PeopleSoft HCM 9.2 Upgrade

"Providing access to better information and improving processes"

In follow up to my August communication regarding upcoming changes to PeopleSoft HCM, I would like to share more detailed information about those changes and what they will mean for you.

If you missed the August message, and would like to read it, click the following link http://se2.ualberta.ca/~/media/se/HCM92Upgrade/Communication/HCM_Upgrade_2016-08-10.pdf.

Expanded Employee Self-Service Coming Soon
One change many faculty and staff will see is expansion of the employee self-service functions available to them. In addition to being able to view your pay statements, benefit summary, tax slips (T4/T4A) and update your direct deposit account(s) and personal information, you will now also be able to make changes to benefit enrollments when eligible. Faculty and staff that have health, dental or life benefits will now have the ability to make optional benefit plan selections and update their dependent/beneficiary information when they have a change in marital or family status.

Online Time Entry and Approval
Another significant enhancement for hourly and salaried support staff is the ability to report their time (hours worked) and vacation/leaves online.

Salaried employees will only enter exceptions to their regular working day (e.g. overtime, shift differential, vacation, illness, special leave, etc.). Hourly employees will enter **the hours they** worked during the pay period.

Faculties and units with also have the option to record vacation time taken using PeopleSoft for Administrative Professional Officers [APOs], Sessional & Other Temporary Staff [SOTS] and Librarians.

Once time has been entered and submitted by the employee, it will be available online for a supervisor to review and approve it. Supervisors will also be able to review alerts for inaccurate time entry submissions and make corrections as needed. Supervisors will have the ability to delegate their approval responsibility, should it be necessary.

Existing timesheet and leave reporting and approval processes will continue to be available to faculties and units. Departments and faculties may wish to continue with the process of having timekeepers support self-service time entry and approvals by proactively verifying and correcting timesheets before approval. Human Resource Services will work with departments and faculties to help define roles and facilitate the rollout of online time entry and approval in the next several weeks and months.

Manager Dashboard
To help our Managers and Supervisors with their daily responsibilities, we have designed the Manager Dashboard or "home page" that provides access to a variety of features. Those individuals with staff reporting to them will now have a consolidated view of information, tasks and alerts as it relates to their faculty and staff. In addition to employee information, the Dashboard will display alerts for pending approvals for time entered as well as alerts for employees terminating or returning from a leave of absence.

The Dashboard also provides additional reporting capability and quick links to commonly used areas within PeopleSoft HCM.

eForm Improvements [formerly Smart Forms]
eForms are online forms used by administrators to process employee hire, changes and termination actions. The current hire form, job change form, employee status change form and security form are being redeveloped to address known issues, enhance capabilities and align more clearly with different groups of employees within PeopleSoft. With the new eForms, administrators now have the ability to start a form and return to it later to complete and process more than one transaction for the same employee at the same time if necessary.

Human Resources
Last but not least, we made a number of changes to the system that will help those people working in human resources across campus. The changes we are introducing include more automation of processes, new and enhanced reporting capability and a new taxonomy for identifying employees. These changes will significantly improve the quality and integrity of our data and create overall efficiencies for those of us working within the human resource function. The savings realized in time and effort will enable people to focus on more value add activities and look for new ways to improve services overall.

Online Training and Learning Support
The upgrade project team is finalizing numerous new training materials and training schedules. More specific information will be published next week.

For more information about the 9.2 HCM upgrade project, please visit the project website at http://se2.ualberta.ca/PeoplesoftUpgrade.aspx or contact our team by email at PeopleSoftHCMUpgrade@ualberta.ca. We will respond as soon as possible but within 2 business days.

Sincerely,

Wayne Patterson
Executive Director and Acting Associate Vice-President (Human Resources)