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Upgrade to PeopleSoft HCM 9.2

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Executive Overview

With increased cost pressures on organizations due to the global economic condition, customers are required to further quantify their administrative investments. To adhere to these challenges, organizations are now tasked with finding more cost effective, flexible solutions to administer their growing, diverse and disparate workforce. Oracle PeopleSoft HCM provides a unique advantage addressing these challenges through our continued investment in an integrated, intuitive, flexible and comprehensive HCM solution.

Oracle PeopleSoft Human Capital Management 9.2 is a pivotal release. It provides innovative self-service features including mobile applications and comprehensive capabilities across the product suite, and presents a new way for PeopleSoft customers to manage PeopleSoft maintenance that will help you adopt new functionality more easily and reduce costs.

With the changing roles in Human Resources and the new expectations of Talent Management by line managers, PeopleSoft HCM provides you with the tools to extend this processing to users beyond HR. PeopleSoft HCM increases organizational efficiency and operating performance with key processes that plan for and place the right people in the right jobs at the right time, develop and reward top performers, and retain key talent for the short and long term.

PeopleSoft 9.2 provides you with the opportunity to deliver comprehensive capabilities to address your most complex HR challenges with simple, easy to use applications for your end users.

Introduction

As part of its Application Unlimited strategy, Oracle continues its long-term strategy of investing in PeopleSoft applications on an ongoing basis. Oracle keeps on building new capabilities across the product suite and delivering enterprise-wide features that enhance your ownership experience and help you run your business more efficiently and profitably.

The design principles of Simplicity, Productivity, and Lowered TCO have been and are expected to remain at the core of planned capabilities for PeopleSoft applications. Oracle believes capabilities centered on these design principles address the challenges our customers face. Those challenges include an extended and more internet savvy set of users, the need to do more with less, and the constant pressure to reduce operational costs.

PeopleSoft Human Capital Management 9.2 enables casual users to leverage PeopleSoft applications effectively while remaining focused on their primary job function. This ability greatly reduces the need for training and help desk inquiries when deploying self-service applications to a broad user community. A key part of this is changing the way users navigate and interact with the system. New concepts like Activity Guides, Train Stops, Related Actions, and Embedded Help—coupled with powerful Global and Component search capabilities—enable both casual and power users to find the information they need and provide user process flows that are intuitive and at once familiar.

This document demonstrates this investment highlighting your opportunities with PeopleSoft Human Capital Management 9.2.

Intuitive Usability

PeopleSoft HCM 9.2 delivers new capabilities that enable users to navigate and interact with the system in a new way.

With the new PeopleSoft Interaction Hub, PeopleSoft 9.2 delivers a configurable user interface with single navigation across all applications powered by a new global search capability. PeopleSoft Interaction Hub makes unifying PeopleSoft application content easy. It provides out-of-the-box integration with PeopleSoft applications, a common security and provisioning approach, branding, and unified navigation across PeopleSoft applications. With some straightforward web design, branding, and configuration, organizations can create a role based,self-service platform that can aggregate information from various sources, including both PeopleSoft and external content. This enables users and communities to accomplish day-to-day and self-service tasks and breaks down the barriers between applications. It also allows you to align your user experience with your business processes.

For example, from a single company branded home page, users can access any transaction across HCM, ELM, and HR HelpDesk. This collaborative platform now available through the latest version of PeopleTools is available to all customers without the need for any additional license. A configurable end user experience with embedded help provides you with the tools to guide the user online with minimal training.

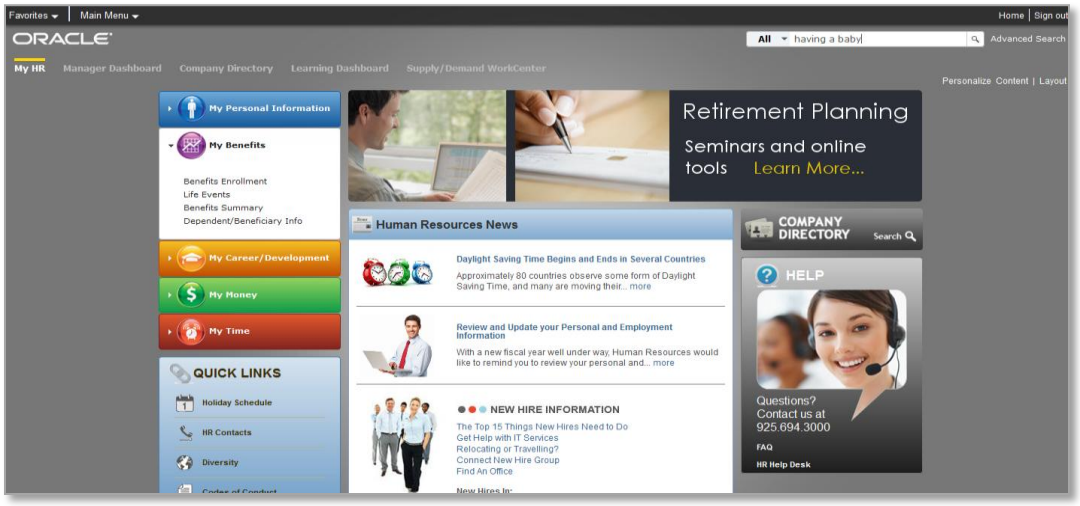

Figure 1. PeopleSoft Interaction Hub

PeopleSoft Human Capital Management 9.2 also includes new Dashboards and Workcenters which guide your users through complex processes in a simple, intuitive way. This enables you to further extend your self service offering with minimal effort.

Personalized Dashboards and Workcenters provide a single place for key users to accomplish their role based tasks. Focused on the daily tasks of those roles, these dashboards streamline the work performed most often and simplify navigation and search. Actions are never more than one click away and the user stays in context as they perform new tasks, run reports, or view analytics.

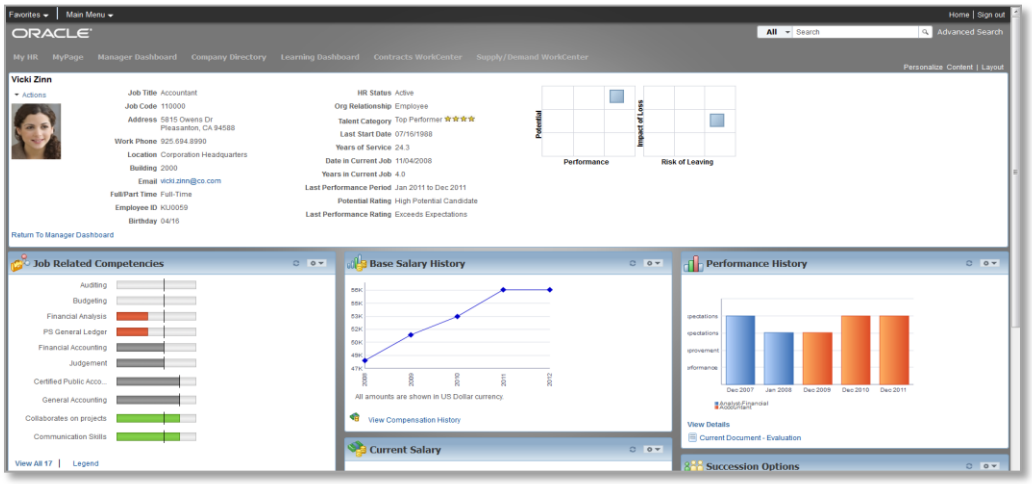

Figure 2. Talent Summary

Workcenters can also be used for guided processes, as shown below in the Performance Management Workcenter. The Performance Management Workcenter enables Employees and Managers to view their performance documents with all of the upcoming performance tasks, such as the definition of goals and mid-period check points, and their progress in each task is outlined so users can always see where they are and can navigate through the performance process with ease.

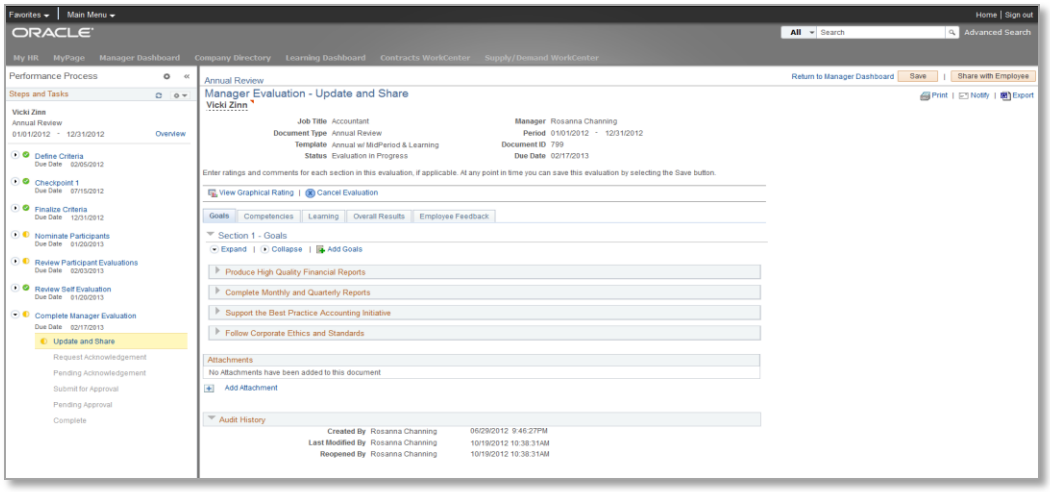

Figure 3. Performance Management Workcenter

The Time and Labor WorkCenter shown below provides a single navigation point for administrators and managers to view their work queue, conduct transactions, responds to workflow requests, run reports and view analytics.

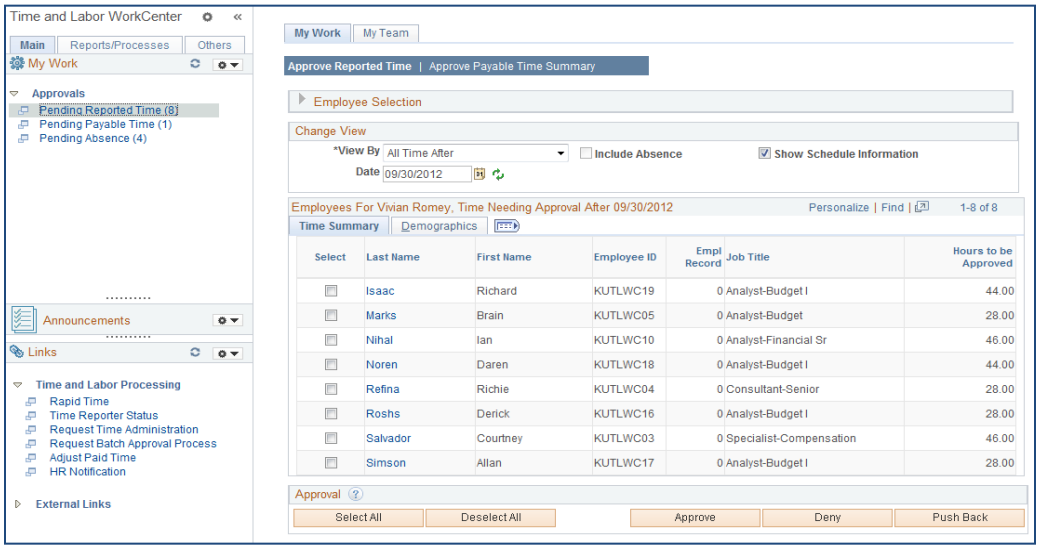

Figure 4. Time and Labor Workcenter

Several of the delivered dashboards and workcenters also include new real time Operational Analytics. These analytics have been created using PeopleTools Pivot Grids. Pivot Grids provide real time insight into operational data. Users will notice these easy to use embedded

analytics within key transaction pages across HCM. Once again, configurability plays a prominent role in that users can change data elements and chart types on the fly with a simple point and click. Most importantly, users can analyze the information and take action directly from there. For example, a Manager can view a pivot grid that shows performance documents by status and navigate, from the chart itself, to a specific performance doc to work on it.With HCM 9.2, the PeopleSoft Application Search framework has been greatly expanded. The new search experience functions similarly to an everyday internet search, providing a look and feel that users will find both familiar and intuitive. Available at any point in an application, it enables users to initiate transactions or navigate to key information without using the PeopleSoft application menu or returning to the homepage to do so. Users can easily use filters and facets to narrow seach results, further enabling them to identify and navigate to specific application content. Related Action menus are embedded directly in the search results, allowing users to navigate to specific related transactions based on the resulting data. Users never lose context.

Demonstrated by the introduction of various new tools, such as Organization Visualization through our Company Directory, Related Actions and our enhanced Search, PeopleSoft continues to invest in the development of the user experience. All of these solutions create an intuitive user experience, enabling you to navigate through the application quickly and easily.

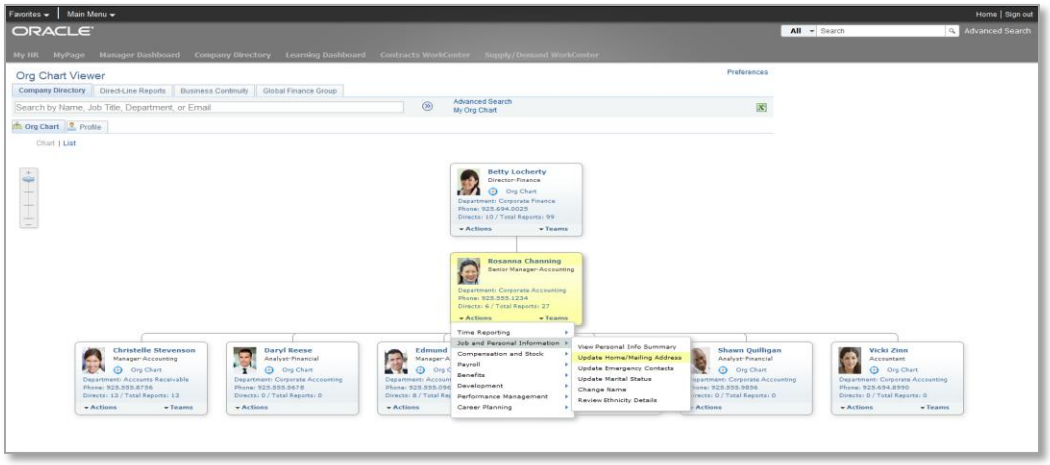

Figure 5: Company Directory

These are just some examples of new capabilities delivered in the 9.2 release. PeopleSoft 9.2 has reinvented the user experience to support logical, streamlined processing requiring

minimal to no training for the end user. The new 9.2 features and capabilities enable you to redefine how your workforce gets work done.

Strengthened Self Service Experience

As organizations expand their workforce in size as well as location, it becomes more critical to have scalable processes to support these growing, demanding populations. The simplest approach is through intuitive, standard self service processes. PeopleSoft HCM 9.2 provides the tools to support these configurable processes for your growing, changing workforce and enable you to easily deploy new solutions quickly. Many of the new tools and features delivered to create an intuitive user experience, such as Workcenters and Dashboards, are also used to strengthen the self service features in the applications.

With HCM 9.2 over 35 self service transactions have been redesigned to streamline the business processes. A great example of the new self service capabilities is the new Paycheck Modeling feature in North American Payroll. Paycheck Modeling guides a worker through a modeled paycheck to determine the potential impact to their personal bottom line.

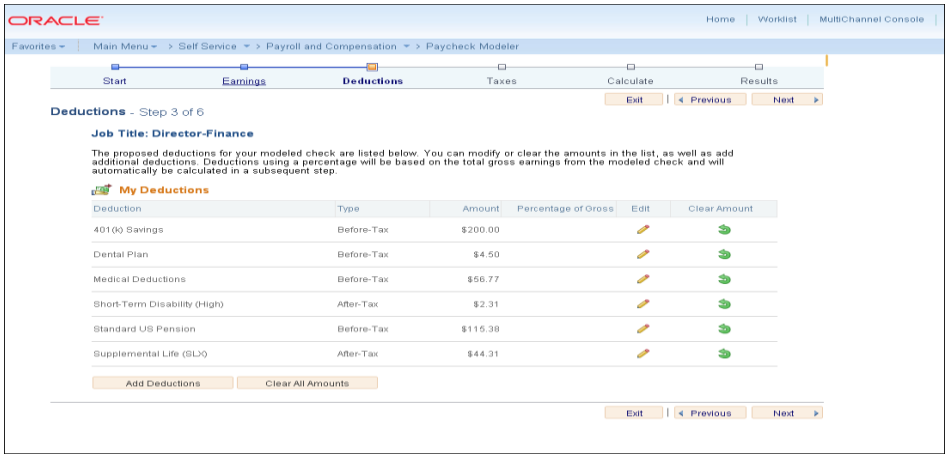

Figure 6. Paycheck Modeling

Continuing on our theme of supporting the guided self service experience, PeopleSoft HCM 9.2 introduced a new process to manage Employee Life Changes using activity guides. This enables a user to navigate through a single process to manage multiple impacts from a single

life event. Activity guides are configurable, allowing you to manage your unique requirements to support this business process. As your organization changes, PeopleSoft HCM provides you with the tools to support those changes.

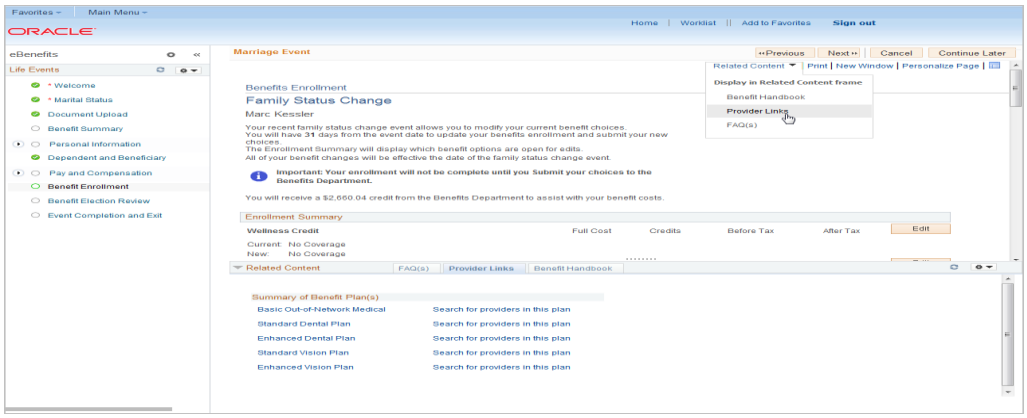

Figure 7. Benefits – Live Events Activity Guide

PeopleSoft HCM 9.2 also delivers train stops which provide configurable step by step horizontal guided navigation. This is very similar to how shopping carts work when making a purchase on the internet. Using the candidate gateway in PeopleSoft Recruiting Solutions 9.2, candidates can make their way through the application process with ease.

PeopleSoft ELM 9.2 delivers multiple enhancements to the self service experience through a role-based Learning Homepage that utilizes the Dashboard tools to provide easy to use pagelets to your workforce. These pagelets are designed to provide a single place within ELM for users to access all self service tasks with one click. The Learning Homepage, combined with the redesigned learning search within ELM, enables self service users to access the training they need to keep your workforce engaged and informed and your organization in compliance.

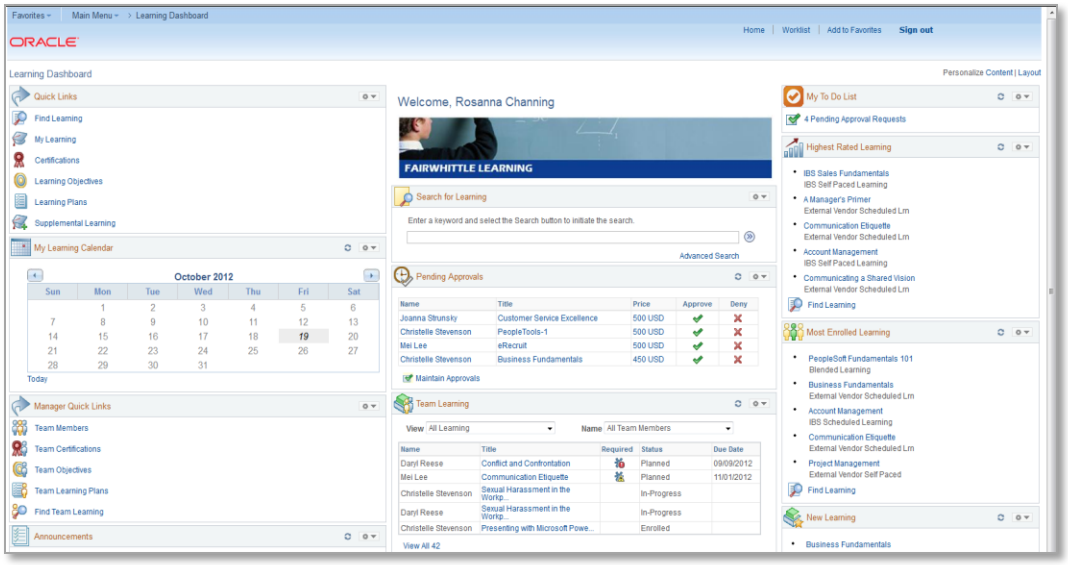

Figure 8. Learning Dashboard.

PeopleSoft HCM Mobile applications are also part of our Self Service Strategy.

As part of the first release of our Mobile solution, PeopleSoft HCM delivered a Company Directory feature forboth tablet and smart phone mobile devices. Configuration is by device, providing flexibility for how and when this solution is deployed by you, enabling you to deliver HCM capabilities securely to your workforce's supported mobile devices.

Figure 9. Mobile Solutions – Company Directory

Comprehensive Capabilities

PeopleSoft HCM 9.2 continues to invest in our comprehensive capabilities to support our wide customer base across industries and geographies. We have taken a unique approach to ensure these comprehensive capabilities are minimally invasive to you and your technical support team. This includes the introduction of new functionality like Matrix Relationship Administration as a separate feature; ensuring you can adopt this new functionality on your schedule. Continued investments in our global best practices are also demonstrated through the enhancements in the following Global Payroll extensions:

- Australia

- China
- France
- India
- Mexico
- New Zealand
- Singapore
- Spain
- UK

New features and functionality are introduced in various products in the HCM suite of applications. Functionality to support the expansion of the recruiting process is demonstrated with the new Job Search process in Candidate Gateway. This new feature leverages the latest technologies available in PeopleTools 8.53 with enhanced search capabilities.

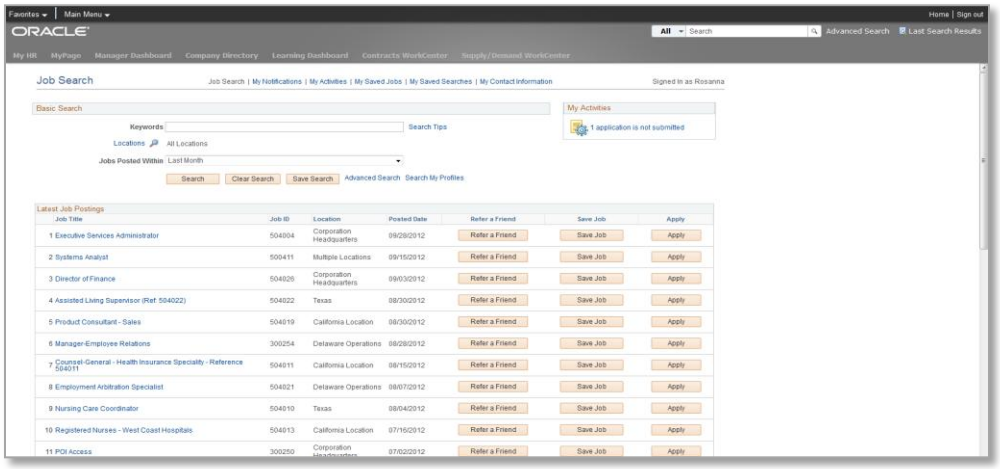

Figure 10. Recruiting Solutions

PeopleSoft HCM 9.2 provides you with the technology and capabilities to support more configurable solutions that eliminate the need for customization.

In support of Oracle's strategy to provide seamless integration to Oracle products, PeopleSoft HCM 9.2 continues to deliver and support interoperability between PeopleSoft HCM and other

Oracle products including Fusion HCM and Taleo. We are committed to support and expand the delivery of our integrations to the Oracle family of products.

New Way to Manage PeopleSoft Maintenance

With the PeopleTools enhancements supporting HCM 9.2, customers are able to more easily manage the adoption of new features and technologies. The introduction of PeopleSoft Update Manager will facilitate this to ensure you are managing your cost and enabling new functionality on your schedule and not a release schedule. PeopleSoft Update Manager provides the tools you need to reduce time, effort, and the cost of PeopleSoft application maintenance. On a regular schedule, we will deliver the most current application code and objects in the form of a PeopleSoft Update Image on a Virtual Machine. PeopleSoft Update Manager utilizes familiar tools like Change Assistant and Change Packager and provides a way for you to select what you want to patch to your environment. The PeopleSoft Test Framework then tells you which test scripts should be executed in conjunction with the selected changes. With PeopleSoft Update Manager:

- Your environment does not have to be current on maintenance.
- You can select a single fix and have the system automatically find the needed prerequisites to go with that fix.
- You can “get current” on fixes by having the system generate a custom change package that suits the current state of your environment.
- You can know which automated tests should be executed.

Conclusion

Oracle PeopleSoft HCM 9.2 is a pivotal release for you as it provides comprehensive, integrated, simple solutions to support your ever changing business needs. As you become more dynamic in your expectations for solution support, PeopleSoft delivers to ensure your success. This latest release of PeopleSoft HCM enables you to leverage the latest technologies and innovative solutions with minimal cost and on your schedule.

So, why upgrade to PeopleSoft HCM 9.2?

- New technology to enhance the user experience: With the introduction of new search capabilities, dashboards, workcenters, the PeopleSoft Interaction Hub, guided navigation, analytics and the related actions framework (among other new features), users can intuitively move through the system without losing context and with the ability to take action from wherever they are.
- Compelling investment in new functionality: PeopleSoft 9.2 delivers numerous new features across products as well as supported integration with other Oracle solutions.
- New PeopleSoft maintenance solutions to manage adoption of new features on your schedule: PeopleSoft Update Manager provides a way for you to select what you want to patch to your environment reducing the time, effort and cost of application maintenance.
- New Mobile Solutions for users on the go: PeopleSoft mobile solutions provide today's mobile workforce with real-time access to critical business processes and analytics via the desktop, smart-phones or tablet devices.
- Continuous investment and innovation: PeopleSoft HCM will continue its ongoing investment strategy by periodically delivering new functionality on top of its latest release. This in conjunction with new Life Management tools like PeopleSoft Update Manager, provide you with the options and flexibility you need to best support your business needs with a best-in class HCM system that keeps evolving.

This document provides a high-level view of some of the new enhancements and features available in PeopleSoft HCM and ELM 9.2. To find more information and details on all of the features and functionality available with the new PeopleSoft 9.2 release, please review the following reference:

PeopleSoft HCM Documentation

Video Feature Overviews

PeopleSoft Information

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Hardware and Software, Engineered to Work Together