

Preparing for PeopleSoft HCM 9.0

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Objectives

- **Present tips on preparing for an upgrade**
- **Present a high level view of functional enhancements in PeopleSoft HCM 9.0**



Preparing for an Upgrade

- **Gather Your Team**
- **Normalize Data**
- **Gather and Review Documentation**
- **Prepare Conversion Environment**
- **Prepare Test Scenarios**



Preparing for an Upgrade – Gather Your Team

- **Team should include**
 - Database Administrator
 - Technical Developers
 - Technical Support
 - Application Experts
 - Functional Experts
- **Ensure resources are dedicated**
- **Develop a project plan and resource strategy**
- **Obtain management buy-in and sign-off**



Preparing for an Upgrade – Normalize Data

- Review data inconsistencies, especially configuration tables
- Make necessary changes before upgrade
- Ensure back-up works
- Ensure recovery works



Preparing for an Upgrade – Gather and Review Documentation

- **Gather all documentation from original implementation and prior upgrades**
- **Review documentation**
- **Review your “To Do” and “Wish” lists**
- **Record your findings**



Preparing for an Upgrade – Prepare Conversion Environment

- Determine space requirements for upgrade environment
- Build, configure, or partition environment
- Load software
- Test environment



Preparing for an Upgrade – Prepare Test Scenarios

- Use test scenarios from implementation or recent upgrade
- Create new test scenarios



Enhancements in HCM 9.0

- **Human Resources and Benefits**

- Core Human Resources
- Benefits Administration
- eBenefits

- **Talent Management**

- Recruiting Solution
- ePerformance
- eDevelopment

- **Time and Labor**

- **Payroll**

- ePay

- **Absence Management**



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CORE HUMAN RESOURCES



Profile Management (New Module)

- **Track Qualitative Attributes**
- **Integrated with Competency Management Elements**



Smart Hire

- **Template based administration to manage on-boarding / hire process**



Person Model Enhancements

- **Contingent Workers Enhancements**
- **Person of Interest Payees**



I-9 Enhancements

- **Workflow Driven Self Service**
- **Notification of upcoming and past due expiration dates**
- **Store, Print and archive I-9 forms as required by law**



Mass Update Enhancements

- Power users can configure and execute mass updates by using



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BASE BENEFITS & BENEFITS ADMINISTRATION



Rate Configurations

- **Single Rate Structure replaces the following:**
- **Adds support for following rate options**



Calculation Rules

- Reorganized the Calculation Rules Component



Life Insurance / Disability Enhancements

- Centralized



Simple Rate Plans

- Simple Rate plans that require an associated rate only:



Dependent Data

- Options on placing controls on dependent relationships:



Savings Plan

- **Savings Management Page is easier to read**
- **Increased flexibility to limit processing and overrides**



Medicare Eligibility

- **Added fields to track Medical Entitlements and enrollments**



Dependent Coverage

- **Allow overage dependents to remain covered in plans until no longer eligible**
- **Provisions within event rules to maintain dependents and coverage**



eBenefits

- **Certification**
- **Dependent Validation**



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TALENT MANAGEMENT



Talent Acquisition Manager

- **Flexibility and Ease of Use for Recruitment Letters**
- **Interview Notes**



ePerformance

- **Leverage Profile Management**



Learning Management Integration

- Integrated links to Learning Management



Employee and Manager Self Service for Profile Management

- **Employee Self Service**
- **Manager Self Service**



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PAYROLL FOR NORTH AMERICA



Garnishment Setup Enhancements

- Streamlined method of adding deductions to disposable earnings definitions
- Flexible Garnishment Calculations Formulas
- Utility for Cloning Garnishment Rules
- Historical View of Garnishment Proration Rules
- Improved Usability of Garnishment Specification Data Pages



Garnishment Processing Enhancements

- **Modified garnishment processing COBOL:**
- **Enhanced Extract Non-Tax Deductions process:**
- **New inquiry page for Reviewing Garnishment History for Administrators**



ePay

- Can specify when self-service paychecks are available for employee viewing
- The year-to-date amounts for earnings, taxes, deductions, and leave balances are displayed on all PDF checks, not just on the current paycheck
- The self-service paycheck displays and prints to a single page
- The self-service paycheck is identical to the printed check stub or direct deposit advice
- Year End forms available as PDF format through self service



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TIME AND LABOR



Load Process

- **New filtering and separate check parameters for the Load Time and Labor process**
- **Enhanced Error Reporting**
- **Load Processing Performance Enhanced for speedier loads**



Payable Time Status and Reason Codes

- Status Code
- Reason Codes



Integration with Payroll

- **New Payable Time Reversal Processing**



Integration with Absence Management

- Absence Entries on Timesheets
- Absence Approvals
- Consideration of Absence Data



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ABSENCE MANAGEMENT



Delegation Framework

- **Authorize another person to serve as his or her representative**



Approval Framework

- **AWE (Approval Workflow Engine) is now available with Absence Management**



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QUESTIONS ?

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