

SUBJECT: GeorgiaFIRST HRMS Project Release 3.21

PURPOSE: Release of PeopleSoft Self-Service functionalities (see details below).

TECHNICAL IMPACT:

DATABASE: Your PeopleSoft HRMS database has been upgraded with BOR Release 3.21, and is available. You can verify your release level by navigating to any page, hitting [CTRL][J], and verifying the last three digits of the Application Release field. Please note: during the release process, all server-side cache files are deleted; this may cause performance issues during initial page loads.

WORKSTATION: As with any release, we recommend clearing your internet browser cache files before logging in to your database.

SECURITY: Security modifications are a part of this release. See details below.

Self-Service Functionalities

EMPLOYEE Portal:

(Note: This is the PeopleSoft HRMS application where functional users like HR, Benefits, Payroll, and Budget perform business tasks such as running payroll or hiring a new employee, etc.)

Self Service Transactions – This new menu will display if a user is assigned the Personnel Administrator role and is responsible for monitoring and administering Name Change and Marital Status Change requests. This new menu is located at Workforce Administration -> Self Service Transactions.

Worklist – This new menu will display if a user is assigned either the Personnel Administrator or Payroll Administrator role. These two roles allow functional user to monitor and administer worklist items such as Name Change, Marital Status Change, or W-2 Reissue Request.

Worklist Reports – 10 worklist reports are delivered to assist worklist administrator to monitor ALL the worklist items generated or worked on. User who has either the Personnel Administrator or Payroll Administrator role will have access to the reports. The reports are located at PeopleTools -> Workflow -> Worklist Reports.

SELF-SERVICE Portal:

(Note: This is the PeopleSoft HRMS application where all users (both employees and functional users) perform self-service tasks such as reviewing/modifying their personal information or reviewing paycheck, etc. **Currently only the pilot institutions have access to this part of the application.**)

eBenefits - moves beyond paperless self-service transactions to provide employees the information they need to maximize the value of their benefits plan.

- Benefits Summary
- Health Care Summary
- Insurance Summary
- Dependent Personal Information
- Flexible Spending Accounts
- Dependent Coverage Summary

ePay – is a collaborative application that gives employees immediate access to their personal payroll data.

- Review paycheck data online
- Add, change or discontinue direct deposit
- View, add, change, or stop voluntary deductions

- Request duplicate W-2 forms
- Change federal tax withholding information

eProfile – is a collaborative application that enables employees to maintain their personal profile information by giving them the ability to view, and in some cases update their personal profile information. Items that may be view/maintained via eProfile self-service include:

- Emergency contacts
- Home and mailing addresses.
- Marital status change
- Name change
- Personal information
- Phone numbers

Security Fixes and Enhancements

Modifications to Model Security:

Permission List:

BORDP99 (Data Permission List SS) – This new permission list is assigned to the self-service users only as the Row Security permission list in the user profile. This data permission list provides no specific access to self-service users. This is used as a placeholder. Functional users, however, should NOT be assigned such permission list. For more information on this new permission list and the changes to the security model, please refer to business processes SEC 105 – HRMS Security Overview and SEC 110 – Maintaining HRMS User Profiles.

BORHSS20 (User Self Service) – This new permission list is assigned to the existing BOR PeopleSoft User role to provide all users with access to the Self-Service functionalities in the Self-Service portal. For more information on this new permission list and the changes to the security model, please refer to business processes SEC 105 – HRMS Security Overview and SEC 110 – Maintaining HRMS User Profiles.

BORPP99 (Primary Permission List SS) – This new permission list is assigned to the self-service users only as the Primary permission list in the user profile. This primary permission list provides no specific access to self-service users. This is used as a placeholder. Functional users, however, should NOT be assigned such permission list. For more information on this new permission list and the changes to the security model, please refer to business processes SEC 105 – HRMS Security Overview and SEC 110 – Maintaining HRMS User Profiles.

BORPRC99 (Process Permissions SS) – This new permission list is assigned to the self-service users only as the Process Profile permission list in the user profile. This process profile permission list provides no specific access to self-service users. This is used as a placeholder. Functional users, however, should NOT be assigned such permission list. For more information on this new permission list and the changes to the security model, please refer to business processes SEC 105 – HRMS Security Overview and SEC 110 – Maintaining HRMS User Profiles.

BORWFPE20 (BOR Personnel Worklist) – This new permission list is assigned to the new Personnel Administrator role. To monitor and administer personnel worklist items such as Name Change and Marital Status Change requests, a user must have the Personnel Administrator role assigned to their user profile. For more information on this new permission list and the changes to the security model, please refer to business process SEC 105 – HRMS Security Overview.

BORWFPY20 (BOR Payroll Worklist) – This new permission list is assigned to the new Payroll Administrator role. To monitor and administer payroll worklist items such as W-2 Reissue Requests a user must have the Payroll Administrator role assigned to their user profile. For more information on this new permission list

and the changes to the security model, please refer to business process SEC 105 – HRMS Security Overview.

User Role:

BOR PeopleSoft User – This existing role has been modified by adding the new permission list BORHSS20 to the role. For more information on this new user role and the changes to the security model, please refer to business process SEC 105 – HRMS Security Overview.

Payroll Administrator – This new role is assigned to any users who are responsible for monitoring and administering the W-2 reissue requests. For more information on this new user role and the changes to the security model, please refer to business process SEC 105 – HRMS Security Overview.

Personnel Administrator – This new role is assigned to any users who are responsible for monitoring and administering Name Change and Marital Status Change requests. For more information on this new user role and the changes to the security model, please refer to business process SEC 105 – HRMS Security Overview

RELEASE DOCUMENTATION: Detailed Release documentation is available at the HRMS/GeorgiaFIRST website: <http://www.usg.edu/gafirst/hrms> - Release Information - Current Release.

The following business processes have been recently created or updated, and are available for viewing on our website:

- HR 205 – Hiring a New Employee – The Note in Step 3 regarding an employee whose home address is an out-of-state address has been revised. The state of residence must be included in the Company State Tax table before the employee's home address can be entered.
- HR 505 – Badge Upload Process – This is a new business process to assist user in running the Badge Upload Process (BORI037) which was delivered in Release 3.20.
- HR 510 – Mass Rate Changes for B07 or B08 Employees – This business is renamed from HR 222 to HR 510.
- HR 605 – Worklist and Worklist Details – This is a new business process developed to provide information about the Worklist and Worklist Details pages as a result of the self-service implementation.
- HR 610 – Approving an Employee Name Change – This is a new business process developed to describe the steps necessary to approve a change to an employee's name made by the employee through the self service application.
- HR 615 – Approving an Employee Marital Status Change – This is a new business process developed to describe the steps necessary to approve a change to an employee's marital status made by the employee through the self service application.
- HR 620 – Approving a W2 Reissue Request – This is a new business process developed to describe the steps necessary to complete the worklist item when an employee requests a copy of a W-2 through the self service application.
- PAY 215 – One-time Adjustments on the Payline – Reversed order of Steps 1 and 2 on Page 2 for clarity. In Step 2, changed "One-Time Adjustment definitions" to "One-Time Code definitions" to match field name on Payline page.
- PAY 235 – Payroll Form Print Process – Reformatted document to bring into line with current format and reduce page count.
- PAY 310 – Creating Off-Cycle Paychecks
- RPT 325 – VETS-100 Reporting – Revised the note in the Output Information section to reflect that, as of Release 3.20, the PeopleSoft VETS-100 report (PER027) now includes data on Newly Separated Veterans.
- SEC 105 – HRMS Security Overview – Updated the BOR Security Model with the new permission lists and user roles for self-services

- SEC 110 – Maintaining HRMS User Profiles – Added new procedures: Upgrading User Profiles and Downgrading User Profiles.

Note: A summary of changes to the Business Processes may be viewed by clicking the ‘here’ link displayed at the top of the Business Process when opened directly from the HRMS web site. The changes may also be viewed by opening the Business Process and going to File>Properties>Summary>Comments.

The following other documentation has also been recently created or updated, and is available for viewing on our website:

- Foundation Table Changes/Additions – (Documentation>Foundation Table Changes/Additions)
 - Foundation Table Changes/Additions - FY07.01 – 10/3/2006
- HRMS Self-Service – (Project Information>HRMS Self-Service>eApps Project Phase 1)
 - September 2006 Newsletter
 - October 2006 Newsletter
 - Sample communications such as Quick Reference Guide, brochure, etc.
 - Memos from Mr. Bill Bowes to the CBOs
 - Presentations from the GA Summit
 - Presentations from the CBO and HR Directors Meetings
 - Presentation from the Security Workshop
 - Scope Document
 - High-level Timeline
- Known Issues – (Documentation>Known Issues)
 - KI0065 – Release of Microsoft Internet Explorer 7.0.
 - KI0066 – Potential Warning Received when Modifying User Profiles after Release 3.21
- Query Job Aid – (Documentation>Business Processes>Business Processes – version 8)
 - Added EMAIL_ADDRESSES record

NEXT SCHEDULED RELEASE: The next regularly scheduled release for Version 8 – 3.22 – is tentatively scheduled for December 15, 2006.