What’s New with the Upgraded eUMB HRMS?

PLEASE BE SURE THAT YOU SIGN IN. IF YOUR NAME IS NOT ON THE SHEET THEN JUST ADD IT AT THE BOTTOM.

1. Intro me
2. Intro SMEs in the room with me
3. The session: Mainly an information session
   A. May be enough training for experienced users
   B. If not, see the UPKs (online tutorials)
   C. If you really want to, you can attend a New Users class
4. Two handouts:
   A. ePAF Roles Setup Worksheet (double-sided)
      • ePAF roles descriptions
      • Guidelines for assigning ePAF roles, &
      • Worksheet for assigning roles
   B. Key Points (Your “Notes”)

Also, we will be posting this PowerPoint presentation online where you can access it if you like. And because sometimes a PowerPoint without the presenter’s comments isn’t very helpful, one of the handouts that we have for you today is a set of notes covering the important points of what I plan to say. In other words, I have taken your notes for you in advance, so all you have to do here now is watch and listen, and ask any questions that you may have.
Here are the five topics that I will present to you today, some with a lot more detail than others. **5 BULLETS**

It’s a lot of information, but I have organized it logically in sections, and I will try to make sure that you know where we are in this agenda as I go along.

I will pause for questions after each major section of this presentation, and there should be time left over for more questions at the end. I promise to leave lots of time for Q and A. Okay? Let’s begin.

**What’s New...**

- Major upgrades of software and hardware
- *Community System* will handle Affiliates
- Changes/enhancements to HRMS, DPP, CA
- Electronic Personnel Action Forms (ePAF)
- Training on everything, in a choice of formats
MAJOR Upgrades of SW and HW

• 11-year-old HR system was due for a change!
• Oracle PS HRMS v.8.3 → HCM v. 9.1
• LOTS of technical changes behind the scenes
• Some changes in HRMS, DPP, CA...
  plus Community System recently added,
  and ePAF to be phased in over a five-month period

5+ Bullets – 6 Clicks.
What’s New...

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- Changes/enhancements to HRMS, DPP, CA
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- Training on everything, in a choice of formats

Topic #1 – covered. That was painless, right?

[ANY QUESTIONS SO FAR?]

They will not all be this quick!
**Community System Will Handle Affiliates**

- New Affiliates input into the **Community System**
- Current Affiliates converted into it
- If they need access to a UM system they must *also* establish an application identity
- Only Affiliates who have a role in an enterprise system will be included in eUM HRMS
- Affiliates’ personal information now maintained in the CS, not via the myUM portal

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**5 BULLETS**

How many of you are familiar with the term “Affiliates”?  
**Just to be sure that we are all on the same page...**  
Affiliates are **Non-employees** of the University (not on our payroll), who need access to University buildings, systems, etc.  
E.G., Contractors, consultants, employees of FPI (Faculty Physicians Inc.), etc.  
- There are designated **Sponsors, Approvers** and **Editors**.  
- Information, FAQs, and online Tutorials about the Affiliate System all at the Community System website:  
**IT Help Desk>Help with Systems>Community System.**  See also the Link provided on the Key Points handout.
And that’s Topic #2.  [ANY QUESTIONS ON THE COMMUNITY SYSTEM?]

Moving right along, we get into the longest topic—Changes to the HRMS itself.
There are FOUR Major areas we will talk about here...
1),  2), 3) + 4) and 5)

+6) And the completely revised Action/Action Reason Codes which are at the heart of the new ePAF system—
Electronic Personnel Action Forms -- which we will discuss in depth later on in this presentation
Changes to HRMS – Terminology

<table>
<thead>
<tr>
<th>New Term</th>
<th>Replaces</th>
</tr>
</thead>
<tbody>
<tr>
<td>HCM (Human Capital Mgmt)</td>
<td>HRMS</td>
</tr>
<tr>
<td>Person ID</td>
<td>Affiliate ID</td>
</tr>
<tr>
<td>Workforce Administration</td>
<td>Administer Workforce</td>
</tr>
<tr>
<td>Personal Information</td>
<td>Personal Data</td>
</tr>
<tr>
<td>Combo (Combination) Codes</td>
<td>Account Codes</td>
</tr>
<tr>
<td>Electronic Personnel Action Forms</td>
<td>EA Form</td>
</tr>
</tbody>
</table>
Changes to HRMS – Personalizations

• Personalize Content – Pagelets on Home page
• Personalize Layout – Columns on Home page
• My Reports – Convenient access on Home page
• My Dictionary – Add terms to “Spellcheck”
• My Personalizations – Navigation Preferences

5 BULLETS –

5 areas in which you can personalize how the HRMS looks to you or how you work with it
Here’s what the new Main Menu or Home Page looks like. The overall look is different from what you are used to. And this happens to be a screenshot of my Home Page, on the Test system where I have access to a lot of functions, so the sidebar menu here is probably much longer than yours will be.

**4 BULLETS**

Of course (1) the logo and the rest of the header are different. And there are a number of new additions, such as (2) the Favorites and (3) drop-down Main Menu options, (4) and the new Search function—all things that I’m going to talk about.
What I’d like to show you first are some of the **Personalization options** you get with the new upgrade—such as **(1)** the **Content** of what you see here on your home screen, **(2)** the **Layout** of that content, **(3)** My Dictionary, and **(4)** some personalizations having to do with **Navigation** preferences....

If I click on **(5)** Personalize **Content**...
3 CLICKS

...A window like this pops up. Notice that you have no choice as to whether the (1) Side Menu is displayed (that choice is grayed out), but the boxes for (2) Top Menu Features Description and (3) My Reports are checked. My understanding is that this is how the Home page will be set up when you first see the upgraded version of HRMS. But in any case you will be able to come to this screen and either check or un-check either of these options to suit your personal preferences.
Here is what the Home page looks like with both of these boxes—known as **Pagelets**—displaying.
Clicking on the **Personalize - Layout (1)** link ...
...Displays a window like *this*, which lets you choose which items appear in the **Left Column** vs. the **Right Column** – or if you happen to want your page laid out in **three** columns.
To talk about the **My Reports** personalization I have to come back to this view of the Home page. If you do work in HRMS you probably run reports, and now your reports will be quicker and easier to get to.

The **My Reports** Pagelet you see here is linked with the **1) Report Manager** function in HRMS. In the course of your work, as you run reports, name them and save them, they will also display here. Unless of course you have chosen not to display this pagelet at all. Here is a quick example...
Let’s say that you’ve navigated to the UMB Emergency Contact page and you want to run the Emergency Contacts Report. I’m not going to walk through all the steps of running a report here today. That has not changed, and you can learn that in training, if you don’t already know how.
So let’s say that you run the report as you are accustomed to doing....
Now when you are back on your home page you will be able to see a record of that report, and access it directly, from the My Reports pagelet. *(Let me give you a closer look at that...)*

If you do not see it immediately, try clicking the **Refresh** button, which is the first of these four little icons here in the corner. **Personalize** allows you to change some details of what is displayed; **Minimize** collapses the My Reports pagelet, and **Remove** deletes it from your Home Page.
The **My Dictionary** personalization works very similarly to the “Add to Dictionary” function in the MS Word Spell-Checker. If you have occasion to write a comment somewhere in this system, and the built-in spellchecker does not recognize a word that you have used—for example a proper name or a technical term-- you have the option to add it to your dictionary so the system will recognize it the next time you write it.

Selecting “My Dictionary” from the menu...
... brings you to this page, where you would add the term that you want the HRMS “spell-checker” to recognize. You get to specify *1) the language you are working in, *2) as well as the word itself. And once you *3) click the SAVE button it is added to your personal dictionary. *4) There is even a convenient NOTIFY function if you want to email anybody about the fact that this term has been added.

You should note that the words that you enter in your personal dictionary are attached to your user ID, so your personal dictionary is available to you no matter where you log in. Also: Entries must be 40 characters or less, and this dictionary case sensitive. For example, in the case of a term as eUMB, or a word with an embedded capital letter, such as PeopleSoft, only an exact match is valid.
Lastly, clicking on the *My Personalizations* link on the sidebar menu...
...Brings you to this Personalizations screen. Here you can choose, as the screen says, to **Click 1) [MAGNIFY]**

“**Personalize (your) Navigation Personalizations.**”
2) [Arrow] Selecting **Personalize Navigation Personalizations** displays ...

(For any Monty Python fans in the audience, this screen is brought to you by the department of Redundancy Department.)
...this screen where you have a number of options. The one that I think is of greatest interest is the *1) Autocomplete. I have been told that some of you like it when the system makes suggestions to you of where it thinks you are going when you type the first few letters or numbers of your entry into a field--and some people just find this annoying. This is the place where you can turn this function on or off. By default it is set in the “Yes,” or “do make suggestions” mode.
If you click the drop-down arrow here *1)…and select the “No” option *2), then the system will stop trying to complete your entries for you. Of course on any of these screens where you enter a personalization you need to click **OK *3)** or Save, or whatever button means “keep it like this until I choose otherwise.”
The other Personalizations options on this page work just the same way. Let’s take a closer look  **[1) to Enlarge]**

2) **Drop-down Menu Sort Order** – changes the order of the items displayed in the Drop-down menus between Ascending (alphabetical) and the reverse. I’m sure that you are familiar with Drop-down menus in general; I’ll show you how they look in HRMS in just a moment.

3) The **Tab over Lookup Button** can make it faster to enter data on a screen that has many data entry fields, by hopping your cursor **directly** from field to field when you press **Tab**, instead of pausing in between on the little lookup button icons.

4) **Remember that you may have to log out and log back in again for any of these navigation personalization changes to take effect.**

And of course you always have the option to UN-do **all** your personalizations by clicking the **[4) Restore Category Defaults]** button.
In addition to these navigation personalizations, you also have your choice of several ways to navigate from one page to another to get to the one where you need to do your work. Here are the Navigation Options that I want to briefly show you today.

4 BULLETS
Here is a picture of the Home page for system user Jonathan Black. This menu is showing fewer choices than the one that I showed you a little while ago, and Jonathan has chosen to display the **My Reports** pagelet, only, in the left column. You will find that some screen names have changed with the HRMS upgrade, and quite a few screens are now in different locations than they used to be. But none of this will be a problem for you, because of what I am about to show you...
Okay. If somebody sitting beside you is sleeping you’ll want to wake them up now, because here comes some really good stuff! Easily one of the best features that has been added to HRMS is a Menu *1) Search box! Now you no longer need to know a navigation path in order to locate a page that you need. You simply begin at the Menu Search field by entering words that are related to the name of a page you need to work on.
In this case I’ve entered "employee funding profile."

Then click the **1) "Start your search"** button.
Sometimes your search results may contain more than one option. If this is the case, simply select the page that you need. In this case we’ll click on the link for *UMB Employee Funding Profile.*
Now after locating the page you need, you can save it as an eUM HRMS Favorite for quicker navigation next time! To do this, Click the *1) Favorites* drop-down.
Then select **Add to Favorites** *.
And just as if you were creating a favorite for a Web page, you can change the Description for this link if prefer something other than what the system offers, which will be the Oracle screen name. Then click the **OK** button *
Your HRMS Favorites are saved with your login, not on the computer where you happen to be working, so they are available to you each time you login - from any device, any location!

You might want to consider spending a little time on Monday, March 17th, searching for frequently accessed pages and then saving those pages as eUM HRMS Favorites for easy access later on.

Click the OK button *
When you want to access a page that you have saved as a Favorite, simply click *1) Favorites on the drop-down menus and then click the appropriate description under *2) My Favorites.

3)* Recently accessed screens and * Recent Search Results - also shown on the Favorites dropdown – are two other ways to do quick navigation.
Or you can navigate the old-fashioned way, by using menus. If you prefer to navigate using menus, you have **two options:**

1) **Drop-down menus or the**
2) **Sidebar menu,**

We’ll start with the **Sidebar Menu.** Although the Sidebar Menu in the updated HRMS looks a bit different than the menu in HRMS 8.3, the **way** that it works should be pretty familiar to you.
Navigation by **Sidebar Menu** requires that you know the path to the page you need. For demonstration purposes let’s say that we want to navigate to the **UMB Employee Funding Profile**. In order to get there from the Sidebar Menu I need to know that I start by selecting the **Set Up HRMS** link.

* 1) Clicking on the small triangle to the left of any menu item
* 2) expands the next level menu.
Then we must continue expanding the **Sidebar Menu** levels until we reach the desired page.

In this case, next we click the **Product Related** button.
Then we click the **Commitment Accounting** button.
...and the **Budget Information** button.
From this point we see no more menu item buttons - only links to actual pages.

So for this example, we select the link for the **UMB Employee Funding Profile page *1)**
And here we are.

1)* Click the **Home** link at any time to return to the Home Page.
This time we will navigate using the Drop-Down menus, once again going to the UMB Employee Funding Profile. Navigating by either the side or the top (Drop-down) Menu requires that you know the path to the page you need.

In this case we will start with the drop-down menus and then use the “breadcrumbs” for a related navigation. We’ll start by clicking the *Main Menu* button in the page header.
Click the *Set Up HRMS* menu.
Then the *Product Related* menu.
Then the *Commitment Accounting* menu.

...Just a comment here: that again this might look very different to you from what you are accustomed to seeing, but I think you can easily grasp the logic of it.
Click the *Budget Information* menu.
...then * UMB Employee Funding Profile...
And again, here we are at the eUMB Employee Funding Profile.

Now let’s say that we want to go next to UMB Workflow Status, a different destination that shares most of the same navigation path. We can do that by simply clicking the appropriate breadcrumb and then following the path to the new destination.

Here we select * 1) Budget Information...
Then the **UMB EFP Workflow Status** menu.
And that’s it. The Breadcrumbs provide a way to navigate to another related page without having to re-do a long navigation path.
5 BULLETS: Another big change that’s coming with the new upgrade of HRMS is the totally revamped list of Action/Action Reason codes. The ones that are used presently with the Employee Action forms have not been revisited since 2003. The process of editing and categorizing the existing codes to align with current business processes was as much of an effort as the creation of the ePAF functionality itself. New codes and forms will be available starting the week of March 10, 2014, and must be used starting March 17, 2014. (Old codes will be inactivated as of March 16th!)
Changes to Dept. Payroll Processing

Payroll Reps no longer able to adjust leave on the **Weekly Elapsed Time (WET)** page

- Employee can change timesheet -- back four pay periods
- Payroll Rep can request a change -- submit Payroll Adjustment Form to Payroll Dept.

1) The only change to Department Payroll Processing right now is that the so-called “WET” page is going away.  
2) An employee will still be able to change his or her timesheet, going back about two months.  
3) For additional changes the Payroll Rep will need to submit a Payroll Adjustment Form to the Payroll Department.

Admittedly, this is NOT a technological advancement. This is being done at this time to correct a flaw we have observed in our UMB business processes before the auditors tell us to.

Accrued leave represents BIG DOLLARS; there needed to be more documentation and accountability than we had.
And in the area of **Commitment Accounting**: The HRMS upgrade simplifies some of the “Housekeeping” duties for those of you who manage **Employee Funding Profiles**: *First*, currently in order to have multi-year salary encumbrances you have to manage **two** (current Fiscal Year plus next FY) **EFPs**, this will become only **one**. And *secondly*, one EFP now recognizes a **Funding End Date** up to five years in the future.
Changes to Commitment Accounting

- In HCM 9.1 Account Codes have a new name: *Combination Codes* (a.k.a. “Combo Codes”).
- The function remains the same; only the name is changing.

I mentioned this earlier, but I wanted to remind you at this point, just to put it in context.

2 clicks
Changes to Commitment Accounting

Heads-Up:

- All FY 2015 Employee Funding Profiles in the system at Go-Live will be REMOVED
- Departments need to update/modify the respective FY 2014 EFPs to the appropriate funding end dates
- More info in forthcoming communications to Payroll Reps

1.) The logic behind this bullet is that Because in v. 9.1 you only have to manage **one** FY EFP, not multiple fiscal years, all future FYs will be removed

2.) (The FY 2014 EFP funding end date should be reviewed to make sure it reflects the correct funding end date – presumably the one that was on the removed 2015 EFP)

3.) More info forthcoming... At a Future PR Rep meeting etc. This is just a heads-up for those who manage EFPs, and it’s a one-time task)
Okay, that was a long one, but I hope that it was of interest to you.

[Now I suspect that there are some questions...] 

Next comes a shorter topic, but a very important one—ePAF.
Electronic Personnel Action Forms (ePAF)

- What is ePAF and what are the benefits?
- Similarities to Travel eForms
- Action/Action Reason Codes
- Phased Implementation
- Critical importance of departmental roles

5 BULLETS

Now we come to a whole new feature, that is not really part of the HRMS software Upgrade, but more of an add-on. You will mostly hear it referred to as “ePAF,” which stands for Electronic Personnel Action Forms. I will go over the 1) What and the Why 2), 3) How it works, 4) When to expect it, and 5) What departments need to do to get ready for it.
Electronic Personnel Action Forms (ePAF)

- What is ePAF and what are the benefits?
  - ePAF w/workflow replaces EA form + sneakernet
  - Like EA form, it handles Hires/Rehires, Job Changes and Job Status Changes
  - Unlike EA form, data loads directly into eUM HRMS
  - Approval process can be tracked online; you can see who has the form, how long it has been there

4 SUB-BULLETS

- * Electronic Forms, or eForms, are the modern replacement for paper forms that have to be hand-carried from office to office and hand-signed by various levels of Approver. ePAF replaces the Employee Action, or “EA” Form, in just the same way that Travel eForms replaced the paper forms we used to use on campus for travel approval and reimbursement.
- * ePAF will accomplish just what the EA form process used to do, but more efficiently.
- * **For one thing, it eliminates the delay and potential source of errors of having someone re-key information from a paper form into the system.**
- * And if there are delays, or bottlenecks, in getting a form through the approval process, they will be transparent.
Electronic Personnel Action Forms (ePAF)

- Similarities to Travel eForms (2011)
  - Completed online
  - Routed electronically for approval
  - Approved online based on Approver’s credentials
  - Stored online and available by search

Electronic Personnel Action Forms are the second “eForm” to be implemented on campus. Travel eForms were implemented in 2011. ePAF was actually created using the same software toolset. And there will be more paper forms replaced with electronic versions as time goes by.
This graphic depicts the workflow of a Personnel Action in a typical academic department.

[4 Clicks]

- When an Initiator submits an ePAF, email notifications are sent to those who hold Approver roles.
- Some departments require a third-level Approver (Dean’s Office level—or Dean or VP-Assigned).
- Action/Action Reasons determine the approval path through HRS.

[CLICK]...then [CLICK]

- Recycled forms ALWAYS go back to the form Initiator.
- Also, the Initiator--ONLY--can pull a form back at any point. And then the cycle starts over.
Electronic Personnel Action Forms (ePAF)

• Action/Action Reason Codes
  – Action/Action Reason Codes are the foundation of the ePAF system
  – They were substantially revised and enhanced from those used with the paper EA Form
  – New Action/Action Reason Codes will be available on the HR website starting 03/10/14
  – You must start using the updated paper forms, available from the Website

[4 SUB-BULLETS]
The paper forms will guide you through the choice of Action and appropriate Action Reason.

The system goes live on 03/17/14, but you can start using the codes and forms 03/10/14 because the system will be down 03/11–03/16. So the HR Service Center will not be processing any of them until 03/17/14
Electronic Personnel Action Forms (ePAF)

- Phased Implementation
  - Pilot Group rollout starting in May
  - Campus-wide training offered starting in May
  - Full Campus rollout: June/August
  - Paper and ePAF accepted through August 31st
  - No paper forms accepted as of September 1st

[5 SUB-BULLETS]
Electronic Personnel Action Forms (ePAF)

- Critical Importance of Departmental Roles
  - Labor is 75-85% of budget for most departments!
  - ePAF roles carry great responsibility
  - Now is the time to plan Departmental ePAF roles
  - See handout (double-sided):

**ePAF Roles Setup Worksheet** for ePAF Roles
- Descriptions plus Guidelines and a Worksheet for assigning roles

[4 SUB-BULLETS – Plus 2 more clicks]
This is a facsimile of the ePAF Roles Setup Worksheet, one of the handouts that we have for you today.

- The paper worksheet is two-sided and has a lot of explanation on it to help you determine who in your department should fill what roles.
- I emphasize that this is a worksheet, only, to help your department plan its approach to this important process. The worksheet handout includes information about obtaining the actual eForms Access Request Forms which you will submit to the IT Help Desk.
- Many departments will not have three levels of approval. But if you want to add an additional level of backup for the approval levels that you do have, you are welcome to do that.
- You should name at least one backup for each role, and a single individual cannot hold all four roles.
- Individuals may hold more than one role if necessary, but be very careful about assigning multiple roles, because one click takes action on all roles that an individual holds.
- The ePAF Roles Setup Worksheet does an excellent job of explaining the Guidelines for assigning roles and giving examples what can go wrong if you are not careful about multiple role assignments.
- Your goal is to ensure a clear separation of duties—and protect the integrity of your employee action process--by inserting as many people as possible into the ePAF Initiate/Approval process.
What’s New...

- Major upgrades of software and hardware
- Community System will handle Affiliates
- Changes/enhancements to HRMS, DPP, CA
- Electronic Personnel Action Forms (ePAF)
- Training on everything, in a choice of formats

This was another meaty topic, so there are probably some questions...

Okay; 4 topics down, one to go. Coming down the home stretch. Let’s talk training...
5 BULLETS:

I want to tell you about What training is being offered, When and Where;
How do you get to it, and
Who should attend;
Training

• **What** training is being offered?
  o What’s New with the Upgraded eUMB HRMS?
  o Introduction to eUMB HRMS (Revised)
  o Departmental Payroll Processing (Revised)
  o Commitment Accounting (Upgrade training + new reporting section + revised course for new users)
  o Working with ePAF

5 BULLETS: List of the 5 courses (including this presentation)
Training

• **When?**
  - What’s New with eUMB HRMS – Feb. thru March
  - Introduction to eUMB HRMS – Starting March
  - Departmental Payroll Processing – Starting March
  - Commitment Accounting – Starting March
  - Working with ePAF – Starting May

**5 BULLETS**: List of the 5 courses and the dates they will be offered
Training

• Where?
  o As always:
    o Classrooms in Lexington Bldg., 4th floor
    o Online

• How?
  o Enterprise Systems Training Enrollment Database
  o myUM Portal – UMB Systems Tutorials Browser

Enterprise Systems Training Enrollment Database:
https://cf.umaryland.edu/cits_training/index.cfm
SEE THE HANDOUT

THESE LINKS
Tutorials (UPKs):
http://cf.umaryland.edu/ondemandtraining/enterprise/PlayerPackage/data/toc.html
Training

• **Who** should attend?
  o It’s up to you...but
  o Training for *new users* is still required
  o ePAF training is *strongly recommended*
  o Look for additional training communications

⚠ Be sure you take today’s handouts:
  • *ePAF Roles Setup Worksheet* (double-sided)
  • *Key Points* of today’s presentation

5 BULLETS -- 4 plus A REMINDER about the handouts

Handouts:
  • *ePAF Roles Setup Worksheet* (double-sided)
    • ePAF roles descriptions
    • Guidelines for assigning ePAF roles, &
    • Worksheet for assigning roles
  • Key Points (Your “Notes”)

Look for additional training communications:
  * ePAF training for those with Dept. roles
What Happens Next?

- This “What’s New...” presentation will be given multiple times, from Feb. 11 thru Mid-March
- HRMS *shutdown* for the upgrade: March 12-16
- Go-Live of upgraded HRMS: March 17, 2014
- ePAF Pilot: May 2014
- ePAF Go-Live: June 2014
Questions?