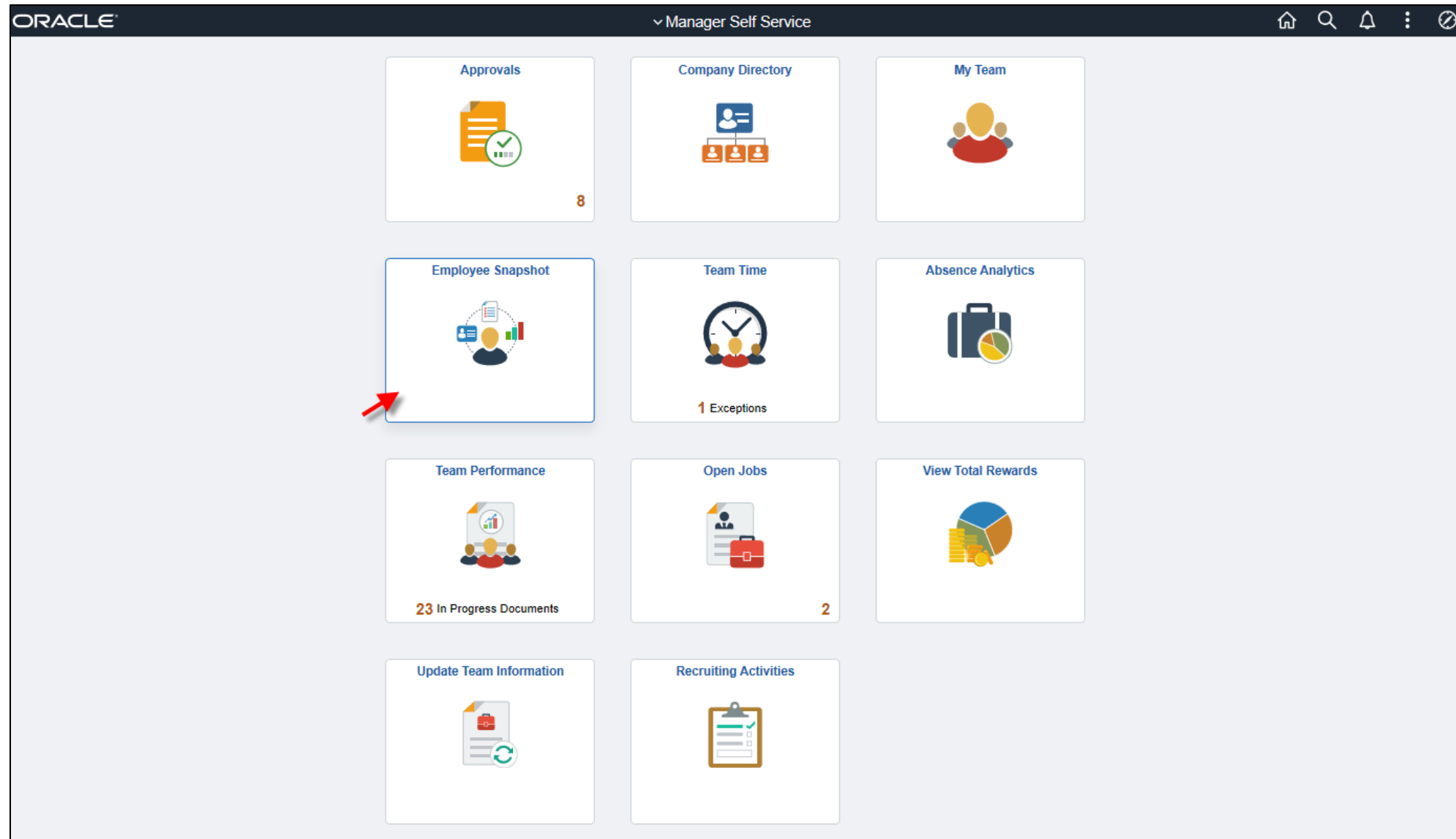
Submitted

Revoke

Transactions	Delegates	Start Date / End Date	Request Status	
<input type="checkbox"/> Approve Demotion, Approve Position Clone, Approve Promotion, Approve Ad Hoc Salary Change	Rosanna Channing	09/30/2020 10/09/2020	Submitted	>
<input type="checkbox"/> Update Performance Documents, Compensation Approvals	Jean Parsons	09/29/2020 10/09/2020	Submitted	>

## Employee Snapshot

# Manager Employee Snapshot



# Select Employee












< Manager Self Service

Employee Snapshot

Search Options

Select Employee





9 rows


Name / Title / ID	Directs / Total	Department	
 <b>Cynthia Adams</b> Corporate Controller KU0101	 2/2	Corporate Accounting	>
 <b>Diane Palmer</b> Administrative Assistant KOMTX005		Corporate Finance	>
 <b>Jill Chancelor</b> Payroll Manager KUL702	 23/25	Payroll	>
 <b>Netty Owyang</b> Manager-Accounting KU0055	 4/20	International Accounting	>
 <b>Pierre Potvin</b> Senior Financial Analyst SI0008		Corporate Finance	>
 <b>Rosanna Channing</b> Senior Accounting Manager KU0046	 8/66	Corporate Accounting	>
 <b>Steve Smith</b> SSMITH			>

# Employee Snapshot Summary


[Manager Self Service](#)


Employee Snapshot








**Rosanna Channing**  
Senior Accounting Manager  
[Select Different Employee](#)

 Summary

 Promotion Readiness

 Compensation Review

 Performance Review

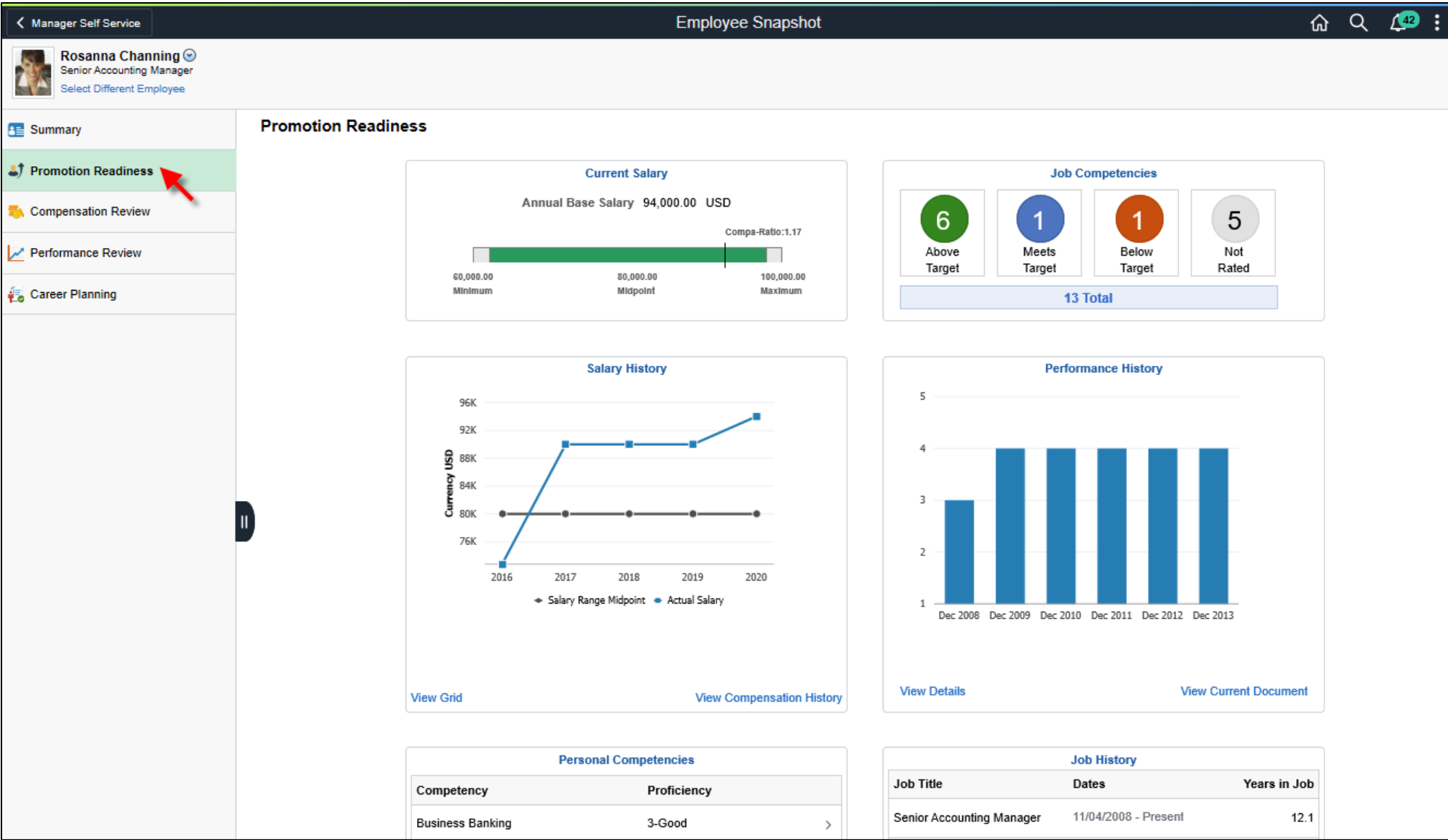
 Career Planning

## Summary

<div>Performance</div> <div><b>Exceeds Expectations</b></div> <div>Period <b>Jan 2013 - Dec 2013</b></div>	<div>Compensation</div> <div><b>94,000.00 USD</b></div> <div>Current Base Salary</div> <div>Last Change ▲ <b>01/01/2020</b></div>	<div>Job Details</div> <div><b>34.3</b> <b>12.1</b></div> <div>Years of Service Years in Current Job</div>	<div>Job Competencies</div> <div><b>7</b> At or Above Target</div> <div><b>1</b> Below Target</div> <div>Total <b>13</b></div>
<div>Personal Competencies</div> <div><b>2</b></div> <div>Total</div>	<div>Licenses and Certifications</div> <div><b>1</b> Current</div> <div><b>0</b> Expired</div> <div>Total <b>1</b></div>	<div>Responsibilities</div> <div><b>3</b></div> <div>Total</div>	<div>Honors and Awards</div> <div><b>1</b></div> <div>Total</div>
<div>Job Interests</div> <div><b>Finance Director</b></div> <div><b>0</b> More</div>	<div>Development</div> <div>There are no development documents for Rosanna Channing</div>	<div>Education</div> <div><b>Master of Business Admin</b></div> <div>06/30/1999</div> <div><b>1</b> More</div>	<div>Career Plans</div> <div><b>Finance Director</b></div> <div>Next Career Step</div> <div><b>1</b> Other Options</div>




# Employee Snapshot / Promotion Readiness



# Employee Snapshot / Total Rewards

Employee Snapshot



Rosanna Channing

Senior Accounting Manager

Select Different Employee

Apply

Reset

Grid Display Options

Salary Frequency  
Annual

View In  
Preferred Currency

Filter Options

Source

Type

Job Title

Time Period  
All

View Compensation History

View Chart

Date of Change	Amount	Salary Change Amount	Salary Change Percent	Source	Type	Currency	Job Title
01/06/2020	1,800.00			Variable Cash	Discretionary Bonus	USD	Senior Accounting Manager
01/01/2020	94,000.00	4,000.00	4.4	Base Salary	Pay Rate Change	USD	Senior Accounting Manager
12/20/2019	1,500.00			Variable Cash	Discretionary Bonus	USD	Senior Accounting Manager
01/01/2019	90,000.00		0.0	Base Salary	Pay Rate Change	USD	Senior Accounting Manager
04/01/2017	90,000.00	17,200.00	23.6	Base Salary	Data Change	USD	Senior Accounting Manager
05/01/2012	72,800.00		0.0	Base Salary	Pay Rate Change	USD	Senior Accounting Manager
07/01/2011	72,800.00	6,240.00	9.4	Base Salary	Pay Rate Change	USD	Senior Accounting Manager
02/11/2011	3,400.00			Variable Cash	Discretionary Bonus	USD	Senior Accounting Manager
07/01/2010	66,560.00	6,552.00	10.9	Base Salary	Pay Rate Change	USD	Senior Accounting Manager
02/15/2010	1,800.00			Variable Cash	Discretionary Bonus	USD	Senior Accounting Manager
02/15/2009	1,200.00			Variable Cash	Discretionary Bonus	USD	Senior Accounting Manager
08/29/1986	60,008.00		0.0	Base Salary	Hire	USD	Manager-Finance

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invest wisely. deliver more.

# Employee Snapshot / Career & Succession

Employee Snapshot

Employee Snapshot





Rosanna Channing

Senior Accounting Manager

Select Different Employee

Summary

Promotion Readiness

Compensation Review

Performance Review

Career Planning

Career Planning

Career Plans

Next Moves

Option Number	Job Title	Readiness
1	Finance Director	1 - 2 Years

Succession Plans

Successor For	Order	Readiness
Betty Locherty	1 of 3	Ready Now
Finance Director	1 of 3	Ready Now

View More

Job Competencies

6  
Above Target

1  
Meets Target

1  
Below Target

5  
Not Rated

13 Total

Employee Impact

Impact of Loss

Potential

Risk of Leaving

Performance

Job Interests

Job Profile

Finance Director

Personal Competencies

Competency	Proficiency
Business Banking	3-Good
Strategic Planning	4-Very Good

# Succession Planning

**ORACLE** Succession 360

Succession Plan Type: ☒ Person ☐ Position ☐ Job Code [Return to Select Employees](#)

Key Person ☒ Ready Now ☐ 1-2 Years ☐ 3-5 Years ☐ Emergency

**Betty Locherty**  
Finance Director

**Rosanna Channing**  
Senior Accounting Manager  
Impact of Loss: High  
Risk of Leaving: High  
Successors (5)

**John Patterson**  
Manager-Executive  
Succession Readiness: ☒  
Impact of Loss: High  
Risk of Leaving: High

**Daryl Reese**  
Financial Analyst  
Succession Readiness: ☐  
Impact of Loss: High  
Risk of Leaving: Medium

**Derek Holsinger**  
Accountant  
Succession Readiness: ☐  
Impact of Loss: Medium  
Risk of Leaving: Medium

**David Ho**  
Senior Financial Analyst  
Impact of Loss: Medium  
Risk of Leaving: Medium

**Rosanna Channing - Senior Accounting Manager**

Person Details | Compare To Role | Performance and Career

**Rosanna Channing**  
Senior Accounting Manager

Person ID: KU0046  
Location: Corporation Headquarters  
Business Address: 320 Madison Ave #30 New York, NY 10022  
Business Phone: 925.555.1234  
Mobile Phone: 925.555.1111

Department: Corporate Accounting  
Years of Service: 34.3  
Talent Category: Achiever ★★☆☆

Go To:

**Successor Details - Rosanna Channing**

Successors | Compare to Incumbent | **Ratings Box**

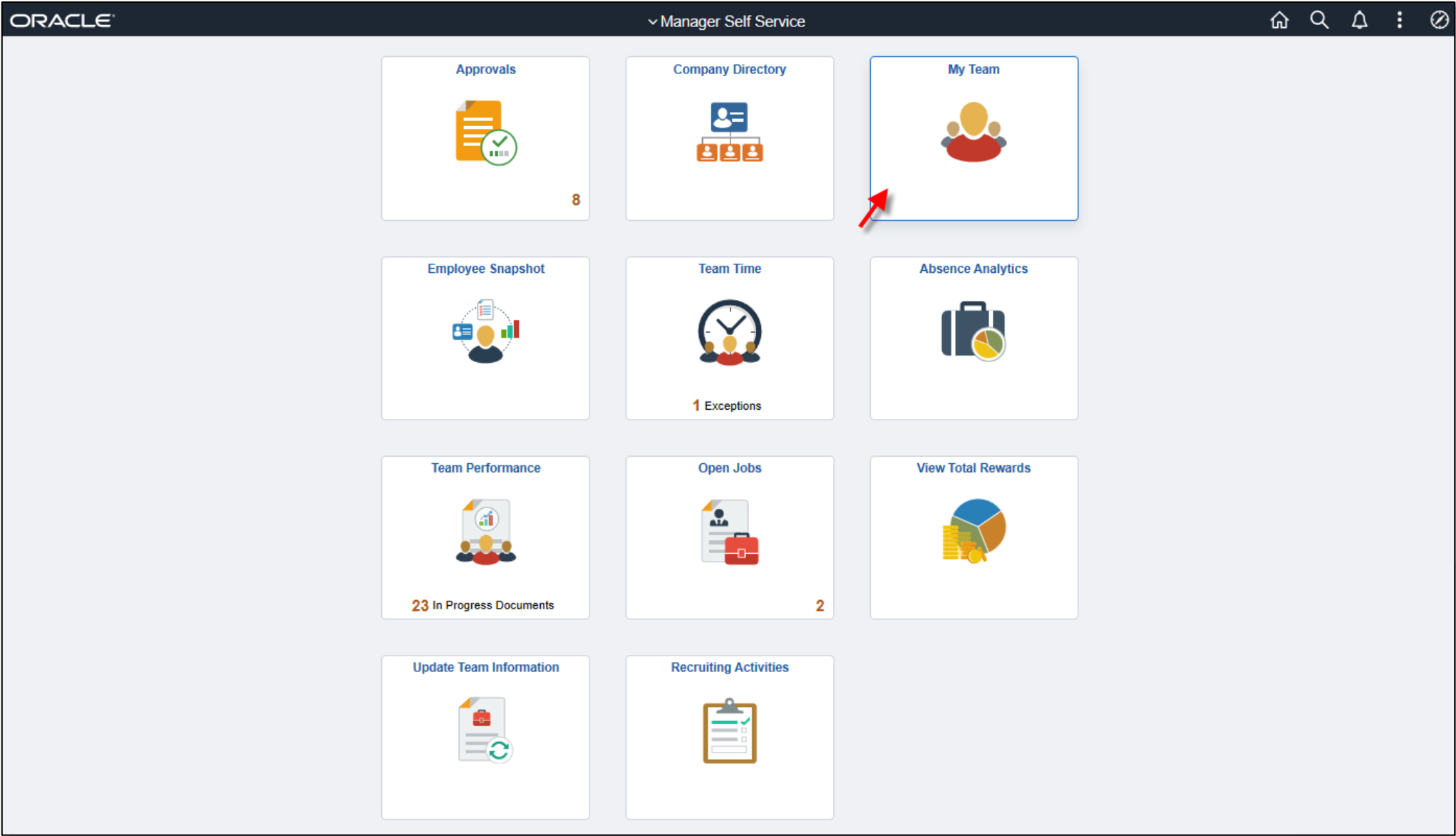
☒ Performance Vs. Potential ☐ Behavior Vs. Influence ☐ Performance Vs. Potential

PERFORMANCE V S. POTENTIAL (KU8PRB01)

POTENTIAL	LOW	MEDIUM	HIGH
LOW			
MEDIUM		Derek Holsinger	
HIGH			Daryl Reese Max Loh

The following active candidates do not have box ratings: Vicki Zinn, John Patterson.

## My Team



# My Team / Summary

< My Team

My Team

Betty Locherty

Change Team

Finance Director

Summary















Performance

Compensation

Leave Balances

📅

📊


Name / Title	Directs / Total	Department / Location	Email / Phone
 <b>Cynthia Adams</b> ⌵ Corporate Controller		Corporate Accounting Corporation Headquarters	<a href="mailto:cynthia.adams@xyzcompany.com">cynthia.adams@xyzcompany.com</a> 925/694-7901
 <b>Diane Palmer</b> ⌵ Administrative Assistant		Corporate Finance Corporation Headquarters	
 <b>Jill Chancelor</b> ⌵ Payroll Manager		Payroll Corporation Headquarters	<a href="mailto:jill.chancelor@xyzcompany.com">jill.chancelor@xyzcompany.com</a> 555.555.3344
 <b>Netty Owyang</b> ⌵ Manager-Accounting		International Accounting Corporation Headquarters	<a href="mailto:netty.owyang@xyzcompany.com">netty.owyang@xyzcompany.com</a> 925.555.6547
 <b>Pierre Potvin</b> ⌵ Senior Financial Analyst		Corporate Finance Montreal Office	
 <b>Rosanna Channing</b> ⌵ Senior Accounting Manager		Corporate Accounting Corporation Headquarters	<a href="mailto:Rosanna.Channing@oraclesample.com">Rosanna.Channing@oraclesample.com</a> 925.555.1234
 <b>Steve Smith</b> ⌵			
 <b>Susan Hoinck</b> ⌵ Senior Financial Analyst		Corporate Finance Corporation Headquarters	<a href="mailto:susan.hoinck@xyzcompany.com">susan.hoinck@xyzcompany.com</a> 925.555.3654
 <b>Tina Palisco</b> ⌵ Manager-Accounting		Corporate Consolidations Corporation Headquarters	<a href="mailto:tina.palisco@xyzcompany.com">tina.palisco@xyzcompany.com</a> 925/694-7971

Related Information

Add Analytics

WS ONE

Current Headcount Profile

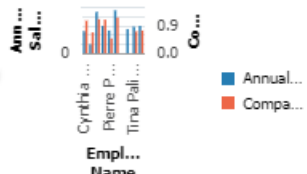


Headcount Movement

Performance Status

Performance vs. Compa-Ratio

Current Salary Analysis



Leave Balances by Type

Manager Self Service
My Team

Betty Locherty Change Team  
Finance Director

Summary Performance Compensation Leave Balances

Actions

- Time Management
- Job and Personal Information
- Compensation
- Development
- Performance Management
- View Employee Snapshot
- Notify Employee

Name / Title	Rating	Period	Impact of Loss	Risk of Leaving
Rosanna Channing Senior Accounting Manager	Exceeds Expectations	01/01/2020 12/31/2020	High	High
Jill Chancellor Payroll Manager	Exceeds Expectations	01/01/2011 12/31/2011	Medium	Low

My Team

Performance Documents

New Window Help Personal

Performance Documents  
Listed are all the performance documents for the employee you selected.

1-7 of 7

Name	Document Type	Document Status	Period Begin	Period End	Job Title	Manager	Rating
Cynthia Adams	Annual Review	Track Progress - Checkpoint 1	01/01/2014	12/31/2014	Corporate Controller	Betty Locherty	
Cynthia Adams	Annual Review	Track Progress - Checkpoint 1	01/01/2012	01/31/2012	Corporate Controller	Betty Locherty	
Cynthia Adams	Annual Review	Completed	01/01/2011	12/31/2011	Corporate Controller	Betty Locherty	Company Maker
Cynthia Adams	Performance Document	Define Criteria	01/01/2009	12/31/2009	Corporate Controller	Betty Locherty	
Cynthia Adams	Performance Document	Completed	01/01/2008	12/31/2008	Corporate Controller	Betty Locherty	4-Very Good
Cynthia Adams	Performance Review	Completed	01/01/2001	12/31/2001	Officer-Loan	Betty Locherty	Company Maker
Cynthia Adams	Update Profile Management	Define Criteria	01/01/2001	12/01/2001	Officer-Loan	Betty Locherty	



# Compensation

Manager Self Service

My Team

Betty Locherty

Change Team

Finance Director

Summary

Performance

Compensation

Leave Balances

\$ €

Name / Title	Compa Ratio	Current Salary	Midpoint	Minimum / Maximum	Position in Se
<div><div></div><div><div>Rosanna Channing</div><div>Senior Accounting Manager</div></div></div> <div>1.17</div> <div>94,000.00 USD</div> <div>80,000.00</div> <div>60,000.00 100,000.00</div> <div><div></div><div></div></div>					
<div><div></div><div><div>Jill Chancelor</div><div>Payroll Manager</div></div></div> <div>1.12</div> <div>90,000.00 USD</div> <div>80,000.00</div> <div>60,000.00 100,000.00</div> <div><div></div><div></div></div>					
<div><div></div><div><div>Netty Owyang</div><div>Manager-Accounting</div></div></div> <div>1.10</div> <div>60,008.00 USD</div> <div>54,499.50</div> <div>49,000.00 59,999.00</div> <div><div></div><div></div></div>				4	
<div><div></div><div><div>Cynthia Adams</div><div>Corporate Controller</div></div></div> <div>1.07</div> <div>48,006.36 USD</div> <div>44,999.50</div> <div>41,000.00 48,999.00</div> <div><div></div><div></div></div>				4	
<div><div></div><div><div>Tina Palisco</div><div>Manager-Accounting</div></div></div> <div>0.72</div> <div>58,000.00 USD</div> <div>80,000.00</div> <div>60,000.00 100,000.00</div> <div><div></div><div></div></div>				1	
<div><div></div><div><div>Diane Palmer</div><div>Administrative Assistant</div></div></div> <div>0.69</div> <div>19,600.00 USD</div> <div>28,499.50</div> <div>24,000.00 32,999.00</div> <div><div></div><div></div></div>				1	
<div><div></div><div><div>Pierre Potvin</div><div>Senior Financial Analyst</div></div></div> <div>0.49</div> <div>38,045.11 USD</div> <div>80,000.00</div> <div>60,000.00 100,000.00</div> <div><div></div><div></div></div>				1	

Sort

Name

Title

Compa-Ratio

Current Salary

Currency

Midpoint

Minimum

Maximum

Quartile

# Leave Balances

< Manager Self Service

My Team

Home

Search

43

Betty Locherty

Change Team









Finance Director

Summary

Performance

Compensation

Leave Balances

Name / Title	Balances
<div><div></div><div><div>Cynthia Adams</div><div>Corporate Controller</div></div></div>	<div><div>Sick Leave</div><div>64.00 Hours</div></div> <div><div>Sick Balance Hrs</div><div>96.00 Hours</div></div> <div><div>Family and Medical Leave Act</div><div>0.00 Hours</div></div> <div><div>Vacation</div><div>162.00 Hours</div></div> <div><div>Vacations Balance Hrs</div><div>1,115.73 Hours</div></div> <div><div>View More Balances</div></div>
<div><div></div><div><div>Diane Palmer</div><div>Administrative Assistant</div></div></div>	<div><div>No leave balances exist</div></div>
<div><div></div><div><div>Jill Chancelor</div><div>Payroll Manager</div></div></div>	<div><div>No leave balances exist</div></div>
<div><div></div><div><div>Netty Owyang</div><div>Manager-Accounting</div></div></div>	<div><div>Sick Leave</div><div>64.00 Hours</div></div> <div><div>Sick Balance Hrs</div><div>3.69 Hours</div></div> <div><div>Family and Medical Leave Act</div><div>0.00 Hours</div></div> <div><div>Vacation</div><div>162.00 Hours</div></div> <div><div>Vacations Balance Hrs</div><div>1,188.92 Hours</div></div> <div><div>View More Balances</div></div>
<div><div></div><div><div>Pierre Potvin</div><div>Senior Financial Analyst</div></div></div>	<div><div>No leave balances exist</div></div>
<div><div></div><div><div>Rosanna Channing</div><div>Senior Accounting Manager</div></div></div>	<div><div>Sick Leave</div><div>64.00 Hours</div></div> <div><div>Sick Balance Hrs</div><div>16.00 Hours</div></div> <div><div>Family and Medical Leave Act</div><div>0.00 Hours</div></div> <div><div>Vacation</div><div>162.00 Hours</div></div> <div><div>Vacations Balance Hrs</div><div>922.66 Hours</div></div> <div><div>View More Balances</div></div>
<div><div></div><div><div>Steve Smith</div></div></div>	<div><div>No leave balances exist</div></div>
<div><div></div><div><div>Susan Hoinck</div><div>Senior Financial Analyst</div></div></div>	<div><div>Sick Leave</div><div>64.00 Hours</div></div> <div><div>Sick Balance Hrs</div><div>3.69 Hours</div></div> <div><div>Family and Medical Leave Act</div><div>0.00 Hours</div></div> <div><div>Vacation</div><div>162.00 Hours</div></div> <div><div>Vacations Balance Hrs</div><div>1,086.19 Hours</div></div> <div><div>View More Balances</div></div>

## Simplified Analytics/Kibana

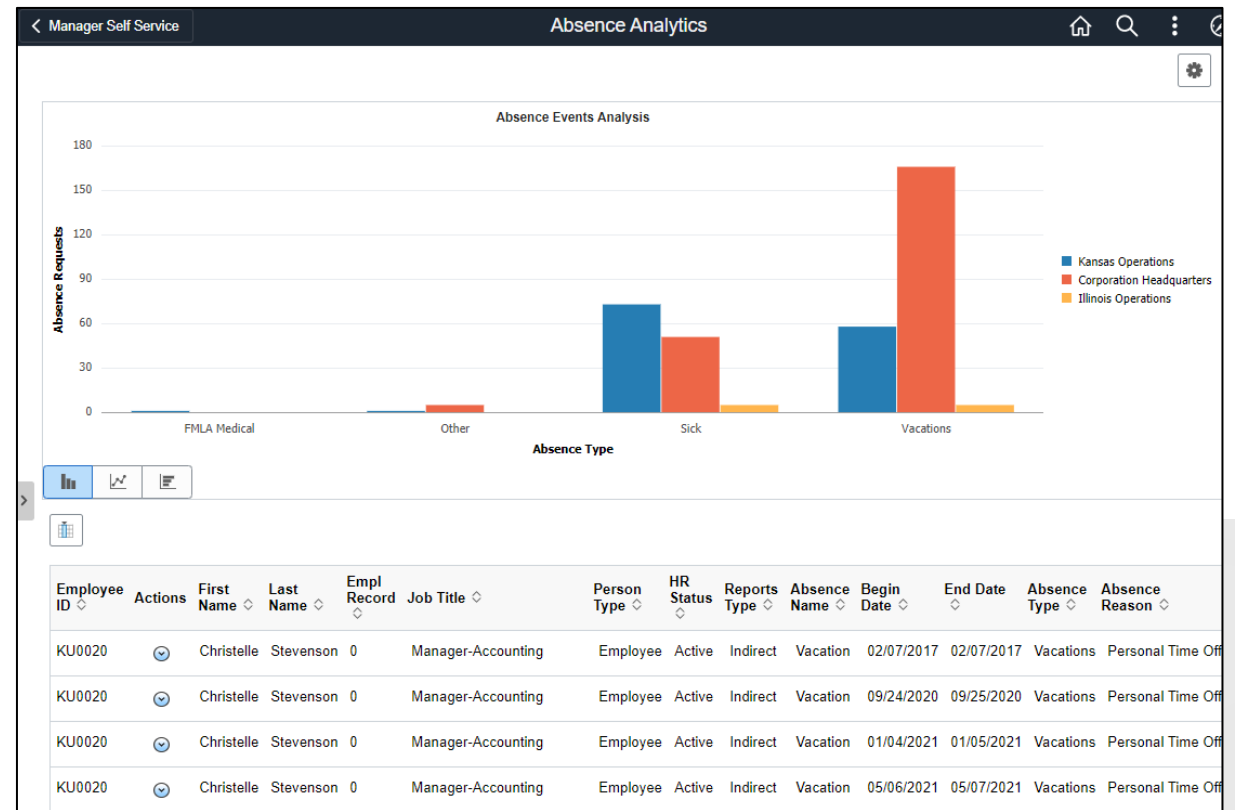
# Types of Simplified Analytics

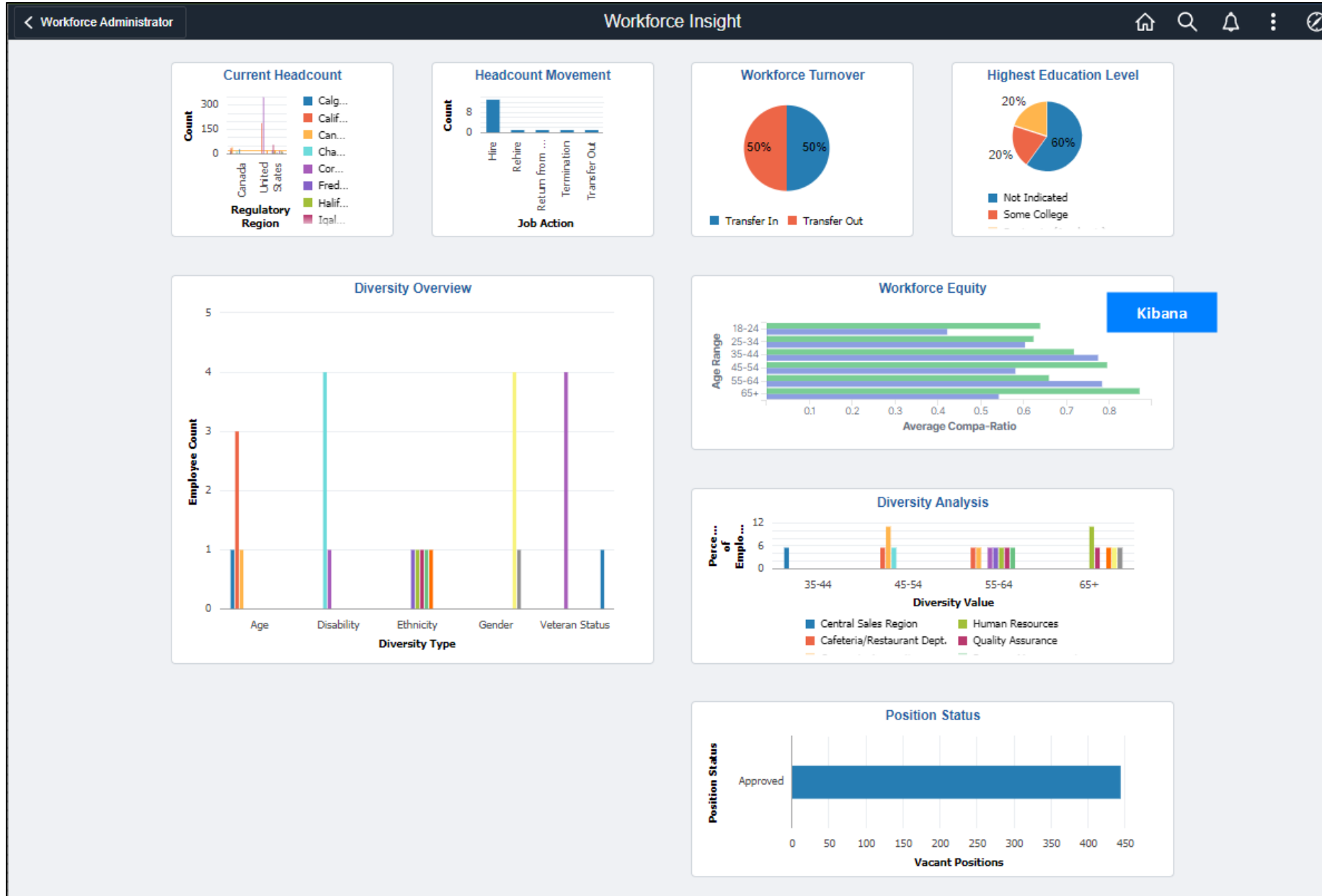
Simplified Analytics that are created by users using the **Add Analytics** side panel option

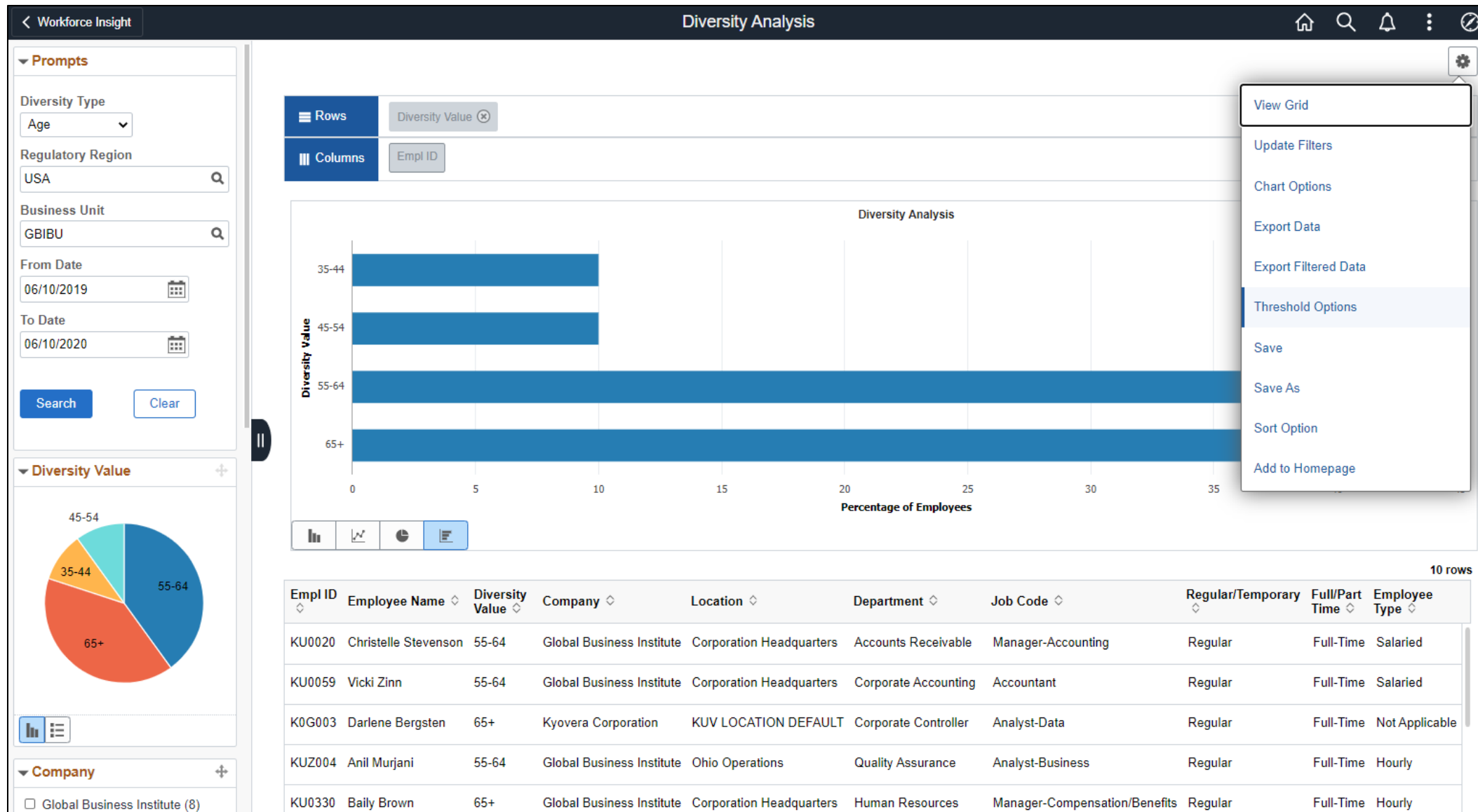
- Users can select filters, link to other HCM transactions, change chart views, export analyzed data, save personalizations, and publish results

Simplified Analytics created by administrators for more complicated queries and analysis

- Requires more knowledge of efficient query design, **Pivot Grid Wizard**, **Related Content** definition, security, Fluid page integration







# Select the Add Analytics Button

< My Team

My Team

Home

Search

Notifications

More

Settings

Betty Locherty [Change Team](#)  
Finance Director

Summary

Performance
























Compensation

Leave Balances

Calendar


Grid

↑↓

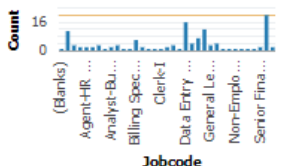
Name / Title	Directs / Total	Department / Location	Email / Phone	Today's Status
 <b>Cynthia Adams</b>  Corporate Controller	 2/2	Corporate Accounting Corporation Headquarters	<a href="mailto:cynthia.adams@xyzcompany.com">cynthia.adams@xyzcompany.com</a> 925/694-7901	
 <b>Diane Palmer</b>  Administrative Assistant		Corporate Finance Corporation Headquarters		
 <b>Jill Chancelor</b>  Payroll Manager	 23/25	Payroll Corporation Headquarters	<a href="mailto:jill.chancelor@xyzcompany.com">jill.chancelor@xyzcompany.com</a> 555.555.3344	
 <b>Netty Owyang</b>  Manager-Accounting	 4/20	International Accounting Corporation Headquarters	<a href="mailto:netty.owyang@xyzcompany.com">netty.owyang@xyzcompany.com</a> 925.555.6547	
 <b>Pierre Potvin</b>  Senior Financial Analyst		Corporate Finance Montreal Office		
 <b>Rosanna Channing</b>  Senior Accounting Manager	 8/66	Corporate Accounting Corporation Headquarters	<a href="mailto:Rosanna.Channing@oraclesample.com">Rosanna.Channing@oraclesample.com</a> 925.555.1234	
 <b>Steve Smith</b>  				
 <b>Susan Hoinck</b>  Senior Financial Analyst		Corporate Finance Corporation Headquarters	<a href="mailto:susan.hoinck@xyzcompany.com">susan.hoinck@xyzcompany.com</a> 925.555.3654	
 <b>Tina Palisco</b>  Manager-Accounting	 4/4	Corporate Consolidations Corporation Headquarters	<a href="mailto:tina.palisco@xyzcompany.com">tina.palisco@xyzcompany.com</a> 925/694-7971	

Related Information

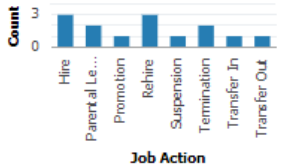
Add Analytics




Current Headcount Profile




Headcount Movement



Perf vs. Compa



Current Salary Analysis



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# Name Your Analytic, Select Type, Chart Options

Manager Self Service

My Team

### Create Analytics

Next

\*Analytics Name: Headcount by Job

\*What kind of analytics would you like to create?

Current Headcount Profile- Mgr  
Current Headcount Profile- Mgr  
Headcount Movement - Manager

Display Option

Would you like to use a chart? Yes

Would you like to use a simple table? Yes

Would you like to use a pivot grid? No



# Creating a New Simplified Analytic

Manager Self Service | My Team

## Create Analytics

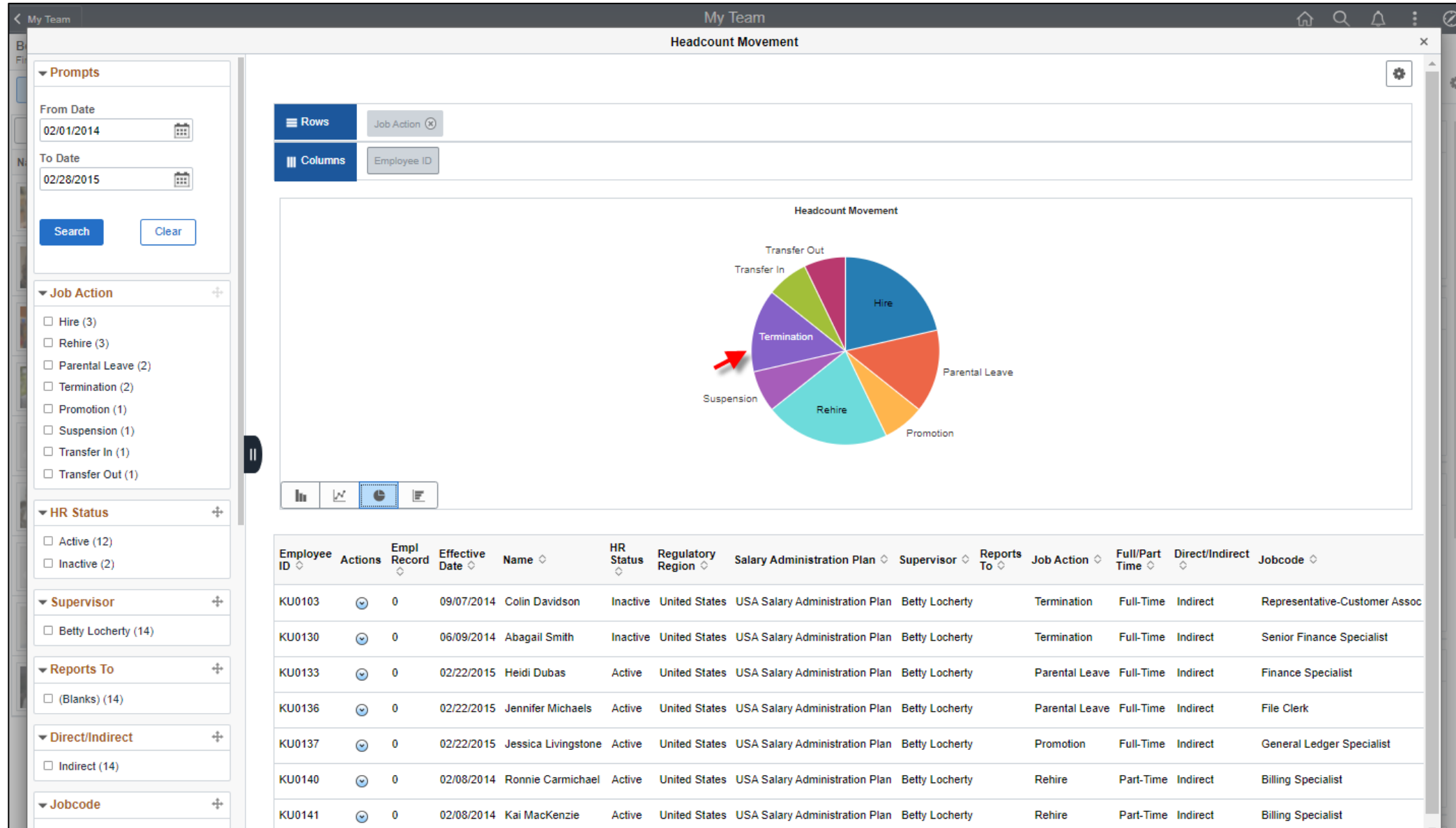
Previous Next

\*Analytics Name

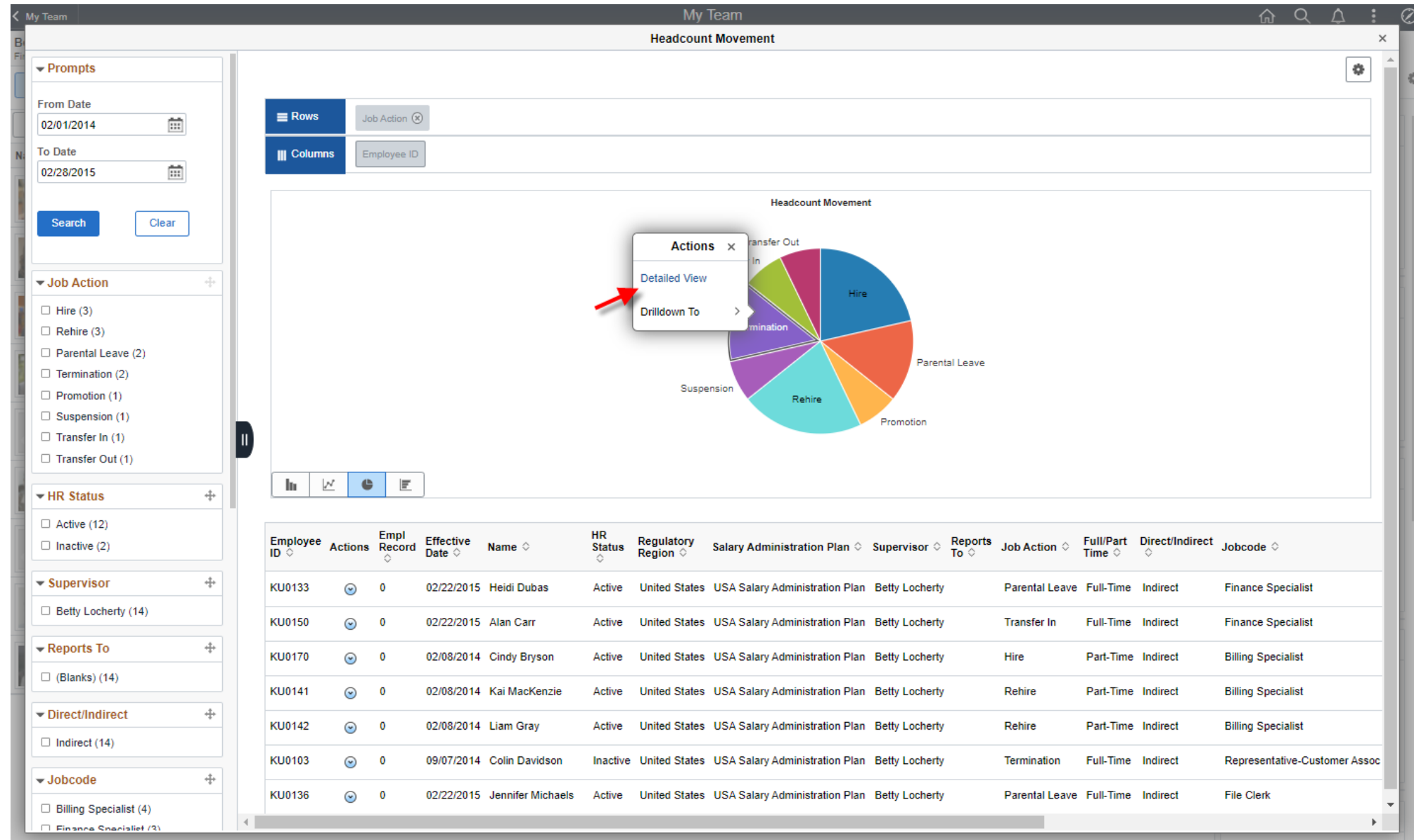
### Choose Fields

<input checked="" type="checkbox"/> Employee ID	<input checked="" type="checkbox"/> Empl Record
<input type="checkbox"/> Effective Date	<input checked="" type="checkbox"/> Name
<input checked="" type="checkbox"/> Salary Administration Plan	<input type="checkbox"/> Organizational Relationship
<input type="checkbox"/> Job Action	<input checked="" type="checkbox"/> HR Status
<input checked="" type="checkbox"/> Supervisor	<input checked="" type="checkbox"/> Reports To
<input checked="" type="checkbox"/> Full/Part Time	<input checked="" type="checkbox"/> Direct/Indirect
<input checked="" type="checkbox"/> Jobcode	<input checked="" type="checkbox"/> Position
<input checked="" type="checkbox"/> Department	<input type="checkbox"/> Establishment
<input checked="" type="checkbox"/> Location	

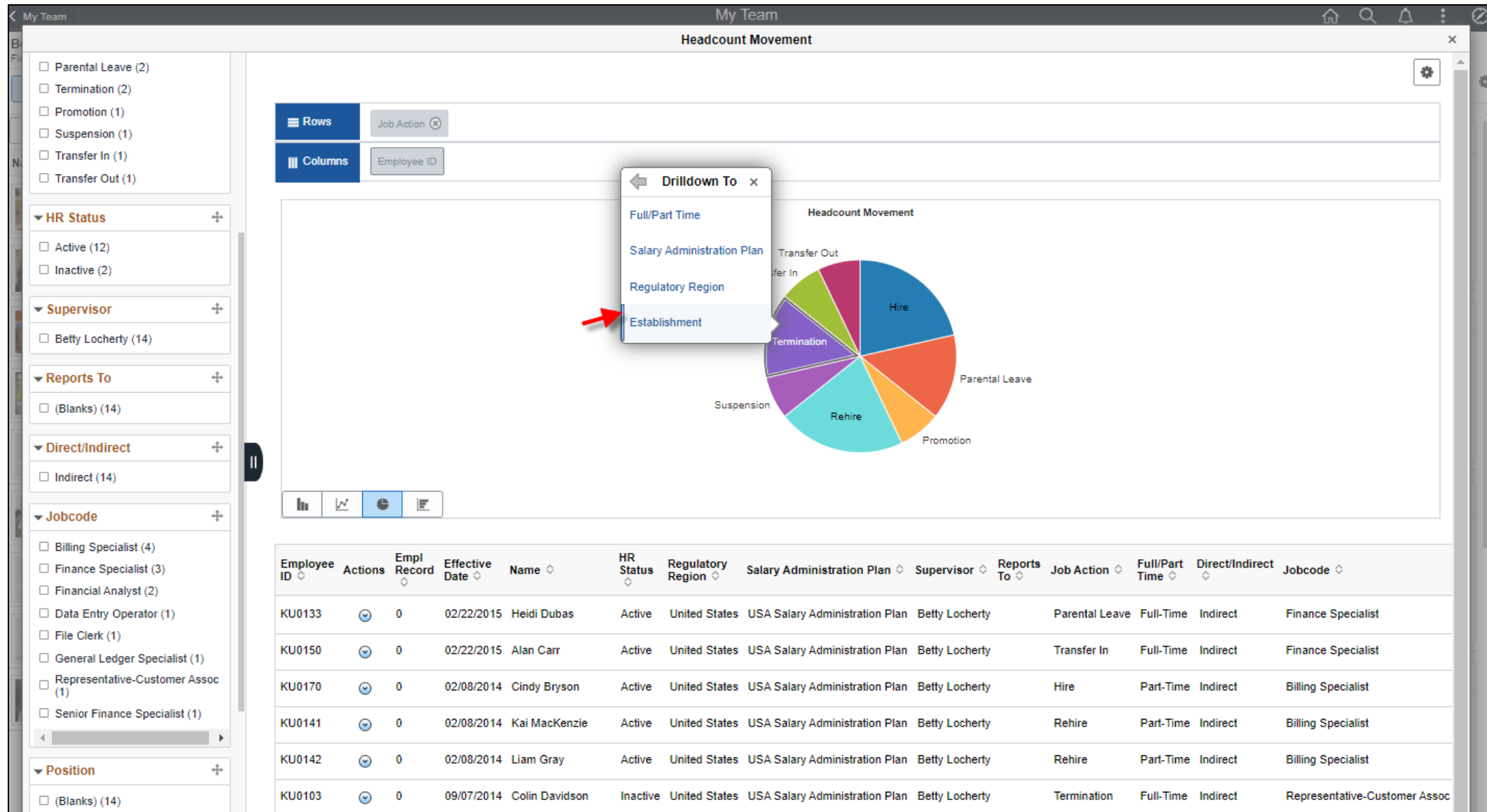
# Design is Intuitive and Configurable



# Design is Intuitive and Configurable



# Design is Intuitive and Configurable



# Select Related Actions from Analytic Data

My Team

## Headcount Movement

From Date: 02/01/2014 To Date: 02/28/2015

Search Clear

**Job Action**

- ☐ Hire (3)
- ☐ Rehire (3)
- ☐ Parental Leave (2)
- ☐ Termination (2)
- ☐ Promotion (1)
- ☐ Suspension (1)
- ☐ Transfer In (1)
- ☐ Transfer Out (1)

**HR Status**

- ☐ Active (12)
- ☐ Inactive (2)

**Supervisor**

- ☐ Betty Locherty (14)

**Reports To**

- ☐ (Blanks) (14)

**Direct/Indirect**

- ☐ Indirect (14)

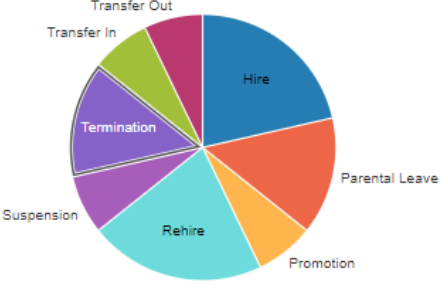
**Jobcode**

- ☐ Billing Specialist (4)
- ☐ Finance Specialist (3)

**Rows** Job Action

**Columns** Employee ID

**Headcount Movement**

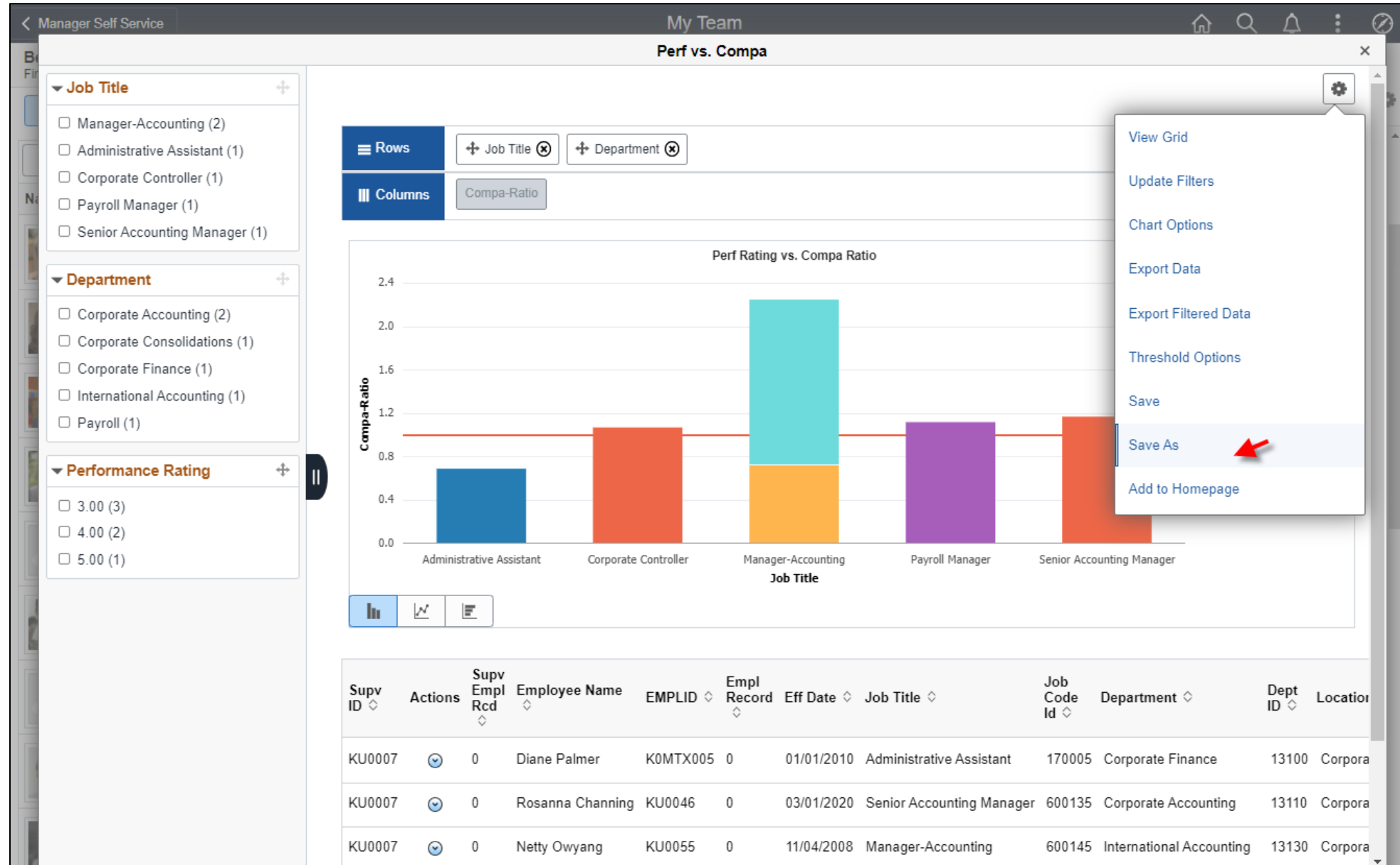


**Actions**

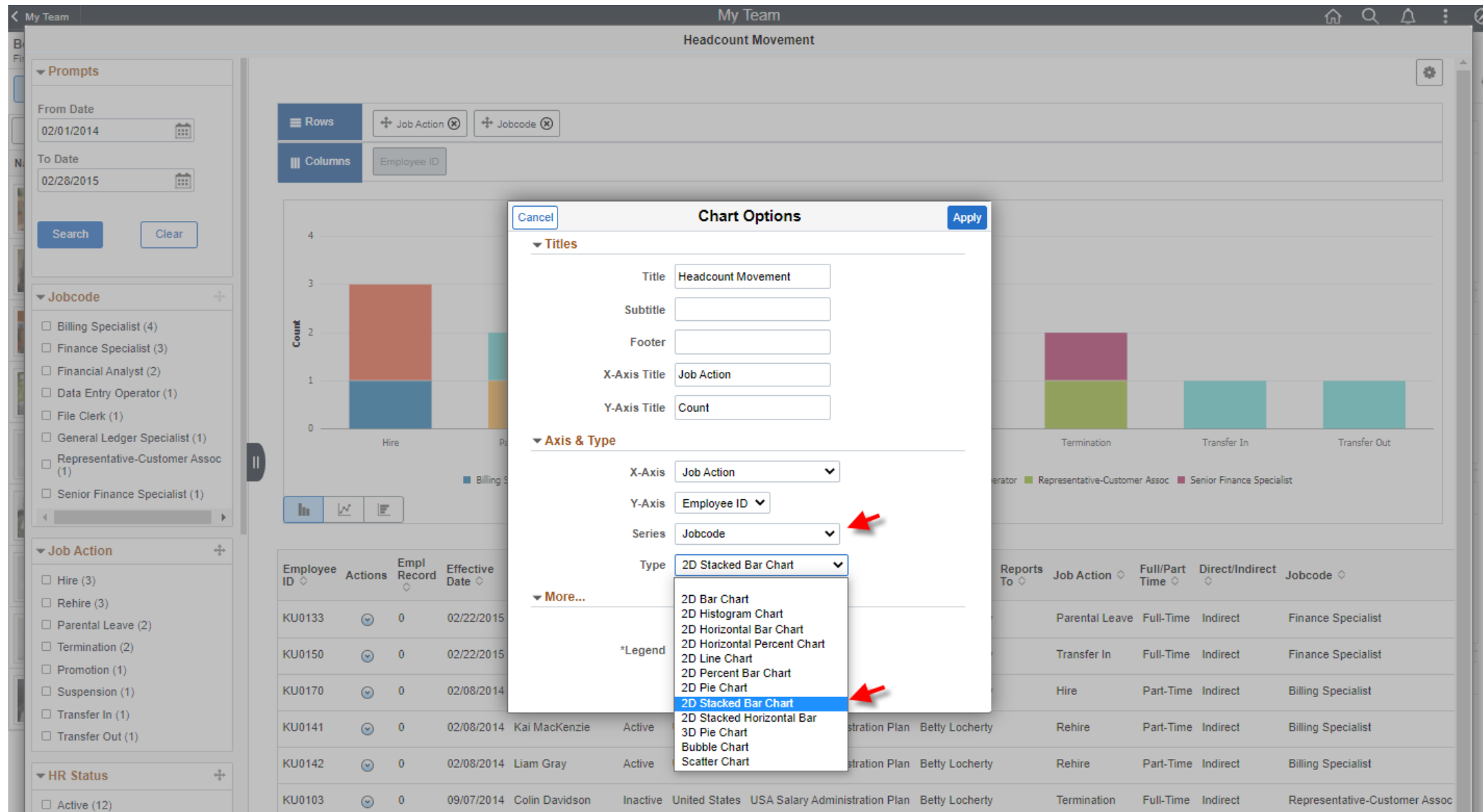
- Time Management >
- Job and Personal Information >
- Compensation and Stock >
- Development >
- Performance Management >
- Career Planning >
- Succession Planning >
- View in Company Directory
- View in Talent Summary

Employee ID	HR Status	Regulatory Region	Salary Administration Plan	Supervisor	Reports To	Job Action	Full/Part Time	Direct/Indirect	Jobcode	Position
KU0103	Inactive	United States	USA Salary Administration Plan	Betty Locherty		Termination	Full-Time	Indirect		Representative-Customer Assoc
KU0130	Inactive	United States	USA Salary Administration Plan	Betty Locherty		Termination	Full-Time	Indirect		Senior Finance Specialist

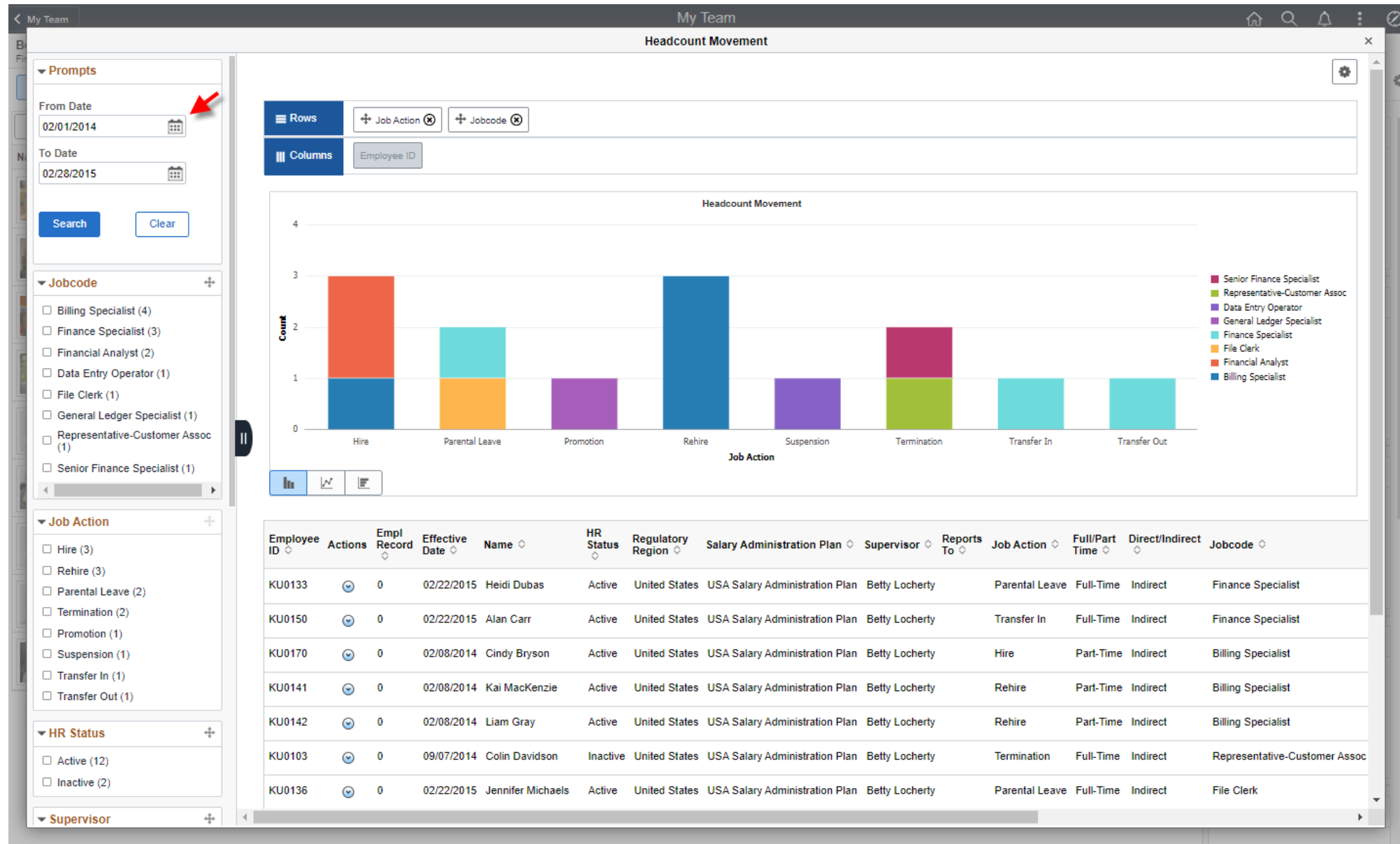
# Update and Save New Simplified Analytics



# Design is Intuitive and Configurable

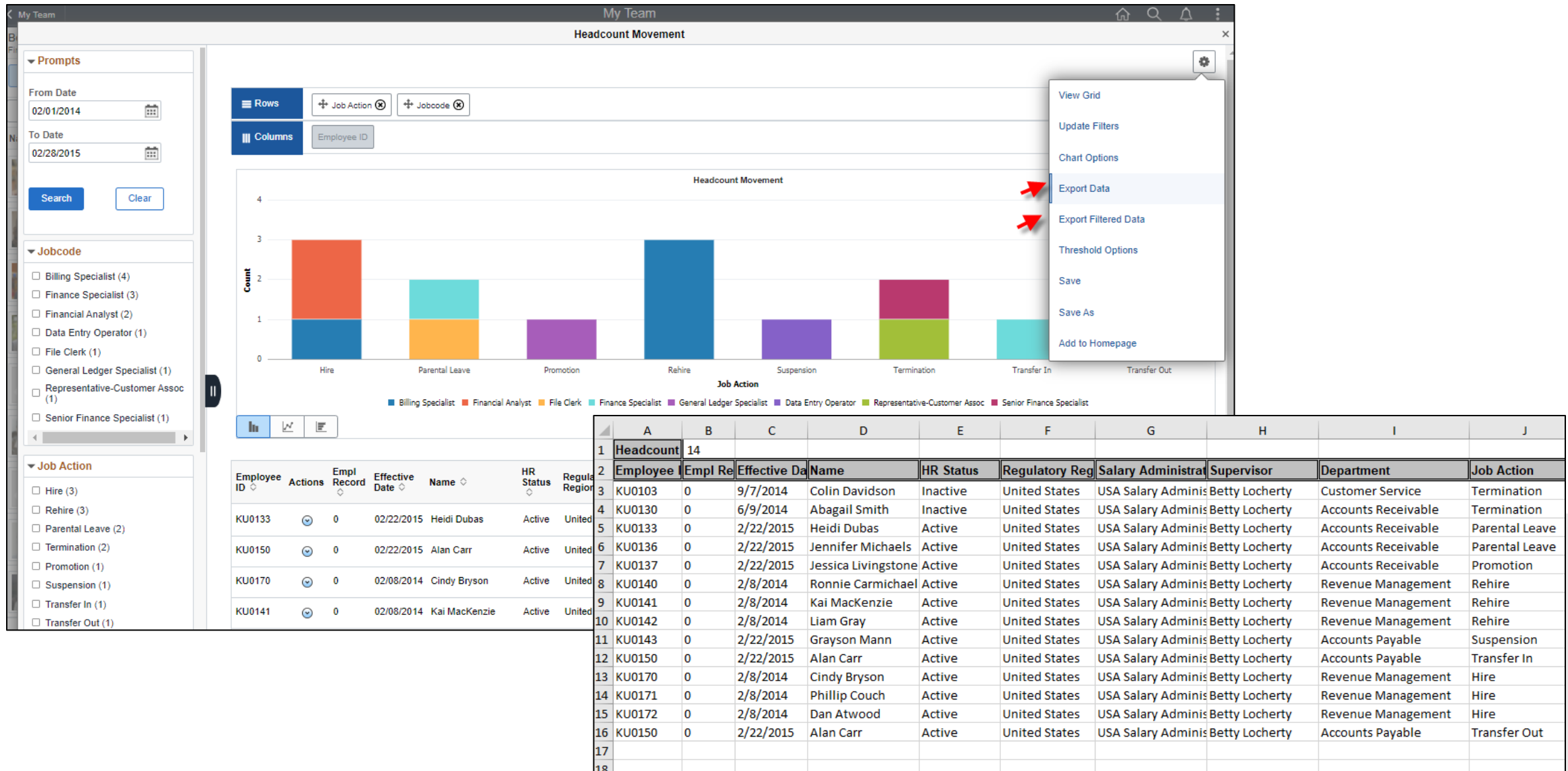


# Design is Intuitive and Configurable





# Chart Data Can Be Exported



# Personalize the Dashboard Analytics

**Manager Self Service** | My Team

Betty Locherty Change Team  
Finance Director

Summary | Performance | Compensation | Leave Balances

Name / Title | Directs / Total

Name / Title	Directs / Total
Cynthia Adams Corporate Controller	2/2
Diane Palmer Administrative Assistant	
Jill Chancelor Payroll Manager	23/25
Netty Owyang Manager-Accounting	4/20
Pierre Potvin Senior Financial Analyst	
Rosanna Channing Senior Accounting Manager	8/66
Steve Smith	
Susan Hoinck Senior Financial Analyst	
Tina Palisco Manager-Accounting	4/4

**Personalize** [Cancel] [Save]

Order Items | Manage Analytics

Section Order  
Link First ▼ | Reset to Default Order

**Link Section**

Link	Display
Headcount by Job	Yes
Headcount by Mgr	Yes

**Tile Section**

Tile	Display
WSTEST1	Yes
Current Headcount Profile	Yes
Headcount Movement	Yes
Perf vs. Compa	Yes
Current Salary Analysis	Yes
Performance Status	Yes
Performance vs. Compa-Ratio	Yes
Performance Vs Annual Rate	Yes
Leave Balances by Type	Yes

**Related Information**

Add Analytics

Headcount by Job

Headcount by Mgr

WSTEST1

Supervisor

Accounts Receivable

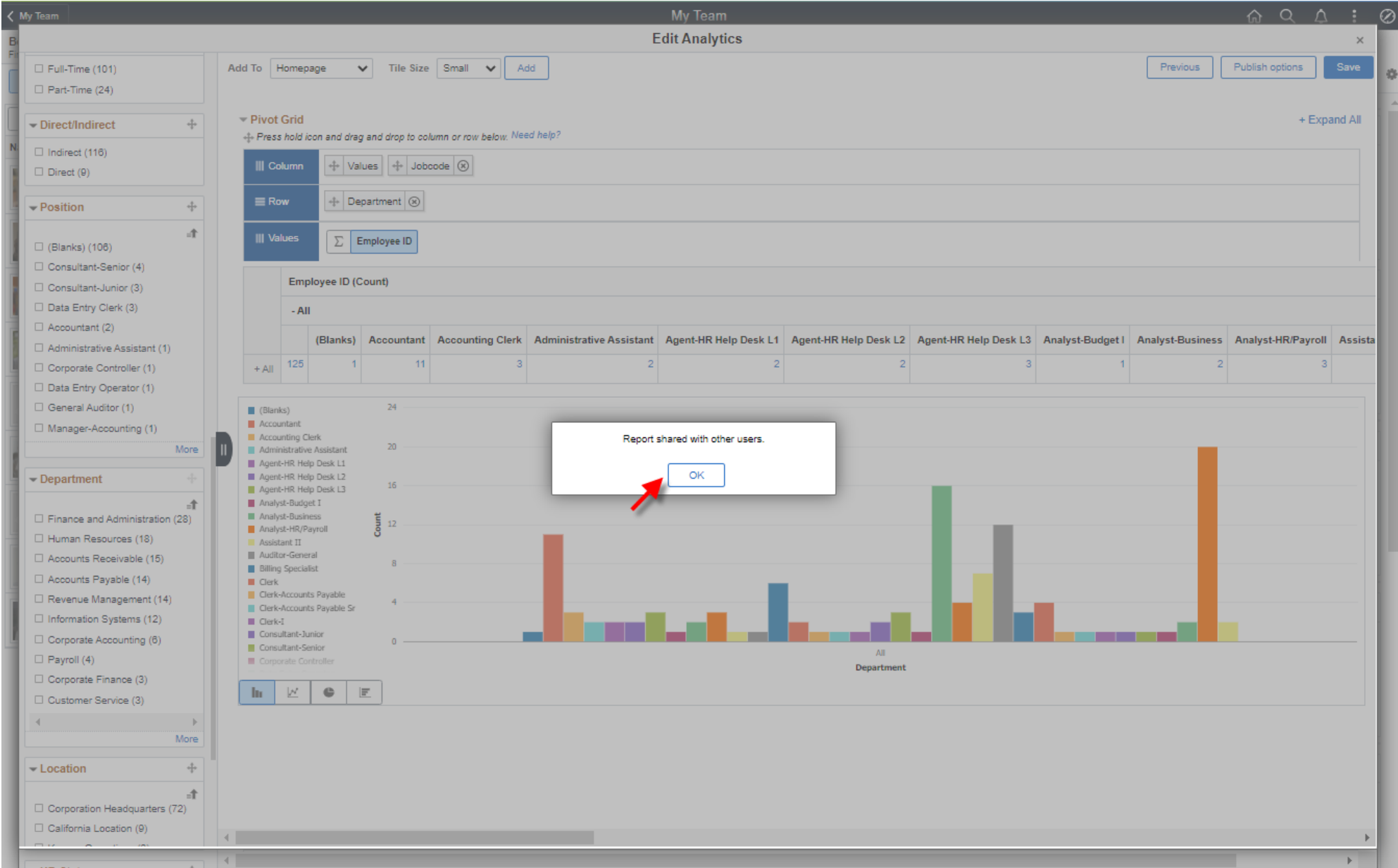
Accounts Payable

Current Headcount Pro...

Jobcode

Headcount Movement

Job Action

















## Personalize the Dashboard Analytics

< My Team
My Team

**Betty Locherty** [Change Team](#)  
Finance Director

Summary
Performance
Compensation
Leave Balances

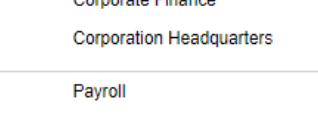
Name / Title	Directs / Total	Department / Location	Email / Phone	Today's Status
 <b>Cynthia Adams</b> <span>⌵</span> Corporate Controller	 2/2	Corporate Accounting Corporation Headquarters	cynthia.adams@xyzcompany.com 925/694-7901	
 <b>Diane Palmer</b> <span>⌵</span> Administrative Assistant		Corporate Finance Corporation Headquarters		
 <b>Jill Chancelor</b> <span>⌵</span> Payroll Manager	 23/25	Payroll Corporation Headquarters	jill.chancelor@xyzcompany.com 555.555.3344	
 <b>Netty Owyang</b> <span>⌵</span> Manager-Accounting	 4/20	International Accounting Corporation Headquarters	netty.owyang@xyzcompany.com 925.555.6547	
 <b>Pierre Potvin</b> <span>⌵</span> Senior Financial Analyst		Corporate Finance Montreal Office		
 <b>Rosanna Channing</b> <span>⌵</span> Senior Accounting Manager	 8/66	Corporate Accounting Corporation Headquarters	Rosanna.Channing@oraclesample.com 925.555.1234	
 <b>Steve Smith</b> <span>⌵</span>				
 <b>Susan Hoinck</b> <span>⌵</span> Senior Financial Analyst		Corporate Finance Corporation Headquarters	susan.hoinck@xyzcompany.com 925.555.3654	
 <b>Tina Palisco</b> <span>⌵</span> Manager-Accounting	 4/4	Corporate Consolidations Corporation Headquarters	tina.palisco@xyzcompany.com 925/694-7971	

#### Related Information

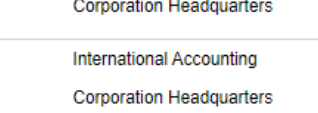
[Add Analytics](#)

##### Headcount by Mgr

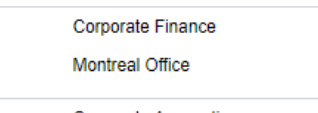
##### Headcount by Job



##### WSTEST1



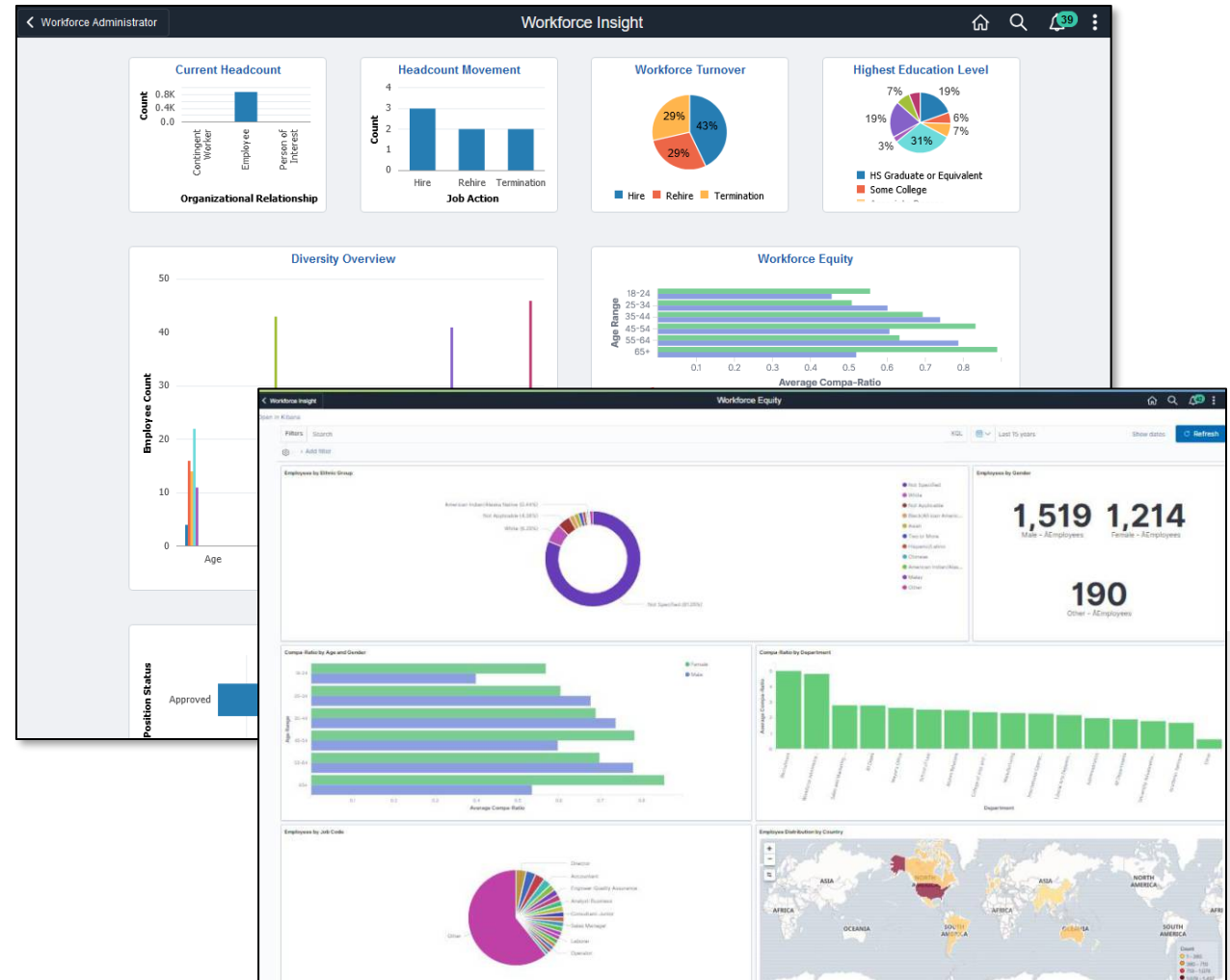
##### Current Headcount Profile



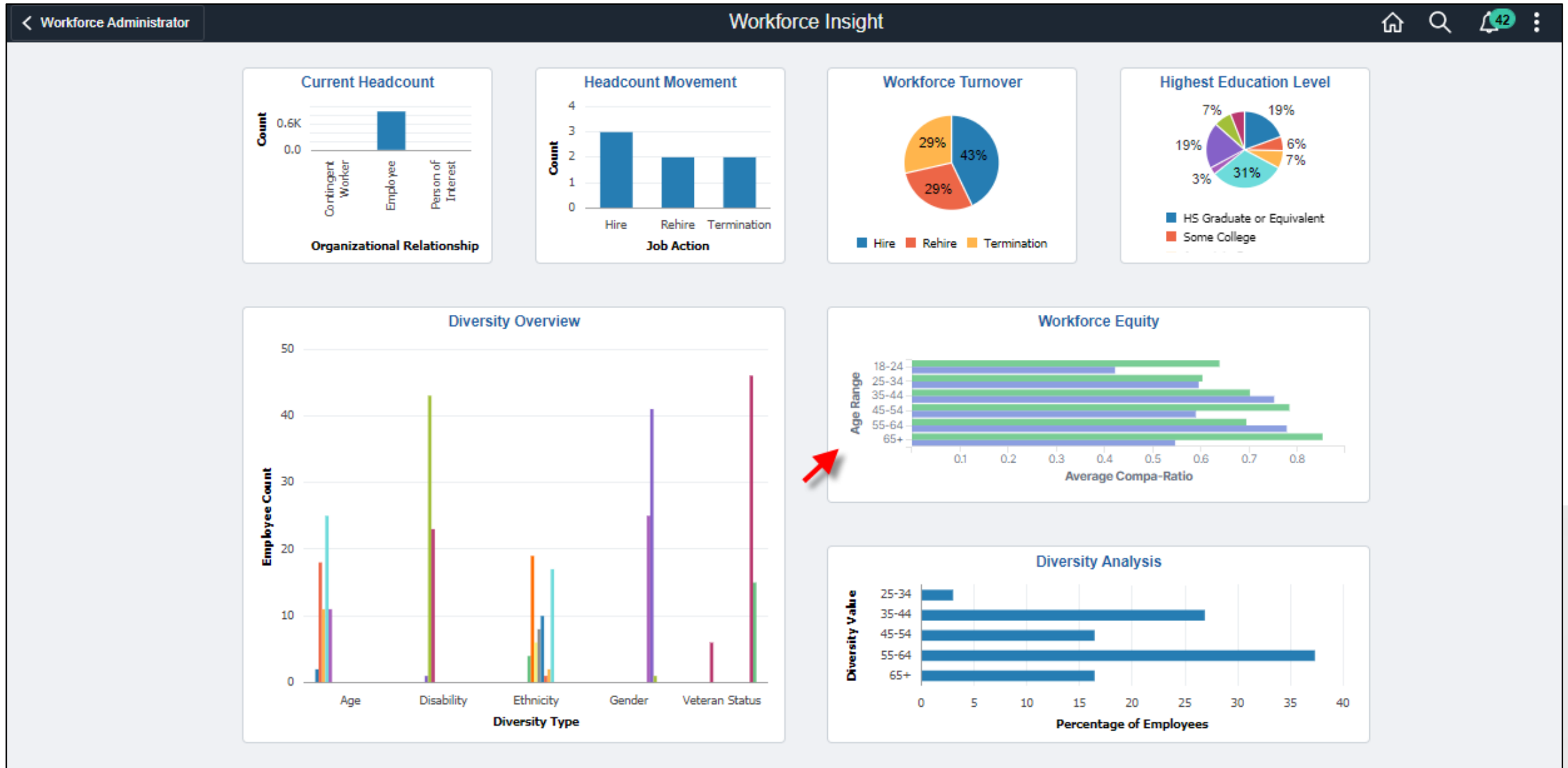
##### Headcount Movement

# Kibana Data Visualization Tool (PUM 34)

- Leverages Elastic framework index
- Requires PeopleTools 8.58, Elasticsearch 7.0, and Kibana 7.0
- Provides a visual representation of PeopleSoft data
- Sample Kibana analytics include Workforce Insight Pay Equity, Recruiting Applicants, Health & Safety Incidents, Reported Time, Absence Management
- With many more on the way !

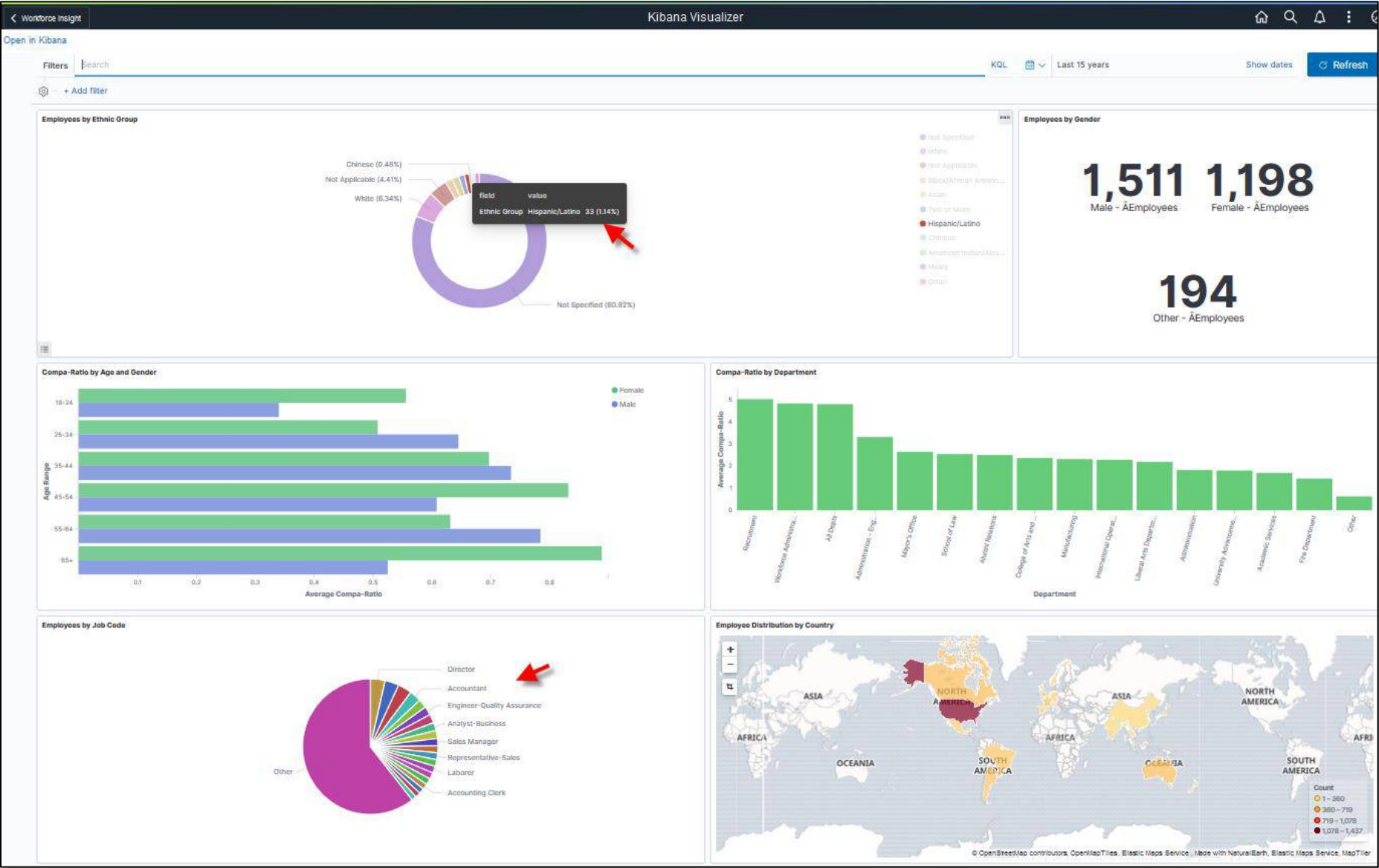


# Workforce Insight / Pay Equity

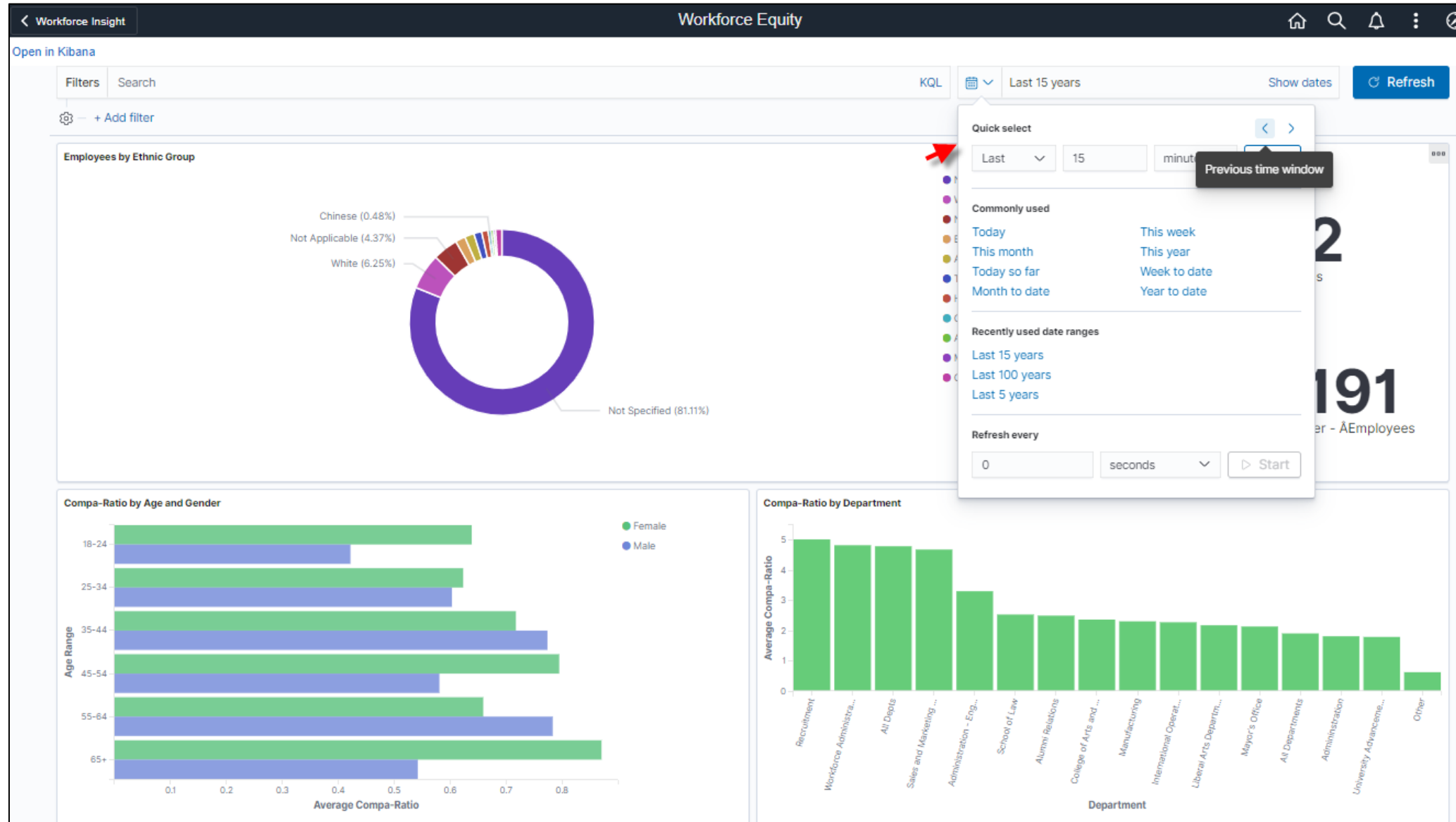




# Pay Equity Sample

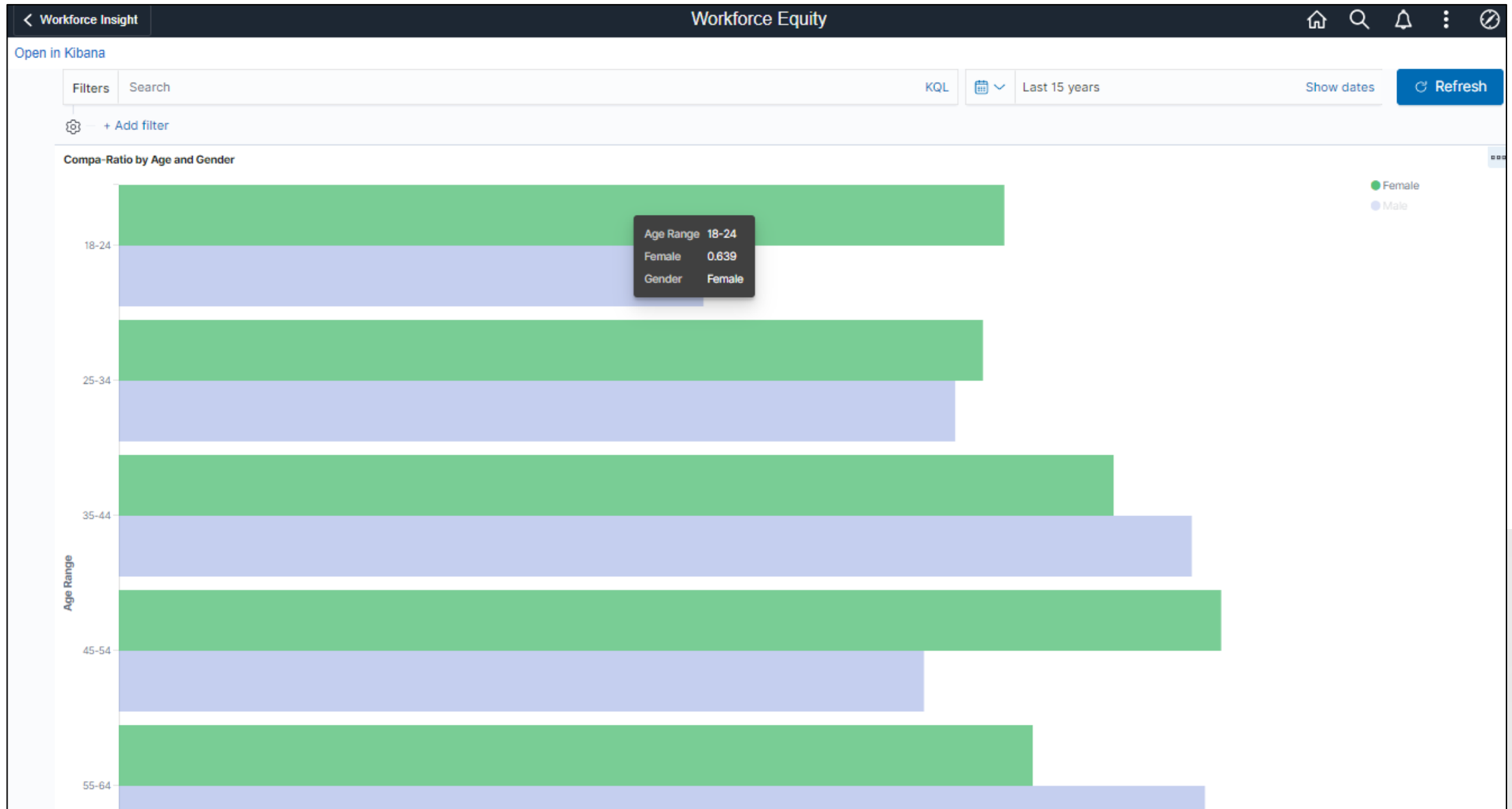


# Drill Down and Filters

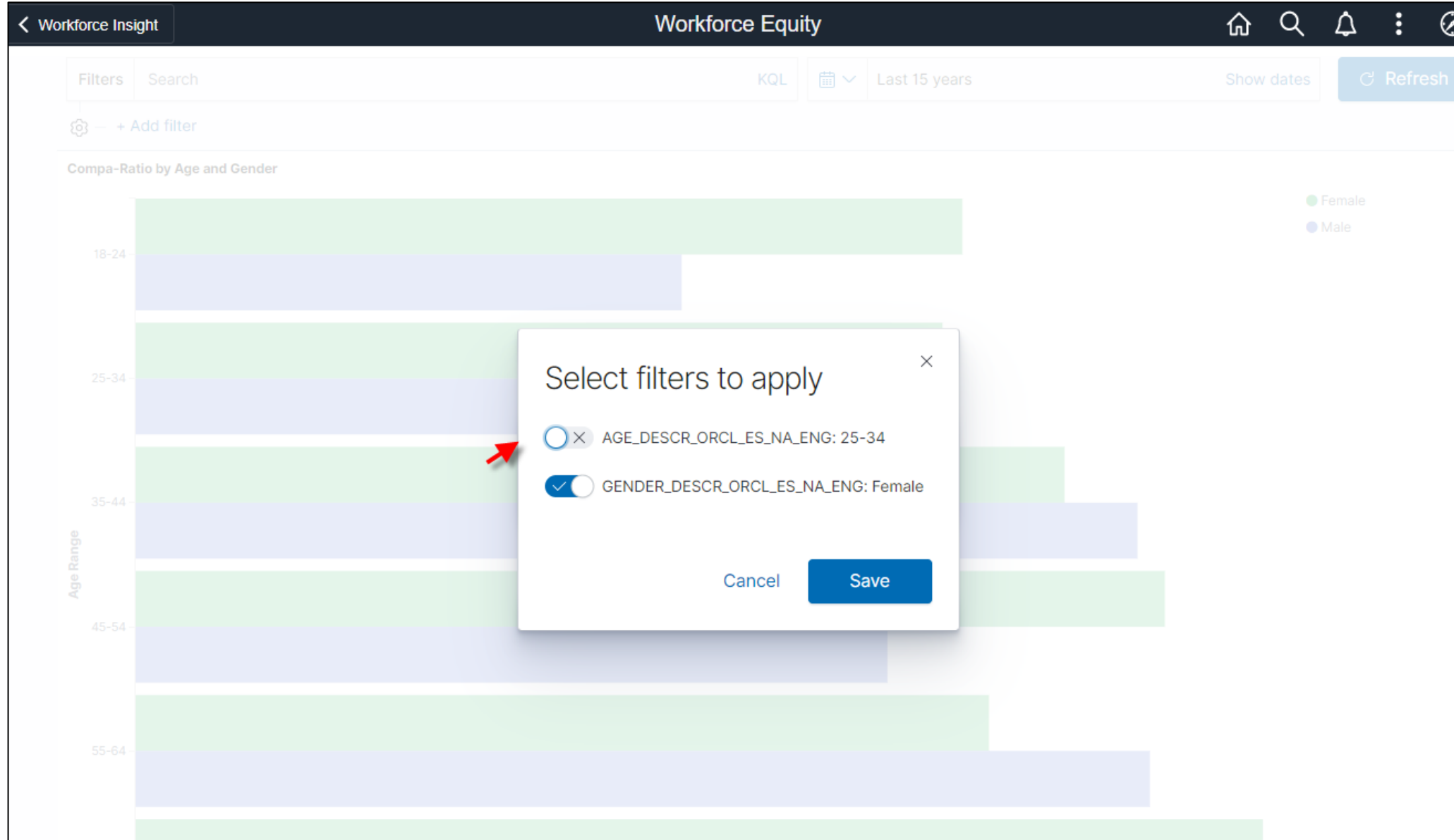




# Zoom into Specific Analytics



# Select Filters



# OnBoarding

Employee and Manager  
HR Administrator

# PeopleSoft 9.2 OnBoarding Features

OnBoarding Activity Guide Steps can be configured for each organization or role

**Roles** – New hires see only the pages, forms, policies and benefits relevant to them based on location, job code, and other attributes, e.g. Executive / Management vs. Hourly or Administrative

**Documents** – Presents relevant documents with electronic signatures ensuring compliance and acknowledgement, e.g. Employee Handbooks, Confidentiality Agreements

**Templates** – group-based design / steps built using the Activity Guide Composer for an event, e.g. Onboarding Sales vs. Marketing

**Category** – general pre-defined template structure, Life Events, OnBoarding, PreBoarding, OffBoarding

**Socialization** – Supports Video streaming, enhanced new-hire learning, additional content links

**Notifications** – Provides employees onboarding step progress and overall status to HR staff and managers.


**Surveys** – solicit feedback about your new OnBoarding process

Company/BU A Template [ 25 steps ]	Company/BU B Template [ 16 steps ]
<ul style="list-style-type: none"><li>— Group A Welcome</li><li>— Group A Intro Video</li><li>— I-9</li><li>— Disability</li><li>— Veteran Status</li><li>— Ethnicity</li><li>— Documents</li><li>— Attachments</li><li>— Verify Name</li><li>— Photo/Preferred Name</li><li>— Verify Addresses</li><li>— Verify Contact Details</li><li>— Marital Status</li><li>— Emergency Contacts</li><li>— Verify Additional Info</li><li>— Competencies</li><li>— Degrees</li><li>— Benefits Enrollment</li><li>— ACA 1095 Consent</li><li>— Direct Deposits</li><li>— Tax Withholding</li><li>— Voluntary Deductions</li><li>— W-2/W-2C Consent</li><li>— Learning Resources</li><li>— Summary</li></ul>	<ul style="list-style-type: none"><li>— Group B Welcome</li><li>— Group B Intro Video</li><li>— Learning Resources</li><li>— I-9</li><li>— Disability</li><li>— Veteran Status</li><li>— Ethnicity</li><li>— Documents</li><li>— Benefits Enrollment</li><li>— Emergency Contacts</li><li>— Verify HR Data</li><li>— Competencies</li><li>— Degrees</li><li>— Direct Deposits</li><li>— Tax Withholding</li><li>— Summary</li></ul>

# OnBoarding Steps

✕ Exit

Sample USA OnBoarding



Rosanna Channing

Mark Complete

< Previous

Next >

✖ Acknowledgement

● Complete

● Welcome from HR !

✖ I-9

▲ Overdue

● Disability

● Visited

● Veteran Status

● Visited

● Ethnic Groups

● Visited

✖ Documents

● In Progress

● Attachments

● Visited

▶ Personal Details

● Visited

▶ Talent Profile

● Visited

▶ Benefits

● Visited

▶ Payroll

● Visited


● OnBoarding Survey

● Visited

○ Summary

○ Not Started

Welcome from HR !



Hi Rosanna Channing

Welcome to Acme Rockets !

We're excited to add another person to our growing team. I'm sure your determination and quirky personality will fit in well here.


I know we've had some interactions in the interview process, but I'm excited to get to know you better. I've been with this company for seven years, and each day I find myself learning more and more. I've become a more driven, inspired person in this role, and as your Human Resources Manager, I'm excited to see how you'll contribute to the team's and the company's growth.

The Acme Rockets "Get Onboard" process will help guide you through some documentation we need and provide you with an overview of the company. You can enroll in your benefit plans and review policies and other helpful tips.

This marks the start of an awesome journey. Please enjoy the Acme Rockets Welcome Video below.

If you have any questions or thoughts, please let me know. There is a brief survey at the end of the **Get Onboard** process - love to get your feedback.


Timothy Jones  
HR Manager, Sales and Marketing Division  
(410) 555-1234  
timothy.jones@acmerockets.com



New Employee Orientation or Onboarding

Watch later

Share



An effective onboarding program:

• Increases staff retention and

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# Activity Guide Templates

Manager Self Service

Activity Guide Templates

28

20 rows

Add Activity Guide Template

Template	Category	Description	Long Description	Active	Update Template	Clone Template	Delete Template
EF_A1FF	Life Event	Adoption Event	Adoption Event	Yes			
EF_B2FF	Life Event	Birth Event	Birth Event	Yes			
EF_D3FF	Life Event	Divorce Event	Divorce Event	Yes			
EF_M4FF	Life Event	Marriage Event	Marriage Event	Yes			
ENROLLM	Open Enrollment	Open Enrollment	Employee Benefits Enrollment	Yes			
HGAEARF	Extended Absence Request	Extended Absence Request	Extended Absence Request without Configurable Section	Yes			
HGAEARQ	Extended Absence Request	Extended Absence Request	Extended Absence Request	Yes			
HSINCD1	Health and Safety	Report Incident	Health and Safety incident reporting	Yes			
JOBDATA	Job Data	Job Data	Job Data	Yes			
KUENROL	Open Enrollment	Benefits Open Enrollment	Employee Benefits Enrollment with Acknowledgement	Yes			
KUTER01	Human Resources Administrator	Activity Guide for Termination	This Activity Guide will allow an HR Administrator to follow a step-by-step process for termination	Yes			
OBDCAN1	OnBoarding	OnBoarding for Canada	OnBoarding for Canada	Yes			
OBDBL1	OnBoarding	Day 1 Onboarding	Day 1 Onboarding	Yes			
OBSTD2	OnBoarding	OnBoarding Template	OnBoarding for Special Finance Individuals	Yes			
OBSTND	OnBoarding	Standard OnBoarding	Basic OnBoarding steps	Yes			
OBUSA1	OnBoarding	OnBoarding for USA	OnBoarding for USA	Yes			
OFBINO	OffBoarding	Involuntary OffBoarding	Involuntary OffBoarding	Yes			
OFVOL1	OffBoarding	Voluntary OffBoarding	Voluntary OffBoarding	Yes			

# Create OnBoarding Activity Guide

Manager Self Service

Activity Guide Templates

28

20 rows

▼

Add Activity Guide Template

Template	Category	Description
ENROLLM	Open Enrollment	Open En
HGAEARF	Extended Absence Request	Extended
HGAEARQ	Extended Absence Request	Extended
HSINCD1	Health and Safety	Report In
JOBDATA	Job Data	Job Data
KUENROL	Open Enrollment	Benefits
KUTER01	Human Resources Administrator	Activity G Terminati
OBDCAN1	OnBoarding	OnBoard
OBGGBL1	OnBoarding	Day 1 On
OBSTD2	OnBoarding	OnBoard
OBSTND	OnBoarding	Standard
OBUSA1	OnBoarding	OnBoard
OFBINVO	OffBoarding	Involunta
OFBVOL1	OffBoarding	Voluntary
POS_DAT	Manage Positions	Manage Position

Update Template

Clone Template

Delete Template

Cancel

Clone Template

Continue

Template

OBUSA1

Description

OnBoarding for USA

New Template Details

\*Template

WSOBUSA

\*Description

Sample USA OnBoarding

\*Effective Date

01/01/2020

Select the effective date of the template to clone.

Available Templates

1 row

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# Activity Guide Setup

✕ Exit

Activity Guide Composer

28

Template WSOBUSA

Effective Date 2020-01-01

Next >

Introduction

● Visited

General Information

○ Not Started

Activity Guide Type

○ Not Started

Security

○ Not Started

Additional Actions

○ Not Started

Sub Banner

○ Not Started

Select Steps

○ Not Started

Organize and Configure Steps

○ Not Started

Display and Processing

○ Not Started

Notifications

○ Not Started

## Introduction

Welcome to the Activity Guide Template Composer!

The Activity Guide Template Composer will guide you through a series of configuration steps where you will be able to select options and enter parameters to configure your activity guide.

At a high level, an activity guide represents a distinct and finite business process that contains one or more steps that a user is expected to complete. The activity guide will track and maintain the users progress as they complete steps.

If this is your first time defining an activity guide using the Activity Guide Template Composer, then take a moment to review the instructions displayed for each step.



# Activity Guide Setup

✕ ExitActivity Guide Composer🔔 28⋮

Template WSOBUSA  
Effective Date 2020-01-01

< PreviousNext >Save

Introduction  
☒ Visited

General Information  
☒ Visited

Activity Guide Type  
☐ Not Started

Security  
☐ Not Started

Additional Actions  
☐ Not Started

Sub Banner  
☐ Not Started

Select Steps  
☐ Not Started

Organize and Configure Steps  
☐ Not Started

Display and Processing  
☐ Not Started

Notifications  
☐ Not Started

## General Information

For this step, you need to provide some general information for the activity guide template you are defining.

The Description entered here is displayed to the user in the Fluid Activity Guide Banner.

The Category selected will control the available options you can specify for the template. For example, the Category will control the steps you can add to the template.

\*Description

Sample USA OnBoarding

\*Long Description

OnBoarding for USA

### Selected Category

Category	Description
OnBoarding	Category for OnBoarding activity guide templates

# Activity Guide Setup

✕ Exit

Activity Guide Composer

28

Template WSOBUSA

Effective Date 2020-01-01

< Previous

Next >

Save

Introduction

● Visited

General Information

● Visited

Activity Guide Type

● Visited

Security

● Visited

Additional Actions

● Visited

Sub Banner

● Visited

Select Steps

○ Not Started

Organize and Configure Steps

○ Not Started

Display and Processing

○ Not Started

Notifications

○ Not Started

Review and Activate

○ Not Started

Sub Banner

For this step, you are able to configure the fluid activity guide sub banner.







The sub banner displays below the fluid activity guide banner, which displays the title of the activity guide. The sub banner can be configured to display an image and up to three fields. The image and fields available for you to select are determined by the Activity Guide Category for this template, which is **OnBoarding**

This configuration is optional, but the information that can be displayed in the sub banner may provide context for who or what the activity guide steps are pertaining to.

Use the View Example to review the layout and format of each sub banner type. Select the Sub Banner type you would like to use and use the Configure Sub Banner button to select the image and/or fields you want to display.

Available Types

Configure Sub Banner

Sub Banner Type	Description	Popup Display Option	View Example
<input type="radio"/> No Sub Banner	No sub banner will be displayed for the activity guide.		
<input checked="" type="radio"/> Image with 1 Primary Field	The sub banner will display an image with a maximum of three fields with no labels. One field can be marked as primary and will be displayed in bold.	<input type="checkbox"/> No	
<input type="radio"/> Image, No Primary Field	The sub banner will display an image with a maximum of three fields with an optional label for each field.	<input type="checkbox"/> No	
<input type="radio"/> No Image with 1 Primary Field	The sub banner will display a maximum of three fields with no labels. One field can be marked as primary and will be displayed in bold.	<input type="checkbox"/> No	
<input type="radio"/> No Image, No Primary Field	The sub banner will display a maximum of three fields with an optional label.	<input type="checkbox"/> No	
<input type="radio"/> Display Page	The sub banner will display a primary field as a link that will open a window to a display page.		

# Activity Guide Setup

✕ Exit

Activity Guide Composer

28

Template WSOBUSA  
Effective Date 2020-01-01

< PreviousNext >

Save

Introduction  
● Visited

General Information  
● Visited

Activity Guide Type  
● Visited

Security  
● Visited

Additional Actions  
● Visited

**Sub Banner**  
● Visited

Select Steps  
○ Not Started

Organize and Configure Steps  
○ Not Started

Display and Processing  
○ Not Started

Notifications  
○ Not Started

Review and Activate

**Sub Banner**

For this step, y

The sub bann

The image and

This configurat

Use the View B

image and/or fi

**Available Types**

Configure Sub Ba

☐ No Sub Bann

☒ Image with 1

☐ Image, No Pr

☐ No Image wit

☐ No Image, No

☐ Display Page

The sub banner will display a primary field as a link that will open a window to a display page.

Cancel

**Configure Sub Banner**

Done

Sub Banner Type Image with 1 Primary Field

\*Image

**Available Fields**

5 rows

	Primary ◇
<input type="checkbox"/> Description ◇	
<input type="checkbox"/> Employee ID	<input type="checkbox"/>
<input type="checkbox"/> Empl Record	<input type="checkbox"/>
<input type="checkbox"/> User ID	<input type="checkbox"/>
<input type="checkbox"/> Job Code Description	<input type="checkbox"/>
<input checked="" type="checkbox"/> Display Name	<input checked="" type="checkbox"/>

Popup Display Option

View Example

	<input type="text" value="No"/>	
arked as primary and will be	<input type="text" value="No"/>	
	<input type="text" value="No"/>	
y and will be displayed in	<input type="text" value="No"/>	
	<input type="text" value="No"/>	

# Activity Guide Setup

✕ Exit

Activity Guide Composer

28

Template WSOBUSA

Effective Date 2020-01-01

< Previous

Next >

Save

Introduction

● Visited

General Information

● Visited

Activity Guide Type

● Visited

Security

● Visited

Additional Actions

● Visited

Sub Banner

● Visited

Select Steps

● Visited

Organize and Configure Steps

● Visited

Display and Processing

○ Not Started

Notifications

○ Not Started

Review and Activate

○ Not Started

Select Steps

For this step, you need to select the steps you want to include in your Activity Guide Template.

The Category specified for this Activity Guide is **OnBoarding** and the different steps that can be included for this template are displayed.

Total Steps for Template 28

Available Steps

36 rows

Add Step	Added Step Count	Step Definition Description	Long Description
Add Step	1	ACA 1095-Consent	The employee will provide consent using Form 1095-C Consent
Add Step	1	Acknowledgement	Employee needs to acknowledge this step before they can review/edit sensitive information
Add Step	0	Banking	Enter your bank account and payment distribution information.
Add Step	0	Benefits Enrollment	Start benefits enrollment and enroll for available benefits.
Add Step	1	Fluid Benefits Enrollment	Start fluid benefits enrollment and enroll for available benefits.
Add Step	1	Competencies	Manage competencies and accomplishments in your current profile.
Add Step	1	Degrees	Manage degrees in your current profile.
Add Step	1	Dependent/Beneficiary Info	Dependent/Beneficiary Information
Add Step	0	Direct Deposits	Add or update your direct deposit information.
Add Step	1	Fluid Direct Deposits	Add or update your direct deposit information.

# Activity Guide Setup

✕ Exit

Activity Guide Composer

28

Template WSOBUSA

Effective Date 2020-01-01

< Previous

Next >

Save

Introduction

● Visited

General Information

● Visited

Activity Guide Type

● Visited

Security

● Visited

Additional Actions

● Visited

Sub Banner

● Visited

Select Steps

● Visited

Organize and Configure Steps

● Visited

Display and Processing

○ Not Started

Notifications

○ Not Started

Review and Activate

○ Not Started

Organize and Configure Steps

For this step, you will assign a description to each step and specify the order in which the steps need to be completed.

Since the Activity Guide Type is **Vertical Non Sequential**, you can create a group step. A group step provides you the ability to organize one or more steps into a group. A step assigned to the group step is considered a sub step.

You are also able to define additional attributes for your steps (i.e. Required, Start Date, Due Date, etc.) and the dependencies between certain steps to control the order of how steps are completed.

Finally, you are able to delete steps. If you need to add steps, you can always return to Select Steps and add more steps.

Selected Steps

32 row

Add Group Step

Step Type	Move Up	Move Down	Step Description	Configure Group Step	Configure Attributes	Configure Dependencies	Configure Page Text	Step Details	Delete Step
Step		▼	Acknowledgement		⚙️	🔗		ℹ️	🗑️
Step	▲	▼	Before You Start		⚙️	🔗	Aa	ℹ️	🗑️
Step	▲	▼	Welcome		⚙️	🔗	Aa	ℹ️	🗑️
Step	▲	▼	I-9		⚙️	🔗		ℹ️	🗑️
Step	▲	▼	Disability		⚙️	🔗		ℹ️	🗑️
Step	▲	▼	Veteran Status		⚙️	🔗		ℹ️	🗑️
Step	▲	▼	Ethnic Groups		⚙️	🔗		ℹ️	🗑️
Step	▲	▼	Documents		⚙️	🔗		ℹ️	🗑️

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# Activity Guide Setup

Activity Guide Composer

Template WSOBUSA  
Effective Date 2020-01-01

Introduction Visited  
General Information Visited  
Activity Guide Type Visited  
Security Visited  
Additional Actions Visited  
Sub Banner Visited  
Select Steps Visited  
Organize and Configure Steps Visited  
Display and Processing Not Started  
Notifications Not Started  
Review and Activate Not Started

Organize

For this st  
Since the  
is consid  
You are al  
Finally, yo

Selected St  
Add Group S

Step Type

Step  
Step  
Step  
Step  
Step  
Step  
Step  
Step  
Step  
Step

Step Description Acknowledgement

Step Controls

Required ☒ Yes  
Disable AWE Status Update ☐ No  
Lock Step After Complete ☐ No

Start Date

Start Date Option None  
Start Date Field

Due Date

Due Date Option Date Field  
\*Due Date Field EE Job Data : Hire Date  
Add Days to Due Date 1  
Inactivate Step After Due Date ☐ No

Step Question

Question  
150 characters remaining

Cancel Done

Previous Next

Save


es	Configure Page Text	Step Details	Delete Step
	Aa		
	Aa		

Ethnic Groups

Documents

# Activity Guide Setup

The screenshot displays the 'Activity Guide Composer' application. The main window has a sidebar on the left with a list of sections: Introduction, General Information, Activity Guide Type, Security, Additional Actions, Sub Banner, Select Steps, Organize and Configure Steps (highlighted), Display and Processing, Notifications, and Review and Activate. The main content area shows the 'Organize and Configure Steps' dialog box, which is titled 'Configure Page Text'. This dialog box contains a rich text editor with the following content:

  
Hi %PERSONAL\_DATA-NAME\_DISPLAY%  
Welcome to Acme Rockets !  
  
We're excited to add another person to our growing team. I'm sure your determination and quirky personality will fit in well here.  
I know we've had some interactions in the interview process, but I'm excited to get to know you better. I've been with this company for seven years, and each day I find myself learning more and more. I've become a more driven, inspired person in this role, and as your Human Resources Manager, I'm excited to see how you'll contribute to the team's and the company's growth.  
The Acme Rockets "Get Onboard" process will help guide you through some documentation we need and provide you with an overview of the company. You can enroll in your benefit plans and review policies and other helpful tips.  
This marks the start of an awesome journey. Please enjoy the Acme Rockets Welcome Video below.  
If you have any questions or thoughts, please let me know. There is a brief survey at the end of the **Get Onboard** process - love to get your feedback.  
  
Timothy Jones  
HR Manager, Sales and Marketing Division  
(410) 555-1234  
timothy.jones@acmerockets.com

The background of the main window shows a table with 31 rows, likely representing the steps of the activity guide. The table has columns for 'Page Text', 'Step Details', and 'Delete Step'. The 'Delete Step' column contains trash icons for each row.

# Activity Guide Setup

✕ Exit

Activity Guide Composer

28

Template WSOBUSA  
Effective Date 2020-01-01

< PreviousNext >

Save

Introduction  
● Visited

General Information  
● Visited

Activity Guide Type  
● Visited

Security  
● Visited

Additional Actions  
● Visited

Sub Banner  
● Visited

Select Steps  
● Visited

Organize and Configure Steps  
● Visited

Display and Processing  
○ Not Started

Notifications  
○ Not Started

Review and Activate  
○ Not Started

Organize and Configure Steps

For this step, you will assign a description to each step and specify the order in which the steps need to be completed.

Since the Activity Guide Type is **Vertical Non Sequential**, you can create a group step. A group step provides you the ability to organize one or more steps into a group. A step assigned to the group step is considered a sub step.

You are also able to define additional attributes for your steps (i.e. Required, Start Date, Due Date, etc.) and the dependencies between certain steps to control the order of how steps are completed.

Finally, you are able to delete steps. If you need to add steps, you can always return to Select Steps and add more steps.

Selected Steps32 row

Add Group Step

Step Type	Move Up	Move Down	Step Description	Configure Group Step	Configure Attributes	Configure Dependencies	Configure Page Text	Step Details	Delete Step
Sub Step	▲	▼	Benefits Enrollment		⚙	🔗		ℹ	🗑
Sub Step	▲	▼	ACA 1095-Consent		⚙	🔗		ℹ	🗑
Group Step	▲	▼	Payroll	⚙	⚙				🗑
Sub Step		▼	Direct Deposits		⚙	🔗		ℹ	🗑
Sub Step	▲	▼	Tax Withholding		⚙	🔗		ℹ	🗑
Sub Step	▲	▼	Voluntary Deductions		⚙	🔗		ℹ	🗑
Sub Step	▲	▼	W-2/W-2C Consent		⚙	🔗		ℹ	🗑
Step	▲	▼	OnBoarding Survey		⚙	🔗		ℹ	🗑

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# Adding Documents to the Activity Guide

Workforce Administrator

HR Administration

Job Information

Headcount

Labor Administration

HR Configuration

Dotted Line

Export Org Chart

OnBoarding

OnBoarding Installation

Document Groups

Configure Documents

Employee Documents

Manage OnBoarding Event

OnBoarding Status

OffBoarding

Documents

Templates

Document Id KU10001

Configure Documents

1 of 1

View All

\*Effective Date 02/01/2020

\*Document Employee Handbook

Description Document detailing company policies

\*Status Active

\*URL Identifier HR\_OBD\_FILES

URL record://HR\_OBD\_FILES

Employee Action Required

☐ None

☒ Acknowledge Document

☐ Upload Document

File Attachment

Attached File Employee\_Handbook.pdf

Last Update Date/Time 03/15/2021 9:35:25PM

Attached By PS

View Document

Delete Document

EMPLOYEE HANDBOOK

GLOBAL BUSINESS INSTITUTE

Table of Contents

1. Welcome

1.1. History, Goals & Culture

1.2. Purpose of Handbook

1.3. At-Will Employment

2. Workplace Commitments

2.1. Equal Opportunity Employment

2.2. Non-Harassment / Non-Discrimination

2.3. Drug Free / Alcohol Free

2.4. Open Door Policy

3. Company Policy and Procedures

3.1. Code of Professional Conduct

3.2. Dress Code

3.3. Payday

3.4. Company Property

3.5. Privacy

3.6. Personnel Files

4. Employment Classification

4.1. Exempt

4.2. Non-Exempt

4.3. Part-Time, Full-Time or Temporary Status

5. Attendance Policies

5.1. General Attendance

5.2. Tardiness

5.3. Breaks

6. Leave Policies

6.1. Vacation

6.2. Sick Leave

6.3. Family and Medical Leave Act

6.4. Holidays

6.5. Jury Duty


6.6. Voting

6.7. Military Leave

6.8. Leave of Absence

# OnBoarding Document Step

✕ ExitSample USA OnBoarding⋮

**Rosanna Channing**

Mark Complete< PreviousNext >

✱ Acknowledgement

✔ Complete

Welcome from HR !

● Visited

✱ I-9

⚠ Overdue

Disability

● Visited

Veteran Status

● Visited

Ethnic Groups

● Visited

✱ Documents

● In Progress

Attachments

● Visited

▶ Personal Details

● Visited

▶ Talent Profile

● Visited

## Documents

### Step 1 - Download Documents

Please download the documents listed below. If you see documents in the Step 2 table, you must acknowledge or upload the updated documents.

Document / Description	File Name	Action
<b>Employee Handbook</b> Document detailing company policies	Employee_Handbook.pdf	✔ <span>Download</span>
<b>Confidentiality Agreement</b> New Hire must sign this Confidentiality Agreement	Confidentiality_Agreement.pdf	<span>Download</span>

### Step 2 - Acknowledge / Upload Required Documents


You must acknowledge or upload the listed documents.

Document / Description	File Name / Attached On	Action
<b>Employee Handbook</b> Document detailing company policies	Employee_Handbook.pdf	<span>Acknowledge</span>
<b>Confidentiality Agreement</b> New Hire must sign this Confidentiality Agreement	Confidentiality_Agreement.pdf	<span>Acknowledge</span>

# OnBoarding Document Acknowledgment

✕ Exit

Sample USA OnBoarding



Rosanna Channing

Mark Complete

< Previous

Next >

★ Acknowledgement

▲ Overdue

Before You Start

○ Not Started

Welcome

○ Not Started

★ I-9

▲ Overdue

Disability

○ Not Started

Veteran Status

○ Not Started

Ethnic Groups

○ Not Started

★ Documents

● In Progress

Attachments

○ Not Started

Personal Details

○ Not Started

Talent Profile

○ Not Started

Documents

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Confidentiality Agreement New Hire must sign this Confidentiality Agreement	Confidentiality_Agreement.pdf	<div>Acknowledge</div>

Downloading Confidentiality Agreement.  
You must acknowledge this document in Step 2 - Acknowledge / Upload Required Documents.

OK

# OnBoarding Document Acknowledgment

✕ ExitSample USA OnBoarding⋮

**Rosanna Channing**

Mark Complete< PreviousNext >

★ Acknowledgement  
✔ Complete

● Before You Start  
Visited

● Welcome  
Visited

★ I-9  
⚠ Overdue

○ Disability  
Not Started

○ Veteran Status  
Not Started

○ Ethnic Groups  
Not Started

★ Documents  
🟡 In Progress

● Attachments  
Visited

▶ Personal Details  
Not Started

▶ Talent Profile  
Not Started

## Documents


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<b>Confidentiality Agreement</b> New Hire must sign this Confidentiality Agreement	Confidentiality_Agreement.pdf	 <button>Acknowledge</button>

# OnBoarding Document Acknowledgment

✕ ExitSample USA OnBoarding⋮

**Rosanna Channing**

Mark Complete< PreviousNext >

★ Acknowledgement  
✔ Complete

Before You Start  
● Visited

Welcome  
● Visited

★ I-9  
⚠ Overdue

Disability  
○ Not Started

Veteran Status  
○ Not Started

Ethnic Groups  
○ Not Started

★ Documents  
● In Progress

Attachments  
● Visited

▶ Personal Details  
○ Not Started

▶ Talent Profile  
○ Not Started

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<b>Confidentiality Agreement</b> New Hire must sign this Confidentiality Agreement	Confidentiality_Agreement.pdf	✔ <button>Acknowledge</button> 03/15/2021 10:08:32PM

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## Don't Forget

- Review all available PUM, Spotlight videos, and PeopleBooks documentation
- Prioritize your deployment
- Prototype in the latest PUM image available
- Check on specific PUM features required and minimum PeopleTools versions

## Get More Information

WorkStrategy can help with:

- Fluid Self Service Roadmap
- Cost / Benefit
- Implementation Best Practices
- Customer Case Studies



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