

# Leveraging HR Self Service as a Deployment Platform for Standard and Custom Functionality

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# Agenda

- About RIT
- Functionality implemented
  - Employee
  - Manager
  - Employee management
  - Potential employee
- Challenges / lessons learned
- Future directions

# About RIT

- Implemented 10.7 Financials in 1998
  - GL, AP, PO, FA, CE
- Implemented 10.7 HR/Payroll in 1999
  - Basic benefits
- Upgraded to 11.5.5 in 2002
  - Employee Self Service
  - Manager Self Service
  - Standard benefits
- Implemented iRecruitment in 2007
- Running 11.5.9 with HR FP K RUP2

# About RIT

- Employees – ~3,265
- Students – ~15,560
  - ~13,140 undergraduate
  - ~2,420 graduate
- Student workers - ~7,500

# Self service is a journey

- Organizational
  - New view on
    - Who interacts with HR / Payroll application
    - How traditionally centralized employee management activities are performed
    - Who does ‘programming’ of new functionality
    - How are application changes tested and migrated into production

# Self service is a journey

- Functional
  - Numerous transactions offered – which to implement first and to whom to deploy

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- Functional
  - Numerous transactions offered – which to implement first and to whom to deploy
- Technical
  - Public middle tiers versus VPN's
  - New development tools and related skill sets

# In the beginning

- Self service initially implemented following upgrade to 11.5.5
- Business reasons
  - Improve accuracy of employee maintained data (e.g., address, phone number)
  - Enable HR and payroll staff to answer employee questions rather than enter data
  - Financial savings



# In the beginning

- Introduce concept of self service computing to the employee community
  - Selected optional employee transactions
  - For period of time accepted paper forms as well on on-line transactions

# Standard Employee Self Service

- **Functionality initially implemented**
  - View / update personal information
  - View employment information
  - Enter / update banking information
  - Federal tax withholding changes

# Challenge

- Account creation, distribution of passwords and general instructions
  - Wanted Oracle Applications account to be the same as RIT computer account
  - Created new hire alert – data center manually creates accounts for new employees
  - Passwords reset by Applications help desk resource who sends them & general instructions to new employees via snail mail

# Standard Employee Self Service

- Phased deployment of on-line pay slips & ability to view W-2's
  - 1 year after employee self service initially deployed
  - Created custom form to enter departments receiving on-line pay slips
  - Existing custom deposit advice program modified

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  - Required downloading and installing software on home PC's

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- Initially needed VPN to access employee self service off campus
  - Required downloading and installing software on home PC's
- Now use public middle tier to allow off-campus access without VPN

# Challenge

- Some employees reluctant to embrace on-line pay slips
  - Shared instructions on how to continue to receive paper deposit advice
  - Resistant population not the one we expected to resist

# Standard Employee Self Service

- Phased deployment of on-line benefits enrollment
  - Display benefit selections at same time pay slips shown on-line
  - Fall 2003 limited pilot on-line benefits enrollment process (select F&A units, ITS)
  - Full on-line enrollment since fall 2004



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- Employees forget passwords
  - Help Desk not always open when employees want to do enrollment
- Not all employees have ready access to a PC
  - Kiosks
  - Benefits enrollment ‘labs’
- Employees don’t always read instructions on enrollment pages

# Standard Employee Self Service

- Continue to add functionality
  - Change my password
  - My schools
  - Expand contact data entry capabilities to accommodate Institute wide emergency mass notification systems needs

# Challenge

- Prefer that all mandatory self service functionality used by employees be done through Oracle Employee Self Service
- Prefer to leverage standard Oracle Employee Self Service features
- Organizations on campus that want to add functionality often want non-standard user interface

# Self Service for Students

- Students request their own accounts
  - Must be current student worker
  - No account naming standards
  - Validate that account doesn't already exist for the student
  - Validate that requested account name doesn't already exist

# Self Service for Students

- Functionality offered
  - On-line pay slip
  - View personal information on file in the Apps
  - Link provided to Web based student system for personal information updates

# Standard Manager Self Service

- Implemented December 2002
  - Personal information on staff
  - Personnel actions (e.g., change supervisor)



# Challenge

- Data shown is specific to manager's department and subordinate departments
  - Security profiles created based on organizational hierarchy
  - Hundreds of responsibilities created and mapped to matching security profile via *HR: Security Profile* system profile option

# Custom Manager Self Service

- Over 2 dozen reports available
  - Accessed via Discoverer Viewer by users
  - Discoverer workbooks developed by HR staff
  - Custom views created as needed by technical staff
  - Leverages existing HR security via Noetix and custom views

# Challenge

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- Locking down Discoverer features to ensure users can see only the data you want them to

# Brief technical note #1

- Useful Metalink notes for integrating Discoverer 10g with the e-Business Suite
  - 278095.1: link to menus
  - 433397.1: security (11.5.10.2 +)
  - 237607.1: recommended patches

# Leveraging the platform

- Automate specific RIT HR and payroll transactions
  - Introduce process efficiencies
  - Improve data quality
  - Improve accountability via on-line approvals
  - Improve timeliness of transactions

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- Volume of transactions being considered for automation
- Business processes in organizations transactions will be deployed to
- Training & support efforts
  - Number of users
  - Complexity of functionality

# Add Pay Form

- Implemented in late 2002 by HR
- Standard Individual Compensation Distributions functionality

# Hire adjuncts

- Hire adjuncts who are current employees or active adjuncts
- Technical staff inserted customization in standard ICD functionality
  - Validates GL code salary should be charged to
  - Forces entry of course number adjunct is teaching

# Assignment Costing form

- Developed by technical staff
- Uses Oracle Applications Framework for consistent look & feel
- Validates account numbers and proportions
- All changes routed to same person for business reasons

# Payroll Change form

- Custom functionality replaces paper form to adjust hours worked by hourly employees
- Automates verification of adjustments requested
  - Links to Kronos time keeping system

# Brief technical note #2

- Metalink note 416708.1
  - Need to use correct version of JDeveloper for the Applications / ATG.H versions you're running
- Metalink note 283158.1
  - Other useful information about using the OA Framework

# iRecruitment

- Deployed to external candidates as well as to employees
- Initial deployment June, 2007
- Primarily implemented by HR functional team with some support from technical staff

# iRecruitment

- Departments create job postings to be displayed on web site
- Candidates can review jobs and apply for specific jobs
- Managers can review applications / resumes on-line



# iRecruitment

- Managers notified when candidate applies for position
- Weekly notice sent to all RIT employees listing all new positions
- Managers disposition of candidates done on-line
- EEO reporting

# Challenge

- Multiple Oracle Applications accounts often exist when student worker or iRecruitment applicant hired as employee
  - Need to be sure correct account linked to person record

# Challenge

- Employees using external candidate link rather than employee link
  - Don't want RIT staff to know their looking at new position

In the future ....

# iExpenses

- Limited pilot for initial deployment, eventually deployed to all employees
- Includes some programmatic enforcement of Institute policies
- Electronic feed of corporate credit card data

# Additional desired functionality

- **Manager Self Service**
  - Performance appraisals
- **Employee Self Service**
  - Total compensation statement
  - Conflict of interest forms
- **iRecruitment**
  - Offer letters
  - Resume parsing

# Summary

- Overview of self service functionality implemented by RIT
- Discussed challenges encountered and how they were overcome
- Shared our self service road map

# Questions?

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