



Specialized PeopleSoft 9.2
Human Capital Management



PeopleSoft Enterprise 9.2 Human Capital Management

Delta Features and Enhancements

Presented by:
Tony Townsend, SpearMC Consulting

www.SpearMC.com
1-866-SPEARMC

HCM 9.2

➤ **General Enhancements**

➤ **Human Resources**

➤ **Benefits**

➤ **Payroll**

➤ **Time and Labor**



General Enhancements

HCM General Enhancement Highlights

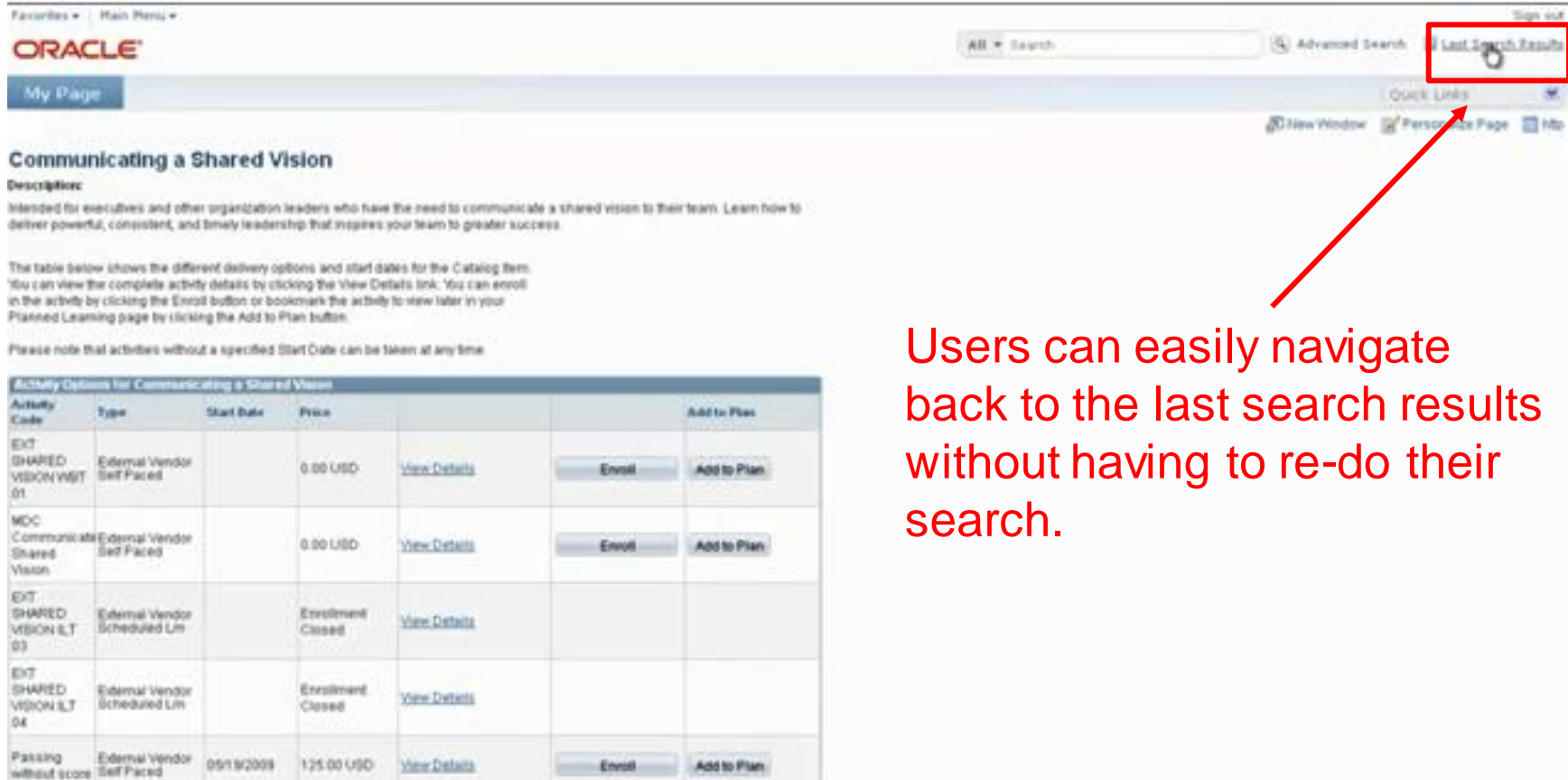
- **PeopleSoft Secure Enterprise Search**
- **Pivot Grid Functionality**
- **Embedded Help**

PeopleSoft Secure Enterprise Search

The screenshot displays the PeopleSoft Secure Enterprise Search interface. At the top right, there is a "Sign out" link. Below it, a search bar contains "All" and "Search", with "Advanced Search" and "Last Search Results" options. A dropdown menu is open, listing search categories: All, Person, Compensation, Absence Mgmt, Time, Learning, Career Plan, Succession Plan, and ePerf/Dev Docs. The "All" option is highlighted. To the right of the search bar is a "Quick Links" dropdown. Below the search bar, there is a "Personalize" link and a "1-7 of 7" indicator. The main content area shows a table with columns for "Job Title" and "Position in Salary Range". The table lists several job titles with their corresponding ratings (stars) and salary range indicators.

Job Title	Position in Salary Range
Corporate Controller	★★★★★
Assistant-Administrative	★★★★★
Manager-Payroll	★★★★★
Manager-Accounting	★★★★★
Senior Manager-Accounting	★★★★★
Analyst-Financial Sr	★★★★★
Manager-Accounting	★★★★★

PeopleSoft Secure Enterprise Search



Oracle
My Page
Sign out
All Search
Advanced Search
Last Search Results
Quick Links
New Window
Personalize Page
Help

Communicating a Shared Vision

Description:
Intended for executives and other organization leaders who have the need to communicate a shared vision to their team. Learn how to deliver powerful, consistent, and timely leadership that inspires your team to greater success.

The table below shows the different delivery options and start dates for the Catalog Item. You can view the complete activity details by clicking the View Details link. You can enroll in the activity by clicking the Enroll button or bookmark the activity to view later in your Planned Learning page by clicking the Add to Plan button.

Please note that activities without a specified Start Date can be taken at any time.

Activity Code	Type	Start Date	Price		Add to Plan
EXT SHARED VISION VIST 01	External Vendor Self Paced		0.00 USD	View Details	<input type="button" value="Enroll"/> <input type="button" value="Add to Plan"/>
MDC Communicate Shared Vision	External Vendor Self Paced		0.00 USD	View Details	<input type="button" value="Enroll"/> <input type="button" value="Add to Plan"/>
EXT SHARED VISION SLT 03	External Vendor Scheduled Lrn		Enrollment Closed	View Details	
EXT SHARED VISION SLT 04	External Vendor Scheduled Lrn		Enrollment Closed	View Details	
Passing without score	External Vendor Self Paced	05/19/2009	125.00 USD	View Details	<input type="button" value="Enroll"/> <input type="button" value="Add to Plan"/>

Users can easily navigate back to the last search results without having to re-do their search.

PeopleSoft Secure Enterprise Search

89 results matched your search criteria

[Learning: Continuous Workplace Improvement | Course Code: LDMG1002 | ID: 8](#)

Last Updated Date: 2009-06-18

Type: Course | Description: This training covers strategies for to increase productivity and efficiency in the workplace. Key areas covered will include training, teamwork skills, and career

▼ Related Actions

[Learning: Communicating a Shared Vision | Course Code: LDMG1003 | ID: 9](#)

Last Updated Date: 2009-05-19

Type: Course | Description: Intended for executives and other organization leaders who have the need to communicate a shared vision to their team. Learn how to deliver powerful, consistent, and

▼ Related Actions

[Learning: Business Fundamentals II | Course Code: BSSK1002 | ID: 11](#)

Last Updated Date: 2009-05-18

Type: Course | Description: Cover advanced concepts of cost accounting, financial forecasting, sales pipeline management, and inventory control.

▼ Related Actions

[Learning: Email as a Marketing Tool | Course Code: COMM1005 | ID: 6](#)

Last Updated Date: 2009-01-09

Type: Course | Description: Make email into a powerful marketing tool that can help you achieve greater sales. Calculate

Search items returned show the date the item was last updated.

Users can access related actions from returned search items.

PeopleSoft Secure Enterprise Search

The screenshot shows the Oracle PeopleSoft Secure Enterprise Search interface. At the top left, there are navigation links for 'Favorites' and 'Main Menu', followed by the 'ORACLE' logo and a 'My Page' tab. The main content area is titled 'Search Results' and includes a filter for 'Courses' with a 'Clear All' button. A 'Filter by' section on the left lists various criteria: Category (Courses: 89), Country (Blank: 82, United States: 48), State (Blank: 82, California: 29, Illinois: 10, New York: 10, Arizona: 4), and City (Blank: 82, San Francisco: 29, Chicago: 10, New York: 10). The search results are grouped into categories, with the first result being 'Learning: Continuous Workplace Improvement | Course Code: CSQM1002 | ID: 15'. A search dropdown menu is visible in the top right corner, showing options like 'All', 'Person', 'Compensation', 'Absence Mgmt', 'Time', 'Learning', 'Career Plan', 'Succession Plan', and 'ePerf/Dev Docs'. Three red boxes with arrows highlight the filter section, the search results, and the search dropdown menu.

Search Results

Courses | Clear All

Filter by

Category
Courses (89)

Country
Blank (82)
United States (48)

State
Blank (82)
California (29)
Illinois (10)
New York (10)
Arizona (4)

City
Blank (82)
San Francisco (29)
Chicago (10)
New York (10)

89 results matched your search criteria

1 2 3 4 5

[Learning: Continuous Workplace Improvement | Course Code: CSQM1002 | ID: 15](#)
Last Updated Date: 2009-08-18
Type: Course | Description: This training covers strategies for to increase productivity and efficiency in the workplace. Key areas covered will include training, teamwork skills, and career
▼ Related Actions

[Learning: Communicating a Shared Vision | Course Code: LDMG1003 | ID: 9](#)
Last Updated Date: 2009-05-19
Type: Course | Description: Intended for executives and other organization leaders who have the need to communicate a shared vision to their team. Learn how to deliver powerful, consistent, and
▼ Related Actions

[Learning: Business](#)
Last Updated Date: 2009-05-19
Type: Course | Description: This course covers forecasting, sales pipeline
▼ Related Actions

[Learning: Email as a Sales Tool](#)
Last Updated Date: 2009-05-19
Type: Course | Description: You will learn how to be
▼ Related Actions

[Learning: Common](#)
Last Updated Date: 2009-05-19
Type: Course | Description: This course covers forecasting, sales pipeline
▼ Related Actions

All Search

- All
- Person
- Compensation
- Absence Mgmt
- Time
- Learning
- Career Plan
- Succession Plan
- ePerf/Dev Docs

Search results are grouped into categories and can be filtered for ease of use.

Users can select to search the entire system or to search within a specific area.

Pivot Grids

- **Pivot Grid supports operational dashboard reporting within the PeopleTools framework to provide a pivot table and chart representation of data**
 - Supports only PSQuery data source
- **The framework also enables users to see different views of the data as in an Microsoft Excel pivot table, and the same data is also available in a chart view.**
- **Using Pivot Grid, users can view data in these different visualizations:**
 - Grid only
 - Chart only - user can perform various actions—pivoting data, dragging and dropping, and slicing and filtering data—to change the grid layout.
 - Grid and chart - data between the grid and the chart is synchronized for an accurate view

Pivot Grids

The screenshot shows a software interface for a Pivot Grid. At the top, there are four filter controls: 'Payable Status' (All), 'Job Code' (All), 'Location' (All), and 'Taskgroup' (All). Below the filters, there are four column headers: 'Sum: Quantity (...)', 'Sum: Est. Gross...', 'Sum: Labour Dis...', and 'Sum: Diluted Di...'. The main area contains a table with five rows of data. The first row is 'Afternoon Shift...' with a sub-row 'All' showing values 99.75, 156.31, 156.3, and 623.60. The second row is 'Bonus' with a sub-row 'All' showing 2315, 2315, 2200, and 2200. The third row is 'Callout Allowan...' with a sub-row 'All' showing 54, 2144.92, 2144.92, and 2144.92. The fourth row is 'GP - Unmapped t...' with a sub-row 'All' showing 215, 6588.5, and empty cells. The fifth row is 'Holiday Worked' with a sub-row 'All' showing 104, 1945, and empty cells. A green box highlights the data grid, and a red arrow points to the filter controls.

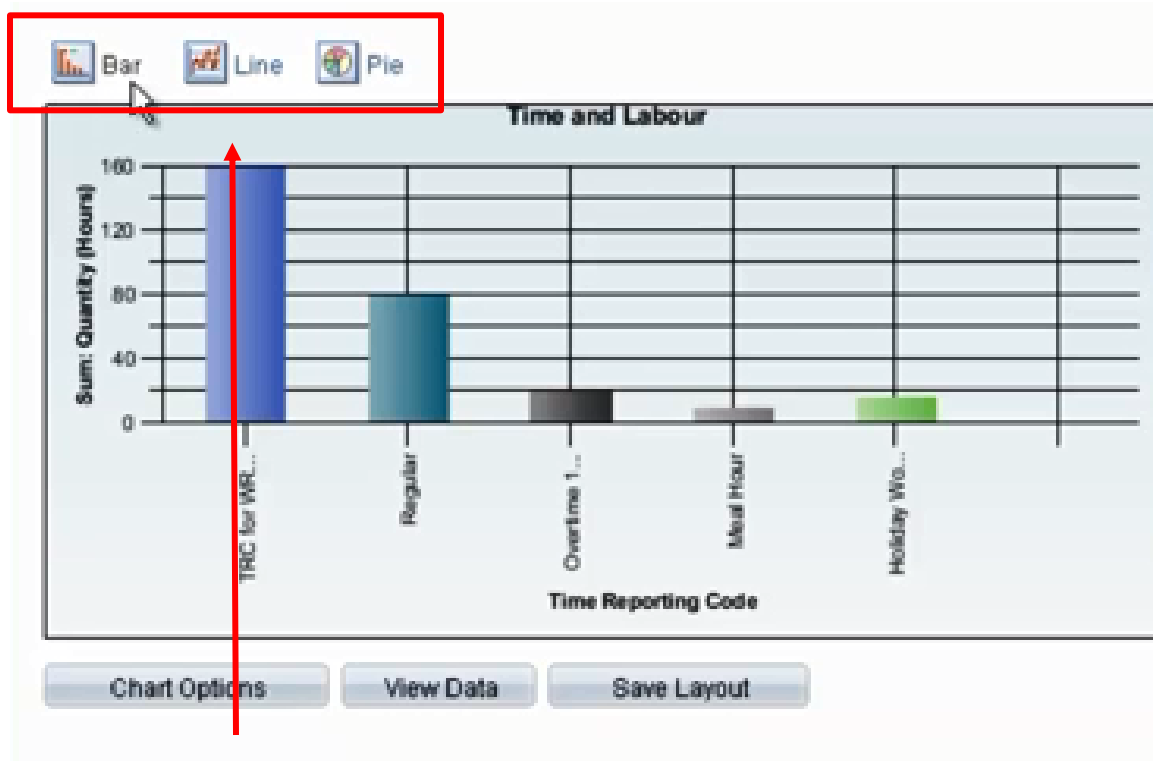
	Sum: Quantity (...)	Sum: Est. Gross...	Sum: Labour Dis...	Sum: Diluted Di...
Afternoon Shift...				
All	99.75	156.31	156.3	623.60
Bonus				
All	2315	2315	2200	2200
Callout Allowan...				
All	54	2144.92	2144.92	2144.92
GP - Unmapped t...				
All	215	6588.5		
Holiday Worked				
All	104	1945		

Users can use filters to manage the results displayed in the grid.

Users can define headers for the grid columns and rows.

Results of the query is displayed in a grid format.

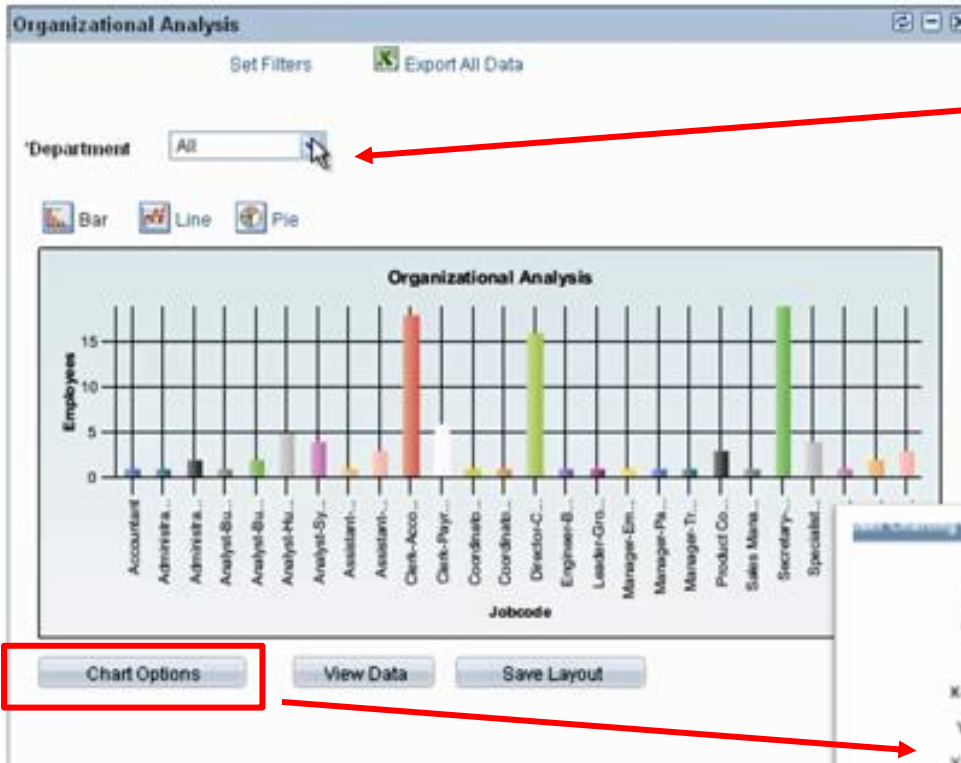
Pivot Grids



Users can elect to view the pivot grid data in a chart format as well in the grid.

Users can easily change the chart type based on the data displayed.

Pivot Grids



The information in the chart may be filtered using the drop down menu.

The Chart Options button allows a user to change the chart layout.

Chart Options

Chart Title: Organizational Analysis

Chart Type: 2D Bar Chart

X-Axis: Jobcode

X-Axis Label: Jobcode

Y-Axis Field: Employees

Y-Axis Label: Employees

Y-Axis Series:

Overlay field:

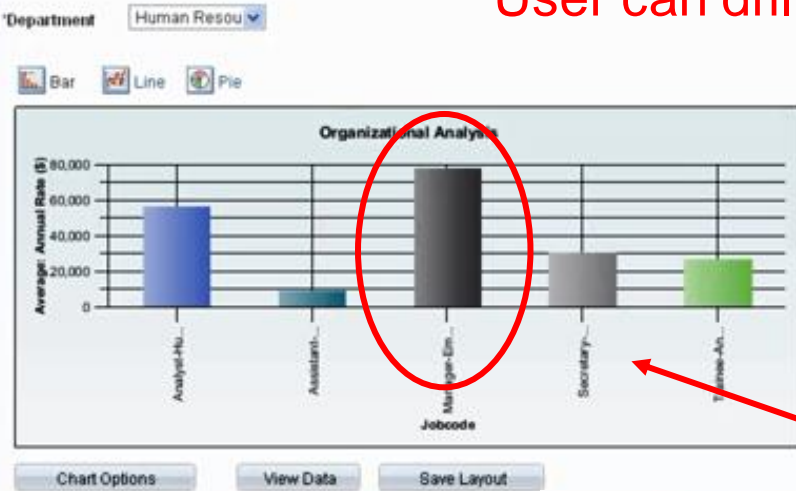
Chart Filters

Filter
1 Department

Ok Cancel

Pivot Grids

User can drill down on the data in a chart.

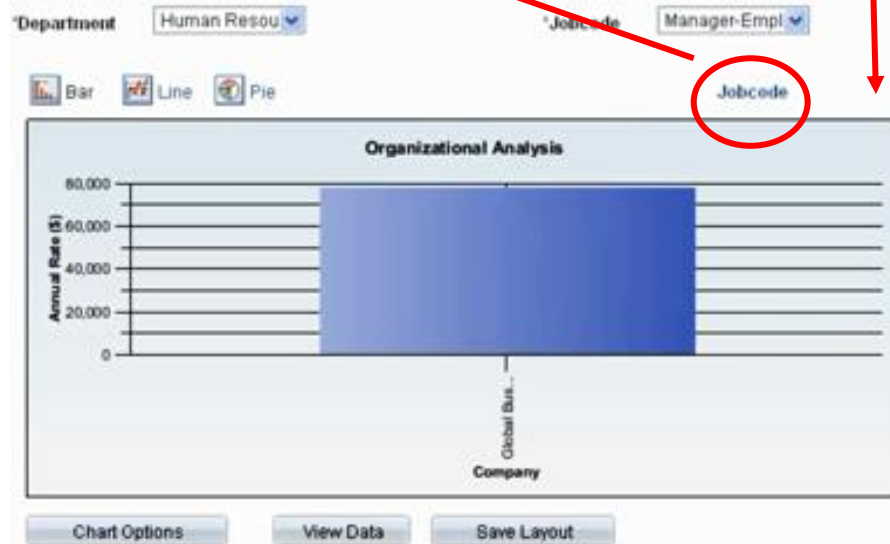


Drill Down On

Drilldown Field: Company

Buttons: Ok, Cancel

Each drilled graph provides a link to return to the high level graph



Pivot Grids – Tips & Helpful Information




- Joins are not encouraged but limited are okay if optimization of criteria order used.
- Expressions cannot be used as fields but can be used to develop a table lookup (ORG_LV1, 2, etc.)
- Prompts within query do not execute without portal configuration (no results)
- Download underlying data; no option built in to download chart (SnagIt)
- Decisions to make regarding fields to make available in X axis, Y axis.
- Limitations with the number of non-measure fields (Axis)
- It is not recommended to have more than 12 axis type of columns in the Pivot Grid Model

Embedded Help


- PeopleSoft has increased the availability of embedded help to many self service and administrative transactions.
- The embedded help provide page specific instructions to help guides users through a specific task.
- Embedded help is easily configurable allowing your organization to create or edit the text of the help to comply with your specific business processes.

Reverse/Adjust Paychecks


Run Control ID 1 Report Manager Process Monitor

Process Request Parameter(s)  Find | View All First  1 of 1  Last

*Company
*Pay Group
*Pay Period End Date



Selection Criteria 

Paycheck Number
Paycheck Issue Date
Empl ID

Help - Process Request Parameter(s) 

Entering Current Pay Calendar Criteria

Enter the pay period end date that corresponds to the on-cycle pay calendar with which you want to process the reversal or reversal/adjustment. You cannot run check reversals if the pay run ID for the specified pay period end date is blank on the Pay Calendar table. Also, the reversal must be associated with a pay calendar that is not closed for off-cycle processing.

*Page 
*Line 



Human Resources

Human Resources Highlights

- **Manager Dashboard**
- **Org Chart Viewer**
- **Smart HR**
- **Profile Management Enhancements**

Manager Dashboard

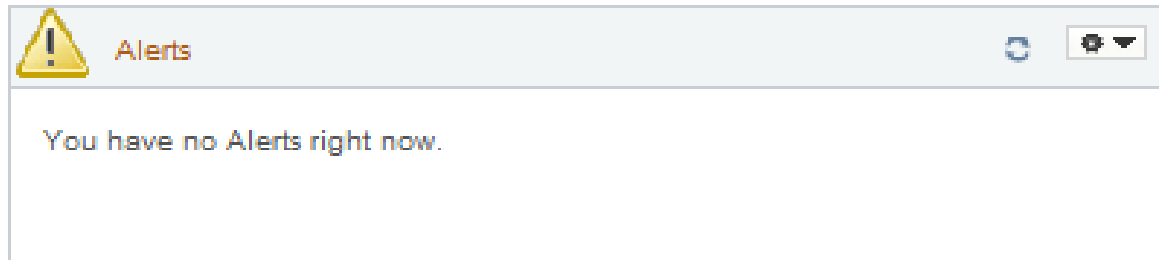
- The Manager Dashboard provides important information for which a manager needs to focus.
- The Administrator can determine which pagelets should display on the dashboard.

The screenshot displays the Oracle Manager Dashboard with the following components:

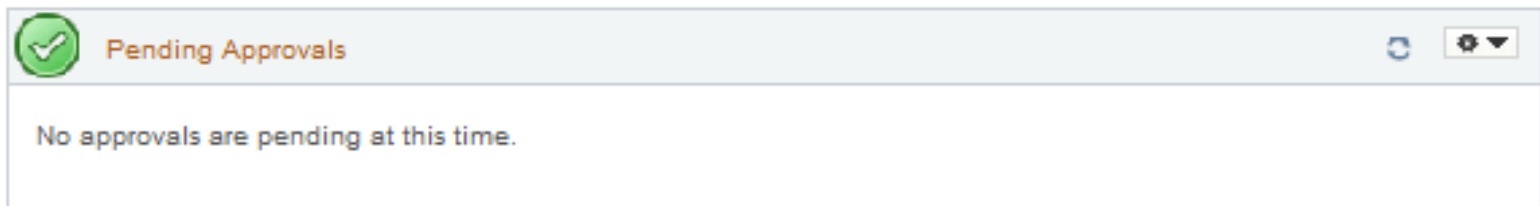
- Alerts:** A notification box stating "You have no Alerts right now."
- Objective Alignment:** A section for "2009 Objectives for the Finance Organization" from 01/01/2009 to 12/31/2009. It includes a dropdown menu for "Section" set to "Employee Commitment" and a bar chart titled "Number of Employees" with three bars of equal height.
- Pending Approvals:** A box indicating "No approvals are pending at this time."
- Direct Line Reports:** A table with columns for Name, Job Title, and Position Salary Range. The table lists several employees and their roles, such as Denise Teal (Analyst-Business Development) and Cynthia Adams (Corporate Controller).
- Company Directory:** A search box with the text "Search by Name, Job Title, Department, or Email" and a "My Profile" link.
- My Open Jobs:** A table listing job openings with columns for Job, Job Title, Days Open, and Applications Received. It shows several administrative assistant positions.
- Quick Links:** A vertical list of navigation options including "Search and Compare Profiles", "Add Delegation Request", "Administer Delegation", "Allocate Compensation", "Smart HR Transactions", and "Manage My Objectives".

Manager Dashboard

- The Alerts provide Managers information about important tasks that require action.



- Pending Approvals allow Managers link to items that require their Approval. Managers can approve or deny items that display in this section.



Manager Dashboard

- The Direct Line Reports section provides a summarized comparative view of their direct line reports.

The screenshot shows the 'Direct Line Reports' dashboard. At the top, there are several tabs: Summary, Job Details, Contact, Career Plan, Compensation, Performance, and Time. The 'Summary' tab is selected and highlighted with a red box. Below the tabs is a table with the following columns: Name, Job Title, and Position in Salary Range. The table lists several employees, and the 'Actions' column for each row is circled in red. A red arrow points from the 'Actions' column to the text 'Managers can take a related action on an individuals.' at the bottom of the dashboard. Another red arrow points from the 'Performance' tab to the text 'Different tabs provide function specific information about direct reports' on the right side of the dashboard.

Name	Job Title	Position in Salary Range
Beatrice Test	Analyst-Business Development	[Progress Bar]
Cynthia Adams	Corporate Controller	[Progress Bar]
Diane Palmer	Assistant-Administrative	[Progress Bar]
Ginger Buckalew	Assistant-Nursing	[Progress Bar]
Jill Chancellor	Manager-Payroll	[Progress Bar]
Netty Owyang	Manager-Accounting	[Progress Bar]
Rosanna Channing	Senior Manager-Accounting	[Progress Bar]
Susan Hoindk	Analyst-Financial Sr	[Progress Bar]
Tina Palisco	Manager-Accounting	[Progress Bar]

Different tabs provide function specific information about direct reports

Managers can take a related action on an individuals.