



Workforce Compensation and Benefit Solutions HCM 8.9 & Beyond

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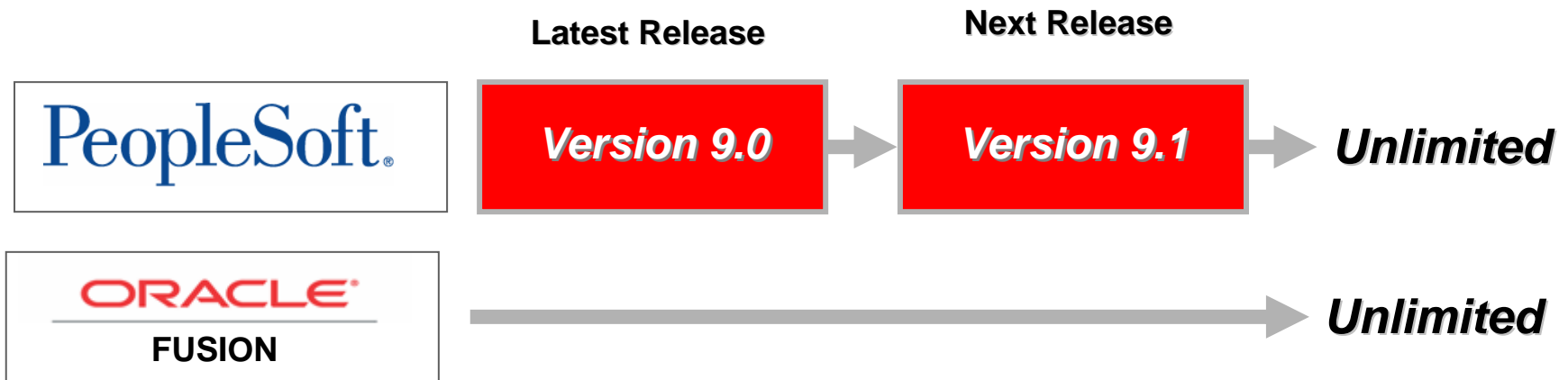
ORACLE

PeopleSoft.

Oracle's Applications Strategy

Applications Unlimited For PeopleSoft Enterprise

Oracle's plan to continue providing ongoing enhancements to current PeopleSoft Enterprise applications beyond the delivery of Oracle Fusion Applications



Applications Unlimited has NO impact on the targeted delivery dates for Oracle Fusion applications

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Oracle's Applications Strategy

Applications Unlimited Delivers More...

✓ More *Choice*

- Remain On Existing Applications
- Upgrade To New Releases
- Deploy Additional Modules
- Adopt Fusion Technology

✓ More *Visibility*

- Customer-Driven Product Roadmaps

✓ More *Value*

- Dedicated Development Teams
- Continued Product Releases

✓ More *Time*

- No Forced Upgrades

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8.9 Enhancements

Labor Management

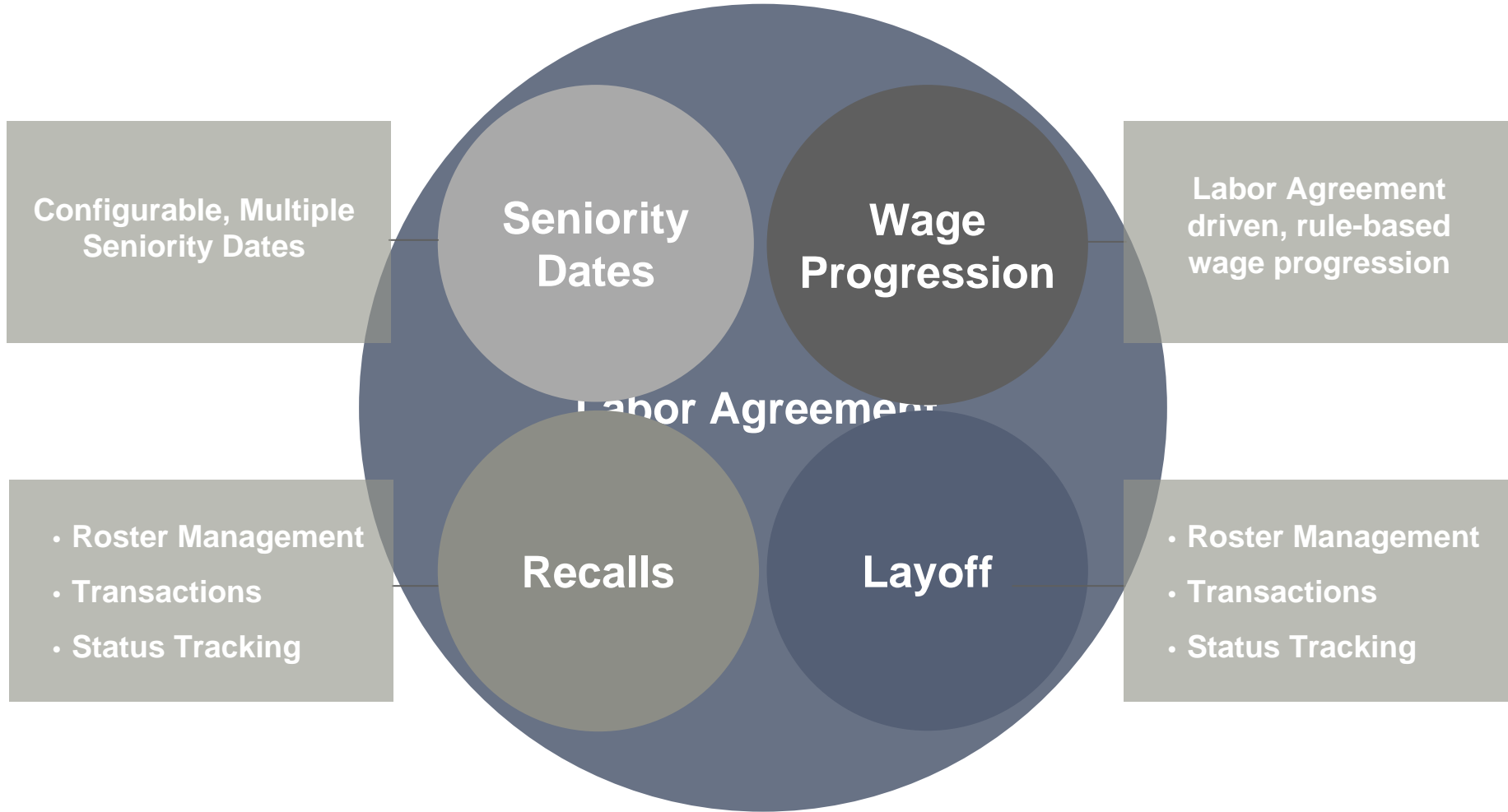
Management By Labor Agreement

- Approximately 60% of PeopleSoft customers operate in unionized industries.
- The result of collective bargaining agreements can generate thousands of HRMS transactions. Two examples are:
 - Automatic Wage Progression
 - Administering Layoffs and Recalls.

Management By Labor Agreement

- In Release 8.9 customer “needs” as expressed in focus groups resulted in
 - Expanded setup tables for union related activity
 - Layoff & Recall Processing
 - Automatic Wage Progression

Labor Management



Management By Labor Agreement

Delivered Union Workforce Management Center

Main Menu > Workforce Administration > Labor Administration >

Union Workforce Mgmt Center

[Edit "Union Workforce Mgmt Center" Collection](#)

Define and administer union workforce agreements, processes, and periodic events.

 Seniority Define and report labor seniority. <ul style="list-style-type: none">Job DataSeniority ReportSeniority DatesTie Breakers	 Labor Agreement Create and maintain Labor Agreements. <ul style="list-style-type: none">Labor AgreementEmployee CategorizationLabor Job Classes3 More...	 Wage Progression Administer new hire and new-in-job wage progression. <ul style="list-style-type: none">Review Wage ProgressionUpdate Wage ProgressionApprove Employees to Advance7 More...
 Layoffs and Recalls Create and administer Layoff, Recall, and Reinstatement events. <ul style="list-style-type: none">Layoff RosterRecall RosterReinstatement Roster4 More...		

Management By Labor Agreement

Typical Real Life Union Hierarchy

- Union →
- Bargaining Unit →
- Labor Agreement →

PeopleSoft Labor Relations

- Setup HRMS → Product Related → Workforce Administration → Labor Administration → Contracts/Unions → Unions
- Setup HRMS → Product Related → Workforce Administration → Labor Administration → Contracts/Unions → Bargaining Unit
- Setup HRMS → Product Related → Workforce Administration → Labor Relations → Labor Agreement

Management By Labor Agreement

Labor Administration Foundation Setup Tables

- Union Table expanded
- Bargaining Unit Table expanded
- Labor Agreement Table expanded
- Labor Facilities new
- Labor Job Classes new
- Labor Group Definition new

Setup HRMS → Product Related → Workforce Administration → Labor Relations → Labor Agreement – Labor Agreement Tab

Labor Agreement | Job Codes | Seniority Rules | Facilities

SetID: USA Labor Agreement: K00001 [Reg Regions that use this Labor Agreement](#)

Labor Agreement Find | View All First 1 of 1 Last

*Effective Date: 01/01/1980 Status: Active

Ratify Date: 01/01/1980

Contract Begin Date: 01/01/1980

Contract End Date: 12/31/2010

*Description: Professional Agreement 1980 Short Description: Prof 1980

Bargaining Unit: KU02 American Professional Union

Comments: Agreement made between Professional workers and Management

Agreement includes

- Job Codes
- Seniority Rules
- Facilities

Wage Progression Carryovers

This Labor Agreement Uses

- Step ID
- Step Entry Date
- Wage Progression Hours Worked

USA

Spain

India

Setup HRMS → Product Related → Workforce Administration → Labor Relations → Labor Agreement – Job Codes Tab – Labor Class K00001 Clerical Workers

[Labor Agreement](#) | **Job Codes** | [Seniority Rules](#) | [Facilities](#)

SetID: USA **Labor Agreement:** K00001

Labor Agreement Find | View All First ◀ 1 of 1 ▶ Last

Effective Date: 01/01/1980 **Status:** Active [Business Units that use these Job Codes](#)

Job Code Assignment Find | View 1 First ◀ 1-3 of 3 ▶ Last

Labor Job Class: Clerical Workers + -

Add Multiple Job Codes

Job Codes Customize | Find | View All First ◀ 1-4 of 4 ▶ Last

Bumping Sequence	Job Code SetID	Job Code	Description	Employee Category	Salary SetID	Salary Plan	Grade		
1	SHARE	140035	Analyst-Financial	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/> + -
2	SHARE	170005	Assistant-Administrative	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/> + -
3	SHARE	200005	Auditor-General	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/> + -
4	SHARE	290075	Clerk-Payroll	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/> + -

Setup HRMS → Product Related → Workforce Administration → Labor Relations → Labor Agreement – Seniority Rules Tab

[Labor Agreement](#) | [Job Codes](#) | **Seniority Rules** | [Facilities](#)

SetID: USA **Labor Agreement:** K00001

Seniority Rules Find | View All First ◀ 1 of 1 ▶ Last

Effective Date: 01/01/1980 **Status:** Active

Recall Expiration Rule ID: Labor Facility Seniority

Seniority Dates Customize | Find | View All | First ◀ 1-3 of 3 ▶ Last

ID	Label	Default from Existing Field	User Editable		
<input type="text" value="K00DEP"/>	DEPT ENTRY DATE	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="button" value="+"/>	<input type="button" value="-"/>
<input type="text" value="K00FAC"/>	FACILITY ENTRY DATE	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="button" value="+"/>	<input type="button" value="-"/>
<input type="text" value="K00JOB"/>	JOB CODE ENTRY DATE	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="button" value="+"/>	<input type="button" value="-"/>

Tie Breakers Customize | Find | View All | First ◀ 1-2 of 2 ▶ Last

ID	Description		
<input type="text" value="K00001"/>	National ID	<input type="button" value="+"/>	<input type="button" value="-"/>
<input type="text" value="K00002"/>	Date of Birth	<input type="button" value="+"/>	<input type="button" value="-"/>


Setup HRMS → Product Related → Workforce Administration → Labor Relations → Labor Agreement – Facilities Tab





[Labor Agreement](#) | [Job Codes](#) | [Seniority Rules](#) | **Facilities**

SetID: USA **Labor Agreement:** K00001

Labor Agreement Find | View All First ◀ 1 of 1 ▶ Last



Effective Date: 01/01/1980 **Status:** Active

Facilities Customize | Find | View 1 |  First ◀ 1-4 of 4 ▶ Last

Labor Facility ID	Description		
K00001 	Georgia Training Facility	+	-
K00002 	Illinois Plant B	+	-
K00005 	Missouri Plant A	+	-
K00007 	Vancouver Training Facility	+	-

Setup HRMS → Product Related → Workforce Administration → Labor Relations → Labor Group Definition – Group Definition Tab

Group Definition | Group Members | Group Security

Group ID: LBR1
***Description:** Labor Group K00001
***Short Desc:** Lgroup
***As Of Date:** 01/01/2000 
***Bargaining Unit:** KU02  American Professional Union
Labor Facility ID:

Labor Agreement			
Agreement	Description	Contract Begin Date	Contract End Date
K00001	Professional Agreement 1980	01/01/1980	12/31/2010

Job Codes		
Job Code	Description	Include
140035	Analyst-Financial	<input checked="" type="checkbox"/>
170005	Assistant-Administrative	<input checked="" type="checkbox"/>
170045	Assistant-Nursing	<input checked="" type="checkbox"/>
200005	Auditor-General	<input checked="" type="checkbox"/>
290075	Clerk-Payroll	<input checked="" type="checkbox"/>
660005	Nurse-Head	<input checked="" type="checkbox"/>
660010	Nurse-Licensed Practical	<input checked="" type="checkbox"/>
660015	Nurse-Registered	<input checked="" type="checkbox"/>

Save

Save and Populate Group

Setup HRMS → Product Related → Workforce Administration → Labor Relations → Labor Group Definition – Group Members Tab




Group Definition

Group Members

Group Security

Group ID: LBR1
Description: Labor Group K00001
As Of Date: 01/01/2000

Group Members - Last Refreshed on 09/07/2004 at 10:45:09AM PDT

Find View All  First  1-13 of 13  Last		
EmpID	Empl Rcd Nbr	Name
KU0010	0	Antonio Santos
KU0021	0	Salish Bir
KU0039	0	Shawn Quilligan
KU0042	0	Danny Johnson
KU0044	0	Daryl Reese
KU0049	0	Julie Dyer
KU0059	0	Vicki Zinn
KU0068	0	Marc Kessler
KU0076	0	Mei Lee
KU0096	0	Wendy Kwan
KU0100	0	Courtney Osborn
KU0113	2	Cassandra Jacobson
KU0202	1	Frankie Fremont

Layoff and Recall Processing

- Creates Layoff and Recall Rosters based on user defined seniority dates
- Once a Roster is approved it is then submitted for processing
- Processing results in
 - The insertion of new Job rows
 - The creation of “Recall Rights”

Layoff and Recall Processing

- Layoff and Recall Specific Setup Tables
 - Seniority Date Fields
 - Seniority Dates Table
 - Tie Breaker Table
 - Recall Reason Table
 - Layoff Exemption Rules
 - Recall Expiration Rules

Layoff and Recall Processing

- Layoff and Recall Process Pages
 - Layoff Roster
 - Recall Roster
 - Recall Rights
 - Reinstatement Roster
 - Process Recall Rights

Workforce Administration → Labor Administration → Layoffs and Recalls → Layoff Roster → Layoff Roster Setup Tab

Layoff Roster Setup | Layoff Roster List

Roster ID: K00001 | Roster Status: 020 - In Progress

Extraction Criteria Find | First 1 of 1 Last

*Effective Date: 08/01/2004

*Roster Type: Permanent

*Description: Layoff - Labor Agreement K00001

Mass Update to be used?

Group ID: K00001

[Labor Group Definition](#)

Labor Agreement: K00001 Professional Agreement 1980

Sort Criteria

Seniority Dates Customize | Find | View All | First 1-2 of 2 Last

Sequence	*Seniority Date ID	Seniority Date Label		
2	K00FAC <input type="text"/> <input type="button" value="Q"/>	FACILITY ENTRY DATE	<input type="button" value="+"/>	<input type="button" value="-"/>
2	K00DEP <input type="text"/> <input type="button" value="Q"/>	DEPT ENTRY DATE	<input type="button" value="+"/>	<input type="button" value="-"/>

Tie Breakers Customize | Find | View All | First 1 of 1 Last

Sequence	*Tie Breaker ID	Record	Field Name	Descending Order?		
1	K00002 <input type="text"/> <input type="button" value="Q"/>	PERSON	BIRTHDATE	<input type="checkbox"/>	<input type="button" value="+"/>	<input type="button" value="-"/>

Workforce Administration → Labor Administration → Layoffs and Recalls → Layoff Roster → Layoff Roster List

Layoff Roster Setup

Layoff Roster List

Roster ID: K00001

Roster Status: 020 - In Progress

Layoff Roster Information

Find | View All | First 1 of 1 Last

Effective Date: 08/01/2004 Date First Notified:

Planned Termination Date: 08/16/2004 Multiple Term Dates? Actual Termination Date:

Total in Group: 23

Nbr in Group to Consider:

Apply Employee Roster Status

Apply To: All Status: K00LAYA

1 to 10 of 10

Layoff Roster List

Customize | Find | View All | First 1-5 of 10 Last

Select	EmpID	Name	Empl Rcd#	Tie	Notes	Rank	Status		
<input type="checkbox"/>	K0HU10	Allison Smith	0	<input checked="" type="checkbox"/>		1	K00LAYA <input type="text"/>	<input type="button" value="+"/>	<input type="button" value="-"/>
<input type="checkbox"/>	K0HU10	Allison Smith	1	<input checked="" type="checkbox"/>		2	K00LAYA <input type="text"/>	<input type="button" value="+"/>	<input type="button" value="-"/>
<input type="checkbox"/>	K0HU11	Thomas Holmes	0	<input checked="" type="checkbox"/>		3	K00LAYA <input type="text"/>	<input type="button" value="+"/>	<input type="button" value="-"/>
<input type="checkbox"/>	K0HU12	Patricia Happs	0	<input checked="" type="checkbox"/>		4	K00LAYA <input type="text"/>	<input type="button" value="+"/>	<input type="button" value="-"/>
<input type="checkbox"/>	K0HU13	Joseph Barnes	0	<input checked="" type="checkbox"/>		5	K00LAYA <input type="text"/>	<input type="button" value="+"/>	<input type="button" value="-"/>

Candidates to be processed: 10

Workforce Administration → Labor Administration → Layoffs and Recalls → Layoff Roster → Layoff Roster List → Process Layoff Button

Layoff Process


Run Control ID: index

[Report Manager](#) [Process Monitor](#)

Run

Report Request Parameter(s)

Roster ID: K00001 Layoff - Labor Agreement K00001

*Action: LOF  Furlough

Action Reason: RED  Staff Reduction

Termination Date: 08/16/2004 

Auto Reinstatement

Auto Reinstatement

Action:

Action Reason:

Reinstatement Date:

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PeopleSoft

The Resulting "Layoff" Job Record

Thomas Holmes ID: K0HU11 Empl Rcd #: 0

Work Location Job Information Job Labor Payroll Salary Plan Compensation

Work Location Find First 1 of 1 Last

HR Status: Active Payroll Status: Suspended

*Effective Date: 08/16/2004 Sequence: 0 *Job Indicator: Primary Job

Action / Reason: Furlough Staff Reduction

Last Start Date: 01/01/2003 Termination Date: 08/15/2004

Expected Job End Date: []

Last Date Worked: 08/15/2004 Override Last Date Worked Expected Return Date: []

Position Number: [] Position Management Record

*Regulatory Region: USA United States

Company: GBI Global Business Institute 9999

*Business Unit: GBIBU Global Business Institute BU

*Department: 14000 Administration Department Entry Date: 01/01/2003

Location: KUNY00 Corporation Headquarters

Establishment ID: KU001 Global Business Institute HQ

Date Created: 09/09/2004

Workforce Administration → Labor Administration → Layoffs and Recalls → Recall Roster → Recall Roster Setup Tab

Recall Roster Setup | Recall Roster List

Roster ID: K00001 RCL

Roster Status: 020 - In Progress

Extraction Criteria

Find First 1 of 1 Last

*Effective Date: 09/09/2004

Default Rehire Date: 10/15/2004

*Description: Recall of K00001

Mass Update to be used?

Group ID:

[Labor Group Definition](#)

Labor Agreement: K00001 Professional Agreement 1980

Layoff Roster ID: K00001

Sort Criteria

Seniority Dates

Customize | Find | View All | First 1 of 1 Last

Sequence	*Seniority Date ID	Seniority Date Label		
1	K00JOB	JOB CODE ENTRY DATE	+	-

Tie Breakers

Customize | Find | View All | First 1 of 1 Last

Sequence	*Tie Breaker ID	Record	Field Name	Descending Order?		
1	K00002	PERSON	BIRTHDATE	<input type="checkbox"/>	+	-

Regenerate Roster List

Refresh Roster

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Workforce Administration → Labor Administration → Layoffs and Recalls → Recall Roster → Recall Roster List Tab

Recall Roster Setup

Recall Roster List

Roster ID: K00001 RCL

Roster Status: 020 - In Progress

Recall Roster Information

Find | View All | First 1 of 1 Last

Effective Date: 09/09/2004

Default Rehire Date: 10/15/2004

Total in Group: 10

Nbr in Group to Consider: 10

[View Roster](#)

Apply Employee Roster Status

Apply To: All Status: K00RECA [Apply](#)

1 to 10 of 10

Recall Roster List

Customize | Find | View All | First 1-5 of 10 Last

Select	EmpID	Name	Empl Rcd#	Tie	Notes	Rank	Status	Rehire Date		
<input type="checkbox"/>	KU0045	Jorge Enriquez	0	<input type="checkbox"/>		1		10/15/2004	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	K0HU10	Allison Smith	1	<input checked="" type="checkbox"/>		2		10/15/2004	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	K0HU10	Allison Smith	0	<input checked="" type="checkbox"/>		3		10/15/2004	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	K0HU11	Thomas Holmes	0	<input checked="" type="checkbox"/>		4		10/15/2004	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	K0HU12	Patricia Happs	0	<input checked="" type="checkbox"/>		5		10/15/2004	<input type="checkbox"/>	<input type="checkbox"/>

[Process Recall](#)

Candidates to be processed: 0

Workforce Administration → Labor Administration → Layoffs and Recalls → Recall Roster → Recall Roster List Tab → Process Recall Button Pressed

Process Recall/Reinstatement

Run Control ID: index

[Report Manager](#)

[Process Monitor](#)

Run

Report Request Parameter(s)

Roster ID: K00001 RCL Recall of K00001

***Action:** REC  Return from Suspension/Furloug

Action Reason: REC  Recall from Suspension/Layoff

The Resulting "Reinstatement" Job Record

Work Location | Job Information | Job Labor | Payroll | Salary Plan | Compensation

Thomas Holmes ID: KOHU11 Empl Rcd #: 0

Work Location Find First 1 of 2 Last

HR Status: Active **Payroll Status:** Active

***Effective Date:** 10/15/2004 **Sequence:** 0 ***Job Indicator:** Primary Job

Action / Reason: Return from Suspension/Furl Recall from Suspension/L

Last Start Date: 01/01/2003 Termination Date: 08/15/2004

Expected Job End Date: Position Entry Date: Future

Position Number:

 Position Management Record

***Regulatory Region:** USA United States

Company: GBI Global Business Institute 9999

***Business Unit:** GBIBU Global Business Institute BU

***Department:** 14000 Administration **Department Entry Date:** 01/01/2003

Location: KUNY00 Corporation Headquarters

Establishment ID: KU001 Global Business Institute HQ

Date Created: 09/09/2004

Wage Progression

Managing Wage Progression

- Administers collectively bargained wage progression contract provisions
- Wage Progression is the automatic advancement from one “salary grade step” to another based on:
 - 1) actual hours worked ... or
 - 2) elapsed time

Managing Wage Progression

Composed of three sub-processes

- One incorporates relevant updates from JOB data
- One incorporates time worked from payroll
- One qualifies the worker's readiness to advance to the next step

Advancement to the next step can be automatic or require approval

Managing Wage Progression

Advancement (rate calculation) to the next “step” can be defined as:

- Percent of Grade Max
- Percent of Grade Minimum
- Percent Increase
- Amount Increase
- User Defined

Managing Wage Progression

The “Increment Type” can be

- Elapsed Months
- Elapsed Weeks
- Actual Hours Worked (not Standard Hours)

Managing Wage Progression

The Salary Plan Table has a link to the Define Wage Progression Rule

Salary Plan Table

SetID: SHARE

Salary Administration Plan:

KUH1

[Business Units that use this Setid](#)

Salary Plan

Find | View All First 1 of 1 Last

*Effective Date:	01/01/1980	*Status:	Active
*Description:	Professional Workers	<input checked="" type="checkbox"/> Wage Progression Plan Define Wage Progression Rule	
Short Description:	Profession	Work Period:	Weekly
*Standard Hours:	40.00		
*Currency Code:	USD US Dollar		
Default Salary Matrix Code:			
Default Rating Model:			
Company:	GBI Global Business Institute 9999		

Frequency Defaults

Hourly:	H	Hourly
Daily:	D	Daily
Monthly:	M	Monthly

Auto Calculated Premium

<input type="checkbox"/> Auto Calculated Premium	
Absorbing Premium:	
Non-Absorbing Premium:	

Managing Wage Progression

SetID: SHARE Salary Administration Plan: KUH2

Salary Plan

Effective Date: 01/01/1980 **Status:** Active **Description:** Administrative Workers

Step Generation Rules

*Rate Calculation: % Grade Max

*Increment Type: Hours Worked

Comp Rate Code: NAHRLY Default NA Hourly

Hours Accumulator: PAS Auto Step Increment - Hours

Advancement Processing Rules

Exceed maximum for Grade

Round to Max of Grade Within

Advancement Approval Required

Job Action: PAY Reason: SPG

Wage Progression Steps [Customize](#) | [Find](#) | [View All](#) | First 1-4 of 4 Last

*Step	Step Description	Time Required In Step	Units		
1	% Max Hrs Wkd No Appr Step 1	160.0000	Hours	+	-
2	% Max Hrs Wkd No Appr Step 2	160.0000	Hours	+	-
3	% Max Hrs Wkd No Appr Step 3	160.0000	Hours	+	-
4	% Max Hrs Wkd No Appr Step 4		Hours	+	-

Managing Wage Progression

Wage Progression Steps Customize | Find | View All | First 1-4 of 4 Last

Time in Step | **Increase** | Time Limits

*Step	Percent of Maximum		
1	70.00		
2	80.00		
3	90.00		
4	100.00		

Wage Progression Steps Customize | Find | View All | First 1-4 of 4 Last

Time in Step | Increase | **Time Limits**

*Step	Time Limit Amount	Time Limit Units		
1	8.00	Weeks		
2	8.00	Weeks		
3	8.00	Weeks		
4				

Managing Wage Progression

SetID: SHARE Salary Administration Plan: KUH1

Salary Plan

Effective Date: 01/01/1980 **Status:** Active **Description:** Professional Workers

Step Generation Rules	Advancement Processing Rules
<p>*Rate Calculation: Amt Increase</p> <p>*Increment Type: Elapsed Weeks</p> <p>Comp Rate Code: NAHRLY Default NA Hourly</p> <p>Leave Accumulator: K20 ST - Vacation + Sick Hours</p>	<p><input type="checkbox"/> Exceed maximum for Grade</p> <p><input checked="" type="checkbox"/> Round to Max of Grade Within</p> <p>Tolerance Type: Flat Amount</p> <p>Tolerance Amount: 0.050000 USD</p> <p><input checked="" type="checkbox"/> Advancement Approval Required</p> <p>Days Within: 5</p> <p>Job Action: PAY Reason: SPG</p>

Wage Progression Steps Customize | Find | View All | First 1-7 of 7 Last

*Step	Step Description	Time Required In Step	Units		
1	Amt Inc Elap Wks Appr Step 1	4.0000	Weeks	+	-
2	Amt Inc Elap Wks Appr Step 2	4.0000	Weeks	+	-
3	Amt Inc Elap Wks Appr Step 3	4.0000	Weeks	+	-
4	Amt Inc Elap Wks Appr Step 4	4.0000	Weeks	+	-
5	Amt Inc Elap Wks Appr Step 5	4.0000	Weeks	+	-
6	Amt Inc Elap Wks Appr Step 6	52.0000	Weeks	+	-
7	Amt Inc Elap Wks Appr Step 7		Weeks	+	-

Managing Wage Progression

Wage Progression Steps Customize | Find | View All | First 1-7 of 7 Last

Time in Step | **Increase** | Time Limits |

*Step	Increase Amount	Currency Code		
1	<input type="text"/>	USD	<input type="button" value="+"/>	<input type="button" value="-"/>
2	<input type="text" value="1.000000"/>	USD	<input type="button" value="+"/>	<input type="button" value="-"/>
3	<input type="text" value="0.250000"/>	USD	<input type="button" value="+"/>	<input type="button" value="-"/>
4	<input type="text" value="0.250000"/>	USD	<input type="button" value="+"/>	<input type="button" value="-"/>
5	<input type="text" value="0.250000"/>	USD	<input type="button" value="+"/>	<input type="button" value="-"/>
6	<input type="text" value="0.250000"/>	USD	<input type="button" value="+"/>	<input type="button" value="-"/>
7	<input type="text" value="3.500000"/>	USD	<input type="button" value="+"/>	<input type="button" value="-"/>

Wage Progression Steps Customize | Find | View All | First 1-7 of 7 Last

Time in Step | Increase | **Time Limits** |

*Step	Maximum Leave Hours		
1	<input type="text"/>	<input type="button" value="+"/>	<input type="button" value="-"/>
2	<input type="text"/>	<input type="button" value="+"/>	<input type="button" value="-"/>
3	<input type="text"/>	<input type="button" value="+"/>	<input type="button" value="-"/>
4	<input type="text"/>	<input type="button" value="+"/>	<input type="button" value="-"/>
5	<input type="text"/>	<input type="button" value="+"/>	<input type="button" value="-"/>
6	<input type="text" value="40.00"/>	<input type="button" value="+"/>	<input type="button" value="-"/>
7	<input type="text"/>	<input type="button" value="+"/>	<input type="button" value="-"/>

Managing Wage Progression

Approve Employees to Advance

Wage Progression Run ID: KUWP1 **By Labor Agmt USA/K00001**

▶ Last Process Dates

Click Select All to approve all employees on the list. Click Save when review and selection are complete. Employees remain on the list until Process Wage Progression is run to advance employee's Step and compensation rate.

Employees Pending Advancement						Customize	Find	View All	First	1-4 of 4	Last
Activity	Job	Wage Plan	Labor Agreement								
Select	Activity Date	Name	Status	Estimated Advance	Activity Detail						
<input type="checkbox"/>	01/01/2003	Joseph Barnes	Qualified - Approval Required	01/29/2003							
<input type="checkbox"/>	01/01/2003	Hector Walpoe	Qualified - Approval Required	01/29/2003							
<input type="checkbox"/>	01/01/2003	Penelope Gustaf	Qualified - Approval Required	01/29/2003							
<input type="checkbox"/>	01/01/2003	Mas Ravi	Qualified - Approval Required	01/29/2003							

Select All

Deselect All

Save

Return to Search

Next in List

Previous in List

Managing Wage Progression

Work Location | Job Information | Job Labor | Payroll | Salary Plan | Compensation

Allison Smith EMP ID: K0HU10 Empl Rcd #: 1

Work Location Find First 1 of 2 Last

HR Status: Active Payroll Status: Active

*Effective Date: 01/29/2003 Sequence: 0 Job Indicator: Secondary Job

Action / Reason: Pay Rate Change Step Progression

Last Start Date: 01/01/2003 Termination Date:

Expected Job End Date: Position Entry Date:

Position Number: Position Management Record

*Regulatory Region: USA United States

Company: GBI Global Business Institute 9999

*Business Unit: GBIBU Global Business Institute BU

*Department: 14000 Administration Department Entry Date: 01/01/2003

Location: KUNY00 Corporation Headquarters

Establishment ID: KU001 Global Business Institute HQ

Date Created: 09/17/2004

Base Compensation

Manage Base Compensation and Budgeting

- We renamed Human Resources Plan Salaries to better reflect the nature of the functionality.
- Base compensation budgets and plans has been significantly enhanced for 8.9.
- Implement mass salary increases by salary plan and pay group or by job codes.

Matrices

Matrices

- Past releases of PeopleSoft compensation business processes have provided hard-coded matrices to track things such as salary ranges in a salary plan.
- With release 8.9, we introduce new functionality that enables you to create custom matrices to use instead or in addition to the earlier versions.
- Once created, you can use matrices to manage compensation related information for job codes, rate codes, and group budgets.

Matrices

Simple Rate Matrix

This matrix is used to determine the compensation rate for a worker based on his department.

Department ID — Input	Rate (US per hour) — Output
10012	10.00
10013	12.00
10014	14.00
10015	16.00

In this example, the single input is the *Department* of the worker and the output is the *Rate*. If a worker is in Department 10012, the pay rate is 10.00 USD per hour

Matrices

Matrix with Multiple Outputs of Different Types — Market Pay Matrix Example

The outputs of a matrix can be of different types, and the following example is a matrix with multiple outputs, one of which is a percentage. This matrix is used to track the compensation rates for a job at various percentiles and different geographical areas.

Geography	Currency	Base 25th	Base 50th	Base 75th	Base 100th	Base Market Reference	Variable Target Percent	Mean Total Compensation	Total Compensation Reference
NORTHWEST REGION	USD	26,000	27,000	27,500	28,000	27,000	12.00	29,000	30,000
MID ATLANTIC REGION	USD	24,000	25,000	25,500	26,000	25,000	10.00	27,000	28,000
SOUTHWEST REGION	USD	27,000	28,000	28,500	29,000	28,000	11.00	30,000	31,000

In this example, the only input is the geographical area. All other columns are outputs. This matrix can be associated with a specific job code, so that the compensation administrator can track market pay for that job code across different geographical regions.

Matrices

Matrix With Calculated Results

You can also embed calculations in the results returned by a matrix. In this example, the matrix returns rates calculated by applying a formula:

Step — Input	Reference — Output	Percentage to Apply — Output
1	Base Salary	5
2	Grade Range Maximum	90
3	Base Salary	4

For example, if the worker's base salary was 10,000 USD and if he was on Step 1, this matrix will return a rate (Base Salary x 5%) = 10,500 USD.

The Matrix Salary Increase Matrix

Matrix Definition | Inputs | Outputs | Search Keys | Data Content | **View**

Matrix Name: KUS002

Matrix Definition First 1 of 1 Last

Effective Date: 01/01/2000 Status: Active
 Description: Compa-Ratio Salary Inc Matrix Matrix Type: Salary Increase Matrix

Display Saved Matrix (This will display only the last saved version of the matrix)

Compa-Ratio Salary Inc Matrix (2000-01-01)

Perf Rating	Compa-Ratio										
	90.00			100.00			110.00			120.00	
	Min Percent	Default Percent	Max Percentage	Min Percent	Default Percent	Max Percentage	Min Percent	Default Percent	Max Percentage	Min Percent	Default Pe
1	6.00	6.50	7.00	5.00	6.00	7.00	4.00	5.00	6.00	3.00	
2	5.00	5.50	6.00	4.00	5.00	6.00	3.00	4.00	5.00	2.00	
3	4.00	5.00	5.00	3.00	4.00	5.00	2.00	3.00	4.00	1.00	
4	0.00	0.00	1.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	

Matrix Used in Group Salary Increase Budgets

[Budget Description](#) | [Budget Requested](#) | [Budget Components](#) | [More Budget Details](#)

Group ID: KF001 Executives in Company KF1
Budget Period: 01/01/2000 - 12/31/2000 **Budget ID:** ANNUAL_INC **Level of Proration:** Monthly Calculate

Budget Find | View All First 1 of 1 Last

Effective Date: 07/01/2000 **Sequence:** 0
Budget Type:
Action: Pay Rt Chg **Reason:** Merit
Budget Manager: KF0001 **Rcd#:** 0 Maurice Berger

Load Rate Codes

Requested Budget

Rate Code	Matrix Name	Details	Change Amount	Change Percent	Change Points	Percent of Points	Add Percent		
KF0005	KUS002	Details							+ -
KF0006	KUS002	Details							+ -

Current Budget

Rate Code		Total Increase	Currency	Frequency		
KF0005	Base Salar		FRF	M		+ -
KF0006	Base Pts		FRF	M		+ -

Market Pay

Using the enhanced market pay functionality, you can:

- Define and select the data points that you want to capture rather than restricting you to a limited, predefined set.
- Include geography as an attribute of market pay for different reference points based on the location of the worker.
- You can further distinguish geography by country, state, province, and city.
- Associate a market pay matrix with one or multiple job codes.
- The market pay matrix can be accessed through the Job Codes - Market Pay Match page or through the Associate Market Pay to Job Codes page.

The Market Pay Matrix

Matrix Definition Inputs Outputs Search Keys Data Content View

Matrix Name: KUM001

Matrix Definition First 1 of 1 Last

Effective Date: 01/01/1980 Status: Active

Description: Clerk Payroll 290080 Matrix Type: Market Pay Surveys

Display Saved Matrix (This will display only the last saved version of the matrix)

Clerk Payroll 290080 (1980-01-01)

Geog Area	Currency	25th Percentile	50th Percentile	75th Percentile	100th Percentil	Base Mkt Ref	Variable TgtPct	Var Tgt Pct Ref	Mean Total Comp	Total Comp Ref
COUNTRIES	USD	26,000.00	27,000.00	27,500.00	28,000.00	27,000.00	10.00	2,700.00	29,000.00	30,000.00
MID ATLANTIC STATES	USD	24,000.00	25,000.00	25,500.00	26,000.00	25,000.00	10.00	2,500.00	27,000.00	28,000.00
MIDWEST REGION	USD	27,000.00	28,000.00	28,500.00	29,000.00	28,000.00	10.00	2,800.00	30,000.00	31,000.00

Matrix Used in the Job Code Table


[Job Code Profile](#) | [Evaluation Criteria](#) | **Market Pay Match** | [Default Compensation](#) | [Non-Base Compensation](#)

SetID: SHARE **Job Code:** 290075

Market Pay Match

Effective Date: 01/01/1980 **Status:** Active

Description: Clerk-Payroll

Matrix Name:  Clerk Payroll 290080

[Edit Data](#)

Clerk Payroll 290080 (1980-01-01)

Geog Area	Currency	25th Percentile	50th Percentile	75th Percentile	100th Percentil	Base Mkt Ref	Variable TgtPct	Var Tgt Pct Ref	Mean Total Comp	Total Comp Ref
COUNTRIES	USD	26,000.00	27,000.00	27,500.00	28,000.00	27,000.00	10.00	2,700.00	29,000.00	30,000.00
MID ATLANTIC STATES	USD	24,000.00	25,000.00	25,500.00	26,000.00	25,000.00	10.00	2,500.00	27,000.00	28,000.00
MIDWEST REGION	USD	27,000.00	28,000.00	28,500.00	29,000.00	28,000.00	10.00	2,800.00	30,000.00	31,000.00

[Save](#) | [Return to Search](#) | [Next in List](#) | [Previous in List](#) | [Notify](#)

[Add](#) | [Update/Displa](#)

Population Management

What is Population Management?

Population Management enables you to organize your people into a hierarchy, giving you a visual representation of the relationship between managers and their staff.

It provides a simple, intuitive way to manage large populations and identify the managers and staff relationships required to support business processes like compensation.

Population Management

The tree based on Betty Locherty shows all of the people in the department that Betty manages.

Tree Content

Empl ID Rcd Find

- [-] **Betty Locherty** (KU0007)
- Tom Newman** (KOMTX00)
- Sandy Nickels** (KOMTX00)
- Kathy O'Brien** (KOMTX00)
- Bryan Odell** (KOMTX004)
- Diane Palmer** (KOMTX00)
- Andrew Pierce** (KOMTX0)
- John Quinn** (KOMTX007)
- Michael Rhodes** (KOMTX0)
- Annette Thompson** (KOMTX0)
- Jeremy Sands** (KOMTX01)
- Rosanna Channing** (KU0005)
- Sylena Tyler** (KU0050) 6
- Cynthia Adams** (KU0101)
- Susan Hoinck** (KU0119)

Context Menu:

- Add Child
- Cut
- Replace With Vacant
- Replace From List
- Replace From Clipboard
- Paste as Child
- View as Root
- Group Build - Single Node
- Group Build - Branch
- Job info
- View Group
- Close Menu

Population Management

Rosanna Channing and Sylena Tyler also manage a department and, when expanded, the people in their departments are shown.

Tree Content

Empl ID Rcd Find

- Rosanna Channing** (KU0046) 600085 ▾
 - Joanna Strunsky** (KU0016) 310015 ▾
 - Steve Religioso** (KU0036) 310005 ▾
 - Daryl Reese** (KU0044) 170005 ▾
 - Brenton Francisco** (KU0048) 310005 ▾
 - Russell Parker** (KU0079) 310015 ▾
 - Edmund Donahue** (KU0102) 600195 ▾

Save Tree Save Tree As

Base Salary

Employee ID KU0046 USD

Empl Rcd Nbr

Employee Rosanna Channing

Annual Rate 60,008.00

Department 10000

Job Code 600085

Salary Grade 006

Payroll Status Active

USD

[Customize](#) | [Find](#) | [View All](#) | First 1-6 of 6 Last

Name	Annual Rate	Currency Code
Joanna Strunsky	26,000.00	USD
Steve Religioso	120,016.00	USD
Daryl Reese	26,000.00	USD
Brenton Francisco	26,000.00	USD
Russell Parker	26,000.00	USD
Edmund Donahue	48,006.48	USD

Total Annual Salaries 272,022.48

Benefits

Benefits Solutions

- Effective Dated dependent and beneficiary tables
- Supports Person Model
- Multiple annual base benefit rates
- ERISA regulation updates
 - Improved support for “Consistency Rule”
 - Better validation for ongoing enrollment

Benefits

To enable our customers to track and separate employees, contingent workers, and persons of interest within Benefits, there is an additional option of **Not Managed in PeopleSoft** for the Benefits System field on the Benefit Program Participation page.

Benefit Program Participation			
Douglas Lewis	CWR	ID: <U0001	Empl Rcd #: 1
Benefit Record Number: <input type="text" value="1"/>			
Benefit Status		Find	First ◀ 1 of 1 ▶ Last
Effective Date:	11/18/2004	Effective Sequence:	0
Action / Reason:	Add Contingent Worker		
*Benefits System:	<input type="text" value="Not Managed in PeopleSoft"/>	Benefits Employee Status:	Active
Annual Benefits Base Rate:	<input type="text"/>	USD	
Benefit Program Participation		Find View All	First ◀ 1 of 1 ▶ Last
*Effective Date	*Benefit Program	Currency Code	
<input type="text" value="01/01/1980"/>	<input type="text" value="KU1"/> GBI Master US Benefit Program	USD	
Job Data	Employment Data	Earnings Distribution	Benefits Program Participation

Benefits

In 8.9, the Dependent/Beneficiary record is effective-dated so that customers can have more comprehensive reporting and tracking capabilities in this area. This capability enables our customers to track exactly what dependent and beneficiary information changed and when.

The screenshot displays the Oracle PeopleSoft HR system interface for a Dependent/Beneficiary record. At the top, there are tabs for 'Name', 'Address', and 'Personal Profile'. Below these, the name 'Douglas Lewis' and 'Person ID: KU0001' are shown. The main section is titled 'Dependent/Beneficiaries' and includes a search bar with 'Find | View All' and navigation controls for 'First', '1 of 2', and 'Last'. Below this, the record details are shown for a dependent with ID '01'. A black oval highlights the 'Name History' section, which includes the following fields: '*Effective Date: 01/01/1980' (with a calendar icon), '*Format Type: English' (with a dropdown arrow), and a blue 'Edit Name' link. The 'Name:' field displays 'Lewis, Lydia Park'. At the bottom, there is a section for 'French Public Sector' with a French flag icon.

Benefits

In 8.9, we provide the capability to define and use an unlimited number of annual benefit base rates to meet your needs. PeopleSoft provides new capabilities to support Multiple Annual Benefits Base rates (ABBRs) and, at the same time, to minimize the impact on your current processes.

Update Annual Ben Base Rates

Employee ID: 0C02

Name: Susan Jones

Empl Rcd Nbr: 0

Annual Benefit Base Rates

Find | View All First 1 of 1 Last

*Annual Benefits Base Rate Type Life

Annual Benefit Base Rates

First 1 of 1 Last


	*Effective Date	*Annual Benefits Base Rate	Currency Code	Date of last update	
1	11/18/2004	40000		11/18/2004	


Absence Management


Absence Management


- Flexible and Configurable
 - Rule-based, global architecture
 - Currently embedded in Global Payroll
 - Flexible Absence workflow processing
- Rich Absence Functionality
 - Entitlement definitions
 - Take processing
 - Integrated with all Payroll and Time & Labor applications


Employee Request time off


***Start Date:**  [View Monthly Schedule](#)

End Date: 

Filter by Type: 

***Absence Name:**  **Current Balance:** 46.00 Hours**

Reason: 

Partial Days: 

Duration: Days

Additional Information

Destination:

Emergency Contact:

Emergency Contact Name:

Earliest Return Date: 

Comments

Requestor Comments:   

* Required Field

**Disclaimer: The current balance does not reflect absence requests that have not been processed.

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Forecast Balance


Derek Holsinger


Enter As of Date and Absence Name. Then click Forecast Balance.

Forecast Balance


As of Date: 

Filter by Type: 

Absence Name:  **Current Balance:** 46.00 Hours**

Forecast: **Completed Successfully!** 

Forecast Balance Details

Forecast Results			Accumulator Results	User Keys 1-3	User Keys 4-6	
Absence Name	Forecast Element	Value				
Absence - Paid Time Off	Paid Time Off Take	24.00				
Absence - Paid Time Off	Floating Holiday Balance					
Absence - Paid Time Off	Paid Time Off Balance	48.00				
Absence - Paid Time Off	Floating Holiday Entitlement					
Absence - Paid Time Off	Paid Time Off Entitlement	72.00				
Absence - Paid Time Off	Floating Holiday Take					

* Required Field

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View and Forecast Balances

Manager Approval

Absence Requests

Netty Owyang



Click on the requestor's name link to approve or deny the request. You can view the monthly calendar for your direct reports by clicking on the View Monthly Calendar link. To view all requests or previously approved/denied requests, use the Show Requests by Status and select the Refresh button.

Show Requests by Status:

Pending

Refresh

Absence Requests

Name	Employee ID	Job Title	Absence Name	Start Date	End Date	Status:	Submitted
Derek Holsinger	KU0038	Accountant	Absence - Paid Time Off	02/27/2006	03/03/2006	Submitted	02/17/2006

Go To: [Request Employee Absence](#)

[View Absence Balances](#)

[View Absence Request History](#)

[View Monthly Calendar](#)

Manager can forecast balance, approve or deny the request.

Details		
Start Date:	02/27/2006	
End Date:	03/03/2006	
Absence Name:	Absence - Paid Time Off	Current Balance: 46.00 Hours**
Reason:		
Partial Days:	None	
Duration:	5.00	Days
	<input type="button" value="Forecast Balance"/>	

Additional Information	
Destination:	
Emergency Contact:	
Emergency Contact Name:	
Earliest Return Date:	

Workflow Status	
Status:	Submitted

Comments	
Requestor Comments:	
Approver Comments:	<input type="text"/> <input type="button" value="✓"/>

**Disclaimer: The current balance does not reflect absence requests that have not been processed.

<input type="button" value="Approve"/>	<input type="button" value="Deny"/>	<input type="button" value="Needs Rework"/>
--	-------------------------------------	---

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Stock Administration

Stock Administration

Stock Administration provides the tools to administer and maintain stock option and stock purchase plans for your workforce. As a fully integrated solution, the system enables you to leverage data and functionality that you already use as part of your human resources, payroll, and benefits applications.

Employee - Stock Administration



Stock Activity

[Edit "Stock Activity" Folder](#)

Review your stock options and stock purchases, report sales and update share issuance instructions



Stock Option Summary

Review your stock options.



Stock Option Activity

Review your stock option exercises, releases, sales, cancellations and expirations, and repurchases.



Stock Purchase Activity

Review your stock purchase activity.



Report Stock Sales

Review date, share source, number of shares sold, and price for sales of stock obtained through employee stock plans.



Issuance Instructions

Post instructions for issuance of stock certificates purchased through employee stock plans.

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Employee - Summary

To view details about a stock option, click the grant number

Grant Number	Grant Date	Option Type	Grant Price	Granted	Exercisable
0000000001	01/01/1980	RSA	\$0.000000	20,000.000000	0.000000
0000000012	12/31/1980	ISO	\$0.100000	4,000.000000	0.000000
0000000018	12/31/1981	NQ	\$0.100000	4,000.000000	3,000.000000
0000000028	12/31/1982	NQ	\$0.120000	4,000.000000	4,000.000000
0000000038	12/30/1983	NQ	\$0.120000	4,000.000000	4,000.000000
0000000049	12/31/1984	NQ	\$0.140000	4,000.000000	4,000.000000
0000000062	12/31/1985	NQ	\$0.160000	4,000.000000	4,000.000000
0000000075	12/31/1986	NQ	\$0.160000	4,000.000000	3,200.000000
0000000091	12/31/1987	NQ	\$0.180000	4,000.000000	4,000.000000
0000000110	12/30/1988	NQ	\$0.190000	4,000.000000	4,000.000000
0000000130	12/29/1989	NQ	\$0.200000	4,000.000000	4,000.000000
0000000152	12/31/1990	NQ	\$0.200000	4,000.000000	4,000.000000
0000000179	12/31/1991	NQ	\$0.200000	4,000.000000	4,000.000000
0000000201	12/31/1992	NQ	\$0.250000	4,000.000000	4,000.000000
0000000224	12/31/1993	ISO	\$2.109000	4,000.000000	0.000000
0000000256	12/31/1994	ISO	\$10.375000	4,000.000000	0.000000
0000000283	12/29/1995	ISO	\$19.000000	4,000.000000	0.000000
0000000307	12/31/1996	ISO	\$23.125000	4,000.000000	4,000.000000
0000000327	12/31/1997	ISO	\$22.125000	4,000.000000	4,000.000000
0000000353	12/31/1998	ISO	\$27.500000	2,500.000000	2,500.000000
0000000383	12/30/1999	ISO	\$21.750000	4,300.000000	4,300.000000
0000000439	10/02/2000	RSA	\$0.000000	5,000.000000	0.000000
Total:				103,800.000000	61,000.000000

Employee – Stock Summary

Stock Option Summary

Stock Option Information

Douglas Lewis

General Business International

Grant Information

Grant Number: 0000000224
Option Type: ISO
Agreement Status: Accepted Offer
Grant Price: \$2.109000
Shares Vested: 0.000000
Shares Exercised: 4,000.000000

Stock Option Summary

Vesting Schedule

Douglas Lewis

General Business International

Grant Number: 0000000224

Grant Date: 12/31/1993

<u>Vesting Date</u>	<u>Shares Vested</u>	<u>Expiration Date</u>
12/31/1994	1,000.000000	12/31/2003
12/31/1995	1,000.000000	12/31/2003
12/31/1996	1,000.000000	12/31/2003
12/31/1997	1,000.000000	12/31/2003
Total:	4,000.000000	

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Employee – Stock sale

Shares Available to Sell

Douglas Lewis

General Business International

[Portfolio](#)

Below is a list of shares you currently own. If you have sold or otherwise transferred the shares, click the Report Sale button.

Date	Share Source	Price	Shares Available	
09/24/1997	Option Exercise	\$0.160000	800.000000	Report Sale
09/14/1999	Option Exercise	\$10.375000	1,923.000000	Report Sale
08/09/2000	Option Exercise	\$0		
01/01/2000	Restricted Release	\$0		
Total:				

Issuance Instructions

Douglas Lewis

General Business International

[Portfolio](#)

Below is a list of your issuance instructions. Click the Add button to enter new instructions.

Stock Plan Type	Effective Date	Issuance Type		
Purchase Plan	06/01/1993	Broker	Edit	Delete
Option Plan	01/01/1980	Broker	Edit	Delete

[Add an Issuance Instruction](#)

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Stock Administration – Manager View







Employee Stock Options

Select Employee

Douglas Lewis

To find a specific employee click on Search for Employee. To drill down into the direct reports of one of your employees click the org chart icon.

Transaction Effective Date: 

Direct Reports For Douglas Lewis				Find	First	1-6 of 6	Last
Name	EmplID	Job Title	Department				
Aaron Goldman	KU0172	COO	Admin				
Alex Passantino	KU0067	IntlOps VP	HQ				
Anne Spencer	KU0169	CHRO	HR				
David Wallace	KU0170	CIO	IS				
Kevin Honda	KU0168	CFO	Finance				
Reza Aliverdi	KU0005	Pres & CEO	HQ				

Stock Administration – Manager View

Employee Stock Options

Calculate Potential Gain

Reza Aliverdi

General Business International

Stock option summary as of 02/17/2006



To view a potential net gain, enter an estimated value and tax rate.

Enter Values

Estimate Fair Market Value:

Estimate Total Tax Rate:

 %

Calculate Gain

[Return to Stock Option Summary](#)

Beyond 8.9

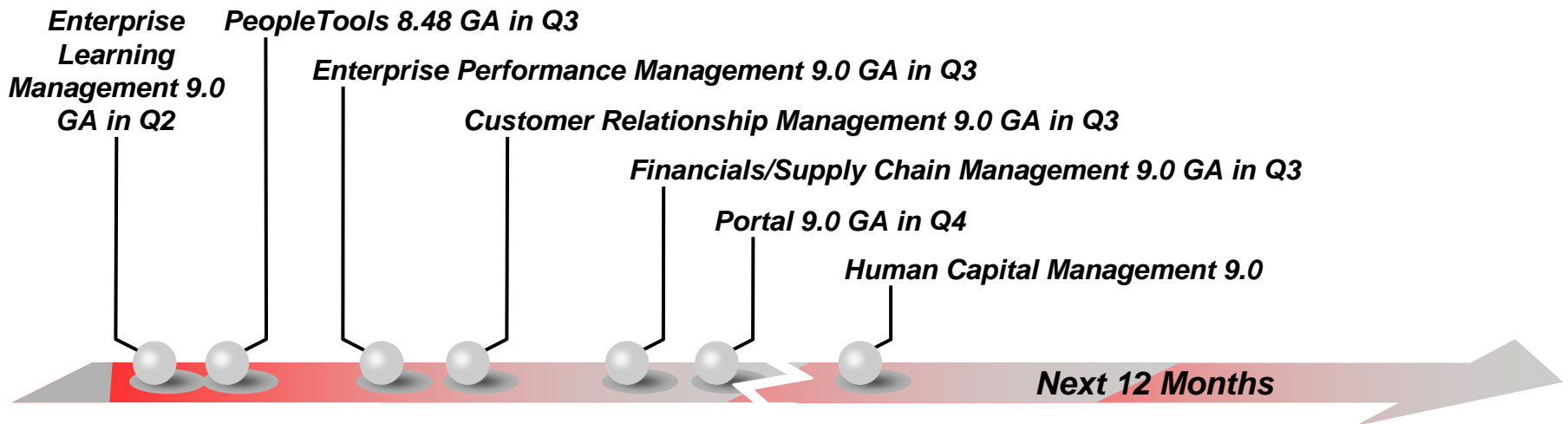
Continued Product Releases

Beginning with Release 9.0



PeopleSoft Release 9.0 Timeline

- All product families planned for delivery in the next 12 months



Applications Unlimited has NO impact on the current release 9.0 content or schedule

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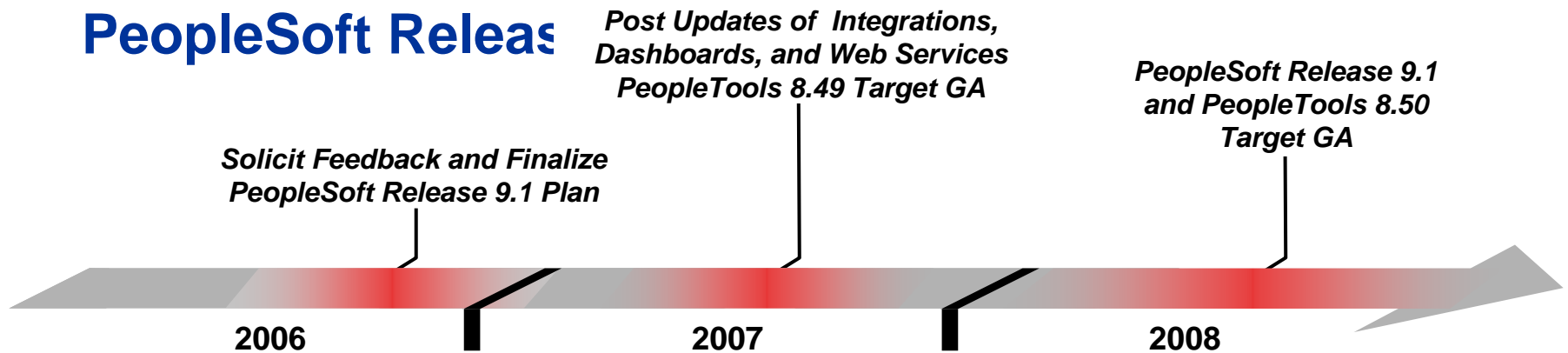
Continued Product Releases

PeopleSoft Release 9.1

Focus of PeopleSoft Roadmap

- Ongoing adoption of Fusion technology components
- Integration to other Oracle products
- New enhancements including ongoing legal and regulatory updates
- Consideration for back-porting selective capabilities to prior releases which have a supported migration path to Fusion

PeopleSoft Releases



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Profile Management



Profile Management

In HCM 9.0, Oracle delivers a best-in-class architecture for defining the attributes that are required for success in a job or organizational entity. This architecture also provides a common method for tracking the achievements and proficiencies of a company's talent pool.

Search and Compare Profiles

Compare Results

*View Section: ▾

Search Criteria	Allan Martin: 50%	Rosanna Channing: 50%
• Competencies <i>Practices ethical behavior :</i> Interest Level: -- Proficiency: 3-Good	• Competencies  0% -- --	• Competencies  0% -- --
• Degrees <i>Bachelor of Arts :</i> Country: --	• Degrees  100% United States	• Degrees  100% United States
• Language Skills <i>English :</i> Reading Proficiency: -- Speaking Proficiency: -- Writing Proficiency -- Native Language: -- Able To Translate: -- Able To Teach:	• Language Skills  100% 3 - High 3 - High 3 - High Yes No No	• Language Skills  100% 3 - High 3 - High 3 - High Yes No No
• Responsibilities <i>Participate in Quarterly Close Process :</i>	• Responsibilities  0%	• Responsibilities  0%

Benefits

On the Benefit Rate Table page, you define how the cost of benefit rates are quoted and Employee premium limits.

You can also define rates based on tax classes. If rates are split, then the matching tax class is required on the deduction code. This allows domestic partner coverage to be managed in a single plan and coverage code.

Benefit Rate Table

Rate Table ID: B101

Benefit Rate Table

Rate Table ID: B101

Benefit Rate Table Find | View All First 1 of 1 Last

*Effective Date: 01/01/1900 *Effective Status: Active

*Benefit Rate Type: Age-Graded (By Gender, Smoker)

*Description: B101 Short Description:

*Premium Frequency: Monthly *Rate per Unit: None

Currency Code: USD [Specify Optional Limit](#)

Rate Data Customize | Find | View All | First 1-4 of 4 Last

Composite Rates | **Detail Rates**

	Gender (=)	Smoker (=)	Age (>=)	Total Rate	Before-Tax Rate	After-Tax Rate	Non-Taxable Rate	Taxable Rate		
1	Female	No	0	0.00000	0.00000	0.00000	0.00000	0.00000		
2	Female	Yes	0	50.00000	0.00000	0.00000	0.00000	0.00000		
3	Male	No	0	0.00000	0.00000	0.00000	0.00000	0.00000		
4	Male	Yes	0	50.00000	0.00000	0.00000	0.00000	0.00000		

Calculation Rules

In HCM 9.0, we reorganized the Calculation Rules component by retaining only fields directly related to the calculation of rates. Calculations rules have a simple interface containing fields that impact the calculation of coverage.

Calculation Rules

Calculation Rules Table ID: KNUL

Calculation Rules Table Find | View All First 1 of 1 Last

*Effective Date: 01/01/1980 31

*Description: KNUL Short Description:

Demographics

*Use Age As Of: Check Date Month: Day:

*Use Service As Of: Check Date Month: Day:

*Source for Demographics: Employee

Benefit Base

*Use Benefits Base As Of: Check Date Month: Day:

Source

Annual Rate

Annual Benefits Base Rate PRIM Primary (From Job Record)

Multiple Jobs

Combine Base for Multiple Jobs

*Group Method: Primary Job in Benefit Record

Consider Active Jobs Only

Optional Rate Limit

Max Deduction % of Gross Pay:

Coverage Formula

All attributes calculating coverage for life insurance and disability plans are centralized in a common formula-based component. You can select from existing formulas to calculate life insurance coverage or create your own coverage calculation formula.

Coverage Formula

Formula ID: B3XADDABBR

Formula Table Find | View All First 1 of 1 Last

*Effective Date: 01/01/2005 31

*Description: BenData: 3 x BAS1 ABBR Short Description: 3 x BAS1

Benefit Base

*Coverage Base As Of: Check Date

*Premium Base As Of: Check Date

Source

Annual Rate

Annual Benefits Base Rate LIFE Life

Multiple Job Rules

Combine Base for Multiple Jobs

*Group Method: Flagged Jobs in Benefit Record

Consider Active Jobs Only

Maximum Benefit Base:

Coverage Formula

(creating your own)

Coverage Minimum and Maximum

Coverage Minimum: **Coverage Maximum:**

Coverage Formula Show Formula

Formula Customize | Find | First 1-2 of 2 Last

Seq No	Operand	Entry Type	Numeric Value	Round to Multiple of	Round Up Amount		
10	<input type="text" value=""/>	Constant	3.000			+	-
20	*	Base				+	-

Age Coverage Reduction Customize | Find | First 1-3 of 3 Last

	Age	Percent		
1	70	10		+
2	75	20		+
3	80	30		+

PeopleSoft Release 9.1

Release Themes

PeopleSoft Enterprise 9.1 Delivers...

Greater
Business
Insight

Deep &
Adaptive
Industry
Business
Processes

Superior
Ownership
Experience

Next Generation Technology

Release 9.1 Themes

ORACLE

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PeopleSoft Release 9.1

Release Themes

Greater
Business
Insight

Importance

- Deliver mission critical information to users
- Deliver timely and actionable information
- Put information into context
- *BI > Σ (TRANSACTIONS 1..n)*

Future Release Candidates

- Value Add Analytics (OBIEE Dashboards in EPM)
 - Cost of Payment Processing, Comparison of Actuals to Budget, Procurement Liability, etc.
- Operational Insight (OBIEE Dashboards in FMS)
 - T&E Comparisons, Liability Exposure, Collections Activity To Credit Exposure, etc.

PeopleSoft Release 9.1

Release Themes

Deep &
Adaptive
Industry
Business
Processes

Importance

- Diverse customer base
- Unique industry requirements
- Changing business needs
- Heterogeneous IT environments

Future Release Candidates

- CRM for Higher Ed
- Enhanced Talent Management
- Integrations currently under consideration include:
Financial Services Accounting Hub, Future Releases
of Fusion Applications
- Orchestrate business process using BPEL Process
Manager from Fusion Middleware

PeopleSoft Release 9.1

Release Themes

Superior
Ownership
Experience

Importance

- Lower operational costs
- Minimize risk
- Higher user adoption rate
- Allocation of IT dollars to new projects

Future Release Candidates

- Enhance approvals and delegation in Time and Labor
- Visual indicator for worklist update
- Provide better tools for troubleshooting errors in Integration Broker

PeopleSoft Release 9.1

Release Themes

Next Generation Technology

Importance

- Move the PeopleSoft architecture forward with leading edge technologies.
- Manage heterogeneous environments
- Ensure viability of PeopleSoft products

Future Release Candidates

- Web Services: Conversion of existing integration points to web services and Define major business processes in BPEL
- Reporting: Make XML Publisher reports pervasive and leverage OBIEE (Siebel) Dashboards
- Utilize Secure Enterprise Search



Total Ownership Experience

ORACLE

PeopleSoft.

ORA

ORACLE

PeopleSoft.