PeopleTools 8.52.05
Upgrade
HRMS Feature Changes

April 23, 2012
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BACKGROUND

An upgrade to the software development tools provided by Oracle ("PeopleTools") and used by HRMS developers is scheduled for implementation over the weekend beginning Saturday morning, May 5, 2012. Completion is expected no later than Monday morning, May 7 and possibly sooner. While the upgrade will not change functionality, there will be changes to the look and behavior of HRMS. And several new features have been added. This document gives you a brief overview of the changes.

Extensive testing by the HRMS developers has been conducted, involving almost 1,000 test and implementation tasks. Human Resources, Payroll, and department users were invited to participate in feedback and preview sessions, as well as numerous user acceptance testing sessions.

IMPORTANT NOTICE

1. Your browser must be one of the Oracle certified browsers (see below) in order to receive help from the Help Desk or the HRMS Team
2. Once the new version has been implemented you must “clear your cache” (temporary Internet files) before logging onto the new HRMS version for the first time
3. Temporarily, all date fields must be entered using a “/” or “-” or “.”, and not as 6 digits (e.g., 7/1/2012 and not 07012012). Oracle plans to provide a fix in late April and it will be implemented as soon as possible
4. Desktop shortcuts and bookmarks may not work and will have to be reestablished when you logon to the new HRMS

CERTIFIED BROWSER SUPPORT

Oracle certifies certain browsers for use with specific versions of PeopleTools. The only “certified” supported web browsers for use with the new HRMS version are:

<table>
<thead>
<tr>
<th>Browser</th>
<th>Version(s) Supported</th>
</tr>
</thead>
<tbody>
<tr>
<td>Firefox</td>
<td>3 Releases (10, 7 and 3.6)</td>
</tr>
<tr>
<td>Google Chrome</td>
<td>1 Release (13)</td>
</tr>
<tr>
<td>Internet Explorer</td>
<td>3 Releases (9, 8 and 7)</td>
</tr>
<tr>
<td>Safari</td>
<td>4 Releases (5, 4.3.3, 4 and 3)</td>
</tr>
</tbody>
</table>
SUMMARY OF CHANGES THAT HRMS USERS WILL NOTICE

1. The Menu in the left margin and middle of the page has been replaced by “Breadcrumbs” at the top of the page
2. Menu choices are alphabetized
3. Most Recently Used pages are displayed in the Favorites menu
4. Type-Ahead (Autocomplete) in search boxes and prompts
5. The flashing “Processing” and “Saving/Saved” replaced by new animated feature
6. Updated look on all pages
7. The column headings on data grids remain “frozen”
8. Auto line highlighting when placing mouse in grid
9. Search results on prompts open in front of the page instead of a new page
10. Pop-Up messages display in front of the page
11. Context-sensitive help information will be available
12. Elimination of page “blinking” (new hire template in particular)
13. Format of Warning and Error messages
14. Broadcast messages can be sent to users
15. System performance improvements
The following is a short summary of each of the feature changes noted above.

1. **Menu Navigation**

The menu is now displayed at the top of the page as “breadcrumbs” and starts with Favorites and Main Menu. The “Welcome” page has been moved to the left side, replacing the old menu path.

The “Top Menu Features Description” is temporary and will be displayed on the left side of the page for about 1 month.

The new Home page is shown here:

![HRMS Home Page Screenshot](image)

The “Top Menu Features Description” will be displayed for about 6 weeks and then removed. Users can remove it themselves by clicking on the “Content” link in the upper right corner of the home page, then uncheck the “Top Menu Features Description” checkbox and click on Save.
Menu Navigation (continued)

When you click the “Main Menu” breadcrumb, the folders and links that are available to you (based upon your user security profile) are displayed immediately below. As you continue to click on the menu choices, the menu “cascades” to the right and unveils your choices within the menu path that you selected.

This example shows all 1st level folders and links under the Main Menu. When you click the “Job & Compensation” folder, the available sub-folders & links are displayed to the right. When you click on one of the sub-folders (e.g., “Job Inquiry”), the links within that sub-folder are displayed further to the right. This continues until there are no more choices within the sub-folder.
Menu Navigation (continued)

When you click on the desired page link, the cascading menu is replaced by “breadcrumbs” at the top of the page. You can easily see the navigation path that you used to get to your current page.

To return, or “backtrack”, just click any of the “breadcrumbs” to see the contents.

Job Data

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

Search Criteria

Use Saved Search:  

Empl ID: begins with  
Empl Rcd Nbr: =  
Name: begins with  
Last Name: begins with  
Job indicator: =  
Department: begins with  
Person Type: =  
Company: begins with  
Pay Group: begins with  
Employee Status: =  

Case Sensitive

Search  Clear Basic Search  Save Search Criteria  Delete Saved Search
2. **Alphabetical Menu**

We used the PeopleTools upgrade as an opportunity to “clean up” the menu choices by putting all folders, sub-folders, and links in alphabetical order. Previously, some folders were alphabetized, but others were not. This brings consistency to all menus and should make it easier to find the page link when looking through the menus.

3. **Most Recently Used Pages**

The Favorites Menu now displays the last 5 pages that you accessed, regardless of when you logged on. This can be very handy if you are returning to the same page for different people and is much faster than going through the navigation again.

The pages are displayed in the order visited, with the most recent on top.

My Favorites contains all Favorites that you may have had prior to the HRMS upgrade. They are listed in alphabetical order, although you can click on “Edit Favorites” and change the display sequence.

4. **Type-Ahead (Autocomplete)**

As you begin typing in a search box or a field that has the magnifying glass (prompt) next to it, a list of values that matches what you have typed so far is displayed on the page.

In this example, the user typed “0031” in the Department field and a list of departments that begin with “0031” is displayed immediately. You can continue typing to narrow the results, or you can click on the appropriate value in the search results.

This is a nice improvement over clicking the yellow Search pushbutton or the magnifying glass, getting a brand new page displayed with the results, selecting what you want, and then returning to the page where the data is to be entered.
5. “Processing/Saving”

Instead of seeing “Processing” or “Saving” flashes continuously in the upper right while data is retrieved or saved, you’ll see a small rectangle with a set of lines that animate in a clockwise motion. This continues to be displayed until the data has been displayed or saved.
6. Updated Look

All pages now have a light blue background, allowing the data to stand out better than previous versions. Folder tabs and grid column headings are easier to read, as is data that is displayed on a page grid.

With the elimination of the left side menu, there is much more space available to display the page contents. This eliminates the need to scroll to the right on some pages, and certainly reduces the need for scrolling on many pages.

The Washington University logo is no longer displayed on the Home page and the upper left corner contains “HRMS” on all pages. Some examples are shown below.

![HRMS Feature Changes – PeopleTools 8.52.05 Upgrade](image-url)
# Leave Record

<table>
<thead>
<tr>
<th>Job Title</th>
<th>Email ID</th>
<th>Role ID: Q</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**View:** Time Period: 03/01/2012

**Reported Leave Hours:** 0.00 Hours

**From Thursday 03/01/2012 to Saturday 03/10/2012**

| Leave Type | Thu 01/2012 | Fri 01/2012 | Mon 01/2012 | Tue 01/2012 | Wed 01/2012 | Thu 01/2012 | Fri 01/2012 | Mon 01/2012 | Tue 01/2012 | Wed 01/2012 | Thu 01/2012 | Fri 01/2012 | Mon 01/2012 | Tue 01/2012 | Wed 01/2012 | Thu 01/2012 | Fri 01/2012 | Mon 01/2012 | Tue 01/2012 | Wed 01/2012 | Thu 01/2012 | Fri 01/2012 | Mon 01/2012 | Tue 01/2012 | Wed 01/2012 | Thu 01/2012 | Fri 01/2012 | Mon 01/2012 | Tue 01/2012 | Wed 01/2012 | Thu 01/2012 | Fri 01/2012 | Mon 01/2012 |
|------------|------------|------------|------------|------------|------------|------------|------------|------------|------------|------------|------------|------------|------------|------------|------------|------------|------------|------------|------------|------------|------------|------------|------------|------------|------------|------------|------------|------------|------------|------------|------------|------------|------------|------------|
|            |            |            |            |            |            |            |            |            |            |            |            |            |            |            |            |            |            |            |            |            |            |            |            |            |            |            |            |            |            |            |            |            |            |            |            |            |
|            |            |            |            |            |            |            |            |            |            |            |            |            |            |            |            |            |            |            |            |            |            |            |            |            |            |            |            |            |            |            |            |            |            |            |            |            |

**Leave Balance As Of 02/28/2012**

<table>
<thead>
<tr>
<th>Leave Type</th>
<th>Balance In Hours</th>
<th>Balance In Days</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sick</td>
<td>878.11</td>
<td>17.58</td>
</tr>
<tr>
<td>Vacation</td>
<td>179.98</td>
<td>24.00</td>
</tr>
<tr>
<td>Personal</td>
<td>0.00</td>
<td>0.00</td>
</tr>
</tbody>
</table>

**Comments**

...
7. **Frozen Grid Column Headings**

Many HRMS pages contain grids that can display dozens, hundreds, and even thousands of rows of data. When you scroll down past the bottom of the 1\textsuperscript{st} page, the column headings would disappear. Depending on your familiarity with the page and data, you would have to scroll back to the top of the page to see what “column 6” represents.

Now, the column headings remain in place as you scroll through all the rows. You can position the cursor anywhere in the grid and use the mouse “wheel” (if you have one) to scroll and continue to see the column headings. Or you can click the scroll bar to the right and either drag it down to view the data or click beneath the scroll bar.

**Note**: we found a problem with grids that are updateable and have the + and – sign to insert or delete rows. On those few pages we had to disable the “frozen column heading” feature. Oracle has agreed this is a problem but the date for the fix to be released to customers is not until sometime in the fall 2012.
8. **Auto Line Highlighting**

When you position the mouse over a row in a grid, the row is highlighted in yellow. As you move the mouse throughout the grid, the row where the mouse is positioned is highlighted.

This change makes it much easier to read the data for a specific row instead of “eye balling” it as you scroll through.
9. **Search Results Using Prompts**

When you click the magnifying glass (prompt) next a field, the search box results are displayed on the page rather than on a new page. In this example, the Department prompt was clicked and the search results stayed on the page, with the page grayed-out.
10. Pop-Up Messages

Instead of a warning or error message displaying on a new page, it is now displayed on the page. You can move the message box by clicking anywhere in the solid blue line and dragging the box. It should be easier to relate the message to what you were doing on the page.
11. Context-Sensitive Help

While not immediately available, the new software used by the HRMS developers allows for “context-sensitive” help. When you see text that is underlined with dashes, you can position the mouse over the text and a “pop-up box” displays help text such as a definition, or the intended use of a data field, or special editing instructions.

This feature is expected to be developed and made available on some pages throughout 2012.

12. Elimination of Page “Blinking”

The New Hire Template pages are a good example of this new feature. Previously, each time you entered data and tabbed out to the next field, the page would briefly “blink” while it refreshed the page with the new data.

Now, the “blinking” is gone and only the field that was entered refreshes instead of the entire page. This change eliminates the constant “blinking” and brief delays as you navigate through the data fields.

13. Rich Text Editor

With the new developer tool set, we are now able to configure text boxes to allow users to format the text using the Rich Text Editor. When you see a text box that displays the traditional text editor options, you can use any of them to format your text as appropriate (bold, italics, underline, color, numbering, indentation, etc.). Here is an example of the Department Verification section on the electronic I-9 page:

14. Broadcast Messages

We will be able to send messages to HRMS users to inform you about significant events such as an emergency system outage, a change in payroll deadlines, reminder of a 3:00 pm payroll closing, new features/fixes/enhancements to HRMS, etc. The messages can be sent to everyone currently logged on to HRMS, as well as informing users the next time they log on. We can also send messages to specific target groups, such as only Hiring Managers, or only Super Users.

This feature allows us to get information to you quickly without going through email.

15. System Performance Improvements

New upgraded HRMS server hardware was required to be installed and configured in order to run on the latest version of PeopleTools. HRMS now has the most powerful Windows servers in the IS&T Data Center. Memory and storage space have been significantly upgraded. As a result, we expect to see faster response time as you navigate through HRMS and enter data.