

PeopleSoft Human Capital Management (HCM) Update & Roadmap

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PeopleSoft HCM

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Safe Harbor Statement

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

PeopleSoft HCM – Delivered

**Fluid Total
Rewards**

Control Access to
Applicant Data

**PeopleTools
8.56**

Guided Self Service
Multi-select

**Fluid ESS for
HR HelpDesk**

Dotted Line
Reporting

Fluid Timesheet for
Elapsed Time

XML Reporting

**Simplified
Analytics**

**PNA Component
Lockdown**

Classic Plus

Day One
Onboarding

**Global Legislative
Updates**

Fluid Manager Self Service
for Time & Labor

**Data Privacy
Enhancements**

Fluid Absence
Self Service
Enhancements

Fluid ESS
for HR
Learning

**Fluid
Approvals**

**GSS for New
Positions**

GP Element
Browser

**T&L Bulk Auto
Enrollment**

Fluid Self Service
Reporting

**Employee
Snapshot**

HCM Features Resonating with Customers

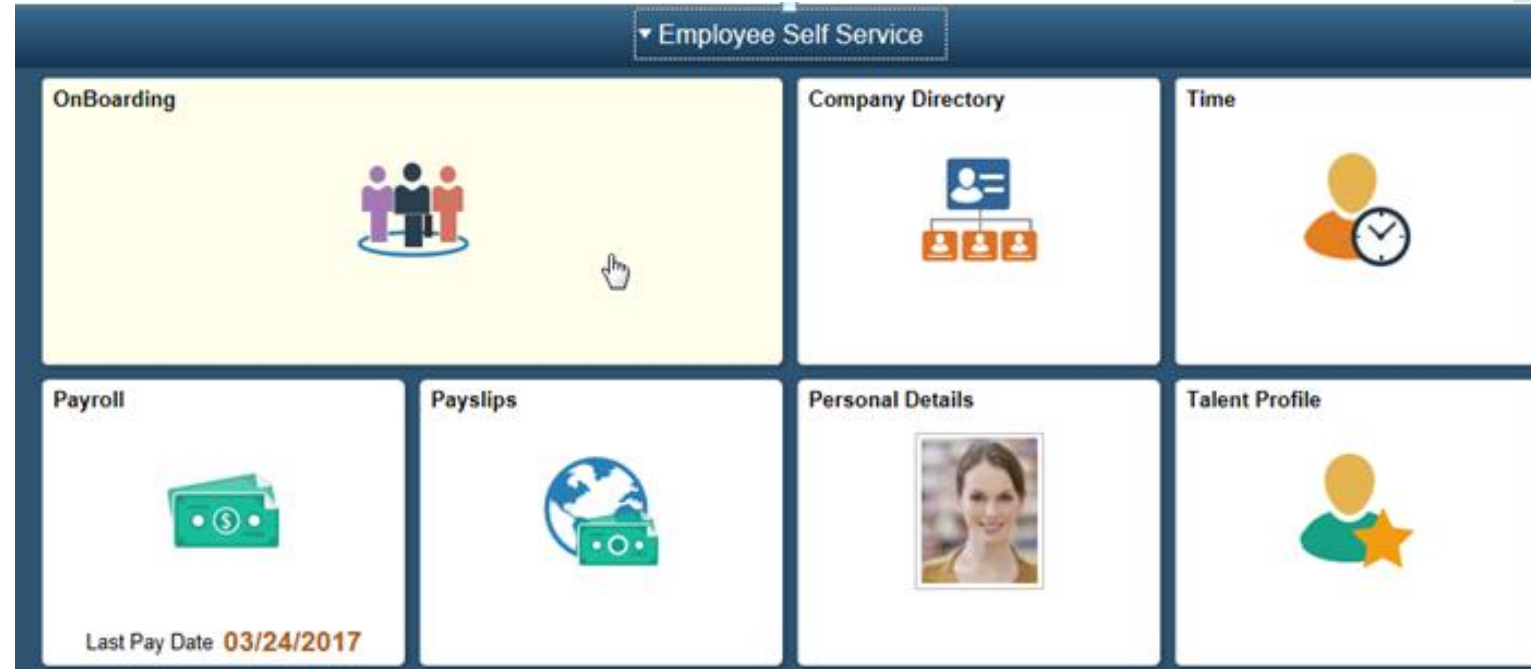


- Day One On-Boarding (Employee Engagement)
- Employee Snapshot (Talent Management)
- Fluid Recruiting Candidate Gateway (Usability)
- Data Privacy Enhancements (Compliance)

Day One Boarding

Available Now

- Guided Process using Fluid Activity Guide
- Configurable List of Steps
- Tracks Status by Steps
- PeopleSoft and Non-PeopleSoft Steps
- Allows Dependencies between Steps
- Workflow Approval by Individual Step
- Alerts and Notifications
- Visibility into the process for all constituents (New Hire, Hiring Manager, HR, IT, etc.)



Day One Boarding

Available Now

✕ Exit

Day 1 OnBoarding

< Previous

Next >

Before to start video

○ Visited

Welcome Video

○ Visited

✱ Acknowledgement

✔ Complete

Company Handbook

○ Visited

Company Documents

○ Not Started

Attachments

○ Not Started

▶ Personal Details

○ Not Started

Ethnic Groups

○ Not Started

▶ Talent Profile

○ Not Started

Banking

○ Not Started

Summary

○ Not Started

Acknowledgement

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

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

[View Terms and Conditions](#)

☒ I Agree to the Terms and Conditions

Updated By

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

Save

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Fluid Maintain Bank Accounts

Available
Now

The screenshot displays the 'Bank Accounts' section of the 'Employee Self Service' portal. A modal window titled 'Bank Accounts' is open, showing the 'Bank Details' form. The form includes the following fields and controls:

- Status:** A toggle switch set to 'Active'.
- *Country:** A dropdown menu showing 'United Kingdom'.
- *Account Type:** A dropdown menu showing 'Checking'.
- Do you have an IBAN:** A toggle switch set to 'No'.
- IBAN:** An empty text input field.
- *Bank ID:** A dropdown menu showing '400000', with 'Midland Bank' listed as a suggestion.
- *Account Number:** An empty text input field.
- Account Name:** An empty text input field.
- AC Account Name:** An empty text input field.
- *Currency Code:** A dropdown menu showing 'GBP', with 'Pound Sterling' listed as a suggestion.
- Funds going to a non U.S. Bank:** A toggle switch set to 'No'.
- Attachments:** A section with a '+' icon to add attachments.

The background shows a sidebar with 'Betty Locherty' and 'Bank Accounts' section, and a main area with a table of bank accounts.

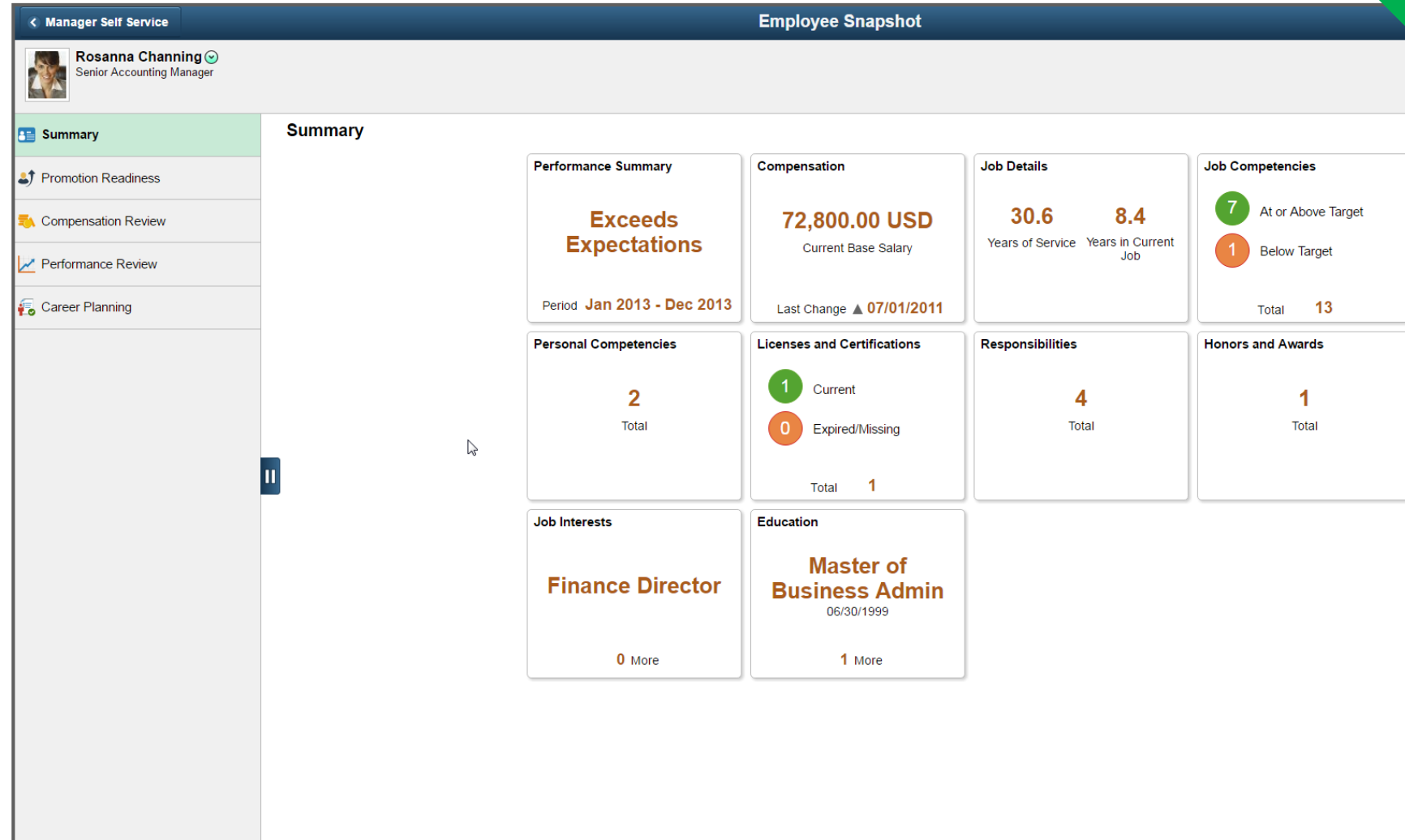
- Modern User Interface
- Configurable
- Notifications
- Attachments
- Enabled for HR-only users *

*) Delivered as part of ePay

Fluid Employee Snapshot

Available
Now

- 360 View of Talent Information
- Talent Summary & Timeline
- Track Employee Readiness for:
 - Promotion
 - Performance Review
 - Salary Changes
 - Succession
- Track Employee Measures
 - Risk of Leaving
 - Impact of Loss
 - 9 Box
 - Potential



Fluid Recruiting Homepage

For Recruiter roles

- Replacement of Classic Recruiting Home – more modern experience for the Recruiter
- “Ease of use”; “Visibility of all parts and pieces”; and “Quick access”
- Recruiters spend most of their day in TAM
- Ability for the Recruiter to personalize the homepage
 - Selecting tiles
 - Arrangement of tiles
- Tiles transfer to Fluid or Classic Plus pages
- Same functionality as Classic Recruiting Home page



Available
Now

My Job Openings

Available
Now

Recruiting

My Job Openings

Quick Search

Search My Job Openings >>

Clear Search Personalize Filters

My Job Openings 28 results found for "Jobs Assigned to Me".

Job Title/Job ID	Recruiting Location	Category	Hiring Manager	Days Open	No Action Taken	Applicants	
Labor Relations Specialist 504094	Delaware Operations		John Patterson	19	1	3	>
Systems Analyst 504093	Delaware Operations		John Patterson	19	0	3	>
Administrator 504092	Public sector		John Patterson	19	2	3	>
Procurement Manager 504089	Kansas City		John Patterson	19	4	4	>
Administrative Assistant 504087	Pennsylvania		John Patterson	183	1	8	>
Assistant 504086	New Jersey		Rosanna Channing	658	1	10	>
Employee Relationship Manager 504085	Illinois		John Patterson	156	1	9	>
Senior Procurement Manager 504083	Texas		John Patterson	657	4	11	>

Related InformationMy Analytics

Job Opening Aging

Job Opening Count

<30

Age Band (In Days)

Jobs Opened/Closed

Status Date

Opened Closed

Time to Fill Jobs

Average Age in Days

Status Date

Manage Job Opening

Classic Plus Example

Available
Now

My Job Openings

Manage Job Opening

Related Content | Personalize Page

Manage Job Opening

Recruiting Home | Search Job Openings | Next | Create New | Clone | Refresh | Add Note | Interviews | HR | Print Job Opening

Personalize

Job Opening ID 504094

Job Posting Title Labor Relations Specialist

Job Code 600060 (Manager-Employee Relations)

Position Number 19000025 (Manager-Employee Relations)

Status 010 Open

Business Unit GBIBU (Global Business Institute BU)

Department 13000 (Finance and Administration)

Job Family KADMIN (Administrative Support)

Applicants

Applicant Search

Applicant Screening

Activity & Attachments

Details

All (3)

Applied (1)

Reviewed (0)

Screen (0)

Route (1)

Interview (1)

Offer (0)

Hire (0)

Hold (0)

Reject (0)

Applicants ?

1-1 of 1

Select	Applicant Name	Applicant ID	Type	Disposition	Application	Resume	Mark Reviewed	Route	Interview	Reject	Print	
<input type="checkbox"/>	Jacqueline Bertholt	300132	External	Applied								▼ Other Action

Select All

Deselect All

▼ Group Actions

Recruiting Home | Search Job Openings | Next | Create New | Clone | Refresh | Add Note | Interviews | HR | Print Job Opening

Top of Page

Customer Success Stories

← → ↻ <https://www.questdirect.org/stories/ps>

OOW 2017 HIUG 2017 ORUG 2017 Collab 2017 UMRUG 2017 Demo 2016 Demo Perm Clu Support Readiness Reconnect 2017 GSE

ABOUT QUEST LOGIN Search


Quest International Users Group

EVENTS COMMUNITY EDUCATION JOIN

QUEST SUCCESS STORIES

Welcome to Quest's Customer Stories. These topic-specific stories collected and curated by our staff editor to showcase what our customers are doing and how they are optimizing their systems. These stories will help you effectively and efficiently access the up-to-date and important information about what customers like you are doing.


CUSTOMER STORY: CRU





PEOPLESOFT CUSTOMER STORIES


Cru began using PeopleSoft in 1994. They started with the HCM and Financials products and built out a custom donor system using PeopleSoft Tools. In 2015, Cru upgraded to HCM 9.2, followed by an upgrade to PeopleTools 8.55 in November 2016. In 2017, Cru upgraded to Financial 9.2 with PeopleTools 8.55 and is now using the fluid pages. Quest recently spoke with Nancy Everson, Senior HRIS Specialist/Team Leader at Cru, about their Fluid User Interface journey. Nancy helped shed some light on why and how Cru decided to implement Fluid, as well as what went well and what obstacles they had to overcome in the process.


MORE CUSTOMER STORIES



ALAMEDA COUNTY



CAPELLA UNIVERSITY



CENTENE

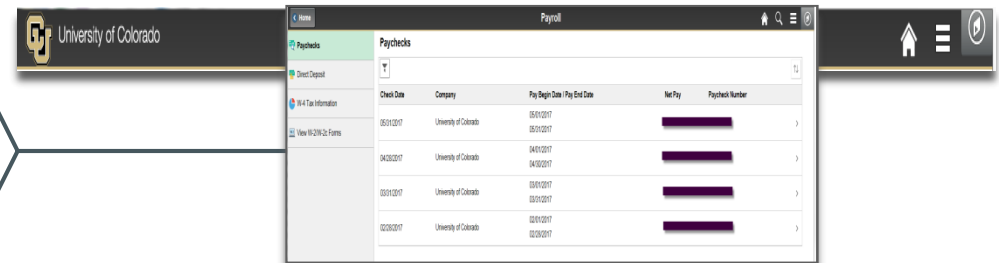
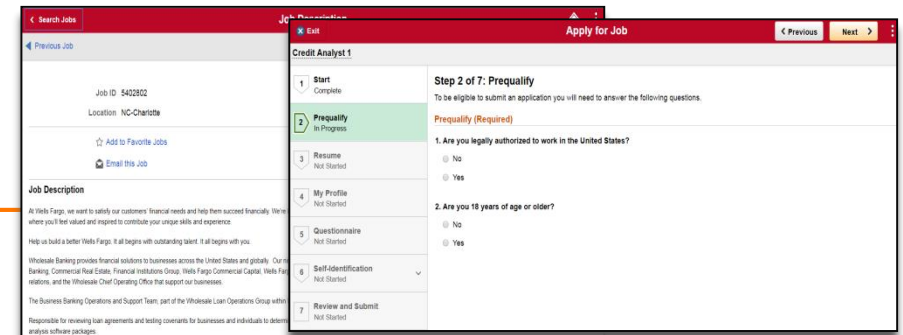
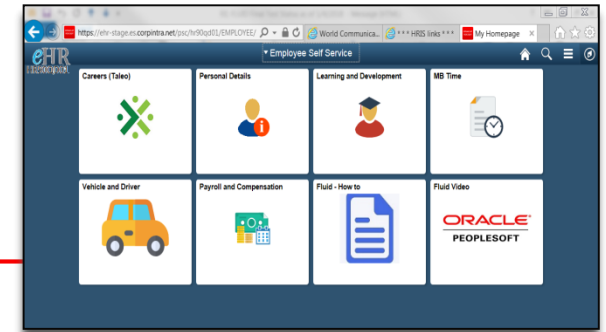
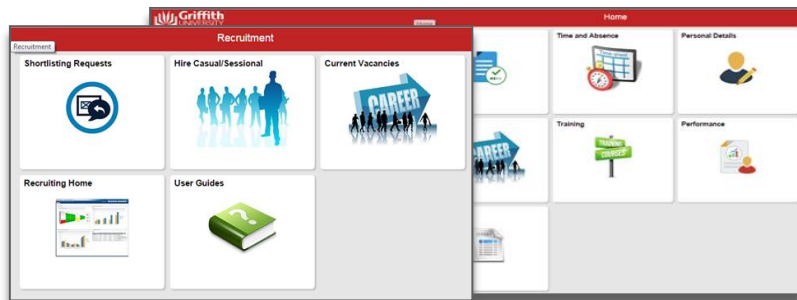
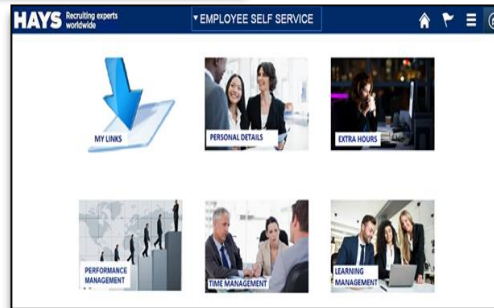
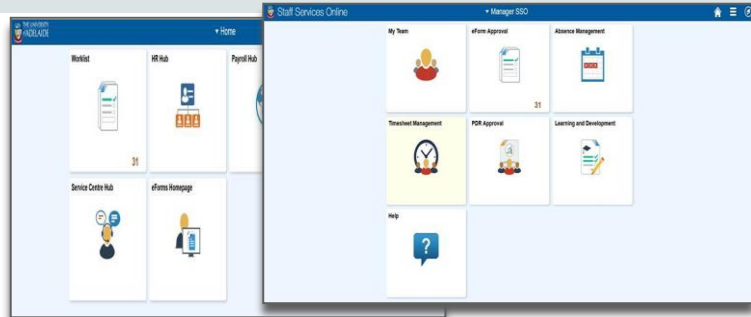

CHILDREN'S HOSPITAL


CLACKAMAS


DEAKIN UNIVERSITY


GRIFFITH UNIVERSITY


HENNEPIN



Must Why you ~~Should~~ Deploy Fluid?

- We are “All In” with Fluid
- Simple and Intuitive for Your Users
- Lower Training Costs
- Mobile Device Compatible
- Seamless User Experience Across Platforms and Applications
- Meet User and Leadership Expectations
- Majority of New Features and Frameworks Delivered using Fluid
- There is a long term cost to NOT deploying Fluid



Data Privacy



Data Privacy Enhancements

Enhancements to support Global Data Privacy requirements

- Personal and Sensitive Data Identification
- Field Level Security
- Data Erasure
- Consent / Acknowledgement



Data Privacy Information



Knowledge Documents on [MyOracleSupport](#):

- PeopleSoft HCM 9.2 - Personally Identifiable and Sensitive Data (Doc ID 2313438.1)
- PeopleSoft HCM 9.2 - Implementing Sensitive Data Masking (Doc ID 2375376.1)
- PeopleSoft HCM Acknowledgement Framework Red Paper (Doc ID 2377140.1)

Legislative Blog

[Managing Data Privacy within PeopleSoft HCM](#)

[PeopleSoft HCM Data Privacy Update](#)

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

Personal and Sensitive Data Data Security

- Limited to most commonly requested fields
 - Date of Birth
 - Bank Account Number
 - National ID
- Masking limitations
 - Birth date limited to entire date or just year
 - Bank account number limited to masking all but last 4 digits
 - National ID masking format will be defined at National ID Type level

Available Now

Biographical Details | Contact Information | Regional

Douglas Lewis Person ID KU0001

Name | 1 of 1 | View All

Effective Date 01/01/1980
Format Type English
Display Name Douglas Lewis **View Name**

Biographic Information

Date of Birth 06/29/XXXX
Date of Death
Birth Country USA United States
Birth State
Birth Location ☐ Waive Data Protection

Biographical History | 1 of 1 | View All

*Effective Date 01/01/1980
*Gender Male
*Highest Education Level A-Not Indicated
*Marital Status Married As of 01/01/1980
Language Code
Alternate ID ☐ Full-Time Student

National ID | 1-1 of 1 | View All

*Country	*National ID Type	National ID	Primary ID		
USA	Social Security Number	XXX-XX-2799	<input checked="" type="checkbox"/>	+	-






Personal and Sensitive Data

Data Privacy Framework

Available Soon

Manager Self Service

View References



Filters

Product

Human Resources

Component

Record

Field

Category

Health Information

Classification

Personal Identifier

Sensitive

Search

Clear

View References

Save

Component/Page

Query

50 rows

Page	Record	Field	Category	Classification	Personal Identifier	Sensitive	Product
Accommodation & Request	ACCOM_DIAGNOSIS	DIAGNOSIS_CD	Health Information	Medical Details	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Human Resources
Workforce Survey Result	CAN_OEE_SURVEY	DISABLED	Health Information	Disability Information	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Human Resources
Accomm & Request	ACCOM_DIAGNOSIS	DIAGNOSIS_CD	Health Information	Medical Details	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Human Resources
& Disability	DISABILITY	COMMENTS	Health Information	Disability Information	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Human Resources
& Disability	DISABILITY	DISABILITY_CD_JPN	Health Information	Disability Information	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Human Resources
& Disability	DISABILITY	DISABILITY_CD_UK	Health Information	Disability Information	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Human Resources
& Disability	DISABILITY	DISABILITY_GR_JPN	Health Information	Disability Information	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Human Resources
& Disability	DISABILITY	DISABILITY_ITA	Health Information	Disability Information	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Human Resources
& Disability	DISABILITY	DISABILITY_PERCTG	Health Information	Disability Information	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Human Resources

Data Privacy

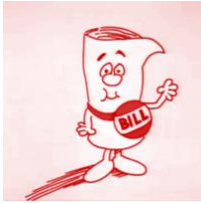
Roadmap Considerations

- Configurable security for any personal or sensitive data field
 - Anonymize or pseudonymize data
 - Mask additional sensitive data attributes
 - e.g. Passport, Drivers License, .. ?
 - Allow View Auditing
-
- Use the Ideas Space on MOS to log and vote for future Data Privacy features!



Roadmap for Next 12 – 18 Months

Roadmap



➤ **Enable Compliance** – Regulation & Legislative Changes



➤ **Empower Administrators** – Fluid & Enhanced Navigation



➤ **Deliver Feature Enhancements** - Customer Feedback & Ideas



➤ **Minimize Customizations** - Leveraging Configurable Functionality

ONBOARDING

Roadmap

✓ Delivered

Day 1 On Boarding

- Employee View – PI-23
- Manager View
- Admin View

Pre-Boarding

- Activities prior to day 1
- Work with PeopleSoft Recruiting



Off Boarding

- Employee Activities
- Manager Activities
- Interested Party Activities

Trans Boarding

- Internal movement
 - Department to Department
 - Company to Company

PeopleSoft Position Management

Roadmap

Allow for multiple actions on a single effective date

Allow customer to select fields to be managed by position management

Modernization of Position Management (i.e., Fluid)



- Usability Improvement
- Functional grouping of fields
- Related display to show description of all codes.
- Improved search results page
- More auto-fill in position data component
- Improve usability how Admins review errors/warnings generated

Flexibility of using Position Title or Business Title throughout the system

Easier process to start using Position Management

Modernization – Job Data & Personal Data

Roadmap

- Refine data entry
- Better Error Handling
- Better Search
- Fluid Capabilities
- Support for Custom Fields
- Smart HR Enhancements

The screenshot displays the Oracle HR Administration interface. The left sidebar shows a navigation menu with categories like Job Information, Job Data, Headcount, Labor Administration, HR Configuration, OnBoarding, and Dotted Line. The main content area is titled 'HR Administration' and shows the 'Work Location' tab for employee Douglas Lewis (Empl ID KU0001). The 'Work Location Details' section includes fields for Effective Date (01/01/2013), Effective Sequence (0), HR Status (Active), Payroll Status (Active), Action (Data Change), Reason, Job Indicator (Primary Job), Position Number (19000001), Position Entry Date (01/01/1980), Regulatory Region (USA), Company (GBI), Business Unit (GBIBU), Department (ADMIN), Department Entry Date (01/01/1980), Location (KUNY00), and Establishment ID (KU001). The interface also shows the employee's title 'President & CEO' and the date created '03/04/2014'.

Mobile Time Entry and Approval

Available Soon

Weekly Time

06/11/18 - 06/17/18

Reported 0

Scheduled 40

*Options

Manual Entry

Select Days

MON

TUE

WED

THU

FRI

SAT

SUN

*Time Reporting Code

Quantity

Time Details

Review

Pending Approvals		
View By	Type	
Full/Part Time or Hours	1	
Job Offer	3	
Job Opening	3	
Leave Donations	4	
Location Change	2	
MaritalStatusChange	1	
Matrix Team	2	
Overtime Request	1	
Payable Time	7	
Performance	2	
Promote Employee	1	
Reported Time	20	
Reporting Change	1	
Request Leave of Absence	2	






20 rows	
Routed	06/01/2014 >
Routed	07/03/2014 >
Routed	02/09/2017 >
Routed	02/09/2017 >
Routed	02/09/2017 >
Routed	

Fluid WorkCenter for Payroll Administrator

Roadmap

Workforce Administrator

Global Payroll WorkCenter



Scope

Open Calendars

My Work

Payroll Items

Payee Messages 43

Missing Bank Accounts 13

Retro Triggers 8

Iterative Triggers 1

Segmentation Trigger 7








Links

Queries

Reports/Processes

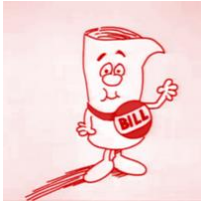
Segmentation Trigger

7 rows

Empl ID	Actions	Name	Trigger Effective Date	Segment Type	Trigger Event ID	Segmentation Trigger Status	Record (Table) Name	Field Name	Character Value	Pay Group
K0G002		Issac Nichta	2017-12-15	Period	JOB	Active				K0PGA
K0G016		Edward Eagle	2017-12-01	Period	JOB	Active	JOB	ACTION	TER	K0PGB
K0G018		Josephine Bonds	2017-12-15	Period	JOB	Active	JOB	ACTION	REH	K0PGB
KGG213		Lilian Fox	2018-06-01	Period	PERIOD	Active	JOB	ACTION	HIR	KGPGMONTH1
KGG213		Lilian Fox	2018-06-01	Element	ELEMENT	Active	JOB	COMPRATE		KGPGMONTH1
KGG213		Lilian Fox	2018-06-01	Period	PERIOD	Active	JOB	GP_PAYGROUP		KGPGMONTH1
KGG213		Lilian Fox	2018-06-01	Period	PERIOD	Active	JOB	PAY_SYSTEM_FLG		KGPGMONTH1

Initiatives for Next 12 – 18 Months

Roadmap



➤ Enable Compliance – Regulation & Legislative Changes

- eSocial (BRA), ACA (USA), Pay Day Reporting (NZL), Single Touch Payroll (AUS), Deduction at Source (FRA), AFI (ESP), Dimona (BEL), ...



➤ Empower Administrators – Fluid & Enhanced Navigation

- Fluid Homepages, Role based Fluid Workcenters, Fluid Simplified Analytics
Fluid Job Data, Personal Data, Smart HR, Classic Plus, ...



➤ Deliver Feature Enhancements - Customer Feedback

- Position Management, Company Directory, Benefits Open Enrollment, Fluid Timesheet, Compensation History, Pay Sheet Updates, Learning Analytics, Profile Management, ...



➤ Minimize Customizations - Leveraging Configurable Functionality

- Acknowledgement Framework, Fluid Approvals, Fluid Attachments, Data Privacy Framework, Comparative Analysis Framework, Activity Guide Composer, ...

Get Connected and Stay Informed

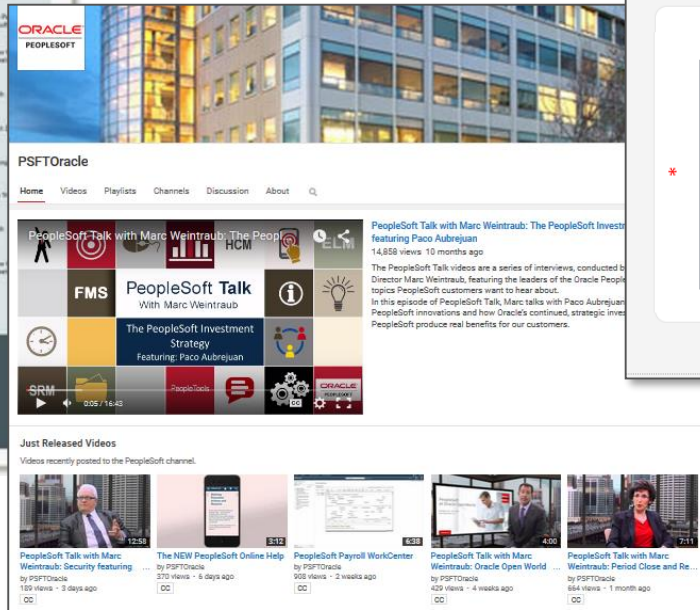
Key PeopleSoft Information Sources

PeopleSoft CFO Tool



PeopleSoft Information Portal

PeopleSoft Video Channel



@PeopleSoft_Info



Find us on Facebook

Oracle PeopleSoft Page

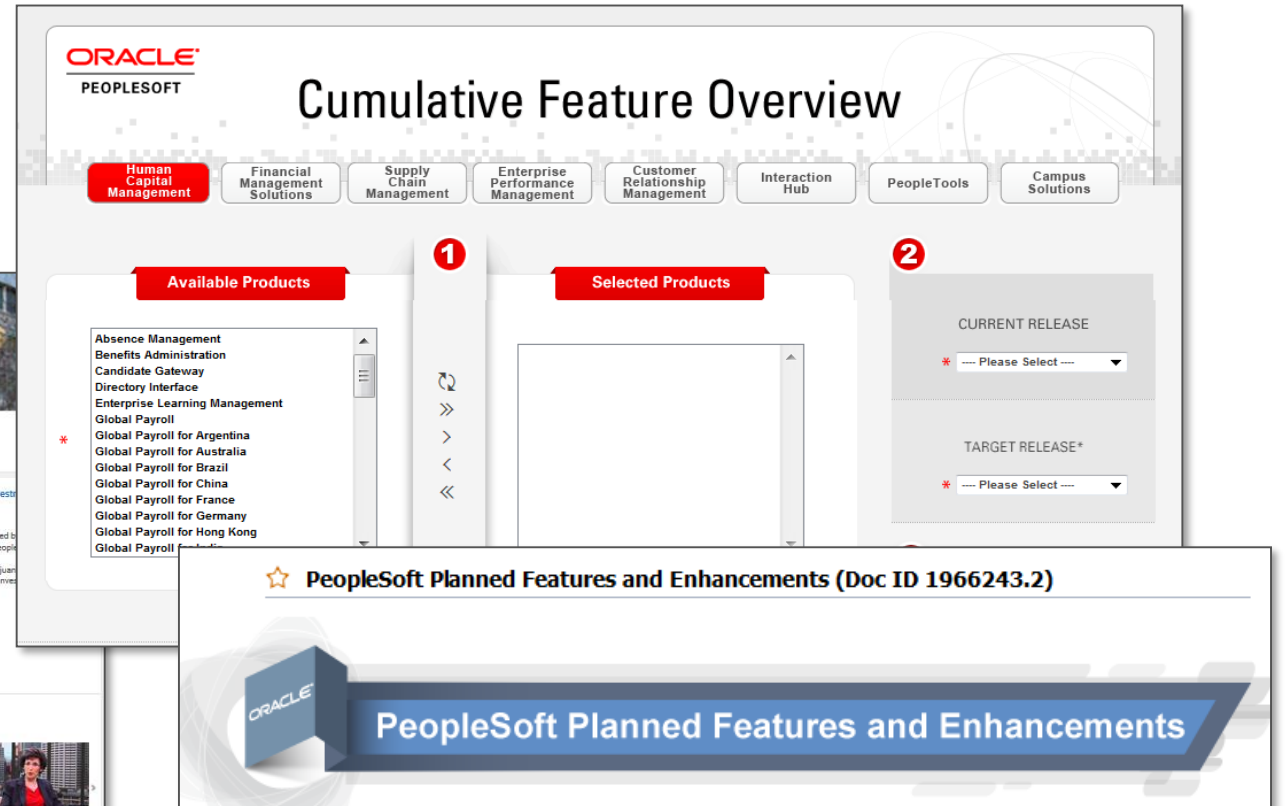
Social Media



Oracle PeopleSoft Development Group



Blogs



PeopleSoft PFE

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