



HARVARD  
Human Resources

## **Overview of PeopleSoft 9.2 Upgrade – Spring 2017**

---

# Overview of PeopleSoft Upgrade

## Why?

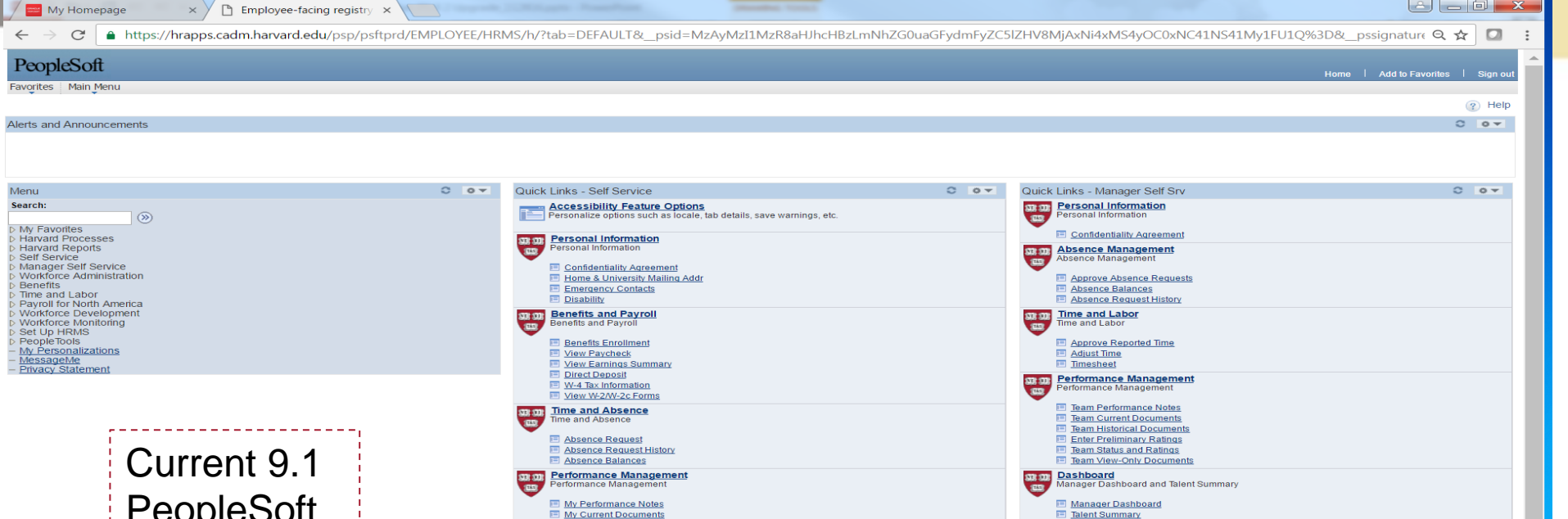
- **Upgrade to current version of software** (PS 9.2) and move to cloud, while minimizing disruption
- **Improve user experience** through
  - mobile enablement
  - re-grouping of tasks in a more intuitive way
  - more powerful search
  - streamlining performance management

## What's Changing?

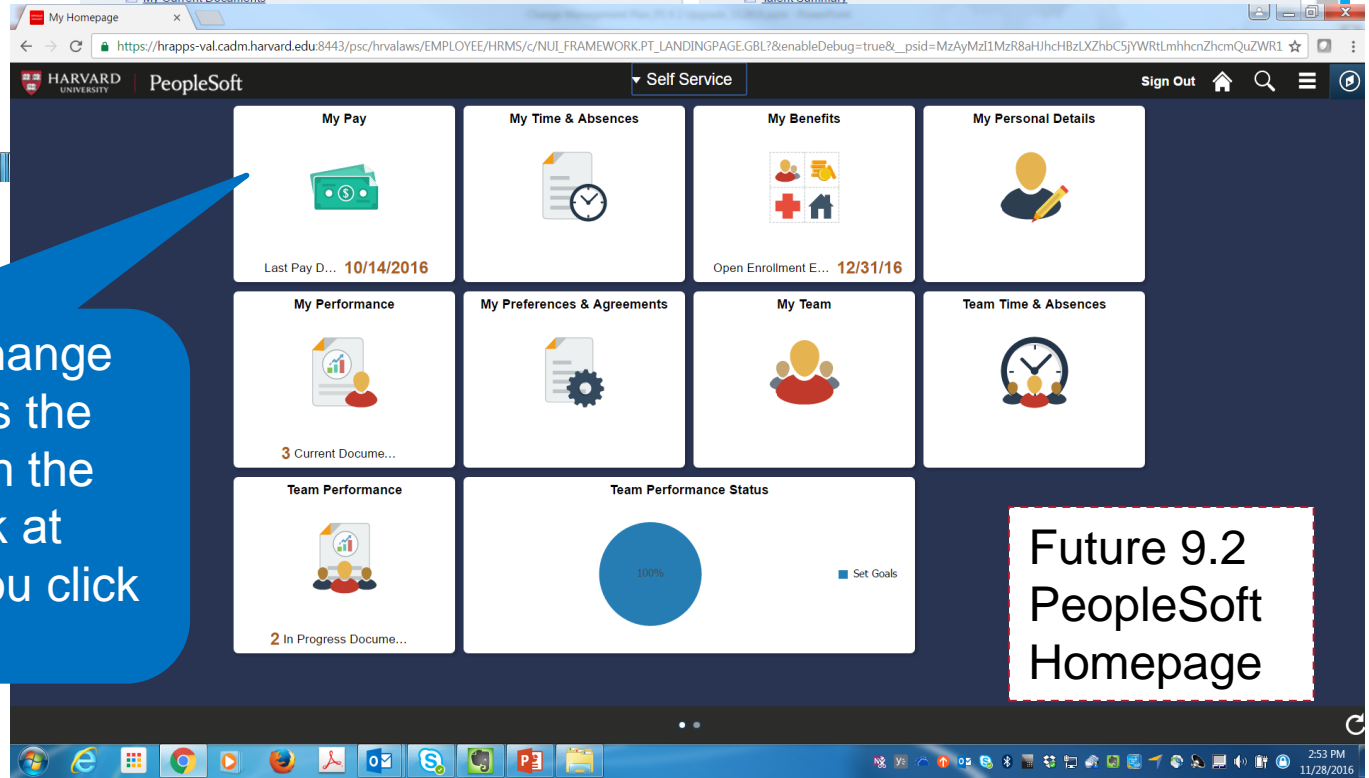
- **Home page navigation** reflects introduction of tiles
- **FY17 performance management process started in 9.1 and will finish in 9.2.** Upgrade will bring some streamlining of pages and process

## What to Expect

- **Re-orientation to the high-level navigation** will be all the training most people need
- User support will include:
  - navigation reorientation now on YouTube
  - help links in system to “how to” instructions on Harvard Training Portal (HTP)
  - updated online training in HTP on time, absence and performance management
  - more information at [hr.harvard.edu/psupgrade](http://hr.harvard.edu/psupgrade)
- Cutover beg. Friday, March 31 with **upgraded system live on Monday, April 3.**



Current 9.1  
PeopleSoft  
Homepage



The most significant change visible to users in 9.2 is the introduction of “tiles” on the home pages. Let’s look at what happens when you click the My Pay tile.

Future 9.2  
PeopleSoft  
Homepage

# My Pay Tile Opens to Page Displaying “Paychecks” with Related Pages on Left Nav

**My Pay** Sign Out Home Search Menu Help ?

**Paychecks**

Rachel Radcliffe ✓  
Museum Professional

**Paychecks**

Check Date	Company	Pay Begin Date / Pay End Date	Net Pay	Paycheck Number	
10/14/2016	Harvard University	09/25/2016 10/08/2016	\$1609.50	7696552	>
09/30/2016	Harvard University	09/20/2016 09/20/2016	\$1496.83	7675882	>
09/16/2016	Harvard University	09/10/2016 09/10/2016	\$1496.83	7649079	>
09/02/2016	Harvard University	08/14/2016 08/27/2016	\$1496.83	7630404	>
08/15/2016	Harvard University	07/31/2016 08/13/2016	\$1496.83	7606321	>

Use the left-side navigation panel to access other related pages

Click [button icon] to minimize (or maximize).

Click anywhere on the line to view a paycheck

# Navigation Changes Include Introduction of Tabs as Shown on Timesheet

**Time and Absences**

Harvard, John  
Faculty Assistant II

Employee ID 91171481  
Empl Record 1  
Earliest Change Date 11/27/2016

Actions ▾

Select Another Timesheet

\*View By Week  
\*Date 12/18/2016

Reported Hours 0.00


	Tue 12/20	Wed 12/21	Thu 12/22	Fri 12/23	Sat 12/24	Total Hours	Time Reporting Code		Comments	
								+	-	
								+	-	
								+	-	

Submit Apply Schedule

Reported Time Status Summary Absence Exceptions

Reported Time Status

Date	Total	TRC	Description
	0.00		

Click  for the left-side menu to re-appear.

Tabs make it easier to move from section to section on this page without vertical scrolling.

# Small Changes in ePerformance Should Improve Usability for Employees...

The screenshot shows a web application titled "Performance Process" for "Annual Review". The main heading is "Self-Evaluation - Update and Complete". The interface includes a left sidebar with a "Steps and Tasks" list, a main content area with a "Long Format" section, and a top navigation bar with "Save" and "Complete" buttons. Three blue callout boxes highlight specific usability features:

- Guide keeps users oriented in multi-step online performance management process:** Points to the "Steps and Tasks" sidebar, which lists tasks like "Set Goals", "Select Reviewers", "My Self Evaluation", "Update and Complete", and "Review Manager Evaluation".
- Action buttons consistently clustered at top right:** Points to the "Save" and "Complete" buttons in the top right corner.
- Tabs reduce need for vertical scrolling on long pages, make it easier to jump from section to section:** Points to the "Goals", "Competencies", and "Summary" tabs in the "Long Format" section.

# ...and for Managers

The screenshot displays the PeopleSoft Self Service interface for managers. The interface is a dark blue dashboard with a grid of white tiles. The top navigation bar includes the Harvard University logo, 'PeopleSoft', 'Self Service', 'Sign Out', and icons for home, search, and user profile. The tiles are:

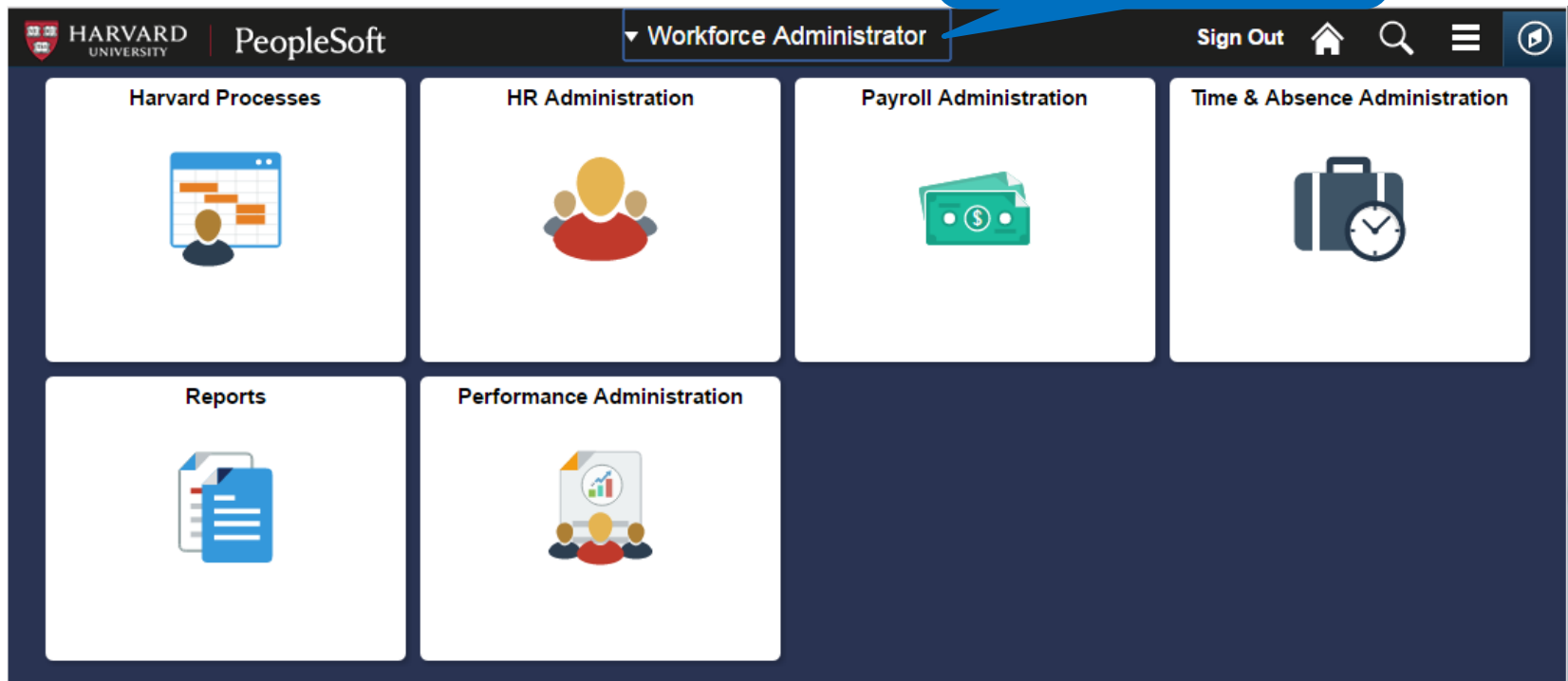
- My Pay**: Last Pay Date **10/14/2016**
- My Time & Absences**
- My Benefits**: Open Enrollment Ends **12/31/16**
- My Personal Details**
- My Performance**: Next Due Date **10/03/2016**
- My Preferences & Agreements**
- My Team**
- Team Time & Absences**
- Team Performance**: **9** In Progress Documents
- Team Performance Status**: **100%**

In addition to ePerformance enhancements for employees, managers will benefit from:

- condensed completion process (4 clicks->2 clicks)
- integration of mid-year assessment and reviewer comments with year-end assessment
- new, enhanced “copy items” feature
- introduction of live analytics in My Team
- introduction of user-friendly, graphical performance status reporting for direct and indirect reports

# Workforce Administrator Tiles Link to Functions that HR and Payroll Administrators Use

Select "Workforce Administrator" to access these tiles





# PeopleSoft 9.2 Upgrade “Explain-amation” Will Be All That Many Users Need



Harvard University - PeopleSoft 9.2 Upgrade



[Let's Watch the Navigation Reorientation Now](#)

# Upgrade will Bring Links to Relevant Help Documents in Harvard Training Portal

The screenshot displays the Harvard Training Portal interface. At the top, there is a navigation bar with a 'Back' button, the title 'My Pay', and options for 'Sign Out', home, search, and menu. Below this, the 'Paychecks' section is visible, showing the user 'Rachel Radcliffe' (Museum Professional) and a 'Paychecks' filter. A blue callout box with a red arrow points to a 'Help ?' link in the top right corner, containing the text: 'Click **Help** to access the related "how to" document in the Harvard Training Portal'. In the foreground, a document preview for 'View Paycheck' is shown, featuring a PDF icon, the title 'View Paycheck', and details such as 'Type: pdf file', 'Created on 06-JUL-2016 9:50 PM', and 'Author: Center for Workplace Development'. The preview also includes a star rating, 'Download', 'Watch', 'Like', and 'More Actions' buttons, and tags for 'Payroll and Compensation' and 'PeopleSoft'.

Paychecks

Rachel Radcliffe ✓  
Museum Professional

Paychecks

Help ?

Click **Help** to access the related "how to" document in the Harvard Training Portal

HARVARD UNIVERSITY | Harvard Training Portal

ME PEOPLE GROUPS ADMIN

View Paycheck

Type: pdf file  
Created on 06-JUL-2016 9:50 PM | Author: Center for Workplace Development  
More like this: Center for Workplace Development's Files

Current Version: 1 |  
Folders: Compensation and Benefits...

Download Watch Like More Actions

Payroll and Compensation PeopleSoft +

Check Number
552 >
882 >
079 >
404 >
321 >

# Summary

---

- Except for the home pages, most changes are minor:
  - Navigate from new tiles on home page to collections of pages organized on left-hand side navigation menus
  - “Tabs” on pages such as the timesheet and performance management forms will reduce vertical scrolling
  - Commonly-used pages will have an embedded “Help” link
  - Performance management pages friendlier and process simplified
- PeopleSoft 9.2 works better on mobile devices – for viewing paychecks and benefits, changing emergency contacts and addresses
- Learn more and be ready for the upgrade by:
  - going to [hr.harvard.edu/psupgrade](http://hr.harvard.edu/psupgrade)
  - viewing the short reorientation to navigation