

Common Management System

CMS HR (Human Resources) Implementation Project Status Update



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February 16, 2006

Agenda

- **CMS Overview**
- **Human Capital Management (HCM)**
- **HCM 8.9 Upgrade Timeline**
- **Questions**
- **HCM 8.9 Preview**
- **Questions**

CMS Overview

- **Reporting Committee**

- Susan Kachner, chair
- Wide Campus Representation
- Examine Report Delivery Needs & Methods
- Recommendation this Spring

CMS Overview

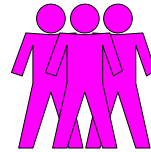
- **Forms Committee**

- Welson Badal, chair
- Wide Campus Representation
- Examine Forms Needs Delivery Methods
- Recommendation this Spring
- Implementation in

CMS Overview

- **Divisional Involvement**

- User Work Teams



- Support Groups



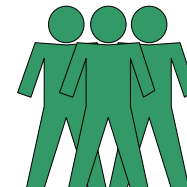
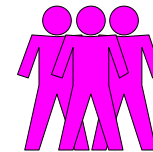
- Integration Work Teams



CMS Overview

- **Divisional Activities**

- Identify issues with existing system
- Input/Feedback from User Work Teams
- Process Map Review
- Fit/Gap Review
- Acceptance Testing
- Forms and Reports



Human Capital Management (HCM)

- In December 2006, CSUF will upgrade from CMS Human Resources 8.0 to CMS Human Capital Management 8.9

HCM 8.9 Upgrade Timeline

	JAN	FEB	MAR	APR	MAY	JUNE	JULY	AUG	SEPT	OCT	NOV	DEC
Planning	█											
Project Preparation		█										
CMS Central Activities		█										
Training & Documentation		█										█
Functional Design				█								
Document Functional Specs				█								
Technical Design				█								
Development				█								
Testing				█			█					
GO-LIVE												█

	Campus users will be involved in Design & Testing Sessions		Will impact the entire campus
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HCM 8.9 Upgrade Timeline

- **Training & Documentation**

02/06 – 12/06

From February thru November we'll develop the training plan, training curriculum, and documentation.

In November and December we'll deliver training to the campus.

HCM 8.9 Upgrade Timeline

- **Functional Design**

04/06 – 06/06

We'll hold Business Process Review and Re-design Sessions.

These design sessions will include campus users.

HCM 8.9 Upgrade Timeline

- **Testing**

04/06 – 11/06

CMS HR will deliver step by step documents to assist with testing (Test Scripts).

Issues and resolution will be documented in SharePoint.



Note: Thorough testing is extremely important during an upgrade, since there is no option to implement a pilot program.

HCM 8.9 Upgrade Timeline

- **Go-Live**

12/06

Freeze 8.0 Production database

Perform Upgrade to 8.9

Questions ???



HCM 8.9 Preview – What’s New

New Look & Feel	Breadcrumbs replaced with a Left Frame navigation
Personalization	Users can customize the CMS look and feel
Grid Sorting	Sort by any column in the grid
Grid Download	Grid Contents can be downloaded to Excel
Grid Personalization	Change default grid properties
Spell Check	Some CMS description fields have Spell Check
Notify	Some modules have built in messaging

HCM 8.9 Preview – Look & Feel

PeopleSoft®

[Home](#) > [CSUF](#) > [Inquire](#) > [Inquire](#)



+ HR Self Service

- Inquire

+ LAPP

+ Student Workers

- Inquire

[CMS CWD Search](#)

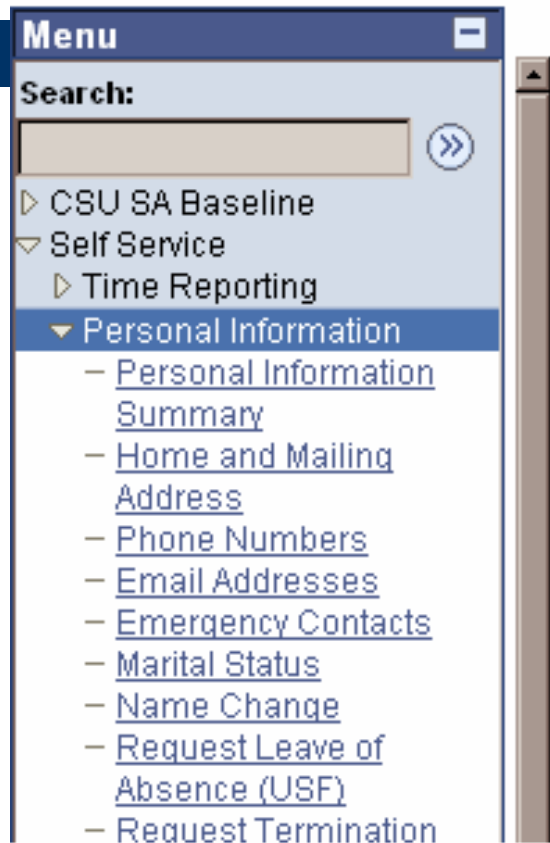
[Employee Job Roster](#)



version 8.0 Navigation - Horizontal

HCM 8.9 Preview – New Look & Feel

PeopleSoft®



version 8.9 Navigation - Vertical

HCM 8.9 Preview – New Look & Feel

[Home](#) > [CSUF](#) > [LAPP](#) > **Inquire**



+ HR Self Service

+ Inquire

- LAPP

+ Student Workers

- Inquire

+ Reports

[CSU Employee Leave Balance](#)

[CSU TL Group Leave Balance](#)

[CSUF Leave Accting Dept Roster](#)

8.0 Menu Selections

HCM 8.9 Preview – New Look & Feel

8.9 Menu Selections ->

Main Menu > [Self Service](#) >



Personal Information

Review and update your personal information.



[Personal Information Summary](#)

Review a summary of your personal information.



[Home and Mailing Address](#)

Review and update your home and mailing addresses.



[Email Addresses](#)

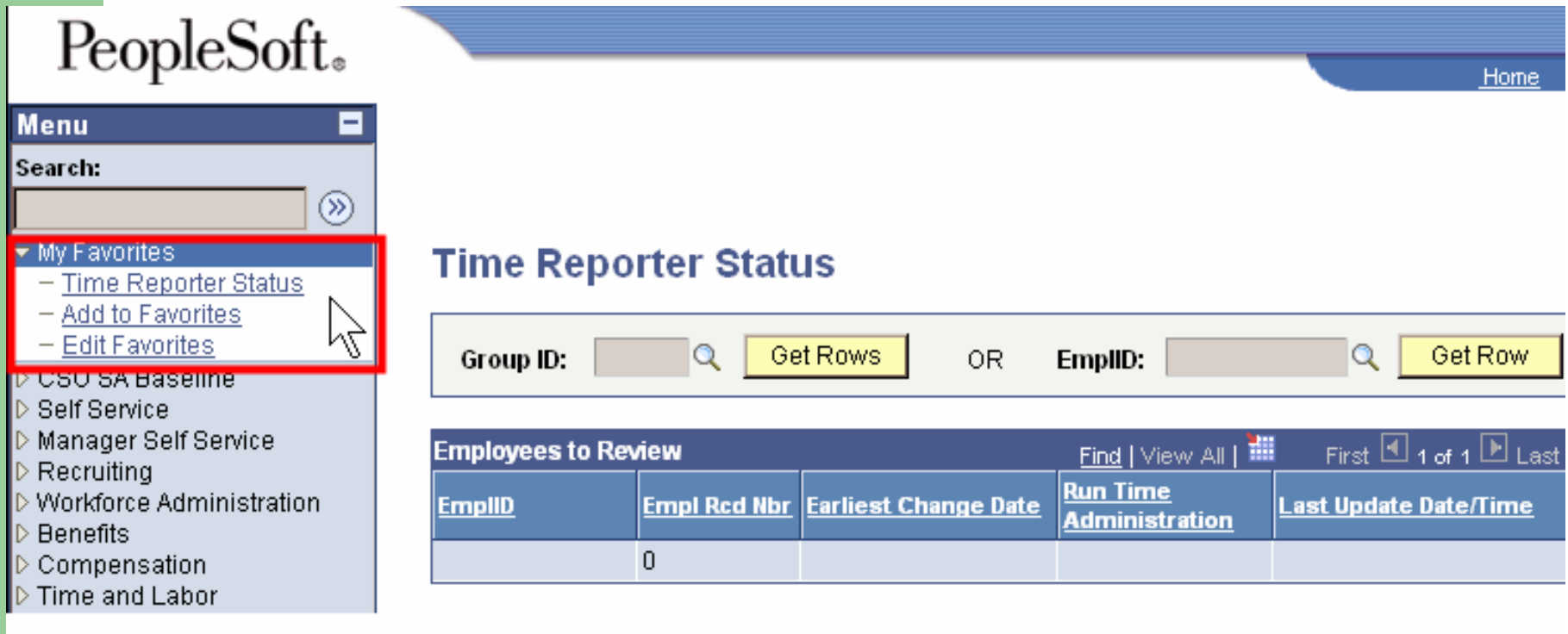
Add or update your email addresses.



[Emergency Contacts](#)

Add or update your emergency contact information.

HCM 8.9 Preview – Personalizations



The screenshot shows the PeopleSoft HCM 8.9 interface. On the left is a 'Menu' sidebar with a search field and a list of items. The 'My Favorites' section is expanded and highlighted with a red box, showing three options: 'Time Reporter Status', 'Add to Favorites', and 'Edit Favorites'. A mouse cursor is pointing at 'Add to Favorites'. Below the menu is the 'Time Reporter Status' page, which includes search fields for 'Group ID' and 'EmplID', and buttons for 'Get Rows' and 'Get Row'. Below that is an 'Employees to Review' table with columns for 'EmplID', 'Empl Rcd Nbr', 'Earliest Change Date', 'Run Time Administration', and 'Last Update Date/Time'. The table shows one row with '0' in the 'Empl Rcd Nbr' column. The page also has a 'Home' link in the top right corner.

Supports Favorites that are saved in the Application for each user. This means wherever you login to CMS, you'll have access to your favorites.

HCM 8.9 Preview – Personalizations

Option Category: General Options

Personalizations			Find	First	1-5 of 5	Last
Personalization Option	Default Value	Override Value				
Accessibility Features	Accessibility features off	<input type="text" value="Accessibility features off"/>	Explain			
Excel 97 grid download	N	<input type="text"/>	Explain			
Time page held in cache	900	<input type="text"/>	Explain			
Multi Language Entry	No	<input type="text"/>	Explain			
Spell Check Dictionary	Use session language	<input type="text"/>	Explain			

Restore Category Defaults

OK

Cancel

HCM 8.9 Preview – Personalizations

- **Accessibility Options**

- Use accessible mode layout - This option is for use with screen readers. Page design is altered to allow for screen readers.
- Use standard mode layout - This option supports assistive technologies without altering the page design.

HCM 8.9 Preview – Enhanced Grid Properties

[Home](#) > [CSUF](#) > [HR Self Service](#) > [Employee](#) > **My Leave Balance**

Employee Attendance History - Last 12 Months

Titan, Tuffy

Personal Holiday: Available

State Service (in Months): 234

Last Posted: 02/01/2006

Attendance History View All First 1 of 1 Last

Department: Parking and Transportation

Job: Admin Support Coord 12 Mo

Sick Leave History

Last Processed Date	Hrs Carried Over	Hrs Earned	Hrs Taken	Cat Hrs Donated	Cat Hrs Received	Hrs Adjusted	Sick Balance
02/01/2006	957.000	8.000	0.000	0.000	0.000	0.000	965.000
01/01/2006	957.000	0.000	0.000	0.000	0.000	0.000	957.000
12/31/2005	949.000	8.000	0.000	0.000	0.000	0.000	957.000
12/01/2005	945.000	8.000	4.000	0.000	0.000	0.000	949.000
11/01/2005	0.000	0.000	0.000	0.000	0.000	0.000	945.000

8.0
Grid

HCM 8.9 Preview – Sort Grid

Report Time

Select Employee

Employee Selection Criteria

Get Employees

Select hyperlink to sort

Employees For Chris P Bacon						Customize Find View All	First	1-8
Name	Employee ID	Empl Rcd Nbr	Job Code	Department ID	Department Description	Workgroup	Position Number	Global Paygr
Bill Melater	0037	0	1870	TEST2	Test 2			
Dan D Lyon	0030	0	2360	TEST3	Test 3			
Ima Newhire	0027	0	3306	TEST1	Test 1			
Joe Smith	0034	0	2360	TEST1	Test 1			
Misty C Shore	0029	0	3306	TEST3	Test 3			
Rhyce Saroni	0038	0	1870	TEST3	Test 3			
Rusty Nickels	0033	0	1870	TEST1	Test 1			
Sharon Sharalike	0036	0	2360	TEST2	Test 2			

Go To: [Manager Self Service](#)
Time Management

HCM 8.9 Preview – Customize Grid

Assign Work Schedule

Deputy Dawg




EmplID: 0048

Job Title: Specialist-HRIS


Empl Rcd Nbr: 0



[Click for Instructions](#)

Assign Schedules

Customize Find | View All |  First  1 of 1  Last

Primary Details

Alternate Details 

*Effective Date	*Assignment Method	Schedule Group	Schedule ID	Description		
	Use Default Schedule					

▶ [View history of Schedule Assignments, including default changes](#)

 Save  Return to Search  Previous in List  Next in List  Refresh  Update/Display  Include History  Correct History





HCM 8.9 Preview – Customize Grid

Assign Schedules

Personalize Column and Sort Order

To order columns or add fields to sort order, highlight column name, then press the appropriate button.
Frozen columns display under every tab.

Column Order

Tab Primary Details (frozen)	  
*Effective Date (frozen)	
*Assignment Method	
Schedule Group	
Schedule ID	<input type="checkbox"/> Hidden
Description	<input type="checkbox"/> Frozen
Tab Alternate Details	
*Assignment Method	
Alt Schedule Group	
Alternate Schedule ID	
Description	

Sort Order

	  
	<input type="checkbox"/> Descending

OK

Cancel

Preview

[Copy Settings](#)

HCM 8.9 Preview – Download Grid to Excel

Report Time

Select Employee

Employee Selection Criteria

Get Employees

Employees For Chris P Bacon

Customize | Find | View All |  First 1-8 of 9 Last

Name	Employee ID	Empl Rcd Nbr	Job Code	Department ID	Department Description	Workgroup	Position Number	Global Payroll Paygroup
Bill Melater	0037	0	1870	TEST2	Test 2			
Dan D Lyon	0030	0	2360	TEST3	Test 3			
Ima Newhire	0027	0	3306	TEST1	Test 1			
Joe Smith	0034	0	2360	TEST1	Test 1			
Misty C Shore	0029	0	3306	TEST3	Test 3			
Rhyce Saroni	0038	0	1870	TEST3	Test 3			
Rusty Nickels	0033	0	1870	TEST1	Test 1			
Sharon Sharalike	0036	0	2360	TEST2	Test 2			

Go To: [Manager Self Service](#)
[Time Management](#)

HCM 8.9 Preview – Download Grid to Excel

http://cmsdev-hcm.calstate.edu:8451/hcmsfg1/psft/V-1643473415/ps.xls - Microsoft Internet Explorer

File Edit View Insert Format Tools Data Go To Favorites Help

← Back → Search Favorites Media

Address http://cmsdev-hcm.calstate.edu:8451/hcmsfg1/psft/V-1643473415/ps.xls

A1 = Name

	A	B	C	D	E	F	G	H	I
1	Name	Employee ID	Empl Rcd Nbr	Job Code	Department ID	Department Description	Workgroup	P	amb
2	Bill Melater	0037	0	1870	TEST2	Test 2			
3	Dan D Lyon	0030	0	2360	TEST3	Test 3			
4	Ima Newhire	0027	0	3306	TEST1	Test 1			
5	Joe Smith	0034	0	2360	TEST1	Test 1			
6	Misty C Shore	0029	0	3306	TEST3	Test 3			
7	Rhyce Saroni	0038	0	1870	TEST3	Test 3			
8	Rusty Nickels	0033	0	1870	TEST1	Test 1			
9	Sharon Sharalike	0036	0	2360	TEST2	Test 2			
10	Starr E Sky	0032	0	3306	TEST1	Test 1			
11									
12									
13									
14									
15									
16									
17									
18									

ps /

Unknown Zone

HCM 8.9 Preview – Spell Check

[Home](#) | [Worklist](#) | [Performance Trace](#) | [Add to Favorites](#) | [Sign out](#)

[New Window](#) | [Help](#) | [Customize Page](#) | 

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

SetID: CSUID

Job Code: 1038

[Business Units that use this Setid](#)

Job Code Profile

Find | View All | First 1 of 1 Last

*Effective Date:

01/01/1901

*Status:

Active

*Job Title:

Admin Analyst/Spclst 12 Mo

Short Job Title:

AA/S 12

Job Description:

Administrative Analyst/Specialist 12 month

Job Function Code:

STF

Staff

Job Profile ID:

Job Family:

*Manager Level:

Mid Mgr

*Standard Hours:

40.00

Standard Work Period:

W

Weekly

Workers' Comp Code:

*Comp Freq:

M

Monthly

Regular/Temporary:

Regular

Medical Checkup Required

Union Code:

R09

Cal State Empl Assn - Tech

 USA

HCM 8.9 Preview – Spell Check



Spell Check Note:




Spell Check can be setup to be user customizable.

We'll determine which fields to use spell check on during our process re-design sessions.

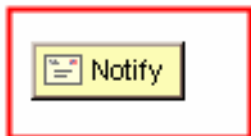
HCM 8.9 Preview – Notify

Time Reporter Status

Group ID:  OR EmpID: 

Employees to Review Find | View All |  First  1 of 1  Last

<u>EmpID</u>	<u>Empl Rcd Nbr</u>	<u>Earliest Change Date</u>	<u>Run Time Administration</u>	<u>Last Update Date/Time</u>
	0			



HCM 8.9 Preview – Notify

Send Notification

Type names or email addresses in the To, CC, or BCC fields, using a semi-colon as a separator.

Click LOOKUP RECIPIENT to search for a name. Click DELIVERY OPTIONS to view or change the method of the send.

Notification Details	
To:	<input type="text"/>
CC:	<input type="text"/>
BCC:	<input type="text"/>
Priority:	<input type="text"/>
Subject:	<input type="text" value="<Enter Subject here>"/>
Template Text:	Workflow Notification Priority: %NotificationPriority Date Sent: 2008-02-12
Message:	<input type="text"/>

[Lookup Recipient](#)

[Delivery Options](#)

Click OK to send this notification and exit this page. Click Cancel to exit this page without sending a notification.

Click Apply to send this notification and remain on this page.

OK

Cancel

Apply

Questions ???

