

PeopleSoft®

PeopleSoft HCM 8.9: A Truly Functional Sneak Peak

Stavros Liakakos

Principal HCM Product Marketing Manager

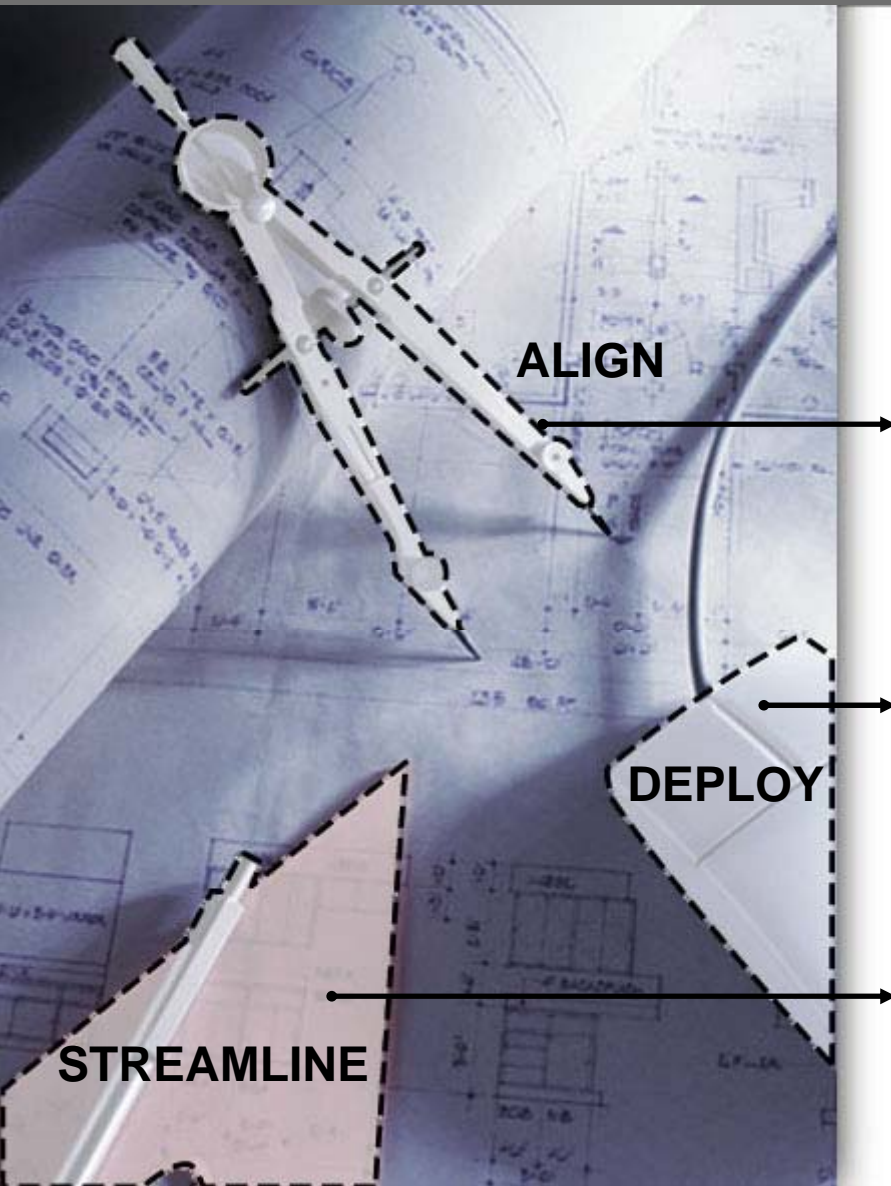
PeopleSoft®

HCM is a Strategy...



...that makes every employee a competitive asset.

PeopleSoft HCM: Blueprint for Success



ALIGN

**ALIGN Workforce with
Goals and Objectives**

Drive Company Performance

**DEPLOY Employee
Self-Service**

Drive Workforce Efficiency

DEPLOY

STREAMLINE HR Systems

Drive HR Department Efficiency

STREAMLINE

Efficiency in any organization begins at the point of impact—where a worker does a job. Employees with the right skills, drives, and habits can have a huge impact on your company's bottom line. Unfortunately, good employees don't materialize on their own. It takes fast, reliable information and a system behind it to manage your workforce so that people can have the greatest positive impact—for themselves, for you, and for your shareholders.



PLAN ATTRACT ONBOARD

The cookie-cutter workforce, if it ever existed, is pure fantasy in modern business. Finding people with the right skills and attitude for your company takes information, judgment, vision, and resources. And how do you know what kind of worker you need at any given moment?

PLAN INCENT REWARD

Keeping good employees around for a while takes new challenges and greater rewards. Investments in highly productive employees can really pay off.

2 ENGAGE AND SELECT

It takes a nimble system to select promising employees and to source reliable contractors to meet your objectives.

1 START

1 PLAN
Set your corporate objectives and plan workforce strategy to meet those objectives.

13 CREATE OPPORTUNITIES

Open doors for advancement for your high-performing employees.

3 EQUIP

Before they can start working, new hires need specific tools for their jobs.

4 SET EXPECTATIONS

Executive vision has to be communicated to everyone.

5 ENCOURAGE GROWTH

Encourage individuals to set challenging goals and to plan for individual growth.

6 ASSESS CURRENT SKILLS

Determine people's current skill levels so you will know when they're improving.

ASSESS DESIGN DEVELOP

Some employees find their place in an organization right away, while others need help. Either way, learning doesn't stop when supplied, trained, and connected employees get to work. A system for setting goals, periodic training, and tracking results helps manage an employee's personal growth—and the growth of the business.

OPTIMIZE TRACK MONITOR

The rubber really hits the road when a supplied, trained, and connected employee gets to work. Monitoring their performance without getting in their way or losing them—especially when operations are spread across the globe—takes a constant flow of information.

CLOSE GAPS

Give underperformers a way to realize their potential.

7 IDENTIFY KNOWLEDGE GAPS

Measure their current skill levels against your performance goals and identify gaps.

8 CONTINUAL TRAINING

Manage a training schedule that fits learning opportunities into the daily activities of your workforce.

9 PUT PEOPLE IN MOTION

With the right people in the right places, even a complex global enterprise can run smoothly.

11 ANALYZE

A real-time information warehouse enables you to measure workforce performance against objectives.

12 PROVIDE INCENTIVES

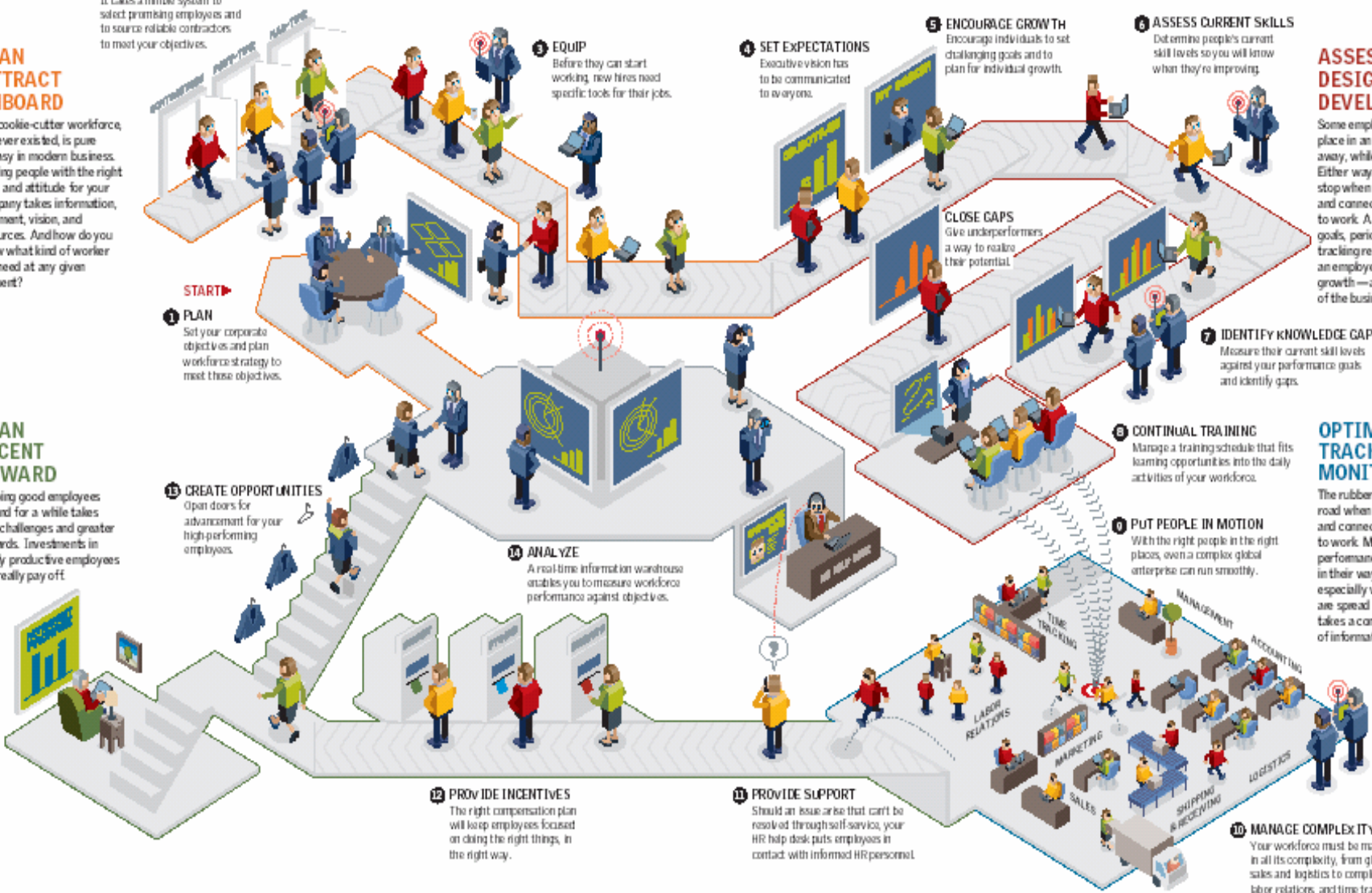
The right compensation plan will keep employees focused on doing the right things, in the right way.

10 PROVIDE SUPPORT

Should an issue arise that can't be resolved through self-service, your HR help desk puts employees in contact with informed HR personnel.

10 MANAGE COMPLEXITY

Your workforce must be managed, in all its complexity, from global sales and logistics to compliance, labor relations, and time tracking.



No one has directed
technology at the people-
intensive process of owning
enterprise software.

What PeopleSoft is doing

- Installations of products in days, not weeks
- Implementations in weeks, not months
- Real-time software support and performance diagnostics
- Out-of-the-box multi-vendor business process integration

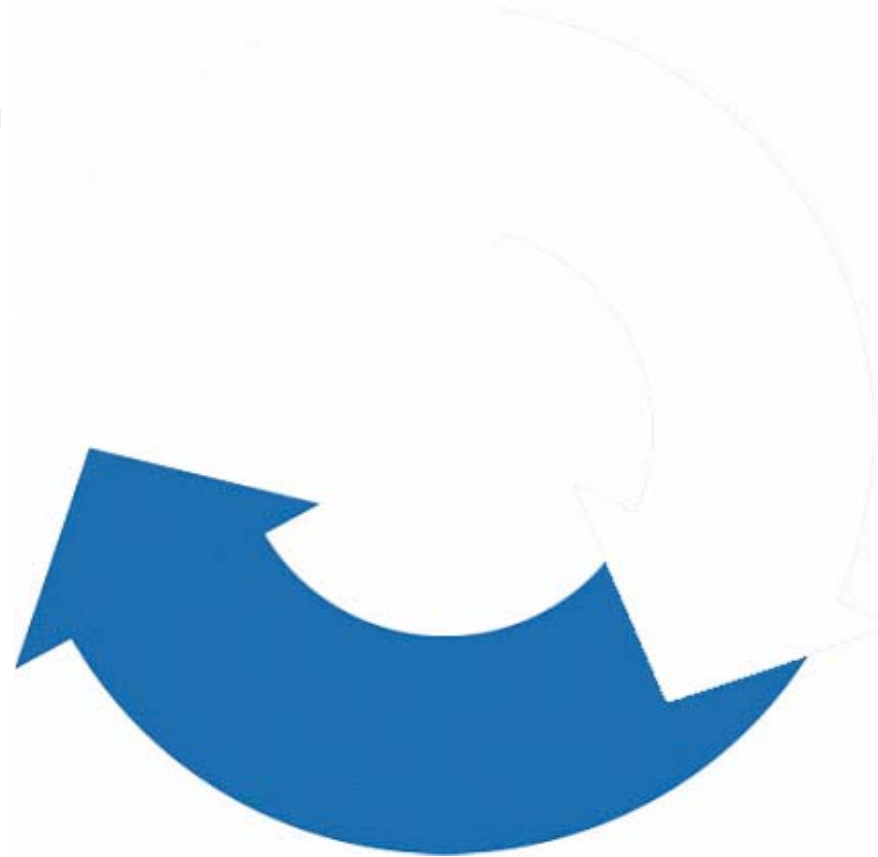
Total Ownership Experience Initiative

Implementing the Application

- Installation
- Configuration
- Integration

Supporting the Application

- Infrastructure
- Supportability
- Performance
- Upgrade



Using the Application

- Usability

Total Ownership Experience

Good for Customers, Good for PeopleSoft

How do we know...

125 Focus Groups

164 Customer Programs

396 CVC visits

478 On-site Customer visits

>5000 enhancement requests

Highlights of product changes in HCM 8.9

1. Recruiting Solutions

2. ePerformance

3. Human Resources

4. Global Payroll Core and Country Extensions

5. Absence Management

6. Process Integration Pack for SAP

7. Time & Labor

8. Help Desk for Human Resources

9. Sales Incentive Management

10. Learning Management

- Enhanced Candidate Experience
- Re-Designed Usability
- Open Integration -- Standard Integration framework
- Additional Core Features

- **Enhanced Candidate Experience**
 - **Simplified Application process:**
 - No more application wizard.
 - Customers define the information they would like to collect, and how many steps they would like to have applicants go through to present that information
 - **Privacy Notice**
 - Notice to candidates explaining how their data will be stored and used (customers can configure the text.)
 - **Recruiting Locations**
 - A new table for locations within Recruiting (not based on complex HRMS locations tables anymore)

eRecruit 8.9 – Candidate Experience Prototype

Generic Company Name generic company tagline

[Home](#) | [Other Navigation](#) | [Jobs](#)

Jobs

[Home](#)

[Find Jobs](#)

[Latest Postings](#)

[My Job Basket](#)

[My Saved Searches](#)

[My Job Applications](#)

[My Job Profile](#)

[Logout](#)

[Our Business](#)

[Our Culture](#)

[Where We Work](#)

[Our Rewards](#)

Welcome Back Max

Your Job Agents have returned **4 new jobs** [Edit Job Agents](#)

Job Agent Results Showing 4 of 4 | [View All](#) | [View Next](#) | [View Previous](#)

	Date	Job Title	Job #	Location		
<input type="checkbox"/>	★ Jan 29	Mortgage Sales Associate	00000	Denver, CO	Find Similar Jobs	Apply
<input type="checkbox"/>	★ Jan 29	40 Hour Teller	00000	Denver, CO	Find Similar Jobs	Apply
<input type="checkbox"/>	★ Jan 29	20 Hour Teller	00000	Denver, CO	Find Similar Jobs	Apply
<input type="checkbox"/>	★ Jan 29	15 Hour Teller	00000	Denver, CO	Find Similar Jobs	Apply

[Select All](#) [Deselect All](#) [Apply for Jobs](#)

Search for Jobs

Search for:

[Search](#)

[Advanced Search](#)

[Search Tips](#)

[Search Preferences](#)

Update Job Profile -- Ensure your latest information is available to our recruiting team

Current Applications Showing 3 of 3 | [View All](#) | [View Next](#) | [View Previous](#)

Job Title	Job #	Location	Date Applied		
Store Manager	00000	Denver, CO	00/00/0000 00:00 PST	View Details	Find Similar Jobs
Store Manager	00000	Denver, CO	00/00/0000 00:00 PST	View Details	Find Similar Jobs
Store Manager	00000	Denver, CO	00/00/0000 00:00 PST	View Details	Find Similar Jobs

eRecruit Manager Desktop 8.9 – Find Applicants Prototype

- Menu
- ▶ [Employee Self Service](#)
- ▶ [Manager Self Service](#)
- ▼ [Recruiting](#)
 - [Recruiting Console](#)
 - [Find Applicants](#)
 - [Find Job Postings](#)
 - [Saved Searches](#)
 - [Add New Applicant](#)
 - [My Lists](#)
 - [Applicant 360](#)
 - [Create New Job](#)
 - [Job 360](#)
 - [Interviews](#)
- ▶ [Recruit Workforce](#)
- ▶ [Setup](#)

Find Applicants

[Customize this page](#)

Quick Search

Advanced Search

Use saved search:

Advanced Search: Select and Enter Required Criteria

Find applicants by matching key words in a job description to key words in an applicant resume or by finding specific key words in an applicant resume.

Search using Job Description

Job:

Search using keywords

Keywords:

You can [Search Now](#) or continue to add more search criteria

Advanced Search: Additional Criteria

This criteria will be used to narrow your results.

Interest Level:

Applicant Type:

Application Date Range: to

Referral Sources:

Accomplishments:

Competencies:

Education:

Work Experience:

City & State or Zip Code:

- Usability

- **“360 degree” views for applicants and requisitions**

- These pages will bring together the similar pages (history, activity and detail) and present the information in one view.

- **Layout and Interaction Design**

- User Interaction Design Team looked at the entire product and brought it up to best practices in usability design

- **Configuration**

- Tools available for customers to use in configuring their application: message catalog and text catalog

- **Integration -- Standard Integration framework for:**
 - **Resume Management**
 - Customers will be able to choose an extraction tool, whether PeopleSoft's Resume Processing product or a third party vendor.
 - Using XML, vendors will be able to feed resumes into the database for customers
 - **Service Procurement**
 - Standard integration for contingent worker management. Will support integration to PeopleSoft's Services Procurement module, or another contingent management product.
 - **Background Checks**
 - Customers can choose their preferred background check provider

- Core Features

- **Approvals**

- New approvals engine: tool was designed to provide a more robust approval process for both requisitions and offers
- Differing approval chains by business unit
- Manage separate approval cycles for requisitions and offers

- **Business Process Support – beyond requisition-based:**

- Job posting (different than a requisition)
- Requisition screening not reserved for power user
- New status for recruiters to apply to candidates who haven't directly applied to the job but are "linked" to it
- Additional actions you can take on a candidate

- **Core Features**

- **Recruiter's Lists**

- Users will have the ability to create a list from search results or ad hoc, and modify the contents over time

- **Contact Management**

- Ability to track notes and correspondence with applicants

- **Hiring**

- Leveraging the Person Model to enhance the pools of candidates who can be managed by the product.

eRecruit Manager Desktop 8.9 – My Lists Prototype

- Menu
- ▶ Employee Self Service
- ▶ Manager Self Service
- ▼ Recruiting
 - Recruiting Console
 - Find Applicants
 - Find Job Postings
 - Saved Searches
 - Add New Applicant
 - My Lists
 - Applicant 360
 - Create New Job
 - Job 360
 - Interviews
- ▶ Recruit Workforce
- ▶ Setup

Recruiting Console

[Alerts & Approvals](#) | [Find Applicants](#) | [My Jobs](#) | **My Lists** | [Scorecard](#)

Display List: UC Berkeley Job Fair 10/15/2003 Refresh

UC Berkeley Job Fair 10/15/2003						Customize Find View All		First	1-9 of 9	Last
	Name	Primary Phone	Location	Interest						
<input type="checkbox"/>	Thomas Aquinas	510-555-1212	Berkeley, CA	High						Find more like me
<input type="checkbox"/>	Jane Austin	510-555-1212	Berkeley, CA	High						Find more like me
<input type="checkbox"/>	Niels Bohr	510-555-1212	Oakland, CA	High						Find more like me
<input type="checkbox"/>	Rene Descartes	510-555-1212	Berkeley, CA	High						Find more like me
<input type="checkbox"/>	Arthur Eddington	510-555-1212	Oakland, CA	High						Find more like me
<input type="checkbox"/>	Johannes Kepler	415-555-1212	San Francisco, CA	High						Find more like me
<input type="checkbox"/>	Gottfried Leibnitz	925-555-1212	San Ramon, CA	High						Find more like me
<input type="checkbox"/>	Max Planck	510-555-1212	Berkeley, CA	High						Find more like me
<input type="checkbox"/>	Alfred Whitehead	510-555-1212	Alameda, CA	High						Find more like me

[Select All](#) [Deselect All](#) Select Action... Go

Save Changes

- Select Action...
- Link to Job
- Add Note
- Send Email
- Remove from List

[New Lists](#) [Create New Applicant](#)

Highlights of product changes in HCM 8.9

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- 2. ePerformance**
3. Human Resources
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- Multi-source functionality (360 and Multi-Rater capabilities)
- Employee initiated performance processes
- User interface enhancements
- Enhanced writing tools
- Improved administrative capabilities Integration

- **Multi-source functionality (360 and Multi-Rater capabilities)**
 - Peers, mentors, and multiple managers will be able to provide feedback
 - Nominations: the “nominate participants step” will enable the manager and/or employee to nominate a list of individuals they want to include in process
- **Employee-initiated Performance process**
 - Employees will be able to initiate and drive the performance process.
 - Collaborative criteria setting: ability for the manager and employee to collaboratively define performance criteria before the individual documents are created

8.9 ePerformance / 360 Review prototype

PeopleSoft Performance Management - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Address [\\adntfs30\ueproducts\HCM\ePerformance\EE_phase1\index.htm](http://adntfs30\ueproducts\HCM\ePerformance\EE_phase1\index.htm) Go

Home | Worklist | Add to Favorites | Sign out

Performance Management Home

Performance Documents

Current Performance Documents [View Performance History](#)

[Create New](#)

Semi-Annual: 06/30/1999 Project: ABC Project: LMN

Evaluation Type: [Semi-Annual Review](#) **Review Period:** 01/01/1999 - 07/01/1999

Due Date: 07/15/1999 **Status:** ☆ Evaluations Complete -- Pending Consolidation [Send Reminder](#)

Self Evaluation: ☆ Complete [View Evaluation](#)

Nomination and Evaluation Progress

Evaluation Type	Evaluation Status	Nominated	Accepted	Completed	Required
Customer	Complete	4	2	2	2
Peer	Complete	4	3	3	3
Mentor	Complete	1	1	1	1

Local intranet

Menu

- Employee Self Service
 - Performance Management
 - [Performance Home](#)
 - [Performance Objectives](#)
 - [Performance Documents](#)
 - [Multi-Rater Evaluations & Requests](#)
 - [Manager Self Service](#)
 - [Performance Management](#)
 - [Setup](#)

- **User interface enhancements**

- Users will see all of the steps (and their status) relevant to that document.
- Users will have instant insight into the performance document and pinpoints the steps required as well as the status for each.
- The employee and manager can quickly and easily track the stage of completion against this easy-to-use grid.

8.9 ePerformance – User Experience prototype

Menu

- Employee Self Service
 - Performance Management
 - Performance Home
 - Create New Performance Document
 - My Performance Documents
 - My Evaluations for Others
- Manager Self Service
- Performance Management
- Setup

My Current Performance Documents

To start your evaluation click the Start Self Evaluation hyperlink.

My Current Performance Documents [View My Performance History](#)

Semi-Annual: 12/31/1999 Semi-Annual: 06/30/1999 Project: ABC Project: LMN

Document Details

Evaluatee: Michael Faraday **Job Profile:** Interaction Designer
Review Type: Semi-Annual **Review Period:** 07/01/1999 - 12/31/1999
Review Owner: William Gilbert **Manager:** William Gilbert
Last Modified: 03/01/1999 **Last Modified By:** William Gilbert

Document Progress

Step		Status	Due Date	
Establish Criteria	✓	Complete	07/15/1999	View Criteria
Nominate Participants	✓	Pending Acceptance	07/30/1999	View Nominations
Track Participant Feedback	◆	Not Started	09/01/1999	
Complete Self Evaluation	◆	Not Started	08/10/1999	Start
Review Final Document	◆	Not Started	09/15/1999	

[View My Performance History](#)

- **Improved Administrative Capabilities**

- Integrating all rating calculation methods to salary planning
- Multi-select for express actions: Cancel, Transfer, Change Status, Enter Preliminary Ratings
- Workflow Notifications

- **Integration**

- Additional integration points to other PeopleSoft applications such as Workforce Compensation Solutions and Learning Management
- More integration points with third party content providers

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- The Person Model
- Contingent Workforce Management
- Non-Worker/Person of interest Management
- Configurable Actions and Action Reasons
- Labor Agreement Management

• **Person Model**

- Provides the capability to separate the creation of a person from entering the Job information.
- Clear distinction between non-employees who are part of the workforce (contingent workers) and non-employees who we track for other reasons
- Revised UI
 - HRMS Personal Data
 - HRMS Job
- Enhancements for Job and Employment Data

- **Contingent Workforce Management**
 - eRecruit/Services Procurement for Contingent Workers
 - People can now seamlessly transition between employee and contingent worker status while keeping the same employee ID.
 - All Payroll products have been enhanced to be able to support contingent workers, employees, or people who are concurrently both contingent workers and employees
 - Ability for contingent workers to use self-service
 - Better reporting and analytics

8.9 Human Resources - prototype

Name //Location

Personal History

Extensions

Checklist

Bauer,Friedrich

EmplID: KDG014

Person Organizations

- Employee
- Contingent Worker
- Person of Interest

Add Employment Instance

Add Contingent Worker Instance

Add Person of Interest

Person Checklist

Person Checklist

Find | View All First 1 of 1 Last

*Checklist Date: 01/06/2004

*Checklist: HCCWR

Add Contingent Worker Instance

Responsible ID:

Comment:

Person Checklist Items

Customize | Find | First 1-2 of 2 Last

Sequence	Item Code	Description	*Brief Stat	Link ID		
1	HC0002	Add Contingent Worker Instance	Initiated	Add Contingent Worker Instance	+	-
2	HC0003	Person Identification	Initiated	Person Identification	+	-

Save

Return to Search

Next in List

Previous in List

Notify

Previous tab

Next tab

Add

Update/Display

Refresh

- **Management by Labor Agreement**

- 1) Enhanced seniority date tracking**

- Multiple, user-defined seniority dates for labor agreement management
 - Determine employees' rights to such processes as shift bidding, promotions, or re-calls by using their configured dates.

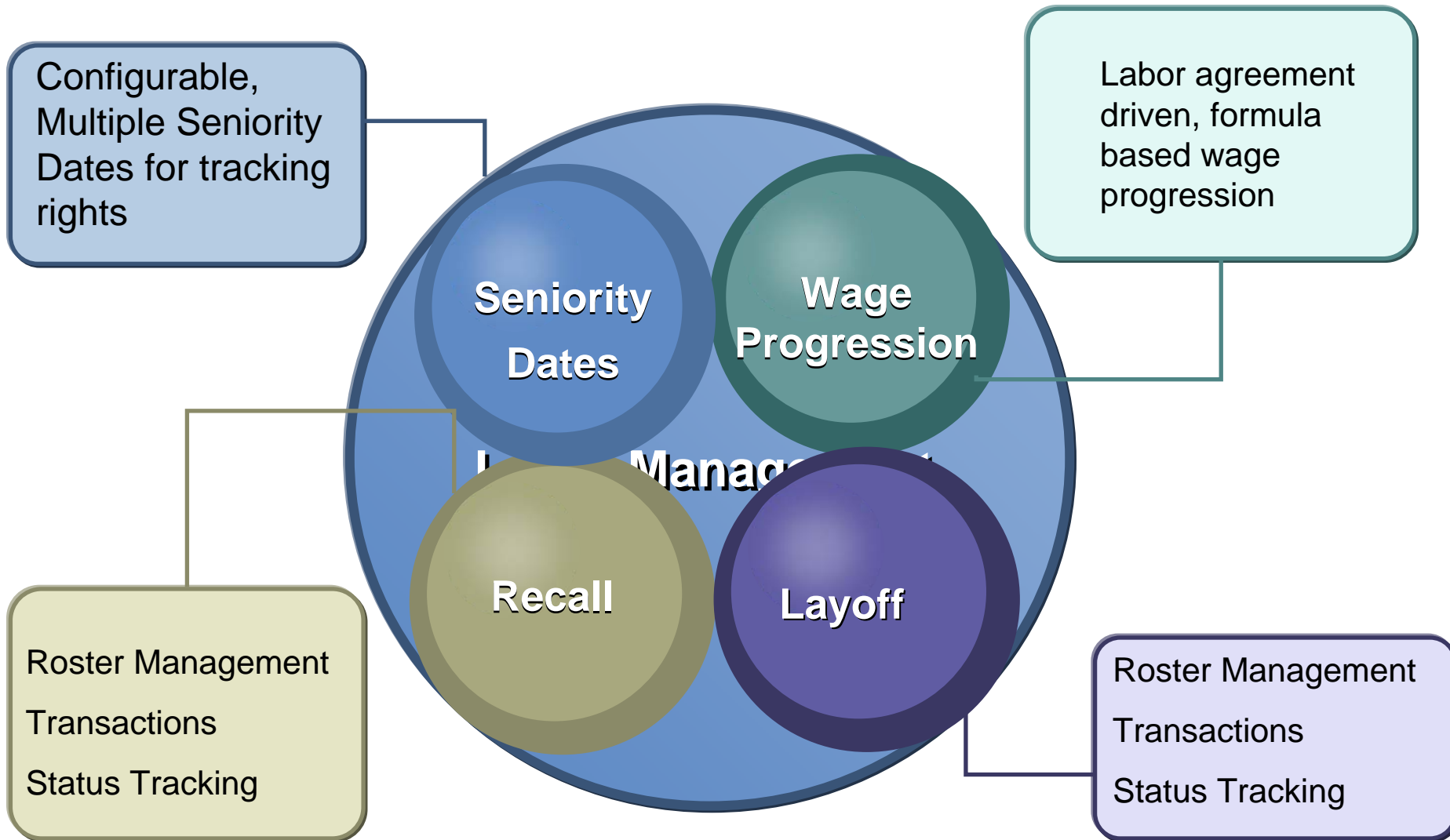
- 2) Automated wage progression**

- Associate jobs and wage plans to labor agreements.
 - Wage progression rules automatically trigger progressions based on such criteria as time worked.

- 3) Collective Action Administration**

- Plan collective actions, iteratively define rosters, and execute collective actions such as layoffs, recalls, or reductions in hours.

Management by Labor Agreement



Human Resources 8.9 -- Labor Agreement Prototype

Labor Agreement

Jobcodes

Seniority Rules

Facility

SetID SHARE Table Set shared across Corp

Labor Agreement BA0001 Test Bargaining Agreement

Jobcode Classification

Job Classification

Office Workers



Select Multiple Job Codes

Jobcodes

Customize | Find | View 4 |

First 1-6 of 6 Last

Job Code SetID	Job Code	Description	Job Code Hierarchy Seq Number	Salary Plan Setid	*Salary Plan	Tier		
SHARE	110000	Accountant	1	SHARE	K0G1	Tier	+	-
SHARE	120000	Administrator	2	SHARE	K0G1	Tier	+	-
SHARE	120005	Administrator Customer Service	3	SHARE	K0G1	Tier	+	-
SHARE	120010	Administrator-Human Resources	4	SHARE	K0G1	Tier	+	-
SHARE	120020	Administrator-Network Services	5	SHARE	K0G1	Tier	+	-
SHARE	170005	Assistant-Administrative	6	SHARE	K0G1	Tier	+	-

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11. Workforce Analytics

Tiered Country Approach

Country Extensions

Country Specific Data /
Absence Management
Payroll Rules
Country Specific Reports

Out-of-the-box functionality



Country
Extensions

Global
Business
Foundation

Architecture & Technology

Global Payroll Core Engine

Global Best Practices
Rules-based Engine

**Highly flexible and configurable, no
customization**

Architecture and Technology

Pure Internet technology
Single code line globally

**Low Cost deployment,
maintenance and support**

• **Functional Enhancements:**

- Off-cycle payroll processing
- User-friendly payroll inquiry pages
- Banking enhancements
- Mass retroactivity functionality
- Integration with Sales Incentive
- Manual check update
- Automated reversal process

• **Specific Country Compliance Enhancements**

- United Kingdom
- France
- Switzerland
- Germany

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Absence Management 8.9


- Built on the proven, in-production absence functionality in Global Payroll
- Absence Management is now available as a standalone product, but is also automatically included as an integral part of Global Payroll 8.9
- Special emphasis on:
 - Self service ease of use
 - Integration

- **Self service ease of use**
 - **For Employee**
 - Simple and efficient employee self-service to submit absence requests and view their status.
 - Simple and efficient employee self-service to view current and projected absence balances.
 - **For Manager**
 - Simple and efficient manager self-service to view current and projected absence balances for their employees.
 - Simple and efficient manager self-service to act on (approve/deny) absence requests.

Absence Management 8.9 – Employee self service: Submit Absence Request Prototype

Absence Request

***Start Date:**  (example: 12/31/2004) [View Calendar](#)

End Date: 

Absence Type: ▼

***Absence Name:** ▼ **Current Balance:** 10 Hours


Partial Days: ▼

Start Date Absent Hours: Start Date is Half Day

Duration: Hours

Comments

Requestor Comments



Absence Management 8.9 – Employee self service: View Absence Requests Prototype



View Absence Requests

George Forman

Analyst - Business

Specify the date range of interest. To retrieve a complete history, leave From and To dates blank and click Refresh. Select absence name link to view request details, and edit or delete buttons to modify the request.

From:  (example: 12/31/2003) **Through:** 

Absence History							
View All First  1-4 of 4  Last							
Absence Name	Requested By	Start Date	End Date	Duration	Status		
Surgery	Employee	08/23/2004	08/27/2004	36 Hours	Submitted	<input type="button" value="Edit"/>	<input type="button" value="Delete"/>
Paid Time Off	Administrator	07/05/2004	07/05/2004	Not Available	Saved		
Paid Time Off	Manager	05/28/2004	05/28/2004	1 Day	Approved		
Annual Leave	Employee	03/01/2004	03/01/2004	16 Hours	Denied	<input type="button" value="Edit"/>	<input type="button" value="Delete"/>

Go To: [Request Absence](#) [View Absence Balances](#) [Absence Home](#) [Employee Home](#)

Absence Management 8.9 – Manager self service: Process requests Prototype

Select Absence Request

Cynthia Sykora

Manager

Click on the requestor's name link to approve or decline requests. You can view the work calendar for your direct reports by clicking in the View Calendar for All Direct Reports link. To view all requests or previously approved or denied requests, use Show Requests by Status and select the Refresh button.

Show Requests by Status: Pending [View Calendar for All Direct Reports](#)

Pending Requests View All | First ◀ 1-5 of 5 ▶ Last

Employee	Employee		Absence Name	Start Date	End Date	Status	Date Submitted
Patrick Valhalla	KG0002	Controller	Personal	04/22/2004	4/25/2004	Resubmitted	04/01/2004
Bob Anderson	KG0004	Programmer	Paid Time Off	04/24/2004	4/24/2004	Awaiting Final Approval	03/28/2004
George Forman	KG0001	Analyst	Paid Time Off	04/28/2004	04/30/2004	Submitted	04/09/2004
Patrick Foster	KG0003	Controller	Sickness	05/01/2004	5/15/2004	Cancelled	04/02/2004
George Forman	KG0001	Analyst	Sickness	08/23/2004	08/27/2004	Submitted	04/20/2004

Go To: [Request Employee Absence](#) [View Employee Absence Requests](#) [View Employee Absence Balances](#)
[Absence Home](#) [Manager Home](#)

- Self service ease of use
 - For Absence Management Administrator
 - **Highly configurable** request approval functionality, including multi-level approvals and alternate approvers
 - **Highly configurable** absence accrual functionality, including a rules engine to compute the most complex accrual logic
 - **Highly configurable** absence consumption (“absence take”) functionality, including a rules engine to compute the most complex consumption logic.
 - **Highly configurable** absence terminology

- **Integration**

- **Integration with PeopleSoft Enterprise Payroll for North America.**

- Ability to export computed absence accruals and consumption (by employee, by pay period) for actual payment.

- **Integration with Payroll Interface**

- Ability to export computed absence accruals and consumption (by employee, by pay period) for actual payment.

- **Integration with Time & Labor**

- Ability to export computed absence accruals and consumption (by employee, by pay period) to PeopleSoft Enterprise Time & Labor for payable time generation.

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11. Workforce Analytics

Process Integration Pack to SAP 8.9

- Bi-directional integration from the PeopleSoft payroll application to SAP Financials.
- Delivers all the required levels of integration, including:
 - data transformation
 - routing
 - cross-reference maps
 - connectors and adapters needed for a complete end-to-end process
- Payroll transactions from PeopleSoft Payroll for North America and PeopleSoft Global Payroll are posted to the SAP General Ledger

Highlights of product changes in HCM 8.9

1. Recruiting Solutions
2. ePerformance
3. Human Resources
4. Global Payroll Core and Country Extensions
5. Absence Management
6. Integration with Enterprise One (already here!)
7. Process Integration Pack for SAP
- 8. Time & Labor**
9. Help Desk for Human Resources
10. Sales Incentive Management
11. Learning Management
12. Workforce Analytics

- Enhanced Scheduling
- Time Reporting
- Business Process Controls
- Financials Integration
- Performance

- Scheduling: Provide improved capabilities to support all scheduling environment...
 - Fixed Schedule / Rotating Schedule Environments
 - Define sets of rotations, with relative start days
 - Schedule patterns are not associated to specific dates until an employee is assigned to the pattern
 - “What – if” schedule views
 - Accommodate split shifts on one day, off shifts that are greater or less than 24 hours, and daybreaker rounding for shifts that cross midnight.

Time and Labor 8.9 -- Manager Self Service – Manage Schedules Prototype

Manage Schedules

[View Options](#)

▶ [Selection Criteria](#)

View By:

Show:

Date: Start Time: End Time:

◀ Previous Day Sunday, February 1st: 12:53PM Next Day ▶

Time Reporter	Job Title	Location		8am	10am	12pm	2pm	4pm	6pm	Scheduled	Standard
<input checked="" type="checkbox"/> Mary Agar	Attendant	FR								8.0	8.0
<input type="checkbox"/> Nancy Breckenridge	Sales	FR								8.0	8.0
<input type="checkbox"/> Linda Evans	Manager	D5								8.0	8.0
<input type="checkbox"/> Mary Jones	Cashier	NOC								5.5	6.0
<input type="checkbox"/> Stephen King	Host	N5									8.0
<input type="checkbox"/> Jerry Rice	Sales	D6								4.0	4.0
	Stocker	N2								2.0	2.0
<input type="checkbox"/> Susan Sanders	Trainer	N1								8.0	8.0
<input type="checkbox"/> Scott Black	Server	D5								6.0	8.0
<input type="checkbox"/> Bob Zimmerman	Sales	N1								8.0	8.0

Schedule Actions

Legend	
	Approved Training
	Holiday
	No Shows
	Absence

Go to: [Manage Schedule Assignments](#)

- Time Reporting - New and improved self-service timesheets:
 - **Pre-population and Configurability**
 - Pre-defined punch pattern (e.g. in/meal/in/out) will pre-populate the timesheet.
 - Timesheets can be pre-populated from one of three different sources according to the configuration: schedules, previous period time, or personal task values.
 - **Visibility to Useful Information**
 - Total hours reported and available leave balances
 - Easy access to leave balance and schedule information from within the timesheet.
 - View daily and period running totals by time categories (customer configured groupings of time reporting codes).



Time and Labor 8.9 -- Individual Timesheet Prototype

Betty Locherty
Administrative Assistant

Empl ID KU0010

Empl Rcd Nbr

View By:

Date  

Time Populated From:

Available Time Off: [88 Hours](#)

Total Hours: [42 Hours](#)

Deviation: [-6.00 Hours](#)

Betty's Timesheet From: 02/02/04 To: 02/08/04

Find | View All | 

First

Mon 02/02	Tues 02/03	Wed 02/04	Thur 02/05	Fri 02/06	Sat 02/07	Sun 02/08	Total	Reporting Code	PC Bus Unit	Project ID	Activity
<input type="text" value="8.00"/>	<input type="text" value="5.00"/>	<input type="text" value="8.00"/>	<input type="text" value="5.00"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	26.0	<input type="text" value="REG"/>	<input type="text"/>	<input type="text" value="3500 ABC"/>	<input type="text"/>
<input type="text"/>	<input type="text" value="4.00"/>	<input type="text"/>	<input type="text" value="4.00"/>	<input type="text"/>	<input type="text" value="5.00"/>	<input type="text"/>	8.0	<input type="text" value="REG"/>	<input type="text"/>	<input type="text" value="2100 CRD"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text" value="8.00"/>	<input type="text"/>	<input type="text"/>	8.0	<input type="text" value="VAC"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Time Summary From: 02/02/04 To: 02/08/04

Type	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday	Week Total
Time Worked	8.00	9.00	8.00	9.00				34.00
Time Not Worked					8.00			8.00
Total Hours	8.00	9.00	8.00	9.00	8.00			42.00
Schedule Deviation		+1.00		+1.00	-8.00			-6.00

- **Business Process Enhancements**
 - **Manager Self-Service**
 - User-friendly interface to easily identify and navigate through the pool of employees.
 - Establish preferred employee criteria, establish default values
 - Pre-populate lists with dynamic subsets of overall employee pool
 - **Timesheet Approvals and Controls**
 - Time approval workflow, including the ability to submit, approve, deny, or adjust time at the timesheet or detail level.
 - Visibility to the timesheet statuses of employees
 - Including those that have not yet submitted time and those that have exceptions associated with their time in one central location.

Highlights of product changes in HCM 8.9

1. Recruiting Solutions
2. ePerformance
3. Human Resources
4. Global Payroll Core and Country Extensions
5. Absence Management
6. Process Integration Pack for SAP
7. Time & Labor
- 8. Help Desk for Human Resources**
9. Sales Incentive Management
10. Learning Management
11. Workforce Analytics

- Service Level Agreement Management
- Knowledge Management Enhancements
- Active Analytics Framework
- Configurable Case
- New 360 Degree View and Case Page Look and Feel

- **Service Agreement Level Management**
 - Define different service levels by role, dept, contact method, case priority
 - Determine response and restore times
 - Track and report on service level violations

- **Knowledge Management Enhancements**
 - Support of Thesaurus, HTTP spidering, File spidering, crawling
 - Leveraging external content (eg- external websites and docs)

- **Active Analytics Framework**
 - Action Links suggest actions or next steps to HR agents
- **Configurable Case**
 - Tailor case page through configuration rather than through changes to PeopleCode
 - Hide/ unhide specific fields, sections, pages
 - More flexibility in changing field labels and specifying roles
- **New 360 Degree View and Case Page**
 - New Layout, collapsible sections, process driven workflow

Help Desk for HR 8.9 -- Active Analytics Framework

Case March 05 2004

Case ID 220406 **Status** Open - New
Employee ID KU0113 **Employee Name** [Cassandra Jacobson](#)
Summary Make a Benefits Change

[Case](#) [Solution](#) [Summary](#) [Notes](#) [Case History](#)

Employee Information

Employee [Cassandra Jacobson](#)

Contact Method [Edit](#)

[Show Details](#)

[Search Again](#)

Problem

***Summary**
Make a Benefits Change

Description
Employee would like to make a Benefits Change

Actions

Suggested Action

Description

Human Resources

Benefits

Payroll

Stock

Training

Case Information

[Main](#) [More](#)

Secured Case

Quick Code

***Status**

Resolved by First Contact

Provider Group

Assigned To

Product

Description

Problem Type

Asset Tag

[Select Agreement](#)

Category

Specialty Type

Detail

Priority

Impact

Severity

Actions

Suggested Action

Description

Human Resources

Benefits

Payroll

Stock

Training

HelpDesk for HR 8.9 – Worker 360 Degree View

History 360 View Pacific Standard Time

360 Degree View

[Save](#) [Refresh](#) [New Search](#) [Personalize](#) [Send](#) [Notify](#) [Edit Toolbar](#)

360 Degree View Relationship Viewer

Go To [Go](#)

Profile

Name [Antonio Santos](#)
Home Phone 916-647-4346
Home Address 2050 Gateway Place,
San Jose, CA 95124, USA

Social Security 578-29-0482
Employee ID KU0010
Business Email H2177-ASANTOS@ps
sales@peoplesoft.com

Emergency Contact

Name Jill Hill
Phone 916-674-4346
Address 2050 Gateway Place, San
Jose, CA 95124, USA

Activities

Date Filter Last Year
First | Previous | Next | Last | Left | Right

Overview of - Antonio Santos

- Cases (40)**
 - [Authorized Cases \(5\)](#)
 - [Unauthorized Cases \(10\)](#)
- [Add Case](#)
- [Search Cases](#)
- Interactions - (10)**

Open - New Case (10)

Case ID	Date Created	Priority	Subject	Assigned To
220438	2003-07-01	Medium	Problem with Air Conditioner	Perry, David L
220450	2003-07-01	Medium	Electrical Problem	Employee 125
221234	2003-07-01	Medium	Freezer not working	Employee 126
224567	2003-07-01	Medium	Problem with Refrigerator	Employee 128
220438	2003-07-01	Medium	Problem with Air Conditioner	Perry, David L

Log Interaction Note / Log Customer Interaction

Date 10/20/2003 **Time** 2:36 pm

Contact Method **Status**

Callback Date **Callback Time**

Note

[Save Note](#) [Email Note](#)

Recent Transactions

Number	Description	Comments
1	Note	
2	Note	

Profile

Dynamic Grid

Highlights of product changes in HCM 8.9

1. Recruiting Solutions
2. ePerformance
3. Human Resources
4. Global Payroll Core and Country Extensions
5. Absence Management
6. Integration with Enterprise One (already here!)
7. Process Integration Pack for SAP
8. Time & Labor
9. Help Desk for Human Resources
- 10. Sales Incentive Management**
11. Learning Management
12. Workforce Analytics

Sales Incentives Management

Stand alone solution. SIM 8.9 is scheduled for Q4 2004

- **Tools for Compensation Administrators**

- Ability to easily configure user interface objects
- Structured variables to assist with plan design
- Vertical development kit to customize metrics

- **Core Functionality Enhancements**

- Additional standard integration
- Generic performance metric transactions to customize as needed
- Enhanced template data and formulas

- **Banking and Capital Markets Template**

Learning Management

Stand alone solution on its own release cycle scheduled for release 1H04

Training for profit.

- Self-service registration for external (nonemployee) learners
- Integration with PeopleSoft Enterprise CRM and Accounts Receivable
- Subscription-based learning, and distributed registrar capabilities

Learning portfolio management.

- Forecast the demand for learning
- Plan and track resource use
- Track learning revenue, costs, and budget

• **Learning marketing.**

- Market learning programs to targeted audiences
- Gather critical information about the success of your learning through rating, instructor scorecard, and simple survey functionality.

- Thoughtful enhancements to current functionality
 - Recruiting
 - ePerformance
 - Time & Labor
 - Help Desk for Human Resources
- New Products / New Functionality
 - Absence Management
 - Labor Agreement Management
 - Person Model / Contingent Workforce
- Continued investment in Global functionality