

P-047470

RECONNECT Live! Presentation

May 7 – 10, 2024

PeopleSoft

RECONNECT

AT BLUEPRINT4D

LIVE!

Meet SpearMC



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Recognition and Specializations

Oracle Specialized

ORACLE | Partner

Since joining Oracle's Partner Program in 2006, SpearMC was elevated to Platinum Partner level in 2017 and to Oracle Applications Managed Partner in 2018.

ORACLE | Expertise in PeopleSoft in North America

SpearMC is an authorized PeopleSoft Resale Partner, allowing us to resell, host and finance PeopleSoft at steep discounts.

ORACLE | Expertise in Oracle EPM Cloud in North America

SpearMC is an authorized Oracle EPM Cloud, Analytics and Hyperion Resale and Implementation Partner.

ORACLE | Expertise in Oracle Cloud Platform in North America

SpearMC is an authorized Oracle Cloud Infrastructure (OCI) Resale Partner and North America's only PeopleSoft Partner recognized by Gartner for OCI Professional and Managed Services.

ORACLE | Education Reseller

SpearMC is an authorized Oracle University Education Reseller and PeopleSoft Training Provider. We are the sole PeopleSoft Partner authorized to resell and implement Oracle Guided Learning.

ORACLE | Public Sector Addendum

Reflecting our deep domain expertise in state and local government, SpearMC has a Public Sector Addendum in place allowing us to resell Oracle applications and technology to public sector organizations.

SOC 2 Type II Certified



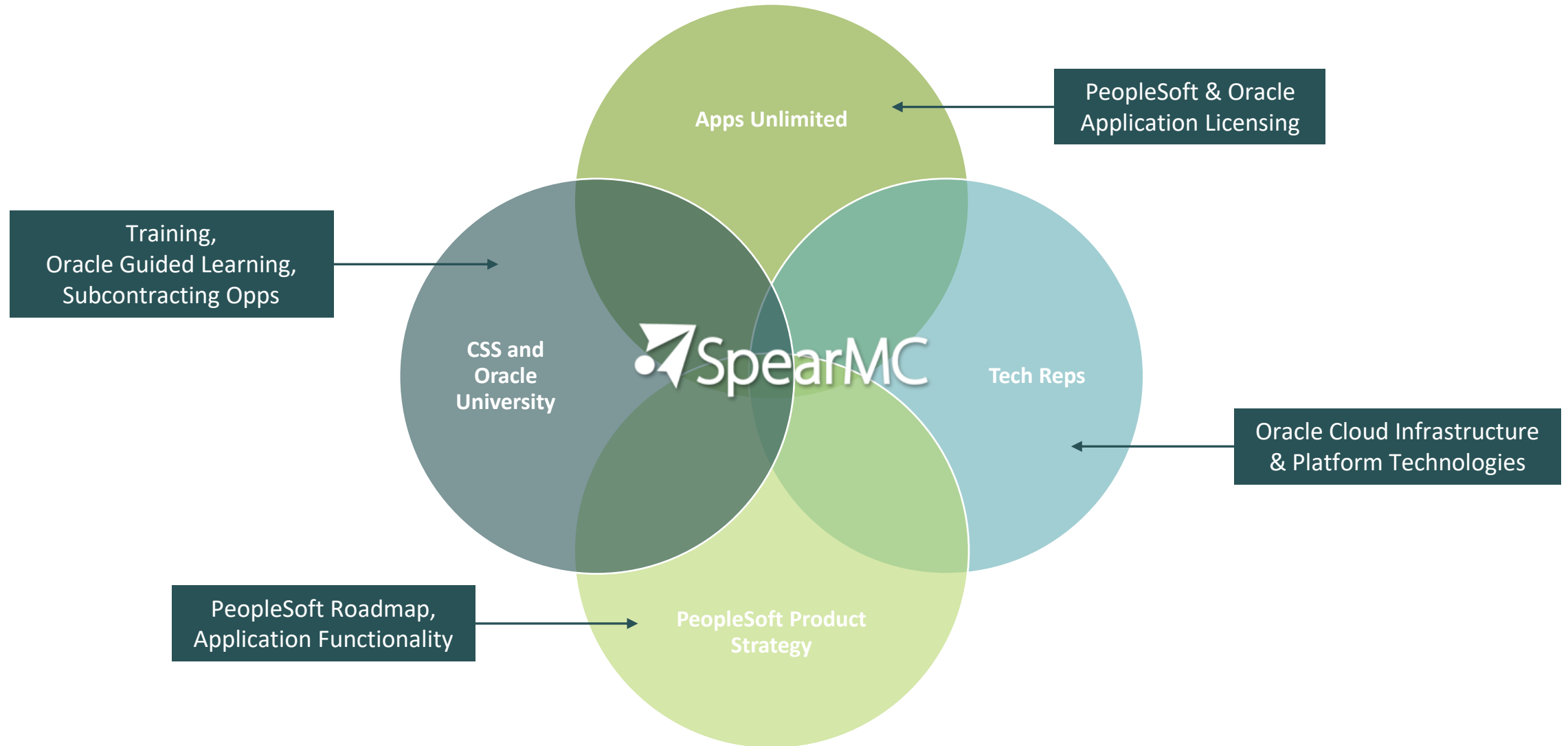
Reduce risk with a partner you can trust. This certification demonstrates our deep commitment to protecting data.

Gartner-Recognized Vendor



SpearMC is the sole featured PeopleSoft vendor in the latest 2023 Gartner Market Guide for Oracle Professional Services.

SpearMC Strategy: Positioning with Oracle



PRODUCTS AND SERVICES

HEALTHCARE | HIGHER ED | FINANCIAL SERVICES | PUBLIC SECTOR



- Managed Services

Application Support
Testing as a Service
System Administration
Infrastructure Hosting

- Consulting Services

Financials and Supply Chain
Test Framework
Human Capital Management
Campus Solutions

- PeopleSoft Training

All-Access Learning Pass
Live Private Training
Oracle Guided Learning
Oracle University Reseller

Oracle PeopleSoft

- Oracle Cloud Platform

OCI Migration
Infrastructure Hosting
Disaster Recovery

- Emerging Technology

Oracle Assessment
Chatbots & Digital Assistants
PeopleSoft Roadmap
OpenSearch Dashboards

- Proprietary Products

PTF Testing Grounds
Grants: LCD/Effort Reporting
Supplier Contracts: Authoring
Lease Admin: GASB 87

PeopleSoft Training Opportunities

Learn from an Oracle University Partner

PeopleSoft Public Training Classes

You will receive Powerful, Practical Learning Experiences covering PeopleSoft Campus Solutions, Human Capital Management, Financials and PeopleTools:

- HCM Solutions: Core HR, NA Payroll, Benefits
- Campus Solutions: Advisement, Admissions, Registration, 3C's
- PeopleSoft Systems Administration: Maintenance and Troubleshooting
- PeopleTools: Security, PeopleCode and Object-Oriented Programming
- PeopleTools: Fluid Development, and Integration Broker/REST Web Services
- Reporting: OpenSearch Dashboards (formerly Kibana) and Query

Visit our [website](#) for a full listing of available public courses and free webinars



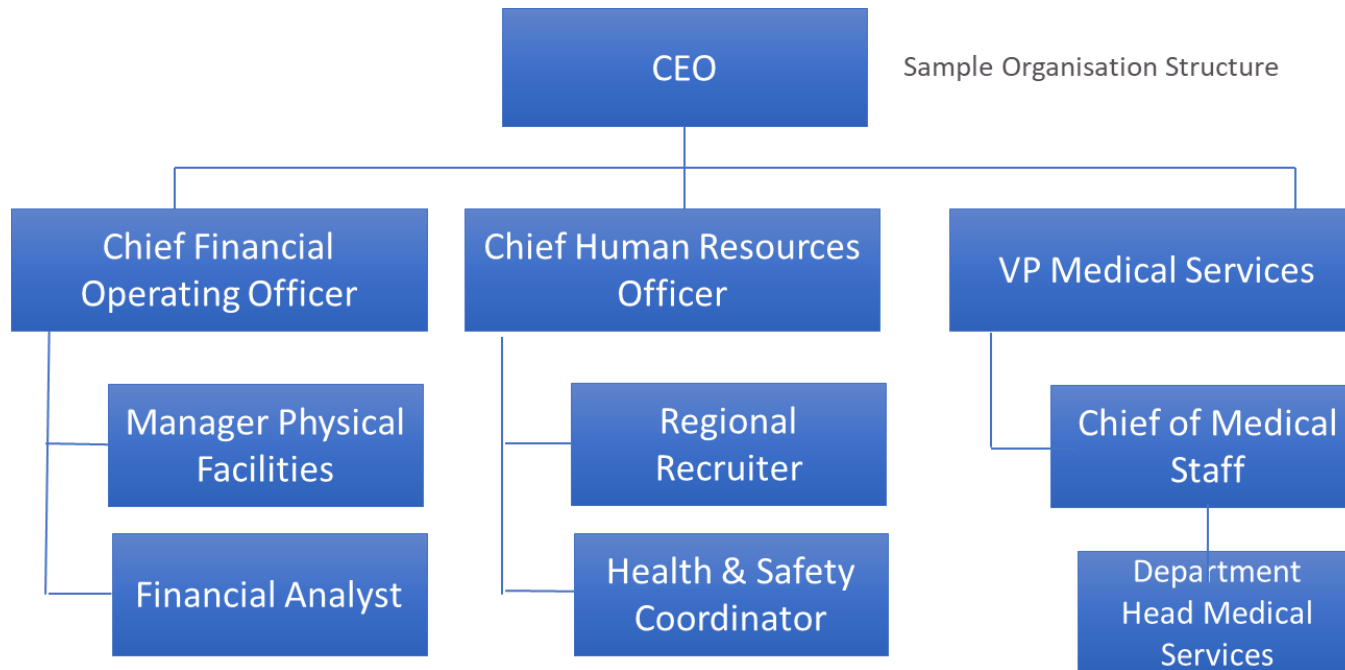
Scan the QR code to view the full listing of offerings and courses

Agenda

- ✓ Position Management Overview
- ✓ Benefit Value Proposition
- ✓ Partial vs Full Position Management
- ✓ Fluid (Modern) Position Management
- ✓ Guided Self-Service and Position Management
- ✓ Implementation Process
- ✓ Best Practice Recommendations
- ✓ Customer Case Study
- ✓ Questions

Position Management

- Define Org structure using Positions (*Empty Chairs*)
- Assign and remove employees to Positions



Position Data Model

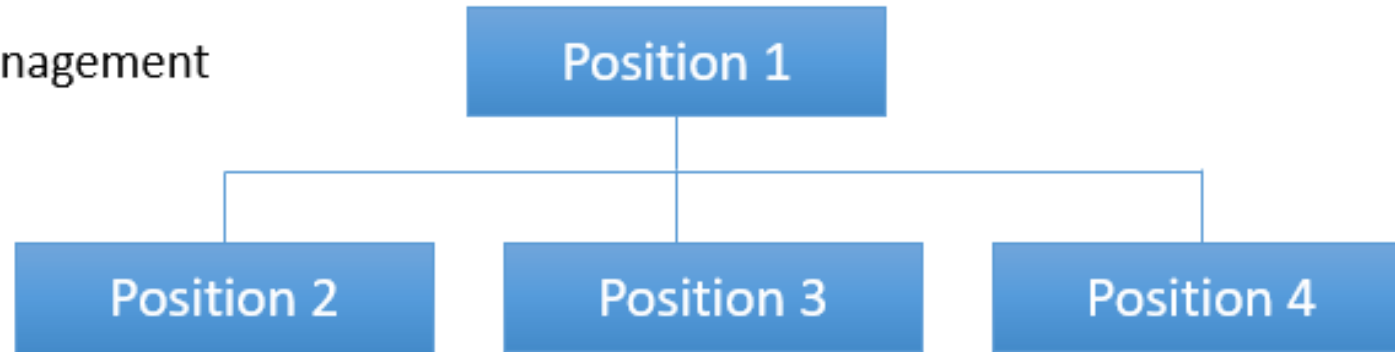
Jobcode	Position	EE Job Data
Description (Title, 30 Char)	Description (30)	Jobcode
Short Description (10 Char)	Short Description(10)	Position Number
Salary Administration Plan	Business Unit	Regulatory Region
Salary Grade	Department	Company
Manager Level	Company	Business Unit
Standard Hours	Job Code	Department
Standard Work Period	Position Status	Location
Compensation Frequency	Status Date	Establishment
Workers' Comp Code	Max Head Count	Employee Class
Regular/Temporary (R/T)	Reports To Position Number	Regular Shift
FLSA Status(X/N)	Location Code	Regular/Temporary (R/T)
EEO-1 Job Category	Standard Hours	Full/Part Time (F/P)
EEO-4 Job Category	Standard Work Period	FLSA Status
EEO-5 Job Category	Regular Shift	Standard Hours
EEO-6 Job Category	Regular/Temporary (R/T)	Standard Work Period
Long Description	Full/Part Time (F/P)	EEO Class
	FLSA Status	Supervisor Level
	Regulatory Region	Salary Administration Plan
	Salary Administration Plan	Salary Grade
	Salary Grade	Individual Compensation*
	Supervisor Level	Payroll Fields*
	Long Description	Benefit Fields*

Position Management Benefits

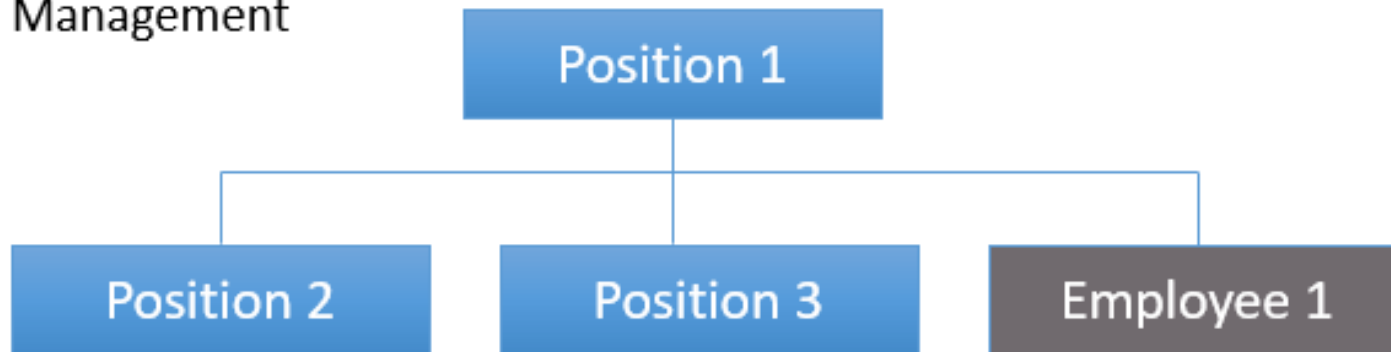
- ✓ Maintain accurate Headcount using positions – Approved, Filled, Vacant
- ✓ Keep and track position history including incumbent history
- ✓ Automatically update employee Job data via Update Incumbent Process
- ✓ Simplify employee job data maintenance by eliminating data duplication
- ✓ Assign a Title to the position different from the Job Code Description
- ✓ Integration with other modules – Recruitment, Budgeting, Succession Planning
- ✓ Integrated with Org Chart Viewer to display filled and vacant positions
- ✓ Allows Dotted Line Reporting (Displayed on Org Chart Viewer)

Full vs Partial Position Management

Full Position Management



Partial Position Management



PROS	CONS
Ensures data integrity by validating company, department, location, and job code through systems edits, and requiring users to hire all employees into positions	Requires that a position is created or vacated before hiring an employee
Allows identification of vacant, filled and approved position data to be reported	Increases complexity of data conversion of groups not currently using position management
Reduces data entry because most employee- related job data defaults from position data.	If non-employees are going to be captured in the employee records, they would also need to be associated with positions

PROS

Vacant, approved and filled positions may be tracked where appropriate

Affords the option of implementing position management incrementally: groups that do not currently use position management may be rolled into it post-conversion

With this option, employee data records do not have to be associated with positions prior to conversion.

CONS

Vanilla functionality will not require you to assign a position number during hire (Job Data entry).

Fluid Position Management

- ✓ Classic version of Position Management is HR Admin Centric
- ✓ Fluid Position Management introduces significant enhancements
 - Segregate Position Request and Approvals
 - Separate Approvals for New Positions vs Position Changes
 - Attachments for Supporting Documents
 - Effective Sequencing for granular record keeping

Fluid Position Management (Snapshot)

✕ Exit

Create Position

Position Number 00000000
Headcount Status Open
Current Head Count 0

Next >

1 Position Data
Visited

2 Additional Information
Not Started

3 Attachments
Not Started

4 Budget Incumbents
Not Started

5 Review and Submit
Not Started

Step 1 of 5: Position Data

Effective Date 06/06/2022
Effective Sequence 0

Reason Code NEW New Position
Approval Status Not Available

Position Information

*Filed Status Approved

*Status Active

Action Date 06/06/2022

Key Position No

Budgeted Position Yes

Confidential Position No

Max Head Count 1

Status Date 06/06/2022

Job Sharing Permitted No

Available for Telework No

Job Information

*Business Unit GBIBU Global Business Institute BU

*Job Code 140040 Senior Financial Analyst

*Regular/Temporary

*Regular Shift Not Applicable

*Title Senior Financial Analyst

*Full/Part Time Full-Time

Union Code

Short Title SrFinAnlst

Description Review and analyze monthly country performance advising international and

Work Location

*Reg Region USA United States

*Department

Location

Reports To

Supervisor Level

*Company

Dot-Line

Security Clearance

Salary Plan Information

Salary Admin Plan KU01

Grade 006

Related Information

Guided Self-Service and Position Management

Guided Self-Service for Managers fully supports Partial and Full Position Management and provides following features,

- Managers can select a Position reporting to them and request for it to be cloned
- Managers can request changes to Positions currently reporting to them (Reports To, Location, Full/Part Time etc.)
- Managers can move employees reporting to them from one position to another (Transfer, Promotion, Demotion)

When an employee is in a position, system updates the Position Data and the incumbent update process propagates the changes to Job data.

Guided Self-Service for Managers (Snapshot)

< Manager Self Service

Request Reporting Change

Transfer Employee

Promote Employee

Request Ad Hoc Salary Change

Request Location Change

Change Full/Part Time or Hours

Request Leave of Absence

Request Paid Leave of Absence

Retire Employee

Terminate Employee

Demote Employee

Position Clone

Update Job Details for Group

Update Team Information

Find Team Member

Team Members

8 rows

KU0007 - 0

Betty Locherty

Job Title

Finance Director

Status

Active

Position

19000230

Type

Employee

9 Directs

SI0004 - 0

James Sharpe

Job Title

Administrator

Status

Active

Position

Type

Employee

2 Directs

KU0206 - 0

Kathy Wise

Job Title

Administration Director

Status

Active

Position

Type

Employee

2 Directs

KRE0031 - 1

Matheus Goncalves Guimaraes

Job Title

Administrator Customer Service

Status

Active

Position

Type

Employee

KU0025 - 0

May Gee

Job Title

Administrative Assistant

Status

Active

Position

Type

Employee

KOG001 - 0

Rebekah Jones

Job Title

Status

Position

Type

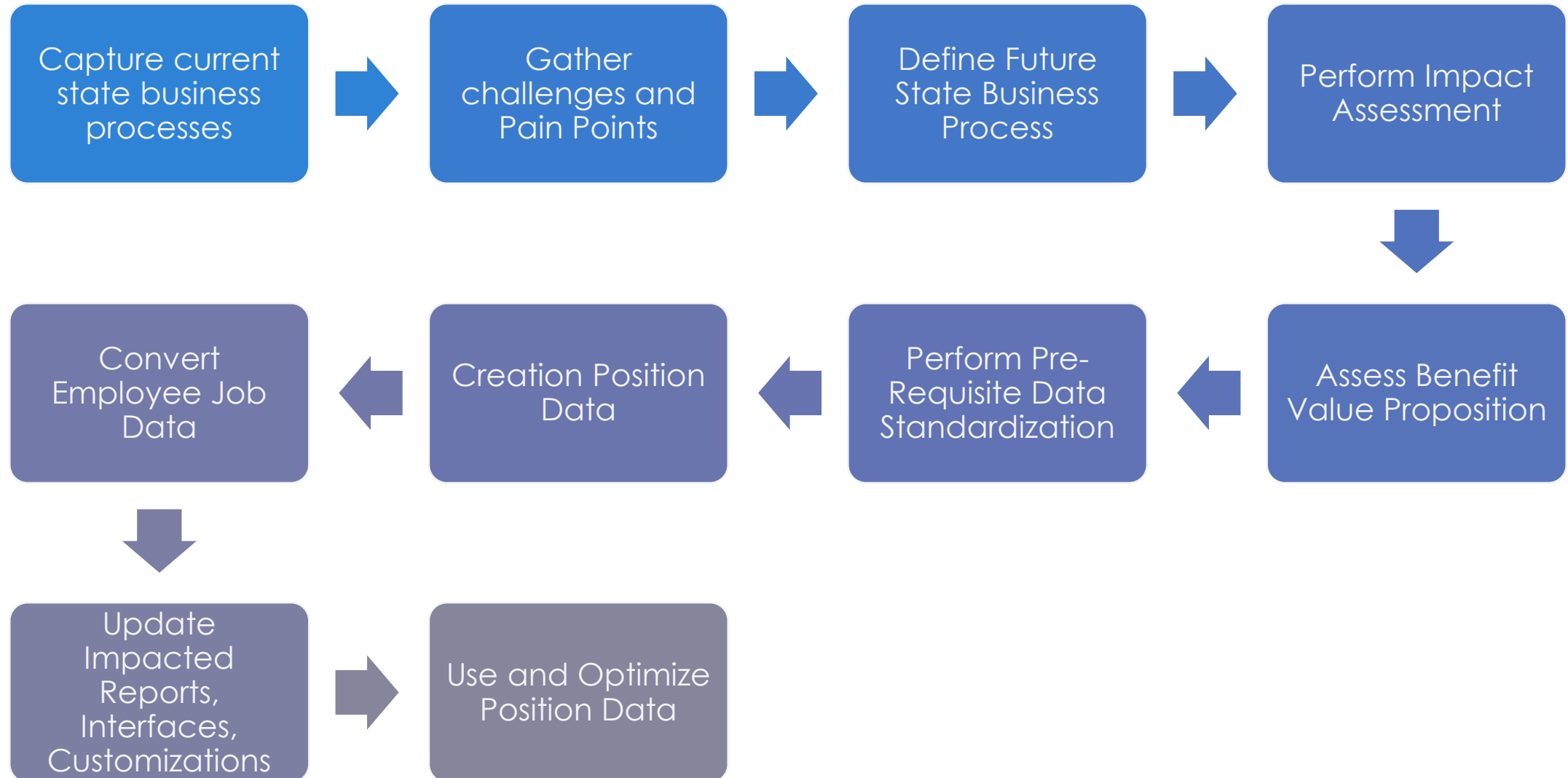
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Multiple Incumbents and Primary Incumbent

- Position is typically 1:1 with Employee Job Data
- Job sharing can involve multiple employees sharing same position
- Multiple employees performing same job in same location, department etc. can share same position ***
 - Avoid “Position Overrides” unless absolutely needed
 - Multi-incumbent positions ‘easy to manage’ for non-managerial position.
- New “Primary Incumbent” feature to manage positions with multiple incumbents

Position Management Implementation Process



Best Practice Recommendations

- ✓ Partial Position Management offers most flexibility
- ✓ Reduce the number of unique positions needed compared to headcount
- ✓ Clean up Action/Action Reason list and isolate Position updates vs Job Data updates
- ✓ Reports and Interfaces that use Supervisor Id on job data are impacted
- ✓ Consider rolling out Guided Self-Service for Personnel Actions along with Position management

Customer Case Study

- Customer: Global Media Brand
- Number of Active Employees: 14,000+
- Number of Managers: 3000+
- Scope: Implement Position Management
- Key Drivers: Accurate Head Count Reporting, Improve data accuracy, Reduce data entry workload

Customer Case Study - Findings

- Number of unique positions needed: 12,000 Positions for 14,000+ Employees
 - *Based on the unique set of data values in Job data for following data fields (Business Unit, Company, Department, Location, Jobcode, Reports To, Regular/Temporary, Full/Part Time, Standard Work Hours, FLSA Status, Business Title, Direct Reports Exist*
- Based on job data for calendar year,
 - *Number of HIR/REH records – 5500+*
 - *Number of TER records – 4200+*
- Approximate increase in headcount for the calendar year is 1300+ which will result in approximately 1000+ new positions getting created annually.

Action/Reason Changes

- All employment changes were performed directly on employee job data.
- When position management is implemented,
 - Changes to the attributes maintained in Position will be performed on position data and it will automatically update the incumbent data.
 - Changes to attributes maintained in Job data will be performed directly on job data.
- E.g. DTA/SPV (Data change/Supervisor Change) performed on Job data will be replaced by POS/SPV (Position/Supervisor Change) on Position Data.

Action/Reason Change Analysis

Action	Reason	Descr	COUNT	To be updated in Position When using Position Management
DTA	SPV	Supervisor Change	7421	Y
PAY	MER	Merit	3602	
PAY	BON	Bonus	2671	
DTA	TTL	Lateral Job Code/Title Change	2372	Y
HIR	NPS	New Position	2139	
HIR	RPL	Replacement	2123	
PAY	PRO	Promotion	1944	
PAY	ADJ	Adjustment	1624	
PRO	NCP	Normal Career Progression	1439	Y
XFR	DEP	Department/Cost Center	1412	Y
DTA	PGC	Pay Group Change	1405	
PAY	ANR	Annual Review	1160	
TER	RES	Resignation-V	1014	
PAY	ALL	Allowance	763	

Reports and Interface Impact

- **SUPERVISOR_ID vs REPORTS_TO**

- All reports and queries that utilize SUPERVISOR_ID field on JOB table will need to be reviewed and updated to utilize REPORTS_TO field on JOB table.
- REPORTS_TO field only provides the position number of the reporting manager, so this information needs to be joined with view - POSN_INCUMBENT to obtain the employee id of the reporting manager.

- **ACTION/ACTION_REASON Changes**

- Reports that use ACTION and ACTION_REASON fields for reporting job data changes, will need to be reviewed and updated to use new Action/Action Reasons introduced by Position Management.
- E.g. DTA/SPV (Data change/Supervisor Change) needs to be replaced by POS/SPV (Position/Supervisor Change)

Job Data Standardization Sample

Listed below are few examples of employee job data, where all of the attributes are common except for one attribute, resulting in a need for unique positions. If the differing attribute can be unified then the headcounts can be combined.

Bus Unit	Comp	Department	Location	Job Code	Supervisor ID	FLSA	Business Title	Comments
6400A	REP	RE640CR010	NYNYBR1400	110836	1000275068	Y	Director, SEO	All other attributes same except for Business titles
6400A	REP	RE640CR010	NYNYBR1400	110836	1000275068	Y	Director, SEO & eComm	
6400A	REP	RE640NA000	NYNY33W100	110747	1000276404	Y	SVP, Accounts & Perf, INI	All other attributes same except for Business titles
6400A	REP	RE640NA000	NYNY33W100	110747	1000276404	Y	SVP, Performance	
8810A	3XM	3X881MM004	ONTOWE0200	110776	1000257502	X	Media Account Director	All other attributes same except for FLSA Status
8810A	3XM	3X881MM004	ONTOWE0200	110776	1000257502	Y	Media Account Director	
8810A	3XM	3X881MO000	ONTOWE0200	110853	1000257550	Y	Manager, Social Media	All other attributes same except for Business titles
8810A	3XM	3X881MO000	ONTOWE0200	110853	1000257550	Y	Supervisor, Social Media	
8980A	3MM	3M898ME000	ONTOBAY010	110776	1000230613	Y	Director, Performance	All other attributes same except for Jobcode
8980A	3MM	3M898ME000	ONTOBAY010	110846	1000230613	Y	Director, Performance	
G009H	7ME	7ME10AA009	GBRLONSJSQ	111180	1000166345	N	Reception/Facilities Assistant	All other attributes same except for Business titles
G009H	7ME	7ME10AA009	GBRLONSJSQ	111188	1000166345	N	Receptionist	
G702H	7NE	7NE0000702	NLDGROHELP	110991	1000252121	N	Software Engineer Jr	All other attributes same except for Business titles
G702H	7NE	7NE0000702	NLDGROHELP	110991	1000252121	N	Software Engineer Jr.	

References

- Fluid Position Management – <https://www.youtube.com/watch?v=g08u63VkZO8>
- Fluid Guided Self-Service - <https://www.youtube.com/watch?v=wsdtP02luko>
- Fluid Position Data People Books - [Creating Positions using Fluid UI](#)
- Guided Self-Service People Books - [GSS for Managers](#)



Celebrating 20 Years

QUESTIONS



At Quest, you belong.

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Special Interest Groups

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Save the date:



RECONNECT Dive Deep - Virtual

October 28 - 31, 2024



Quest Experience Week PeopleSoft Day

December 10, 2024

SpearMC Sessions at BLUEPRINT 4D

Date	Time	Session Title	Presenters	Session #
May 7 th	9:45 – 10:15 AM	Get PeopleSoft HCM Chatbots (PICASO) Production Ready In 5 Simple Steps	Logesh Balasubramaniam	P-040023
May 7 th	3:45 – 4:30 PM	Reporting on Projects/Grants: Reporting Features and Lessons Learned	Jessica Mann	P-045431
May 7 th	4:45 – 5:30 PM	The Road to OpenSearch: See How Customers in 2024 will Pave their way to OpenSearch Analytics and Dashboards (vis-a-vis Kibana)	Gary Dranikoski	P-027421
May 8 th	4:00 – 4:45 PM	PeopleSoft Expenses at HMH: Featuring Google Maps Integration, Fluid UI, & Duo MFA Security	Randall Johnson	P-047224
May 9 th	11:15 – 12:00 PM	Modernize your HR Data Maintenance with PeopleSoft Position Management	Logesh Balasubramaniam	P-047470
May 9 th	2:30 – 3:15 PM	Achieve a Seamlessly Integrated Time, Absence: Payroll Management Using PeopleSoft HCM	Logesh Balasubramaniam	P-023124
May 9 th	3:30 – 4:15 PM	Oracle Guided Learning on PeopleSoft: Customer Panel	Cameron McClurg	P-035922
May 9 th	3:30 – 4:15 PM	PeopleSoft ChatBots: Use Case for Financials & Supply Chain	Tom Tretter	P-036771
May 10 th	9:00 – 9:45 AM	PeopleSoft Selective Adoption & Staying Current - Panel Discussion	Julie Alonso (Oracle) Cameron McClurg	P-048924

2024 Training Calendar

Upcoming Class Schedule

Date	Session Title
May 14	PeopleTools 8.59-8.60 OpenSearch Dashboards (formerly Kibana)
May 28	PeopleSoft 9.2 Query Advanced for FSCM
June 10	PeopleSoft 9.2 Query Basic & Intermediate for Campus Solutions
June 11	PeopleTools 8.59-8.60 Automated Testing with PeopleSoft Test Framework
June 14	PeopleSoft 9.2 Query Advanced for Campus Solutions
June 16	PeopleSoft 9.2 HCM Bootcamp - Core HR
July 17	PeopleSoft HCM Bootcamp - NA Payroll
July 18	PeopleSoft HCM Bootcamp - Benefits
July 16 – 18	3-Day Registration for HCM Bootcamp - Core HR / NA Payroll / Benefits
July 22	PeopleSoft 9.2 Query Basic & Intermediate for HCM
July 23	PeopleSoft 9.2 Query Advanced for HCM

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