Webinar and Event Schedule

Upcoming Webinars

- July 27  PeopleSoft HCM 9.2 Upgrade, PUM, and Fluid
- Aug 10    PeopleSoft 9.2 eBenefits and Life Events
- Aug 24    PeopleSoft Succession and Talent Management

Upcoming Conferences

- July 19   Quest PeopleSoft Reconnect, Chicago Booth #803
  - PeopleSoft HCM 9.2 Upgrade Planning
  - PeopleSoft 9.2 Self Service Features
  - PeopleSoft 9.2 ePerformance at Big Lots Stores
WorkStrategy Profile

- HR Technology Firm Based in Columbia, Maryland
- Staff of HR Practitioners and Oracle HCM Specialists
- Oracle Gold Level Implementation Partner
- PeopleSoft and HCM Cloud (Fusion) Implementation Services
- PeopleSoft: ePerformance, Succession, Profiles, ELM, eComp
- HCM Cloud: Performance, Goals, Succession, Talent Reviews, Compensation
- 9.2 Upgrade Planning and Remote Lab Services
- Integrated PeopleTools Bolt-ons
PeopleSoft and HCM Cloud Roadmap

Free WorkStrategy services designed to help customers transition to the Cloud

**Pre-Upgrade Analysis (PUA)**
- Review customizations, new features, and change impact
- Expected budget ($$$) and resource hours
- Functional overview for eBenefits, ePerformance, New User Navigation

**PeopleSoft to HCM Cloud Roadmap**
- HCM Cloud Talent Management
- Performance, Goals, Comp, Succession, Talent Review, OTBI Analytics
- Overview of Oracle HCM Cloud Integration Options
- Implementation Planning and Project Plan
- Competitive Analysis Against other Vendors (RFI/RFP Prep)

**HCM Cloud and Talent Management Solutions**
- Demos and Case Study Review
- How these SaaS-based applications will work for you
PeopleSoft Customer Feedback

2016 Strategic Planning Discussions

- **Upgrading to 9.2**
  - Exploring full Cloud: 30%
  - Evaluating Cloud Talent: 50%
  - Integrated with Cloud Talent: 20%

- **On 9.2/PUM XX**
  - Exploring full Cloud: 30%
  - Evaluating Cloud Talent: 50%
  - Integrated with Cloud Talent: 20%

- **9.2 Upgr TBD**
  - Exploring full Cloud: 30%
  - Evaluating Cloud Talent: 60%
  - Integrated with Cloud Talent: 20%
Session Agenda

- Preparing for Your HCM Cloud TM Implementation
- HCM Cloud Talent Features
- Implementation Methodology
- Project Plan Milestones
- Integration Considerations

- Case Study: HCM Cloud Comp Configuration
- PS HCM Integration Model
- HCM Cloud Comp Manager View

- Next Steps, Q&A
A Partial List of Considerations

- Compatibility with Existing ERP Vendor
- Available Integrations and “Connectors”
- Integration Approach (Pre-built Import and Exports, Web Services)
- Functional Breadth
- User Experience
- Reporting and Analytics
- Design and Configuration Tools (typically no customizations)
- Experience within Subject Matter Span
- Release Frequency
- Implementation Support
- Training
Oracle Cloud Information Portal

http://cloud.oracle.com

Modern Business. Modern Cloud.
Re-imagine your business with Oracle Cloud applications

Software as a Service
Modern cloud applications from Oracle help you re-imagine your business. The best-of-breed SaaS applications in Oracle Cloud are integrated with social, mobile, and analytic capabilities to help you deliver the experiences customers expect, the talent to succeed, and the performance the market demands.

Free Cloud Trial
Oracle HCM Cloud TM for PeopleSoft Customers

A Wealth of Information Available – *Before You Buy*

- Release Highlights
- Product Demos and Videos
- Feature Brochures
- Functional Guides
- FAQs
- Integration Tips
- Training Videos
Talent Management **Release 11**


- **Performance**
  - Comments Fields Increases Sizes
  - Autosave
  - Rating Calc Rules using Fast Formulas
  - Goal Plan Integration
- **Goal Management**
  - Cascading Objective-Goal Management
  - Employee vs. Organization Goal Plan Management
- **Career Development**
  - New Job Profile role discussions and collaboration support using Oracle Social Network for employees and key staff
Talent Review and Succession

- **Talent Review**
  - Manager ability to create Succession Plans from Org Directory
  - New filters for adding candidates during Talent Review by Job Family, Job Function, and Management Level
  - Create Talent Review populations using OTBI analysis results

- **Succession Management**
  - Manage Succession Transactions from New TR/SP Org Directory
Learning Cloud

• Learning / New
  – On Demand Social Learning
  – Role-based Video / Tutorial Access and Publishing
  – Integration with Oracle Social Network (OSN)
  – Employee / Manager Self Service
  – Manager Access to Team Member Learning Status
  – Learning Catalog Management
  – 360 view of Learner Participation
  – Integration with SCORM-based Learning Content
  – Mobile Access to Online and Offline Learning Content
OTBI Analytics

• New Subject Area: Workforce Performance
  – Supports employee performance document eligibility
  – e.g. eligibility criteria, worker count, performance document status
  – Evaluation Manager added subject area
  – Performance Document Manager reporting for situations where evaluation manager is different from the assignment manager

• New Subject Area: Workforce Career Development
  – Supports reporting on all development goals created by employees and managers
  – Supports analysis of employee goal progress

• New Subject Area: Performance Rating
  – New dimension contains the history details related to employee performance documents, sections, and corresponding ratings

• New Subject Area: Succession Management – Position Plans
  – Supports reporting on positions, corresponding incumbents, candidates, candidate readiness, and other details related to your succession plans
Help Center, Documentation, and More Videos

http://docs.oracle.com/cloud/latest/talentcs_gs/index.html

- Project Prep
- Design Tips
- Implementation
- Integration
- Security
Fusion Information Center

My Oracle Support ID 1392507.2

- Monthly Enhancements
- Case Studies
- FAQs
- Technical Links
**Advisory Webcasts**

My Oracle Support ID 1485098.1

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### Oracle Webcasts for Oracle Fusion Applications

#### Why attend the Oracle Advisory Webcast Program

The Oracle Advisory Webcast Program brings interactive expertise straight to your desktop using Oracle Web Conference technology, at no cost. This technology brings you and Oracle experts together to access information about support services, products, technologies, best practices and more.

#### Archives

Select the Year Tabs to view archive content. Select Column Headers to sort the table content.

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<tr>
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<th>Date</th>
<th>View &amp; Download</th>
<th>Discuss in the Community</th>
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<td>April 07, 2016</td>
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WorkStrategy Methodology Case Study

- Project Management Tools
- Assess Cloud / SaaS Readiness
- HCM Cloud Environment Certification
- Resources – need experienced PM, PS, and HCM Cloud IT staff
- Functional Design – Lock down scope, configurations and integrations as soon as possible to allow for appropriate testing
- Prototypes and Conference Room Pilots (CRPs)
- Configuration
- Build Integrations and Reports
- Testing / UAT
- Feedback and Adjustments
- Integration Progress Checks
- Change Management
- Production Cutover Plan, Readiness and Support
Recommended Project Team Training

- **Online Resources**
  - HCM Cloud (Fusion) Portals and Hubs
  - Documentation and Videos

- **Functional Courses**
  - Oracle Cloud Global HCM (5 days)
  - Oracle Cloud Talent Management (5 days)

- **Technical Courses**
  - Oracle Cloud HCM Security (2 days)
  - Oracle Cloud Identity Management (OIM)
  - Oracle Cloud Provision Identity Management (2 days)
  - Oracle Cloud Functional Setup Manager (1 day)

- **Other Courses as Available**
  - Periodic Updates on Oracle University
  - Customer Demand-based
Implementation Steps

- Planning Phase – includes setting up Cloud Staging Environment
- Design Phase – includes functional analysis, defining configurations, defining integrations/migrations and data mapping for migrations (initial and ongoing)
- Cloud Upgrades – must plan for these 2/yr during project
- Configuration and Build Phase - includes manual and automated loading of setup data and worker data, security and reports
- Testing Phase – Functional and UAT
- Deployment / Go Live Phase
  - Training, Change Management and Communications
  - Production Cutover Planning and preparation
  - Execution of Production Cutover Plan
  - Production Go-Live
  - Production Support
Phase 1 – Job Profiles, Performance, Goal Management, and Career Development

- Kick off: July
- Design: July – August
- Configuration: August – September
- Integration/Changes: August – October
- Acceptance Testing: November
- Adjustments/Production: November – December
- Production Support: January – February

Phase 2 – Talent and Job Profiles, Succession Planning and Talent Review modules
Project Assumptions

- Integrated with PeopleSoft HCM 9.1
- Use of a multi-phased implementation methodology
- Project status and check-in meetings – critical !!!!
- Team-based Design (JAD), Prototype, Configuration, Data Mapping and Testing
- PS HCM – OTM integration tool (Recommendation of HDL vs. FBL)
- Analysis required to define ongoing system of record for talent data
- Customer responsible for data extraction and formatting
- Define worker population and types of workers, e.g. include contingent workers
- Define hierarchical definition of the customer’s organization, e.g. Position Mgt
- Multiple jobs and concurrent jobs are used
- Customer may be implementing Single Sign-on (SSO)
Project Team Roles

• Functional Tasks (SME)
  – Finalize module design, configurations, rules, communication strategy
  – Assist in defining data map and HCM Cloud element usage
  – Define Process, Workflow, Approvals, Rules, Security and User Experience
  – Configure HCM Cloud Applications – function by function
  – Prototype HCM Cloud functionality
  – Build test cycle scenarios and define test cases / scripts
  – Execute and support testing

• Technical
  – Acquire HCM Cloud SaaS architecture and concepts knowledge
  – Define the data sources, attributes, and update frequency (Foundation & Worker)
  – Identify the integration tools (ex. HDL) and data mapping
  – Finalize data mapping and integration tool (ex. HDL Templates)
  – Test bi-directional PS – HCM Cloud incremental integration steps
  – Build / enhance integration technology
  – Build OTM Customizations
  – Build new OTM Analytics/Reports (OTBI)
  – Test PS to HCM Cloud SaaS communication infrastructure
  – Resolve functional and technical issues
WorkStrategy Methodology

Phase: Planning and Project Charter

- Define Project Scope & Objectives
- Identify Project Team
- Define Project Controls
- Team Training
- Oracle Success Manager
- Kick-Off Meeting
- Provision SAAS Environment
- Approve Schedule

Deliverables
- Executed Agreements
- Resources Defined
- Tools & Communications Defined
- Customer Training (Oracle)
- Project Plan Created & Approved
- Cloud Site Established
- Access to HCM Cloud TM and PS
- Conducted Kick-Off Meeting
Phase: **Functional Design**

- Perform Functional Analysis
- Conduct Design Sessions
- Review & Define Configurations
- Define Required Integrations
- Identify Inbound Source
- Define Migration Objects
- Perform Initial n Data Mapping
- Define Security Access (Client)

**Deliverables**
- Design Document
- Configuration Guides
- Begin User Guides
- Prototypes 1, 2, X
- Revised Project Plan
WorkStrategy Methodology

Phase: **Configuration**

- Create Cloud Access IDs
- Set up HCM Foundation Tables
- Establish Org Hierarchy
- Configure lookup values
- Configure setup data for modules
- Rules and Formulas
- Workflow and Approvals
- Acceptance Test Cases

**Deliverables**
- Foundation Defined
- Talent and Job Profile Defined
- Perf Doc/Templates Defined
- Goals/Plans Defined
- Career Development Defined
- Initial Cycles Unit Tested
- Completed Prototypes
- Updated Documentation
Phase: **HCM to Talent Cloud Integration**

- From Design/Data Mapping
- Setup PS-Cloud Integration
- Finalize Data Mappings
- Test Export via Cloud Loaders
- Build Other Extracts Required
- Build Other Interfaces
- Build Audit Reports
- Acceptance Test Cases

**Deliverables**
- Data Mapping Templates
- PS-Cloud Integration Finalized
- PS-Cloud Integration Unit Tested
- Exports & Interfaces Finalized
- Exports & Interfaces Unit Tested
- Updated Documentation
- Test Team Trained for UAT
Phase: **Acceptance**

- Perform Cycle 1 UAT
- Perform Cycle 2 UAT
- Verify Configurations
- Verify Security
- Verify PS-Cloud Integration
- Verify Interfaces
- Conference Room Pilot
- Prepare for Production

**Deliverables**

- UAT Cycle 1 Completed
- UAT Cycle 2 Completed
- Issues identified and resolved
- PS-Cloud Integration finalized
- Exports & Interfaces finalized
- CRP completed
- Production Cutover Plan finalized
- Production Readiness Determined
## WorkStrategy Methodology

### Phase: Design Adjustments/Production

- Make any final changes
- Ensure all UAT Issues Resolved
- Perform production readiness
- Execute production cutover plan

### Deliverables

- Configurations finalized
- UAT Issues resolved
- OTM Phase 1 approved
- Cutover to production Configurations validated
- Cutover to production validated
- Cutover to production complete
- Updated documentation
- Support production issues
PeopleSoft to HCM Cloud TM Data Mapping

- Define HCM Cloud to PS HCM Integration Tool (HDL vs. FBL)
- Identify the Source system tables (PeopleSoft)
- Define Initial Load vs. Change Files
- Define any custom PS HCM Data to be loaded
- Develop the Data Mapping documents
- Develop sample .dat object files that conform to HCM Cloud specification
- Review data extraction process from PeopleSoft
- Troubleshoot any issues pertaining to data loading
- Analyze the integration points and recommend industry best practices
- Troubleshoot any issues related to integration
- Define any OTM extracts needed
PSOTM Tool Background and Purpose

- For PeopleSoft HCM customers using Oracle HCM Cloud products
- Improve integration between PeopleSoft and Oracle HCM Cloud Talent Management applications (OTM)
- Automate Customer integration steps where possible
- Support OTM Release 10+ Object Data Mappings

- Automate Process from PeopleSoft
  - Read the OTM HDL mapping template .dat into PeopleSoft
  - Map the Data Elements between PeopleSoft and OTM
  - Write the extracted data into file (App Engine)

- Location Table Example
  - Location.dat file created with 2 rows, row 2 = metadata
PSOTM and HCM Data Loader Process Flow

1. Export OTM Object .dat templates using HDL, copy to PS Server
2. Manually Build Data Mapping spreadsheet from OER Analysis
3. Import OTM .dat into PSOTM from PS server folder
4. Manually Map PS to OTM Fields using PSOTM Pages
5. Run App Engine to create .dat files, convert to zip, SFTP to WebCenter
6. Perform HDL Import and Load Steps, remediate errors

Oracle HCM Cloud

- Load Process
  - Application Tables
  - Staging Tables

HCM Data Loader (HDL)

- Import Process
- WebCenter Content Server
  - Foundation data (.dat)
  - Worker data (.dat)

PeopleSoft HCM

- Foundation Tables
- Employee Tables

PSOTM (Pages and PeopleCode)

- HDL Templates, Metadata
- App Engine
  - PS to OTM Mapping Page

New location.dat (contains PS and metadata)

Converted to Compressed Format location.zip

HCM Cloud Release 10

(fusionappsoer.oracle.com)

Oracle Enterprise Repository
OTM HDL Required Setup Considerations

Defining Your Source Owner
• Define the SourceSystemOwner value in the HRC_SOURCE_SYSTEM_OWNER lookup before you load data into OTM as “PEOPLESOFT_Customer”

To edit this lookup:
• In the Setup and Maintenance work area, search for the Manage Common Lookups task
• In the Search Results section, click Go to Task for the Manage Common Lookups task
• On the Manage Common Lookups page, search for the lookup type value HRC_SOURCE_SYSTEM_OWNER
• In the Search Results, select the lookup type to display its lookup codes
• In the Lookup Codes section of the page, click New () to add a lookup-code code row. Complete the fields in the row. Ensure that the new code is enabled and that the start and end dates are valid for the data that you are loading
• Save and Close
Defining Your Reference Data Set

To edit this lookup:

- In the Setup and Maintenance work area, search for the Manage Reference Data Sets task
- In the Search Results section, click Go to Task for the Manage Reference Data Sets task
- In the Search Results, select the lookup type to display its lookup codes
- In the Lookup Codes section of the page, click New ( ) to add a lookup-code row. Complete the fields in the row. Ensure that the new code is enabled and that the start and end dates are valid for the data that you are loading
- Save and Close

Note: The location set for Customer for one of the locations is XXXXX. Customer has more than one PS SetID and will need to load these into OTM manually
Step 1 – Download Templates

- Download the .dat files from “Initiate Data Load” Task in OTM
- Navigator → My Workforce → Data Exchange → Initiate Data Load
HCM Cloud R11 Pages

Navigator
- Financial Reporting Center
- My Workforce
  - Human Resources Dashboard
  - Data Exchange
  - Workforce Structures
  - Person Management
  - Profiles
  - Goals
  - Performance
- My Team
  - Reputation
  - Career Development
- Resource Directory
- Getting Started
- Setup and Maintenance

Tools
- Appearance
- Structure
- Announcements
- User Interface Text
- Application Composer

Financial Reporting Center
- My Workforce
- My Team
- Getting Started

Oracle HCM Data Loader
- Import and Load Data
- Delete Staged Table Data
- Load Spreadsheet Data
- Load Spreadsheet Data and Files for Coexistence
- Load Blank Form

Oracle HCM Coexistence Data Loader
- Import and Load Data
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Oracle HCM Coexistence Data Loader
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- Load Spreadsheet Data and Files for Coexistence
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Data Exchange
- Workforce Structures
- Person Management
- Profiles
- Goals
- Performance

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Oracle HCM Coexistence Data Loader
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- Load Spreadsheet Data and Files for Coexistence
- Load Blank Form
Step 1 – Download Templates

- Select File icon
Step 1 – Open .dat file Using Notepad
Step 3 – Analysis using Oracle Enterprise Repository

- Release 9 Provided HDL Data Mapping Excel Reference Guides
  - MOS document Doc ID 2020600.1, which then points to HCM Data Loader: Loading Work Structures (Doc ID 2021212.1)
- Release 10 did not provide new HDL Excel Reference Guides
- Using R9 Templates on R10 caused HDL upload errors

Workaround Option:
- Analyze OTM Field and Sequence Requirements via Oracle Enterprise Repository (OER) for HCM Cloud Release 10
- Manually build spreadsheet based mapping for manual entry into PSOTM

- Link to https://fusionappsoer.oracle.com
# Sample HCM Data Loader File

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<th>Key Type</th>
<th>Alternate User Key attribute for surrogate Ids</th>
<th>Integration Object Name</th>
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HCM Cloud Talent Modules

- Profile Management (Talent & Job)
- Performance Management
- Goal Management
- Career Development
- Succession Management (includes Talent Pools)
- Talent Review
- Business Intelligence (OTBI) for Reporting and Analysis
- Workforce Compensation
Sample Process Flows

**Business Unit #1**
- Employee Completes Evaluation
- Peers Provide Feedback
- Manager Completes Evaluation
- Manager +1 Approval
- Employee – Manager Discussion
- Manager Acknowledges
- Manager Shares Evaluation With Employee
- Manager and Employee eSign
- Performance Process Completed

**Business Unit #2**
- Employee and Manager Define Goals
- Employee Completes Evaluation
- Peers Provide Feedback
- Manager Reviews and Adjusts Goals
- Employee – Manager Discussion
- Manager Acknowledges
- Manager Shares Evaluation With Employee
- Manager and Employee eSign
- Performance Process Completed
Manager User Interface

[Image of the Manager User Interface]

- Monica Geller
- Share thoughts with your colleagues
- 1 Conversations
- 0 Following
- 0 Followers

- Employee News
- My Flags

- My Workforce
- Benefits Administration
- My Team
- About Me

- Manager Resources Dashboard
- My Team
- Team Compensation
- Team Talent Overview

- Career Development
- Goals
- Performance
- Talent Review

- Hiring
- Workforce Reputation
- Workforce Modeling
- Worker Predictions

- Workforce Compensation
- Manage Users
- New Person
- Document Records
Annual Performance Goals
Types of Goals

- **Organization Goal**: An organization goal is a strategic goal that supports the overall objectives and strategy of the organization.

- **Shared Goal**: A goal can be shared with you by your manager or coworker.

- **Assigned Goal**: Managers are able to assign goals on their annual goal plan to your annual goal plan. When a goal is assigned to you it is not optional, it is automatically added to your plan.

- **Goal Added by your Manager**: Managers are able to add new goals for you to your annual goal plan. When a goal is created by your manager it is not optional, it is automatically added to your plan.
Goal Actions for Employees

- **Edit/Update**: You are able to edit/update shared, organization, and goals that you have created.
- **Reopen**: You are able to reopen a goal that you have completed.
- **Copy**: You are able to copy a goal from one goal plan to another goal plan. Includes goals you have created or received.
- **Move**: You are able to move a goal from your current goal plan to the next year’s goal plan.
- **Extend**: You are able to extend a goal from your current goal plan to the next year’s goal plan. You are able to extend any goal that you have created or received.
- **Align**: You are able to align your goals with goals shared by your manager, coworkers, or published organization goals.
- **Share**: You are able to share goals that you have created with your peers to make them available to add to their goal plan. Shared goals added to a goal plan are automatically aligned to the original shared goal.
- **Cancel**: You are able to cancel a goal that you have created for your goal plan so that it no longer appears on your performance appraisal.
Managing the Goal Library

- Setup and Maintenance
  - Implementation Packages
    - Getting Started
    - Configure Offerings
    - Copy Configurations
    - Manage Implementation Projects
  - Setup Data Export and Import
    - Manage Configuration Packages
    - Manage Export and Import Processes
  - Implementation Objects
    - Manage Offerings and Functional Areas
    - Manage Features
    - Manage Business Processes
    - Manage Task Lists and Tasks
    - Manage Business Objects
  - Topology Objects
    - Manage Domains
    - Manage Enterprise Applications
    - Manage Third Party Applications
    - Manage Modules
    - Manage Composites
  - Topology Registration
    - Review Topology

- Implementation Project: Implementation Project_99
  - Basic Information
    - Name: Implementation Project_99
    - Code: IMPLEMENTATION_PROJECT_99
    - Status
    - Assigned To: ROBERT.JACKMAN
  - Task Lists and Tasks
    - Task:
      - Workforce Deployment
      - Workforce Development
      - Define Common Applications
      - Define Common HCM Co...
Direct Reports

My Team Goals: 2015 Calendar Year

- **Kasey Haskins**
  - Public Health Nurse
  - 3 Total

- **Kevin Newman**
  - CCC Representative
  - 4 Total
    - Not started: 1
    - In progress: 3

- **Leonard Hofstadter**
  - Hospice Team Manager
  - 4 Total
    - Not started: 2
    - In progress: 2
    - Completed: 2
Adding a New Goal

Achieve an average customer service rating of 4 (out of 5) e...

Increase customer satisfaction scores by 5% each quarter

Improve internal communication with peers and cross function...
Copying Goals to Next Plan Years
Navigator Links to Functions and MSS
Team Compensation

Team Compensation

Filter: Direct Reports

Chandler Bing
Financial Analyst 1
50,000.00 USD
Annually
Compa-Ratio

Grade: Test Grade 1
Performance: Leading

Phoebe Buffay
Financial Analyst 1
50,000.00 USD
Annually
Compa-Ratio

Grade

Manage Salary
Manage Compensation
Performance Management
Goal Management

My Team Goals: 2016 Calendar Year

Chandler Bing: Goals: 2016 Calendar Year

- **Goal Plan Set**: Other goal plans
- **Goal Plan**: WS 2016 Goal Plan
- **Meet 10% Profit Target**
  - Category: Financial
  - Priority: Medium
  - Completed
- **Improve Customer Satisfaction**
  - Category: Customer satisfaction
  - Priority: Medium
  - Due in 183 days
  - In progress

Options: Copy, Move, Extend, Align, Cancel, Delete
Talent Review Meeting Notes and Tasks
Talent Review Meeting Prep Reminders

### Data Submission Report: Finance Manager

**Business Leader:** Tribiani, Joseph  
**Data Submission Deadline:** 9/9/2015

<table>
<thead>
<tr>
<th>Participant Name</th>
<th>Department</th>
<th>Job</th>
<th>Participant Type</th>
<th>Data Submission Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tribiani, Joseph</td>
<td>Customer Care Cn</td>
<td>CCC Director</td>
<td>Business leader</td>
<td></td>
</tr>
<tr>
<td>Green, Rachael</td>
<td>CCC - 3136 CC</td>
<td>CCC Manager</td>
<td>Reviewer</td>
<td>✔️ Completed</td>
</tr>
</tbody>
</table>

Not started  In Progress  Completed
## Talent Review

### Talent Review Meeting: Talent Review Meeting 2

<table>
<thead>
<tr>
<th>Category</th>
<th>Count</th>
<th>Performance</th>
</tr>
</thead>
<tbody>
<tr>
<td>Superior Solid (3)</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Superior Strong (2)</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Superior Superior (1)</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Strong Solid (6)</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td>Strong Strong (5)</td>
<td>2</td>
<td>2</td>
</tr>
<tr>
<td>Strong Superior (4)</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Solid Solid (9)</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td>Solid Strong (8)</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Solid Superior (7)</td>
<td>0</td>
<td>0</td>
</tr>
</tbody>
</table>

Person Name: Park, Gunther
Meeting: Talent Review Meeting 2
Performance: Strong Potential: Strong

### Succession Plans and Talent Pools

<table>
<thead>
<tr>
<th>Position</th>
<th>Status</th>
<th>Readiness</th>
</tr>
</thead>
<tbody>
<tr>
<td>Financial Manager Position</td>
<td>Active</td>
<td>Ready Soon 1</td>
</tr>
<tr>
<td>Buffay, Phoebe</td>
<td>Ready Now</td>
<td></td>
</tr>
<tr>
<td>Green, Rachel</td>
<td>Ready Later 2</td>
<td></td>
</tr>
<tr>
<td>Park, Gunther</td>
<td>No readiness</td>
<td></td>
</tr>
</tbody>
</table>

### Reports and Analytics

<table>
<thead>
<tr>
<th>Category</th>
<th>Salary 25%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Superior Solid (3)</td>
<td>0</td>
</tr>
<tr>
<td>Superior Strong (2)</td>
<td>0</td>
</tr>
<tr>
<td>Superior Superior (1)</td>
<td>0</td>
</tr>
<tr>
<td>Strong Solid (6)</td>
<td>0</td>
</tr>
<tr>
<td>Strong Strong (5)</td>
<td>0</td>
</tr>
<tr>
<td>Strong Superior (4)</td>
<td>0</td>
</tr>
<tr>
<td>Solid Solid (9)</td>
<td>0</td>
</tr>
<tr>
<td>Solid Strong (8)</td>
<td>0</td>
</tr>
<tr>
<td>Solid Superior (7)</td>
<td>0</td>
</tr>
</tbody>
</table>

### Holding Area

- Person Name: Park, Gunther
- Meeting: Talent Review Meeting 2
- Performance: Strong
- Potential: Strong
Talent Review Printable Chart
### Talent Review Meeting: Talent Review Meeting 2

<table>
<thead>
<tr>
<th>Person Number</th>
<th>Name</th>
<th>Manager Name</th>
<th>E-Mail</th>
<th>Performance</th>
<th>Potential</th>
<th>Box Assignment</th>
<th>Talent Performance</th>
<th>Risk of Loss</th>
<th>Impact of Loss</th>
</tr>
</thead>
<tbody>
<tr>
<td>18</td>
<td>Waltham, Emily</td>
<td>Hofstadter, Leonard</td>
<td>lisa.wells@workstr...</td>
<td>Solid</td>
<td>Strong</td>
<td>Strong Solid (6)</td>
<td>Ready for New Op...</td>
<td>High</td>
<td>High</td>
</tr>
<tr>
<td>12</td>
<td>Becker, Peter</td>
<td>Green, Rachael</td>
<td>julie.zaccardi@wor...</td>
<td>Solid</td>
<td>Solid</td>
<td>Solid Solid (9)</td>
<td>Top Talent</td>
<td>Medium</td>
<td>High</td>
</tr>
<tr>
<td>4</td>
<td>Bing, Chandler</td>
<td>Geller, Monica</td>
<td>julie.zaccardi@wor...</td>
<td>Strong</td>
<td>Strong</td>
<td>Strong Strong (5)</td>
<td>Emerging Leaders</td>
<td>High</td>
<td>High</td>
</tr>
<tr>
<td>11</td>
<td>Perk, Gunther</td>
<td>Green, Rachael</td>
<td>julie.zaccardi@wor...</td>
<td>Strong</td>
<td>Strong</td>
<td>Strong Strong (5)</td>
<td>Core Talent</td>
<td>Low</td>
<td>Low</td>
</tr>
</tbody>
</table>
### Talent Review List View / Candidate Detail

#### Talent Review Meeting: Talent Review Meeting 2

<table>
<thead>
<tr>
<th>Filter</th>
<th>Display</th>
<th>Information</th>
<th>Actions</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

#### Talent Review Meeting 2: Talent Matrix 2014

<table>
<thead>
<tr>
<th>Person Number</th>
<th>Manager Name</th>
<th>E-Mail</th>
<th>Performance</th>
<th>Potential</th>
<th>Box Assignment</th>
<th>Talent Performance</th>
<th>Risk of Loss</th>
<th>Impact of Loss</th>
<th>Mobility</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>18</td>
<td>Welham, Emily</td>
<td><a href="mailto:kse.wells@workstrategy.com">kse.wells@workstrategy.com</a></td>
<td>Solid</td>
<td>Strong</td>
<td>Medium</td>
<td>Medium</td>
<td>High</td>
<td>High</td>
<td>Medium</td>
<td></td>
</tr>
<tr>
<td>12</td>
<td>Becker, Peter</td>
<td><a href="mailto:julie.zaccardi@workstrategy.com">julie.zaccardi@workstrategy.com</a></td>
<td>Solid</td>
<td>Strong</td>
<td>Medium</td>
<td>Medium</td>
<td>High</td>
<td>High</td>
<td>Medium</td>
<td></td>
</tr>
<tr>
<td>4</td>
<td>Bing, Chandler</td>
<td><a href="mailto:julie.zaccardi@workstrategy.com">julie.zaccardi@workstrategy.com</a></td>
<td>Strong</td>
<td>Strong</td>
<td>Medium</td>
<td>Medium</td>
<td>High</td>
<td>High</td>
<td>Medium</td>
<td></td>
</tr>
<tr>
<td>11</td>
<td>Geller, Monica</td>
<td><a href="mailto:julie.zaccardi@workstrategy.com">julie.zaccardi@workstrategy.com</a></td>
<td>Strong</td>
<td>Strong</td>
<td>Medium</td>
<td>Medium</td>
<td>High</td>
<td>High</td>
<td>Low</td>
<td></td>
</tr>
</tbody>
</table>

#### Person Information

**Chandler Bing**

- **Manager Name**: Monica Geller
- **Department**: Human Resources
- **E-Mail**: julie.zaccardi@workstrategy.com
- **Current Phone Numbers**: (555) 555-5555
- **Work Address**: 1630 East 15th St, BROOKLYN, NEW YORK 11229, UNITED STATES

#### Actions

- Find
- Add
- Move
- Print Profile

#### Work Strategy

60
Talent Review – Assign Tasks

![Talent Review Interface](image)

**Talent Review Meeting: Talent Review Meeting 2**

**Filter**
- Color Code
- Gender
- Show average
- Zoom In
- View

**Information**
- Task:
  - Subject: Assess Performance Ratings in 9-Box
  - Associated Worker: Waldbn, Emily
  - Description: Team Calibration Session Review
  - Task Type: Preparation
  - Priority: Very High
  - Percentage Complete: 10
  - Start Date: 3/16/2016
  - Due Date: 3/16/2017
  - Assignees: Hofstadter, Leonard
  - Owners: Geller, Monica

**Actions**
- Find
- Compare
- Add
- Move
- View Organization Chart
- Print Profile
Talent Review / Succession Planning Setup
Talent Review Ratings Box

Manage Talent Review Template

- Template Name: Template 1
- Status: Active
- Owner: Geller, Monica
- Color Scheme: Red and green
- Maximum Number of Records: 500

Ratings Options

Enter a label and select a rating model for each rating. Select Use as Axis to use the rating in the box chart matrix and table views.

Rating Model

- Impact of Loss Rating Model
- Rating Model Competencies
- Annual Performance Goal Rating Model
- Performance Talent Matrix
- Leadership Potential Rating Model
- Talent Score Rating Model

Talent Matrix 2014: Configure Boxes

Superior Solid (3) | Superior Strong (2) | Superior Superior (1)
Strong Solid (6) | Strong Strong (5) | Strong Superior (4)
Solid Solid (9) | Solid Strong (8) | Solid Superior (7)

Box Chart Views

Add the rating types that appear in the box chart matrix. Select any for which you selected Use as Axis in the Box Chart Matrix section. You can add XY views with two ratings as axes, or single ratings views. Select Submit Box Assignment for at least one XY or single rating view, or one of each.

View Name: Talent Matrix 2014
View Type: XY View
X-Axis or Single Rating: Performance
Y-Axis: Potential
Set as Default: Yes
Submit Box Assignment: Yes
Configure Boxes: Yes
Talent Review Ratings Box Setup
Talent Review Setup / Available Data
Succession Planning
Succession Planning Talent Pools

The image shows a screenshot of a Succession Planning interface, likely from an Oracle application. The interface allows users to manage talent pools for succession planning. The screen shows a table with columns for Pool Name, Description, Status, Owners, Job, Business Unit, Department, and Number of Members. There are entries for 'Leaders' and 'Potential Leaders'.
Succession Planning Talent Pool Candidates

![Succession Planning Talent Pool Candidates](image-url)

<table>
<thead>
<tr>
<th>Name</th>
<th>Job</th>
<th>Department</th>
<th>Risk of Loss</th>
<th>Impact of Loss</th>
<th>Willing to Relocate</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>Buffay, Phoebe</td>
<td>Financial Analyst 1</td>
<td>Patient Retention</td>
<td>Low</td>
<td>Medium</td>
<td>Active</td>
<td></td>
</tr>
<tr>
<td>Green, Rachael</td>
<td>CCC Manager</td>
<td>CCC - 3136 CC</td>
<td>Medium</td>
<td>Medium</td>
<td>Active</td>
<td></td>
</tr>
</tbody>
</table>

Rows Selected: 1
Succession Planning Talent Pools Search
Succession Planning Talent Pools Search
Succession Planning Setup
Business Intelligence Tools

[Image of Oracle Business Intelligence interface]

Sample Performance Data

<table>
<thead>
<tr>
<th>Name</th>
<th>Manager Name</th>
<th>Competency Name</th>
<th>Goal Description</th>
<th>Overall Score</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bing, Chandler</td>
<td>Geller, Monica</td>
<td>Compliance</td>
<td>Cut operational expenses by 3%</td>
<td></td>
</tr>
<tr>
<td>Bing, Chandler</td>
<td>Geller, Monica</td>
<td>Core - Adaptable</td>
<td>Increase Brand Awareness in surrounding communities by 4th quarter</td>
<td></td>
</tr>
<tr>
<td>Bing, Chandler</td>
<td>Geller, Monica</td>
<td>Core - Business Acumen</td>
<td>To establish networks with other Directors in my company and other professionals in the area</td>
<td></td>
</tr>
<tr>
<td>Bing, Chandler</td>
<td>Geller, Monica</td>
<td>Core - Teamwork</td>
<td>n/a</td>
<td></td>
</tr>
<tr>
<td>Bing, Chandler</td>
<td>Geller, Monica</td>
<td>RESP - Financial Analyst</td>
<td>n/a</td>
<td></td>
</tr>
<tr>
<td>Bing, Chandler</td>
<td>Geller, Monica</td>
<td>n/a</td>
<td>n/a</td>
<td></td>
</tr>
<tr>
<td>Bing, Chandler</td>
<td>Geller, Monica</td>
<td>n/a</td>
<td>n/a</td>
<td></td>
</tr>
</tbody>
</table>

[Image of Oracle Business Intelligence interface]
Reporting and Analytics with OTBI
Transactional Analysis Samples
Matrix Analysis
Talent Performance by Potential Analytic

![Talent Performance by Potential Matrix](image-url)
Matrix Definition and Configuration Options
Field Selection and Filters

Oracle Business Intelligence

Talent Performance by Potential Matrix

Criteria | Results | Prompts | Advanced
---|---|---|---

Subject Areas
- Workforce Talent Review - Talent Review Meeting Details
- Facilitator
- Participant
- Reviewees
- Reviewee Talent Data
- Talent Review Meeting Details
- Talent Review Meeting Measures
- Time

Catalog
- My Folders
- Shared Folders

Selected Columns
- Worker
- Calibrated Performance
- Calibrated Potential
- Calculated Metrics
- Person Number
- Performance Category
- Potential Category
- Performance Rating
- Potential Rating
- 9 Box

Filters
- Category Name is not null
- Category Name is not null

Add filters to the analysis criteria by clicking on the Filter option for the specific column in the Selected Columns pane, or by clicking on the filter button in the Subject Areas pane. Add a saved filter by clicking on the add button after selecting its name in the catalog pane.
OTBI Sample Report
% of Market by Business Unit

- Australia: 22.22% (less than 80%)
- Canada: 28.57% (less than 80%)
- China: 50.90% (less than 80%)
- France:
- Germany:
- Hong Kong: 100.0% (less than 80%)
- India: 15.38% (less than 80%)
- Italy:
- Mexico: 100.0% (less than 80%)
- Netherlands: 77.78% (less than 80%)
- Poland:
- Russia:
- Singapore: 25.00% (less than 80%)
- Spain:
- Sweden:
- UK: 84.21% (less than 80%)
- US: 57.0% (less than 80%)

Legend:
1) less than 80%  2) 80 to 120%  3) Over 120%
AvalonBay Communities, Inc. is a real estate investment trust (a "REIT") focused on developing, redeveloping, acquiring and managing high-quality apartment communities in high barrier-to-entry markets of the United States.

These markets are in the Northeast, Mid-Atlantic, Pacific Northwest, Northern California and Southern California regions of the country.

PeopleSoft HCM 9.1/8.52
MS SQL Database
3,000 employees
Merit, Bonus, Equity Plans
HCM, NA Payroll, Ben Admin, eBenefits, ePay

Requirements:
• Annual Compensation Planning Management Tool
• Replace Existing Unsupported Application
Project Team

• AvalonBay Project Team
  – Compensation SME (3)
  – Applications Development SME (2)
  – HRMS SME (2)
  – Other IT SME (2)
  – Communications/Training SME (1)

• WorkStrategy
  – Project Lead / SME (1.75)
  – Technical Consultant (1)

• Oracle Center of Excellence
• Oracle Success Manager
## Project Plan

<table>
<thead>
<tr>
<th>Project Phase</th>
<th>Schedule</th>
<th>Activities</th>
<th>Key Deliverables</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Design</strong></td>
<td>Apr - May ’13</td>
<td>Define customer Comp Plan requirements</td>
<td>Design Documentation</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Design Fusion Comp Rules</td>
<td>Data Mapping</td>
</tr>
<tr>
<td>Config/Proto</td>
<td>Jun - Aug</td>
<td>Design employee communication</td>
<td>Completed Configuration</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Design manager reports and analytics</td>
<td>Prototype 1 thru 4</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Configure org and workflow hierarchy</td>
<td>Functional Tests</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Design rules and data mapping</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Build User roles and security rules</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Build Element Entries, Custom Cols, Fast Formulas</td>
<td></td>
</tr>
<tr>
<td>Integrations</td>
<td>Jun - Nov</td>
<td>Build Bi-directional Int Fusion-PS</td>
<td>Test Integrations</td>
</tr>
<tr>
<td></td>
<td></td>
<td>PS to Fusion SaaS Server Configuration</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Build App Engine and CI Components</td>
<td></td>
</tr>
<tr>
<td>Acceptance Tests</td>
<td>Aug - Oct</td>
<td>Test team training and preparation</td>
<td>Approved Acceptance Tests</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Perform acceptance testing</td>
<td>Completed end-to-end scenarios</td>
</tr>
<tr>
<td>Revised Scope</td>
<td>Nov - Dec</td>
<td>Limited Scope to Onsite (Salary Adjustments)</td>
<td>Retested Limited Onsite Staff</td>
</tr>
<tr>
<td>Move to Production</td>
<td>Dec</td>
<td>Production readiness steps</td>
<td>Completed Move to Prod</td>
</tr>
<tr>
<td>Comp Cycle Launch</td>
<td>Jan 14 - Feb 14</td>
<td>Launch Comp Cycle</td>
<td>Cycle Launched</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Close (apply updates to PS Job/Payroll)</td>
<td>Cycle Closed</td>
</tr>
<tr>
<td>Increases Effective</td>
<td>Mar 2 ’14</td>
<td></td>
<td>Comp Records Uploaded</td>
</tr>
</tbody>
</table>
Project Challenges

• Challenges
  – Integration of major acquisition
  – Limited internal functional/technical resources
  – Demand on resources exceeded time available
  – Changing compensation plans
  – Move to production
  – Potential application upgrade

• Integration Issues
  – Underestimated integration effort
  – Additional external resources required
  – Turn around time on resolution of issues

• Other
  – Built in functionality created “kids in a candy store” mentality
Project Recap

• Very successful reception by users
• Provides insight to Comp and Management team
• Smooth launch
• Analytics and budget summaries are dynamic

• HCM Cloud Comp Plan Configuration
  – Big learning curve for customer staff

• HCM Cloud Integration with PS HCM
  – Concepts required out of box thinking
  – Lots of planning and testing
Next Steps and Recent Updates

• Upgraded to HCM Cloud Comp 9.0 (May ’15)
• **Users really liked the new interface !!!!**
• Review Existing Plan Design
  – Annual Officer, Annual Corporate/Regional, Annual Discretionary Stock
• New Worksheet Functionality
  – Any Adjustments to HCM Cloud Comp Interface
  – Enhanced Workforce Compensation Approval Analytics
  – Placeholder Managers, not eligible for plan, can be viewed in the Tree View
  – Export Delivered Line Manager Reports to Excel
  – Hide Budget Pools and Pages From Managers
• Next Phase Project Timeline
  – Configuration and Testing: June – Mid August
  – User Acceptance Testing: Mid August – September
  – Plan Cycles: December – March
HCM Cloud Workforce Compensation Overview
Setup, Design, Features
Simplified User Experience
# Team Compensation

![Team Compensation](image)

<table>
<thead>
<tr>
<th>Name</th>
<th>Salary</th>
<th>Currency</th>
<th>Grade</th>
<th>Performance</th>
<th>Compa-Ratio</th>
</tr>
</thead>
<tbody>
<tr>
<td>Brian Joseph</td>
<td>74,760.80</td>
<td>USD</td>
<td>Mgmt06</td>
<td>Outstanding</td>
<td>105.0</td>
</tr>
<tr>
<td>Elizabeth Mayer</td>
<td>69,742.40</td>
<td>USD</td>
<td>Mgmt06</td>
<td>Meets Expec</td>
<td>99.6</td>
</tr>
<tr>
<td>Frank Pukta</td>
<td>44,329.20</td>
<td>USD</td>
<td>Mgmt06</td>
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</table>
Manage Salaries
Salary History

Person Gallery

Manage Salary: Brian Joseph

Person Information

Name: Brian Joseph
Assignment Number: E100
Position:
Location: Atlanta

Details

Current Salary Rate: USD Annual Salary
Current Salary: 74,760.90 USD Annually

New Salary Start Date: 08/26/2015
Action Reason: Add Employee Work Relationship

Next Salary Review Date:
Annual Salary: 74,760.90 USD
Annualized Full-Time Salary: 74,760.90 USD
Salary Range: 60,000.00 - 80,000.00 USD Annually
Compa-Ratio: 106.8
Quartile: 3
Quintile: 4

Salary Range | History | Percentage Change | Compa-Ratio | Growth Rate | Performance
---|---|---|---|---|---
| Start Date | Action Reason | Currency | Salary Amount Frequency | Annual Salary | Adjustment Amount | Percentage | Salary Details |
| 07/01/2014 | | USD | 74,760.90 Annually | 74,760.90 | | 4,080.90 | 7 |
| 07/01/2013 | Rent | USD | 69,870.00 Annually | 69,870.00 | 1,570.00 | 2 |
| 07/01/2012 | Rent | USD | 68,590.00 Annually | 68,590.00 | 2,300.00 | 3.47 |
| 07/01/2011 | Rent | USD | 66,200.00 Annually | 66,200.00 | 2,300.00 | 3.6 |
| 07/01/2010 | Rent | USD | 63,900.00 Annually | 63,900.00 | 2,100.00 | 3.4 |
| 07/01/2009 | Rent | USD | 61,800.00 Annually | 61,800.00 | 2,100.00 | 3.52 |

Salary History

- 60,000
- 75,000
- 70,000
- 65,000
- 60,000
Award Compensation (Ad Hoc)
HCM Cloud Workforce Compensation

Configure Worksheet Page Layout

- Tab Name: Salary
- Tab Type: Compensation

Summary Columns
- Component
  - Eligible Workers
  - Workers With Compensation
- Eligible Salary
- Percentage of Workers Compensated
- Allocation Totals
  - Budget Totals
  - Miscellaneous Rates

Allocating Compensation by Percentage of Budget
- Eligible Salary Column: Explained
- Plan Setup Dependencies: Critical Choices
- Role-Based Column Access: Examples
- Varying Worksheet Column Raters: Points to Consider
**Compensation**

**Tasks**
- Base Pay
  - Manage Salary Basis
  - Manage Salary
  - Download Salaries
- Workforce Compensation
  - Act as Proxy Manager
  - Administer Workers
  - Manage Global Models
  - View Administration Reports
  - Manage Plans
  - Manage Active Plans
  - Run Batch Processes
  - Configure Global Settings
- Total Compensation Statements
  - Manage Compensation Items
  - Manage Compensation Categories
  - Manage Statement Definitions
  - Generate Statements
  - Purge Statements
  - Monitor Processes
  - View Generated Statements
  - Configure Global Settings
- Individual Compensation
  - Manage Plans
  - Map Third-Party Plans
  - Manage Compensation
- Market Data
  - Manage Compensation Types
  - Manage Supplier Structures
  - Import Survey
- Compensation History

**Administer Workers**

**Search**

- **Name**
- **Keywords**
- **Person Number**
- **Effective As of Date**
- **National ID**

**Search Results**

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<th>Name</th>
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<th>Department</th>
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No search conducted.

Columns Hidden: 10 | Columns Frozen: 2
HCM Cloud Look & Feel
HCM Cloud Look & Feel

Compensate Workforce: Annual Salary 2013-2014

Summary: Direct Reports

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<tr>
<th>Component</th>
<th>Eligible Associates</th>
<th>Associates with Recommendations</th>
<th>Eligible Salary</th>
<th>Increase Amount</th>
<th>Average Increase %</th>
<th>Overall Budget Amount</th>
<th>Overall Budget %</th>
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Worksheet

Total Salary Increase Over 15%

The sum of the Merit, Equity, Market and Promotion increases exceed 15%. Please adjust Salary Increase(s) or provide notes with rationale.
Access to Configuration and Manager Actions
Comp Plan Configuration
Comp Plan Configuration
### Comp Plan Configuration

**Compensation**

**Tasks**
- Base Pay
  - Manage Salary Basis
  - Manage Salary
  - Download Salaries
- Workforce Compensation
  - Act as Proxy Manager
  - Administer Workers
  - Manage Global Models
  - View Administration Reports
  - Manage Plans
  - Manage Active Plans
  - Run Batch Processes
  - Configure Global Settings
- Total Compensation Statements
  - Manage Compensation Items
  - Manage Compensation Categories
  - Manage Statement Definitions
  - Generate Statements
  - Purge Statements
  - Monitor Processes
  - View Generated Statements
  - Configure Global Settings
- Individual Compensation
  - Manage Plans
  - Map Third-Party Plans
  - Manage Compensation
- Compensation History
  - Manage Compensation History
  - View Compensation History
  - Manage Stock Grants
- Common Configuration
  - Configure Batch Parameters
  - Manage Eligibility Profiles
  - Manage Profile Rating Models
  - Manage Actions
  - Manage Action Reasons
  - Manage Messages
  - Manage Lookup

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**Define Workforce Compensation**

Plan: Annual Compensation Plan

**Task List**

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**Oracle**

**AvalonBay Communities HCM Implementation User**
Comp Plan Configuration
Comp Plan Configuration
Manager Worksheet View

### Workforce Compensation


<table>
<thead>
<tr>
<th>Component</th>
<th>Eligible Associates</th>
<th>Eligible Salary</th>
<th>Proposed Increase / Award Amount</th>
<th>Average Increase %</th>
<th>Overall Budget Amount</th>
<th>Overall Budget %</th>
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#### Worksheet

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<td>1.00</td>
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On Cycle Promotions with Title Change
Entering Data (Merit w/ Rating Guidance)

![Image showing a software interface for Workforce Compensation with data entries for different components such as Salary, Annual Bonus Cash, and Immediate Annual Cash. There are summaries and details for individual workers including their names, job titles, and performance ratings with corresponding merit increases.](image-url)
Promotion Distribution Analytics
Column Settings and Personalization
Filtering Options (Name, Title, Team)
## Workforce Compensation

### Compensate Workforce: Annual Compensation Plan 2014-2015

#### Summary: All Workers

<table>
<thead>
<tr>
<th>Component</th>
<th>Eligible Associates</th>
<th>Associates With Recommendations</th>
<th>Eligible Salary</th>
<th>Proposed Increase / Award Amount</th>
<th>Average Increase %</th>
<th>Overall Budget Amount</th>
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<th>Available Budget</th>
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#### Worksheet

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</table>
Display Format (Tree vs. List)
Summary Analytics (Quartile Distribution)
Alerts on Manager Worksheet

### Compensate Workforce: Annual Compensation Plan 2014-2015

**Salary** | **Annual Bonus Cash** | **Annual Bonus Stock** | **Promotion** | **Approvals** | **Compensation Statement**
---|---|---|---|---|---

#### Summary: All Workers

<table>
<thead>
<tr>
<th>Component</th>
<th>Eligible Associates</th>
<th>Associates With Recommendations</th>
<th>Eligible Salary</th>
<th>Proposed Increase/Award Amount</th>
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#### Worksheet

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<td>2.00</td>
<td>1,775.30</td>
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<td>1.00</td>
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Creating Alerts

Predefined Alerts, Custom Alerts, Soft Alerts, Hard Stop Alerts
Manager Submits Budget for Approval
Manager +1

- Manager +1 receives a notification of a pending budget approval
- Manager +1 selects budget via link, reviews, and approves
- Options:
  - Approve
  - Return for Correction
### Approval of Annual Compensation Plan Worksheet for Chandler Bing

#### Details
- **Assignee:** Monica Geller
- **From:** Chandler Bing
- **Task Number:** 202415

#### Summary
Chandler Bing submitted the Annual Compensation Plan worksheet for approval. Review it and take the appropriate approval action.

- **Plan:** Annual Compensation Plan
- **Cycle:** 2014-2015
- **Submitted by:** Chandler Bing
- **Submit Date:** 5/11/15 9:37 AM

#### Compensation Summary

<table>
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<tr>
<th>Component</th>
<th>Eligible Associates</th>
<th>Eligible Salary</th>
<th>Proposed Increase / Award Amount</th>
<th>Average Increase %</th>
<th>Overall Budget Amount</th>
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<td>0.00</td>
<td>0.00</td>
<td>-4,993.05</td>
</tr>
<tr>
<td>Annual Bonus Cash</td>
<td>4</td>
<td>376,558.00</td>
<td>33,739.08</td>
<td>8.91</td>
<td>52,252.00</td>
<td>13.80</td>
<td>10,513.00</td>
</tr>
<tr>
<td>Annual Bonus Stock</td>
<td>4</td>
<td>0.00</td>
<td>19,121.80</td>
<td>51,000.00</td>
<td>11,878.40</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

#### Promotion Summary

<table>
<thead>
<tr>
<th>Workers Promoted</th>
<th>Employees</th>
<th>EmployeesPct</th>
</tr>
</thead>
<tbody>
<tr>
<td>Promoted</td>
<td>1</td>
<td>25.0</td>
</tr>
<tr>
<td>Not Promoted</td>
<td>3</td>
<td>75.0</td>
</tr>
</tbody>
</table>

#### Related Links
- Workforce Compensation

#### Comments
5/11/15 9:37 PM Chandler Bing
I just completed my department's compensation changes. Please approve.
Generate Employee Statements (Branding)
Manage Implementation Project
Configure Compensation Plans (Tasks)
Manager Worksheet Configuration Tools

- Element Entries
- Descriptive Flexfields
- Fast Formulas
- Dynamic Columns
- User Fields
Fast Formulas

- Creates a database entry when configuring the element entry
- Use the element entry in the formula calculation
- Compile the formula
- Add the formula to a worksheet column or eligibility profile
  - Allows for default values to pre-populate in the manager worksheet
  - A worksheet custom column may need to be used for the calculated value
  - Used for anything that needs to be calculated when the planning cycle opens to managers
- Formula Types
  - Participation and Rate Eligibility
  - Compensation Default and Eligibility
Calc Bonus Using Dynamic Column Formula
Next Steps...Q & A

• Visit cloud.oracle.com for HCM Cloud overviews and videos
• Build your Business Case
• WorkStrategy can demo HCM Cloud Talent Management applications
• If coexistence, prepare for PS HCM Integration tasks
• Understand these Configuration concepts:
  – HCM Data Loader Integration (HDL)
  – Descriptive Flexfields
  – Element Entries
  – Fast Formulas
  – Dynamic Columns
  – BI Publisher
• PeopleSoft 9.2 Upgrades
• Process Improvement
• Talent Management Planning
• Compensation Management
• Performance Management
• Learning and Development
• Succession Planning
• Oracle HCM Cloud (SaaS)

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