

# King County PeopleSoft HCM Fluid Job Data

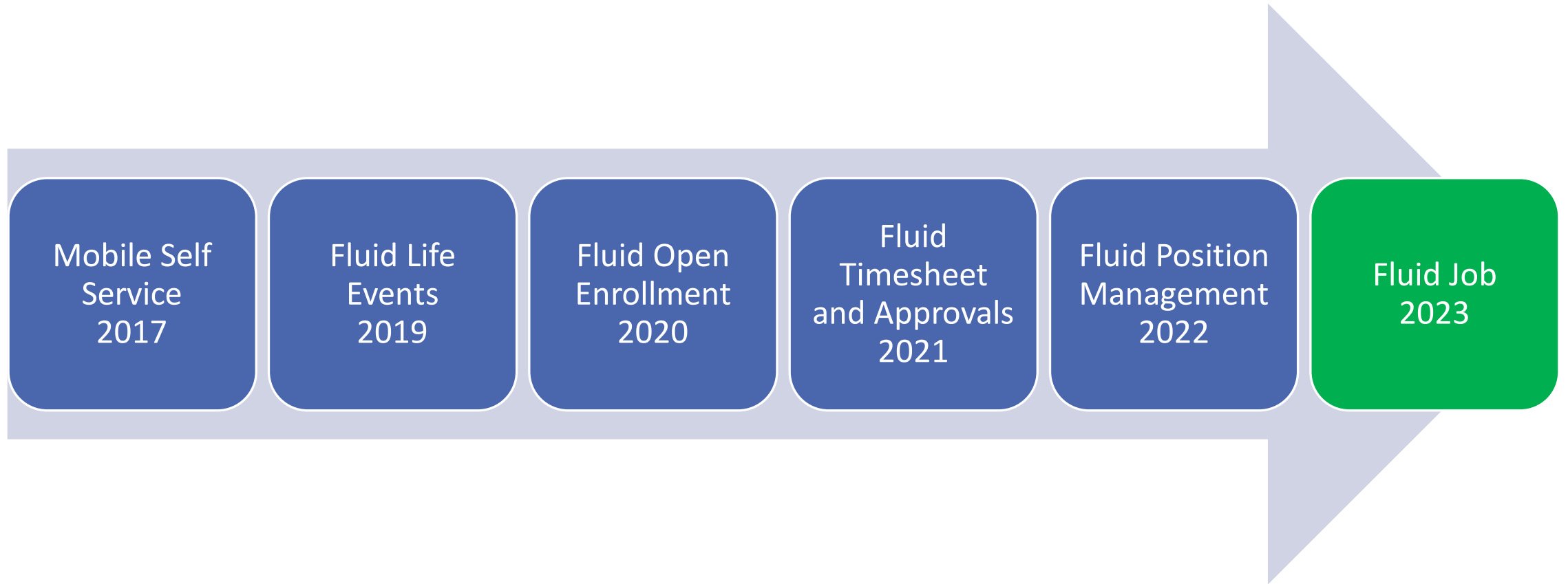
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PEOPLESOFT NW REGIONAL USERS GROUP

DECEMBER 2023

# King County Fluid Implementations

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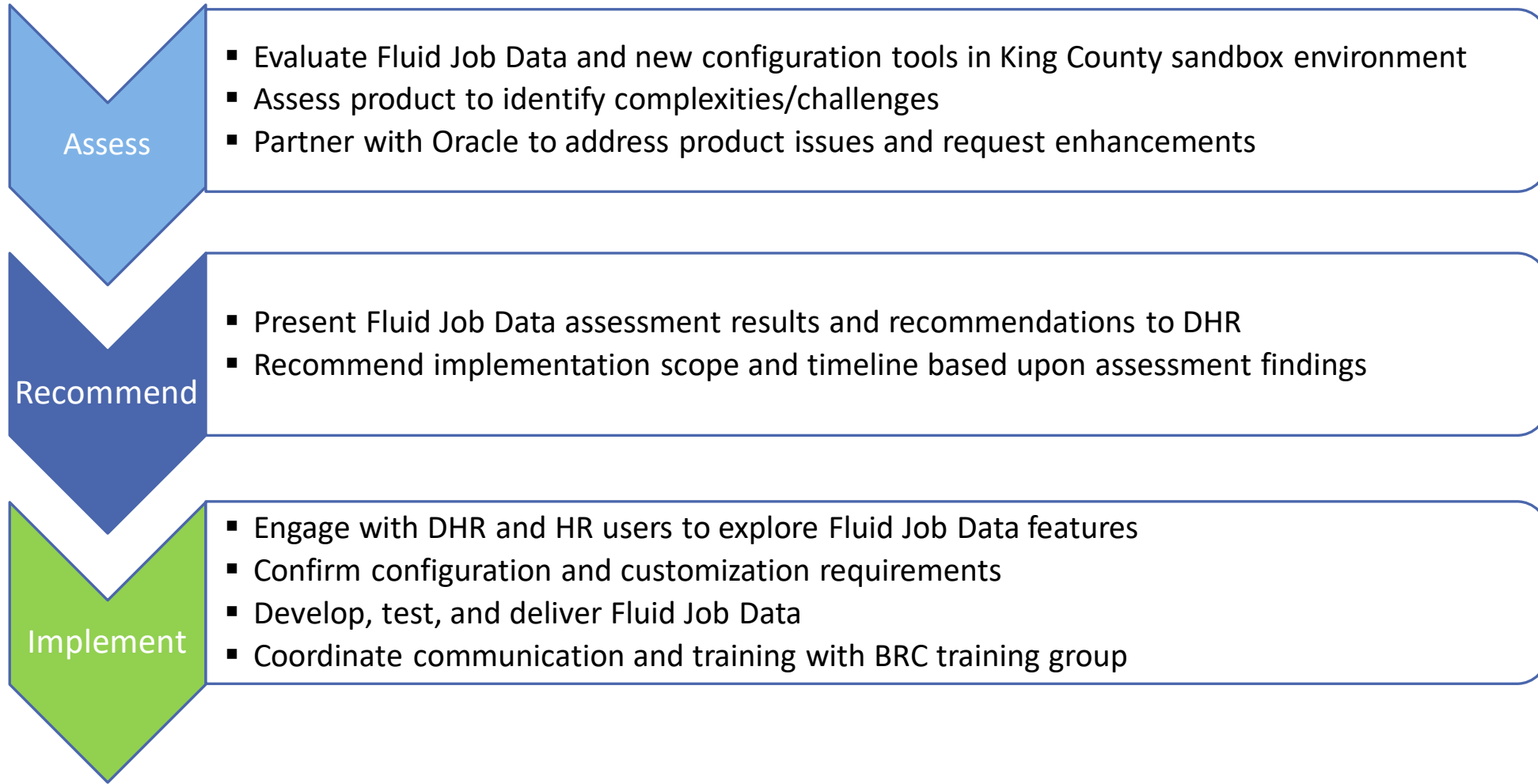
# Fluid Job Project Goals

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From all our fluid **lessons learned**, we adjusted our goals with Fluid Job:

- ✓ full assessment ahead of starting the delivery project
- ✓ improve business value from the new offerings
- ✓ reduce data entry errors
- ✓ increase customer engagement (HR & Payroll professionals)
- ✓ reduce cost of customization by using delivered offerings and configuration options

# Approach to Fluid Job Data Delivery



# Fluid Job Data Feature: Configurable Search

Configurable search allows us to select search filters and results fields

The screenshot shows the 'Manage Job' search interface. At the top, there is a navigation bar with 'Manage Human Resources' and 'Manage Job'. Below this, the 'Search Existing' section is visible. It includes a 'Search Criteria' section with a 'My Saved Searches' dropdown. The search criteria are configured as follows: Empl ID (begins with), Last Name (begins with Smith), First Name (begins with), Position Number (begins with), Reports To Position Number (begins with), and HR Status (begins with Active). There are also checkboxes for 'Include History' and 'Correct History', and buttons for 'Search', 'Clear', and 'Save Search'. Below the search criteria, there is a 'Basic Search' link. The 'Search Results' section shows a summary of 'Last Name: Smith' with '+1 more' and a 'Details' link. A table of results is displayed with 102 rows. The table has columns for Empl ID, Name, Position Number, Business Title, Pay Group, and HR Status. The first three rows are visible:

Empl ID	Name	Position Number	Business Title	Pay Group	HR Status
000042942	Luann Smith	01000989	TRANSITOPERATOR	BW1	Active
000044405	Kelly Smith	01001954	LINEMATERIALWORKERII	BW1	Active
000046911	Eugene Smith	01002534	TRANSITOPERATOR	BW1	Active

- ✓ Observation: Able to add useful fields like Position Number and Reports To Position Number. These are available on the search for Position Data.
- ✓ Configuration: HR Users to identify the most valuable search fields.
- ✓ Oracle SR: Not able to navigate to previous and next rows after selecting an employee in search results, which was available with Classic. SR Response: Working as designed. Impact Low – Mitigate with training
- ✓ Training Recommendation: HR User training sessions to allow exploration of the new configurable search behaviors.

# Fluid Job Data Feature: Job Actions Summary

Job Summary provides an overview of EE history configurable at the field level

Effective Date / Sequence	HR / Payroll Status / Job Indicator	Action / Reason	Last Updated By / Date	Job Code	Position	Reports To	Department	Pay Group	Employee Classification	Full/Part Time	Salary Admin Plan / Grade	FLSA Status	Action Date	Actions
10/28/2023 0	Active Primary Job	PAY-Pay Rate Change GWI-General Wage Increase	Gemilla Sealey 11/01/2023	251070 Transit Operator	01000989 Transit Operator	01040687 Transit Ops Section Manager Monique Trombetta	10816 North Base Operations	BW1 Bi-Weekly Saturday-Friday	O PTTO - Career Service	Part-Time	J2 ATU L587-Transit 32	Nonexempt	11/01/2023	[Edit] [Notes]
08/05/2023 0	Active Primary Job	PAY-Pay Rate Change GWI-General Wage Increase	Gemilla Sealey 10/20/2023	251070 Transit Operator	01000989 Transit Operator	01040687 Transit Ops Section Manager Monique Trombetta	10816 North Base Operations	BW1 Bi-Weekly Saturday-Friday	O PTTO - Career Service	Part-Time	J2 ATU L587-Transit 32	Nonexempt	10/20/2023	[Edit] [Notes]
04/30/2022 0	Active Primary Job	PAY-Pay Rate Change GWI-General Wage Increase	Mildred Llarenas 05/06/2022	251070 Transit Operator	01000989 Transit Operator	01040687 Transit Ops Section Manager Monique Trombetta	10816 North Base Operations	BW1 Bi-Weekly Saturday-Friday	O PTTO - Career Service	Part-Time	J2 ATU L587-Transit 32	Nonexempt	05/06/2022	[Edit] [Notes]

- ✓ Configuration: Removed fields not heavily used by KC with PFC to limit left and right scrolling.
- ✓ Oracle SR: PFC configuration to hide extra fields not working for non-zero sequences. SR Response: Bug fix provided
- ✓ Oracle SR: Job Actions Summary titles not frozen so can't identify column for EE with long history. SR Response: Scrolling fix provided
- ✓ Oracle SR: Comments are added at the summary level using the related actions button. All rows include a Notes link, and there is no indicator that a note exists. SR Response: Notes count feature delivered
- ✓ Oracle SR: Users must go back to the Search page to activate 'Include History' and 'Correct History' if they don't know that they need to research history. Classic Job Data offered these within the component. SR Response: Working as designed. Impact: Medium – Mitigate with training.
- ✓ Configuration Recommendation: Work with HR users to identify the most valuable summary fields. Avoid scrolling left and right by limiting number of fields to fit the screen.

# Fluid Job Data Feature: Create Job Action

Job action prompt is presented before entering the activity guide

Cancel **Create Job Action** Continue

*Note: If a Payroll is currently in process for this employee, data will not be processed until next payroll. Please review the transaction specific details and update the effective date correctly on this page.*

\*Effective Date

Effective Sequence

\*Action

Reason

Regulatory Region  United States

Business Unit  King County Business Unit

Cancel **Create Job Action** Continue

*Note: If a Payroll is currently in process for this employee, data will not be processed until next payroll. Please review the transaction specific details and update the effective date correctly on this page.*

\*Effective Date

Effective Sequence

\*Action

\*Reason

- ✓ Configuration: Hide Regulatory Region and Business Unit – Done with PFC
- ✓ Configuration: Reason is required by KC – Done with PFC
- ✓ Observation: Effective sequence auto defaults based upon top of stack.
- ✓ Observation: Users actively enter action and reason fields on the prompt. With classic, they defaulted from previous row.
- ✓ Oracle SR: When we configured Action Reason to be required, it wasn't validated until submitting the row. User would need to complete the entire transaction before getting error message. SR Response: Working as designed. Impact: High – Added Event Map triggered by continue button.

# Fluid Job Data Feature: Activity Guide Format

Job Data pages are listed as steps top to bottom rather than tabs along the top

The screenshot displays the 'Fluid Job Data' interface for 'Luann Smith' (ID: 000042942, Title: Transit Operator). The page title is 'PAY-Pay Rate Change - GWI-General Wage Increase'. A vertical sidebar on the left lists steps: Work Location (marked as 'Visited'), Job Information, Labor Information, Salary and Compensation, Payroll, Employment Data, Benefit Program, Validate, and Summary. The main content area shows the 'Work Location' details for an effective date of 11/01/2023. Fields include: HR Status (Active), Payroll Status (Active), \*Job Indicator (Primary Job), Position Number (01000989), Position Entry Date (03/06/2010), Regulatory Region (USA), Business Unit (KCBUS), Department (10816), Location (K0131), Date Created (12/06/2023), Last Start Date (03/15/1984), and Expected Job End Date. An organizational rollup path is shown at the bottom: MTD > Bus Operations > Base Management-SEC > Bus-North-GRP > North Base Operations.

- ✓ Observation: Activity guide format is intuitive. Our users are familiar with activity guide layout as used with Position Management.
- ✓ Observation: 'Include History' and 'Correct History' are not available. Also removed Next/Previous in list buttons for historical row navigation.
- ✓ Observation: The Hire transaction is not included in Fluid Job Data. When administrators hire a new employee, the classic Job Data pages are used. Oracle roadmap shows Person Data Modernization is coming soon.
- ✓ Recommendation: Use drop zones to enable KC custom fields
- ✓ Recommendation: Configure Action/Reason combinations to limit fields using PFC.



# Page and Field Configurator: Only what the user needs for Action/Reason combination

The screenshot displays the 'Job Data' page in Workforce Administrator, showing two views of a job record for a Human Resource Analyst - Senior. The left view is labeled 'Classic Termination' and the right view is labeled 'Fluid Termination'. A 'Work Location' pop-up menu is visible in the center, showing options for 'Work Location', 'Validate', and 'Summary'. The 'Classic Termination' view includes fields for Effective Date (05/15/2023), Effective Sequence (0), HR Status (Inactive), Payroll Status (Terminated), Position Number (01012003), Position Entry Date (10/23/2017), Regulatory Region (USA), Company (KC), Business Unit (KCBUS), Department (10669), Location (K0081), and Termination Date (05/14/2023). The 'Fluid Termination' view includes fields for Effective Date (05/15/2023), Effective Sequence (0), HR Status (Inactive), Job Indicator (Primary Job), Position Number (01012003), Position Entry Date (10/23/2017), Regulatory Region (USA), Business Unit (KCBUS), Department (10669), Location (K0081), Date Created (05/31/2023), and Termination Date (05/14/2023). The 'Work Location' pop-up menu is highlighted with an orange border and contains the following text: 'Work Location', '● Visited', 'Validate', '○ Not Started', 'Summary', '○ Not Started'. The 'Classic Termination' view has a 'Next >' button in the top right corner. The 'Fluid Termination' view has a 'Maintain/View Notes' button at the bottom right. The 'Work Location' pop-up menu is positioned over the 'Work Location' field in the 'Fluid Termination' view.

Classic Termination

Fluid Termination

# Fluid Job Data Feature: Online Data Validations

All validation messages are shown together rather than as separate pop ups

**Luann Smith**  
000042942  
Transit Operator

Effective Date 11/01/2023      Effective Sequence 0

**Validate**

Use the Validate button to verify the entered data. This is a required action to validate details and review warning and error messages.

**Messages**  
Validation Successful with warnings

3 rows

Message Severity	Message Text
1 Warning	Warning -- date out of range. (15,9)
2 Warning	Warning -- Change Percent is greater than 20. (1000,30)
3 Warning	Warning -- Hourly Rate is greater than the maximum specified in the Salary Grade Table. (1000,33)

- ✓ Observation: Not required to click multiple acknowledgements.
- ✓ Observation: Validation is optional. User can decide to skip this step.
- ✓ Oracle SR: The validation step is optional, which could potentially increase data entry errors. SR Response: Working as designed. Impact: High – Could add to corrections load. Mitigate with Event Map code on the Submit button to ensure validate button is clicked before submit.
- ✓ Recommendation: Train users to validate before submitting row.

# Fluid Job Data Feature: Correction Mode

Allows users to edit previously added rows using Correction Mode

The screenshot displays a web application window titled "PAY-Pay Rate Change - GWI-General Wage Increase". The user is identified as "Luann Smith" (ID: 000042942, Role: Transit Operator). The interface is in "Correction Mode" for a "Work Location" row, which is currently "Visited".

**Work Location Details:**

- Effective Date: 11/01/2023
- Effective Sequence: 0
- HR Status: Active
- Payroll Status: Active
- \*Job Indicator: Primary Job
- Position Number: 01000989 (Transit Operator)
- Override Details: No
- Position Entry Date: 03/06/2010
- Position Managed Record: No
- Regulatory Region: USA (United States)
- Company: KC (King County)
- Business Unit: KCBUS (King County Business Unit)
- Department: 10816 (North Base Operations)
- Department Entry Date: 04/02/1984
- Location: K0131 (North Base)
- Date Created: 12/06/2023
- Last Start Date: 03/15/1984
- Expected Job End Date: [Empty field]

**Organizational Rollup:** MTD > Bus Operations > Base Management-SEC > Bus-North-GRP > North Base Operations

- ✓ Observation: Access to only one row at a time. Fluid correction mode does not allow movement and changes between individual rows as was allowed with Classic Job Data.
- ✓ Observation: Each row change is submitted individually. In classic Job Data, the user would make all row changes and then submit at once.
- ✓ Oracle SR: Correction mode doesn't allow movement between historical job rows within the activity guide and requires each row to be submitted separately. SR Response: Working as designed. Impact: High –Mitigate with training.
- ✓ Recommendation: As part of the implementation, allow time for users to explore correction mode and become familiar with behaviors and limitations.

# Fluid Job Data Feature: Fluid Approvals

Approvals are configurable for all transaction types

**Luann Smith**  
000042942  
Transit Operator

**Work Location**  
● Visited

**Job Information**  
 Not Started

**Labor Information**  
 Not Started

**Salary and Compensation**  
 Not Started

**Payroll**  
 Not Started

**Employment Data**  
 Not Started

**Benefit Program**  
 Not Started

**Validate**  
 Not Started

**Summary**  
 Not Started

**Work Location**

Effective Date 11/01/2023 Effective Sequence 0  
HR Status Active Payroll Status Active  
\*Job Indicator Primary Job

Position Number 01000989 Transit Operator Override Details No  
Position Entry Date 03/06/2010 Position Managed Record No  
Regulatory Region USA United States Company KC King County  
Business Unit KCBUS King County Business Unit  
Department 10816 North Base Operations Department Entry Date 04/02/1984  
Location K0131 North Base  
Date Created 12/06/2023

Last Start Date 03/15/1984 Expected Job End Date

Organizational Rollup : MTD > Bus Operations > Base Management-SEC > Bus-North-GRP > North Base Operations

- ✓ Assessment Config: Initially set this up to require approvals for only for correction mode.
- ✓ Observation: Only one pending transaction allowed for an EE. This would require separate approval for each corrected row.
- ✓ Oracle SR: Approval required for each job row prior to creating next proposed sequence row. SR Response: Working as designed. Impact: High – Not feasible to hand back/forth for each row
- ✓ Recommendation: Consider adding approvals with a future phase rather than the initial rollout to alleviate overwhelming business process change.

# Fluid Job Data Implementation: Partial versus Full Roll-out

Can choose a slow roll-out approach by department

**George Mills**  
000074349 - 0 - Employee  
Transit Operator

**Work Location**  
Effective Date: 06/30/2022  
Effective Sequence: 0  
HR Status: Active  
Payroll Status: Active  
\*Job Indicator: Primary Job

Position Number: 01010492  
Transit Operator  
Override Details: No

Position Entry: 03/06/2010

**Work Location Details**  
George Mills  
Employee  
Empl ID: 000074349  
Empl Record: 0

\*Effective Date: 10/30/2021  
Effective Sequence: 0  
\*Action: PAY-Pay Rate Change  
\*Reason: GWI-General Wage Increase  
\*Job Indicator: Primary Job

HR Status: Active  
Payroll Status: Active

Position Number: 01010492  
Transit Operator  
Override Position Data

Position Entry Date: 03/06/2010  
Position Management Record

Regulatory Region: USA  
Company: KC  
Business Unit: KCBUS  
Department: 10825

Department Entry Date: 02/18/2012  
Location: K0014  
Establishment ID: 0001  
Date Created: 11/05/2021

Last Start Date: 11/08/2004  
Expected Job End Date

Job Data | Employment Data | Earnings Distribution | Benefits Program Participation

- ✓ Assessment Config: A partial roll-out can be controlled via component security. This was tested successfully as part of the assessment.
- ✓ Observation: With a partial roll-out, Job Data rows entered via Classic do not generate the Fluid Job Data summary of changes.
- ✓ Recommendation: Full roll-out of Fluid Job Data to all agency HR users at once. Allows standardization of HR user training and consistent approach to system support.

# Assessment Key Findings

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Activity Guide format: Simplify pages and fields available based upon Action/Reason

Correction Mode: Can't navigate between rows and individual submittals

Performance Issue: Include history spins when employee has 50+ rows. Customer specific.

Validation button: Doesn't require user to validate before submittal

Approvals: Only one in-process row is allowed

Partial versus full rollout: Full rollout to standardize training and support

# HR Community Engagement

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For this project, we solicited a cross-agency **HR PeopleSoft SME Group** to discuss requirements and configuration options upfront.

We met with **164 HR & Payroll professionals over 25 specific sessions to demo the new Fluid Job Data**, the updated Action / Action Reason guide and ask about their business processes.

We invited **53 HR & Payroll professionals to our sandbox testing environment** for the chance to test out the new Job Data - no pressure practice.



July 2022

Aug/Sept 2022

Q4 2022

Q1 2023

Q2 2023

July 14th

**Assessment Review**

Fluid job assessment review, recommendations for scope, roll-out plan, training plan, change management plan

**Sandbox Configurations in HTESTB**

Configs including drop zones and page & field configurator, and development

**Requirements with DHR SME**

Fluid Job config options analysis including action/action reason page & field configurator options, customization inventory and deprecation plan, working with DHR SME, requirements documentation

**DHR Demos and Agency Focus Groups**

Review and solicit feedback on action/action reason configs, configurable search options, job actions summary fields, document feedback

**Dev**

Development, technical configurations and deprecations in HDEV

**Change Management**

Feedback Demos

Training Prep

Communications Plan

Training Updates

Deliver Training

Full test in HTESTA, PTF adjustments for fluid

**Test**

**Go-Live**

**Support**

Fluid Job Timeline



# Go-Live

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## Communications Plan:

- ✓ Agency outreach with transaction specific walk-throughs
- ✓ PeopleSoft Forum Announcement
- ✓ HR Managers meeting
- ✓ Training materials – FAQ and reference guide
- ✓ Targeted email communications based on user security

## Go-live:

- June 2, 2023 - Move most, if not all Fluid Job Data objects, into Production along with the Full Image 45 'get current' project and it will sit dormant
- Wait 2 full pay cycles for any Full Image bugs to be found and resolved
- **July 14, 2023** – Enable security for Fluid Job Data and disable security for Classic Job Data, move any final pieces to Production after payroll confirm

# Creating a Feedback Loop

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The **gift of time and feedback** allows our team to make configuration changes based on our business process and show the HR Community that their voice is heard!

Another positive, this feedback loop allows King County to put in value enhancement requests to Oracle and **lead the customer space**.

