Electronic Personnel Actions for PeopleSoft

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Dan White, VP of Product Strategy

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Webinar Recordings available at smarterp.com/webinars

Our webinar will begin shortly. Please note all phone lines and computer microphones will be placed on mute throughout the presentation. Please use the GoToWebinar QUESTION feature to ask questions.

ORACLE® Gold Partner

SMART ERP Solutions™

Welcome & Introductions

Doris Wong
CEO, Smart ERP Solutions, Inc.
Former Oracle Group VP and GM for PeopleSoft Enterprise
15 Years Experience with PeopleSoft

Dan White
VP, Product Strategy, Smart ERP Solutions, Inc.
Former Oracle/PeopleSoft Principal Functional Architect
12 Years Experience with PeopleSoft

Agenda

- ## About Smart ERP Solutions, Inc.
  - Who We Are
  - Our Philosophy and Business Value
- ## What is your Personnel Action Process Today?
- ## Introducing Smart Personnel Actions Request
  - Configurable and Automated to Your Requirements
  - Robust Electronic Workflow Approval
  - Replaces Personnel Action Paper Form
  - Streamlines and Enhances Manager Self-Service
- ## Smart Personnel Action Request Demo
- ## Other Use Cases for Smart Solutions
- ## Summary and Q & A

About Smart ERP Solutions, Inc.

Smart ERP Solutions, Inc.

- Comprised of the best former developers, architects and executives from PeopleSoft/Oracle

- Providing cost-effective, robust and repeatable "Smart Solutions" for PeopleSoft applications

- Unique best practices and expertise in PeopleSoft strategic planning, Smart implementation and upgrade services

KEY DIFFERENTIATOR–OUR SMARTADVANTAGE

Rather than assigning teams of consultants to projects we apply our pre-built, proven solutions to efficiently address those efforts common to any PeopleSoft project thus saving time, reducing costs, minimizing risks and lowering total cost of ownership by avoiding costly difficult-to-maintain customizations.

SMART ERP
S o l u t i o n s™

SmartERP: Our Philosophy
Solutions

- Enhance and Extend Standard PeopleSoft Functionality to Meet Business Needs
  - 3Cs : **C**ommon, **C**ritical, **C**omplementary
- Repeatable, Pre-Packaged, Highly-Configurable and Innovative Solutions
- Release Independence
- Customer-Driven Requirements
- Architected and Designed as Add-On Solutions
- Lower Total Cost of Ownership
  - Minimal to No Customizations
  - Minimal Upgrade Impact
- Affordable and Cost-Effective

SMART ERP
Solutions

SmartERP: Our Solutions

Business Requirements	Smart Solutions
Row level security on any data that requires limited or authorized access	Smart Security
Quick ChartField data entry to increase user productivity and data accuracy	Smart Keys
Robust workflow approval capabilities across any business transaction or documents across your Enterprise	Smart Workflow
Streamlined and easy-to-use data entry pages configured to meet your specific business process requirements, incl. industry reqmts; Easily add features anyw~ Attachments, Help, Busines~	Smart Docs including
Configuring and tailoring business processes to meet your organization's specific processes, including defining step-by-step actions for each process and managing your users through your organizations specific business process.	Smart Business Process Management
One-stop visibility into the full business process lifecycle of a transaction	Smart Lifecycle Viewer
Addressing additional compliance requirements not in standard PeopleSoft: I9 Form, W-4 Form, 1042 Foreign National Requirements	Smart Compliance
Manageable solutions for complex integration needs	Smart Integration Packs
Other Common, Critical and Complementary business requirements	Tell us, we'll build it!

PeopleSoft Smart Personnel Action Requests

SmartERP: Our Business Value

- SmartERP Solutions Offer Lower Costs Compared to Traditional Solutions
- Designed and Developed with Customer Requirements and Feedback
- Configurable and Streamlined to Meet Your Specific Business Requirements
- Quick and Short Implementation Times
- Solves Business Needs on Your Current PeopleSoft Release
- Applicable to All Applications: Financials, HCM, Campus Solutions, SCM, CRM, EPM
- Proven and High-Quality Solutions and Services

SMART ERP Solutions

Manual Paper Form

FACULTY PERSONNEL ACTION FORM

A: Employee

1. Last Name First Name Middle Initial	2. Identification #	3. Salutation	4. Supervisor's Position # and Title

B: Assignment

1. Effective Date	2. End Date/Continuous	3. Contract Period (if different from payroll dates)		

4. Department Name	5. Dept. Number	6. Location (Time Keep)	7. Employee Mail Stop

8. Action/Reason (Listed are the most common actions/reasons. If yours is not listed explain the action/reason.)

Hire	Leave of Absence	Data Change	Termination/Separation	Explanation/Comments
☐ Regular (F09)	☐ Paid LOA	(see instructions)	☐ Full Retirement	(Include # of work load units.)
☐ New FTE	☐ Professional	☐ Budget Change	☐ Resignation	
☐ Vacant position	☐ Medical	☐ Department	☐ Termination	
☐ Temporary (ADJ/FYR)	☐ Unpaid LOA	☐ Operating Unit	☐ Disability	
	☐ Personal	☐ Other (explain)	☐ Expired Work Auth.	
☐ Reappoint/Rehire	☐ Medical	Position Change		
☐ Regular (F09)	☐ Military	☐ Change in FTE		
☐ Temporary (ADJ/FYR)		☐ Promotion		
☐ Add. Assignment	☐ Return from LOA	Pay Rate Change		
☐ Phased Assignment (FRE)		(explain in comments)		

I-9: Attached ☐ On File ☐	Social Security Number Verification: NEW HIRE ONLY	Copy provided ☐	Original Viewed by	(initials)

C: Job Information/Payroll

1. Job Code #	2. Job Title	3. Rate Code	4. Standard Hours (40 x % FTE)	5. FTE (% of full-time)

6. Pay Group (for this appointment)				7. Holiday Schedule
☐ 9 mo (F09)	☐ Quarterly NTT (ADJ)	☐ Annual NTT (FYR)	☐ Phased Retiree (FRE)	

8. Position #	9. Dept #	10. Project Grant	Operating Unit	11. Account	12. Rate Code	13. % Percent (if split)	14. Total $ amt if split	15. Semi- $ amt if split

Complete if any portion of payroll is grant funded.

PID #	Grant End Date	Grant Accountant Signature / Date

D: Compensation

Semi-Month $	Number of Payments	Total Amount $

E: Signatures

Signatures must be in BLUE INK to signify original.

1. PAF Originator/Contact Person	Date:	Mail Stop	4. Secondary Appointing Authority	Date:	Mail Stop 7469
2. Department Head	Date:	Mail Stop	5. Provost's Office	Date:	Mail Stop 7503
3. Appointing Authority	Date:	Mail Stop	6. Budget	Date:	Mail Stop 7494

Manual Paper Form

EFF. DATE	ACTION	REASON
1.		
2.		
3.		

DATE SUBMITTED
ADMIN. DEPT. CODE   SOCIAL SECURITY NO.
ADMIN. DEPT. NAME   WORK LOC.

EMPLOYEE ID
NAME Prefix   Suffix
Last, First Middle

PHONE and CONTACTS
OFF. PHONE
RES. PHONE
FAX
PRIMARY E-MAIL

OVERALL STATUS
CU EMP. STATUS   PAY FREQ.
STATUS EFF. DATE   FLSA
ORIGINAL HIRE DATE   CU OVERALL FT/PT STATUS
SERVICE DATE   TOTAL BASE SALARY $

OFFICE ADDRESS

CITY   STATE/ZIP
COUNTRY   CHK SEQ CD

HOME ADDRESS (Permanent)

CITY   STATE
COUNTRY   ZIP

MAILING ADDRESS (Current)

CITY   STATE
COUNTRY   ZIP

PERSONAL	WORK ELIGIBILITY	EDUCATION	TENURE INFORMATION
SEX BIRTH DATE	U.S. CITIZEN	HIGHEST DEGREE	TENURE STATUS
ETHNICITY / RACE	VISA TYPE		
MARITAL STATUS MIL. RPT. STATUS	EXPIRATION DATE	INSTITUTION DATE	TENURE BEGIN DATE
MARITAL STATUS DATE	PERM RES REG # A:		

COMPLETE UNIVERSITY TITLE

POSITION / SALARY INFORMATION   POSITION STATUS   POSITION TYPE   EMPL REC   NO OF ACTIVE POSITIONS

POSITION NUMBER   POSITION ENTRY DATE   GRADE
POS. DEPT CODE   APPT. TYPE   SALARY PLAN
POS. DEPT NAME
TITLE

COMP. RATE $ APPT. /COMP. RATE EFF. DATE   APPT. / COMP. RATE END DATE
SALARY TYPE   ANNUAL RATE $
PAY FREQUENCY RATE

FLSA	FT / PT		HOURS/WEEK	HOURLY RATE

SHIFT   HOURLY SHIFT AMOUNT   ANN'L SHIFT AMOUNT   BARG. UNIT   PROBATIONARY END DATE
JOB CODE   B.U. SEN. DATE   % EFFORT

TERMINATION / RETIREMENT /LAYOFF	LEAVE OF ABSENCE
ACTION ACTION REASON EFFECTIVE DATE	LEAVE ACTION LEAVE BEGIN DATE / LEAVE END DATE
TERM VAC. PAY DAYS: VACATION PAY AMT.	LEAVE REASON EXPECT RET ACTUAL RET
SEVERANCE PAY AMT. MONTHS WEEKS % OF WEEKS	PARTIAL PAY ☐ YES ☐ NO

AUTHORIZATIONS / APPROVALS

NAME	DATE	NAME	DATE
TITLE		TITLE	
NAME	DATE	HRPC	DATE
TITLE		TITLE	

COMMENT:

PLEASE TYPE or USE COLORED INK (DO NOT USE BLACK INK OR PENCIL)

Paper Personnel Action Form Use Case:
Typical Personnel Action Form Process

- Use of <u>Paper</u> Personnel Action Form(s) for Requesting HR Transactions
  - Enter by Administrative Assistants or Managers

- <u>Manual</u> Routing of <u>Paper</u> Forms for Approvals and Signatures

- Upon <u>Manual</u> Approval, HR Admin <u>Manually</u> Enters Transactions into PeopleSoft HR

- <u>Paper </u>Record Retention

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Manager Self-Service: Termination
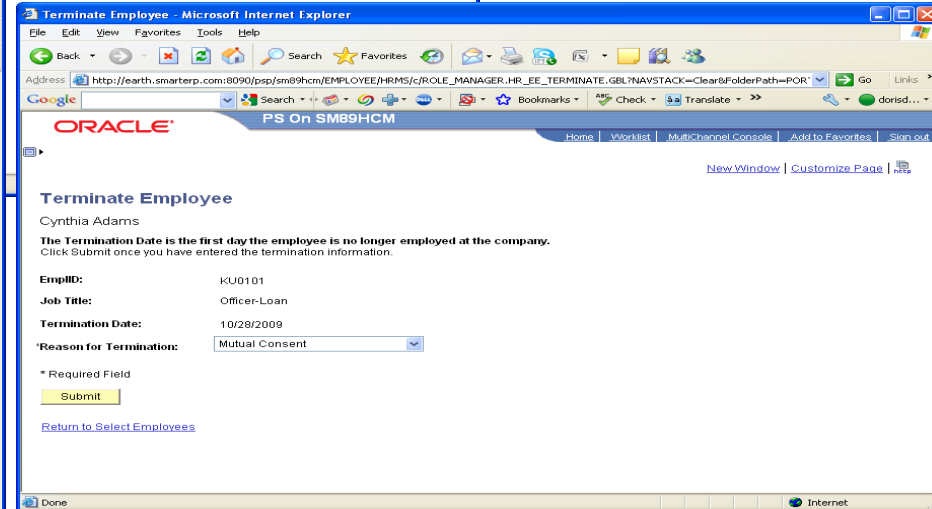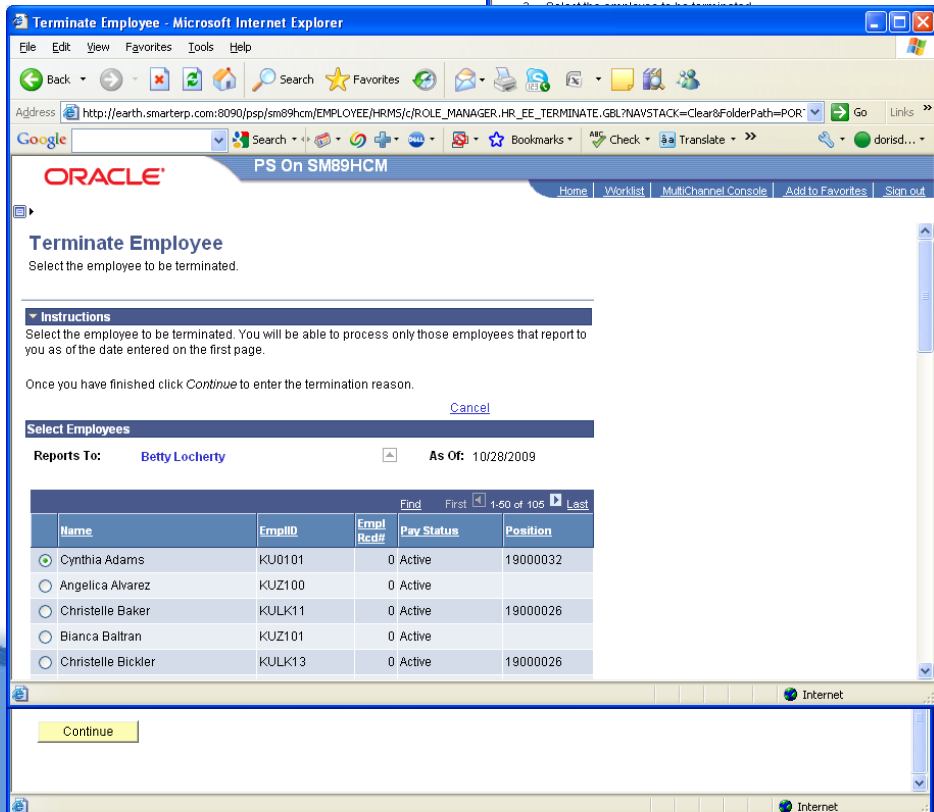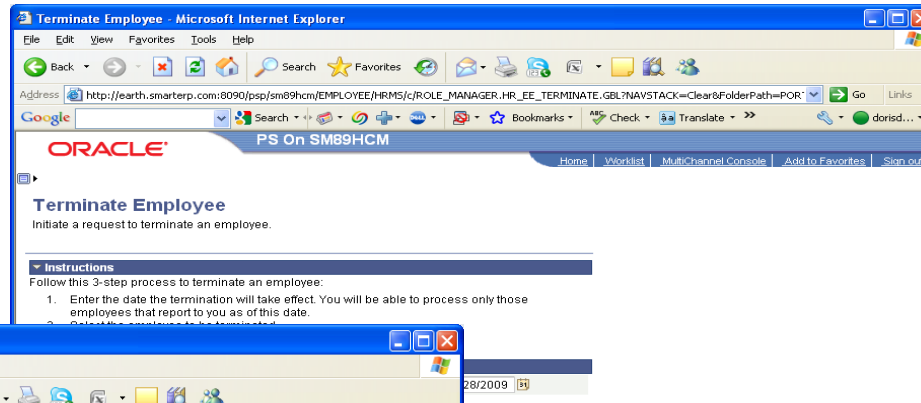
Manager Self-Service Use Cases
Using Standard Manager Self-Service in PeopleSoft

- Managers Submit HR Personnel Transactions Directly into PeopleSoft

- Separate Manager Self-Service Transaction(s) Required Based on Personnel Action

- Availability of Workflow Approval Capabilities dependent on the PeopleSoft version (8.3, 8.8, 8.9, etc)

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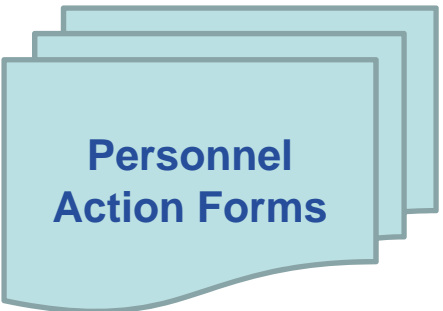# Other Personnel Action Process Options

- Send an Email Request
- Fill in a PDF Form
- Fill in MS Word or MS Excel Template
- Customized a Solution
- Workflow Approval Manually Routed
- Other Options?

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Audience Poll
and Results

Smart Personnel Actions Request

Personnel Action Forms

Manager Self-Service

Electronic Smart Personnel Actions Request

Configurable to Your Needs

Electronic Routing of Workflow Approval

Rules Based, Configurable

Automatic Updating of Employee Information in PeopleSoft

Electronic Record Retention and Audit Trail

Personnel Actions Request
One Stop Shopping for Your HR Personnel Actions

Save Collaborate Attach Print Workflow ▼ Help

⬈ New Window

Personnel Action Request

PAR ID: NEXT   **PAR Description:** [   ]   **PAR Status:** Initial   **PAR Type:** Faculty

Employee

'Employee ID:	Last Name:	First Name:	Middle Name:	Empl Rcd Nbr:
[ ] 🔍				[ ] 🔍

Job Earning Distribution

Position Number: **Department:**

Job Code: **Pay Group:**

Supervisor ID: **Supervisor's Position #:**

Action/Reason

HIRE/REHIRE

Regular Permanent
- ○ New FTE (Create Person)
- ○ New FTE (Person Exists)

Temporary
- ○ Interim
- ○ Temporary

POSITION CHANGE (Curr. Employee)
- ☐ Position
- ☐ Extend Assignment
- ☐ FTE
- ☐ Reallocation
- ☐ Temp Assignment
- ☐ Title

DATA CHANGE
- ☐ Department
- ☐ Pay Group
- ☐ Supervisor
- ☐ Time Keep
- ☐ Other (explain below)

SEPARATION
- ○ Death
- ○ Disability
- ○ Resignation
- ○ Retirement (Full)
- ○ Termination
- ○ Other (explain)

PAY RATE
- ○ Adjustment
- ○ Enquiry
- ○ Retention
- ○ Other (Explain)

PROMOTION
- ☐ Normal Career Progression
- ☐ Outstanding Performance
- ☐ Salary Grade Advance

DEMOTION
- ☐ Unsatisfactory Performance

▼ Earning Chartfields   1 of 1

	Combination Code	Description	Account	Department	Project/Grant	Fund Code	Percent of Distribution
1							

Comments/Explanation:

[   ]

Smart Personnel Actions Request Demo

Smart Personnel Action Request
Demo Scenario

- Scenario 1: Replacing Paper Personnel Action Form with Electronic Smart Personnel Action Request
  - Assign a new position to an existing employee
  - Collaborate, Attachments and Help Capabilities
  - Workflow Approval Requirements (Supervisor and HR)
  - Upon HR Approval, Automatic Update to Job Record
  - Employee Welcome Aboard to New Position Process

- Scenario 2: Using Smart Personnel Action Request to Perform Multiple Manager Self-Service Transactions
  - Multiple Personnel Actions: Position Change and Promotion
  - Workflow Approval Requirements
  - Upon HR Approval, HR Corrections and Automatic Update to Job Record
  - Print Capability
  - Record Retention and Audit Trail

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Other Use Cases for Smart Solutions

Other Use Cases for Smart Solutions

- Onboarding and Offboarding
  - Employees
  - Consultants, Temps
  - Students
  - Customers and Vendors

- Simplify and Streamline Key Transactions
  - Time and Labor Entry
  - Manager or Employee Self-Service Transactions
  - Performance Reviews
  - Grants Pre-Award Proposals

- Configure and Automate Any Business Processes within YOUR Organization
  - Recruit-to-Hire
  - Procure-to-Pay

Summary

Value Statement

Configurable and Seamlessly Integrated Electronic Personnel Actions

- Common Development Frameworks and Solutions
  - Smart Docs
  - Smart Workflow
  - Smart Business Process Management
- Easily Configure and Tailor Any Activities Required for YOUR Business Requirements and Process
- Implement Common and Consistent Capabilities Anywhere
  - Save As, Copy, Workflow, Attachments, Collaboration, Printing, Extend Data, User-Help, etc.
- Lower Total Cost of Ownership
  - Seamless Integration
  - Utilize Best Practices
  - Maintenance and Upgrades
- Complete Projects Better, Faster and Cheaper !
  - Leverage Frameworks for all PeopleSoft Business Process Projects

Upcoming Events

- OHUG 2010 Global Conference
  - Las Vegas, NV, June 13-17
- HIUG Interact 10
  - Orlando, FL, June 27-30
- SmartERP Webinar Series
- Personal Demo with Your Organization
  - Any Time you Want!

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Q & A

To ask a question please use the GoToMeeting QUESTION feature (please note all phone lines and computer microphones have been placed on mute).

If we can't get to your question live we will respond to you directly via email after the webinar.

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Thank You

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