PeopleFluent®

What's New in Talent Management

TM 22.07 - July 2022

Today's Presenters

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Important Dates

Staging Updates:

28 June, 2022

Prod Updates:

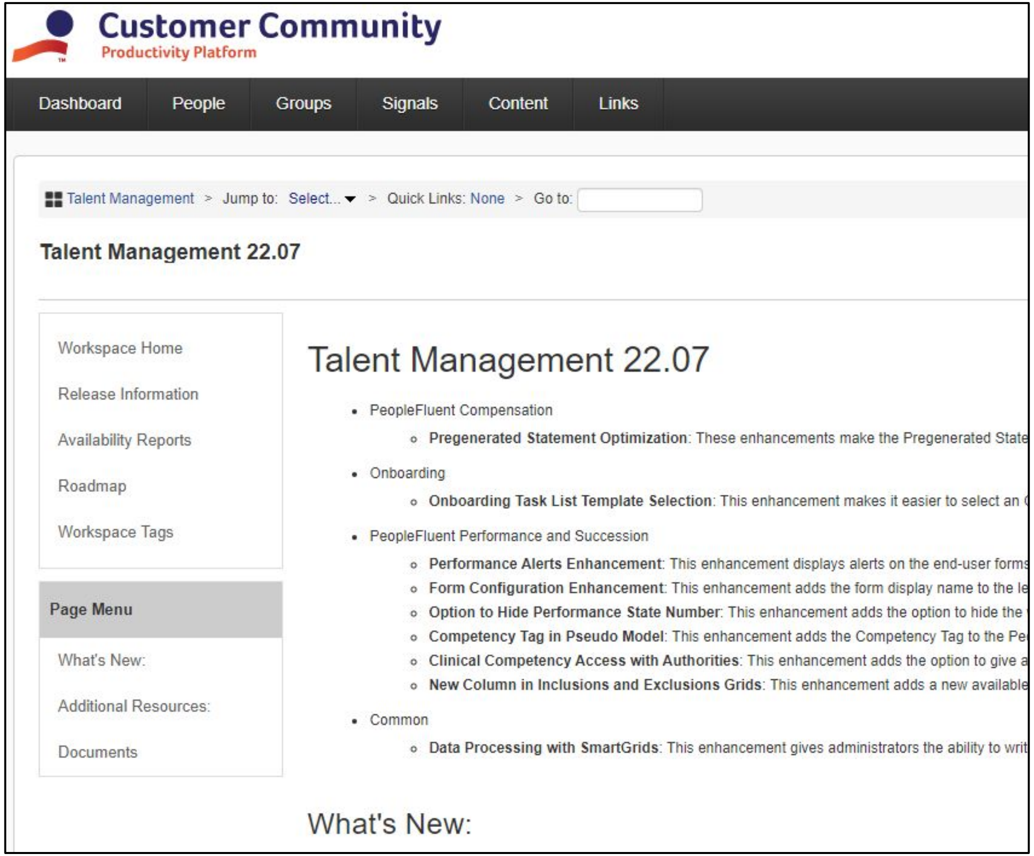
London: 19 July, 2022

Toronto: 22 July, 2022

Atlanta: 22 July, 2022

For more information...

Customer Community
https://customers.peoplefluent.com/tms/talent_management_22_07



22.04 Release Summary

- Employee Performance/Development
  - Performance Form Alerts
  - Progressive Skills Assessments
    - Workflow Display Enhancement
    - Skill Assessment Authorities
    - Competency Tag in Pseudomodel
- Compensation
  - Statement Pre Generation Improvements
  - People Analytics
- Administrator Enhancements
  - Grid-based Data Processing Scripts
  - Performance Form Menu Display
  - Inclusion/Exclusion Column Additions
- Onboarding
  - Onboarding Engagement Wizard
- People Analytics

Employee Performance & Development

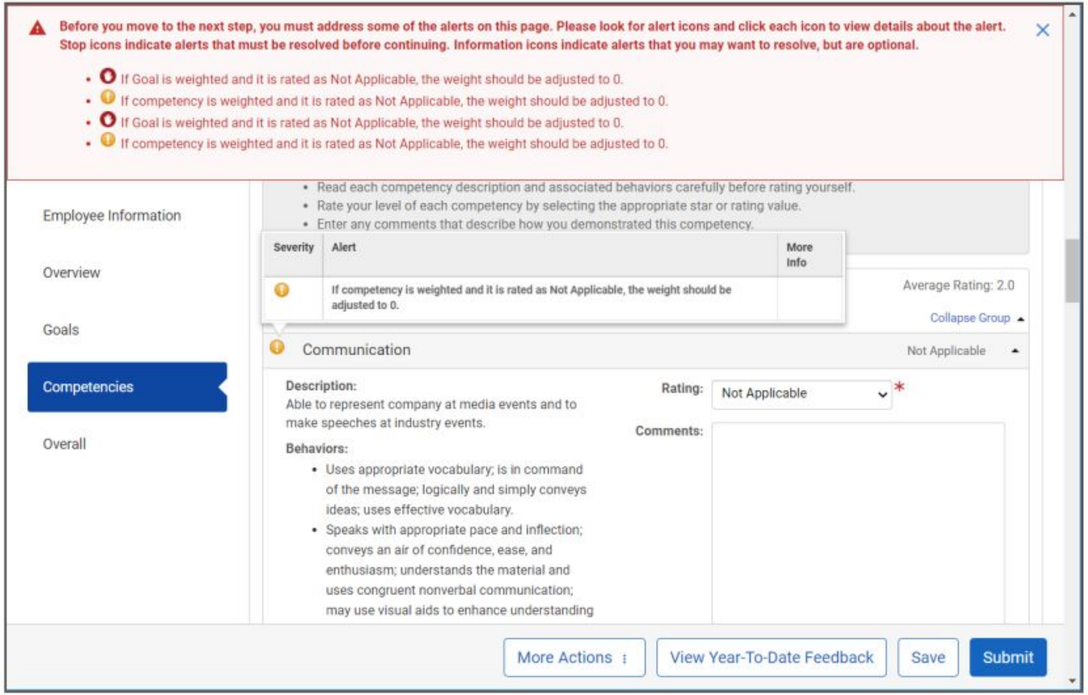
Alert Display on Performance Forms

What was the Problem?

- Performance Forms can contain a number of “validation alerts” which may need to be addressed before the user is allowed to submit their form to the next workflow state.
- Alerts are displayed inline in the Performance Form with a visual icon that can be clicked to reveal the textual description of the specific Alert condition.
- In cases where Performance Forms are lengthy or contained a lot of collapsible containers, it can be difficult to locate any and all instances of triggered alerts and to understand the totality of necessary actions required in order to advance the Performance Form to the next process state.

How did we solve it?

- A new banner has been added to Performance Forms which will enumerate any and all instances where an Alert has been triggered
- Clicking an alert icon in the banner brings that error into the center of the page and displays the alert text (clicking the error icon on the inline form also displays the alert text.)



Alerts Display Conditions

- If there are no Hard Stop or Incomplete alert errors, but there are Exception and/or Within Guidelines alerts, a dialog box appears asking if the user wants to proceed without reviewing the alerts. If they click Yes, the form is submitted, while if they click No, the Exception and/or Within Guidelines alerts appear in a banner.

- **NOTE:** If there are missing required fields and alerts errors on the same form, the missing required fields banner will appear first. Once those errors are corrected, then the alerts banner will appear if any alerts have been triggered.

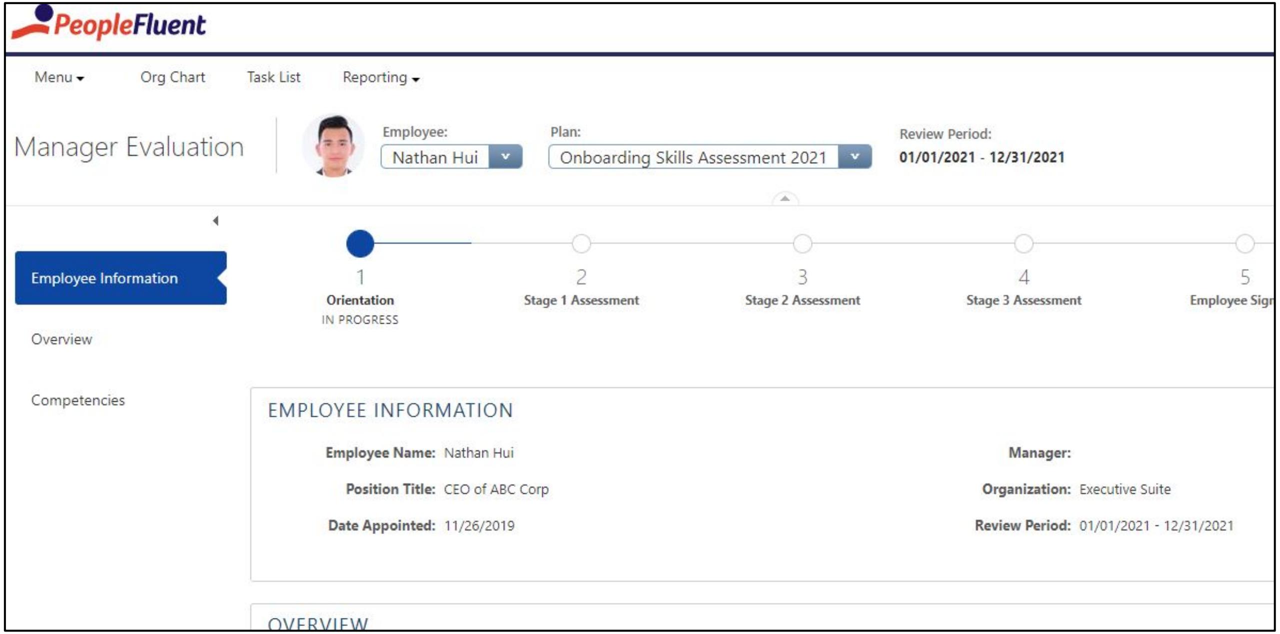
Progressive Skills Assessments

What was the Problem?

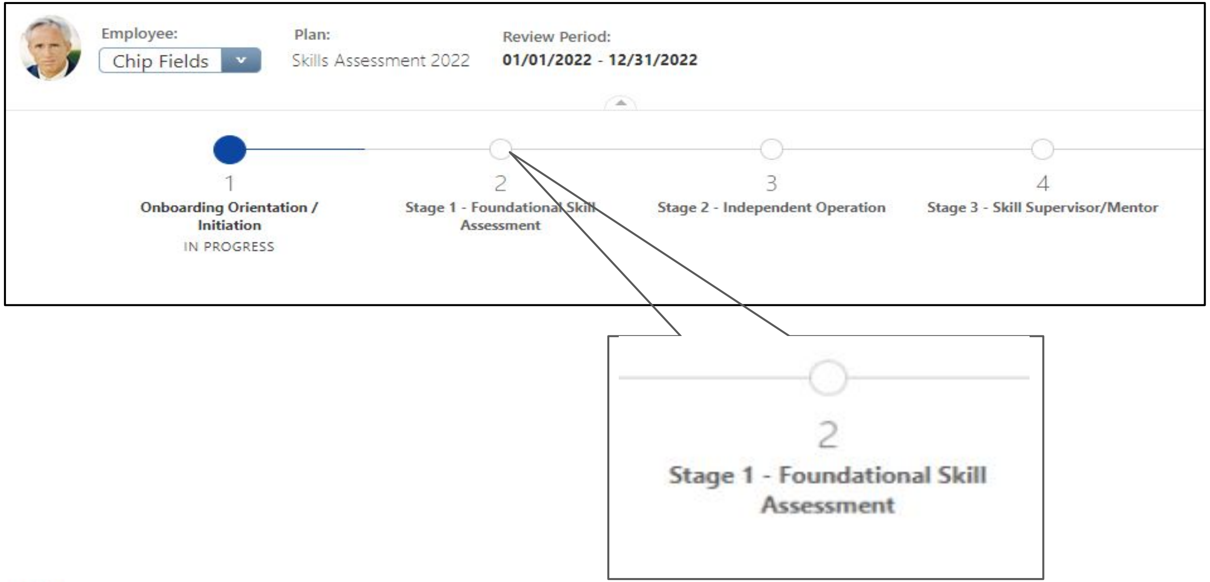
- The need for ongoing observational skills validation (vs. subjective periodic ratings) is growing leading to larger inventories of skills and competencies subject to in-person observational assessments
- Commonplace in regulated industries (healthcare, transportation, energy, etc.) with specific compliance requirements
- Frequent scenarios (new employee onboarding/orientation, etc.) where a guided approach is required, ensuring that employees are meeting all prerequisite and dependent requirements prior to advancing to the next level of validation/demonstration

How did we solve it?

- The Observational Competencies framework has been extended to enable an iterative skills assessment program
- New set of configuration capabilities to support this process design



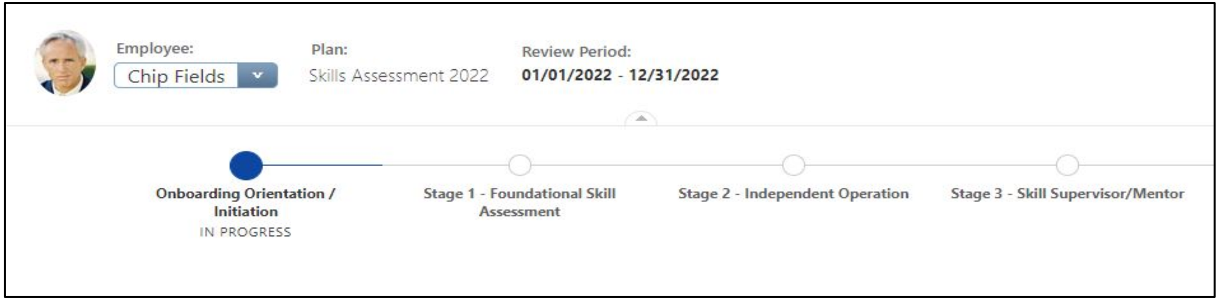
Workflow Display Option



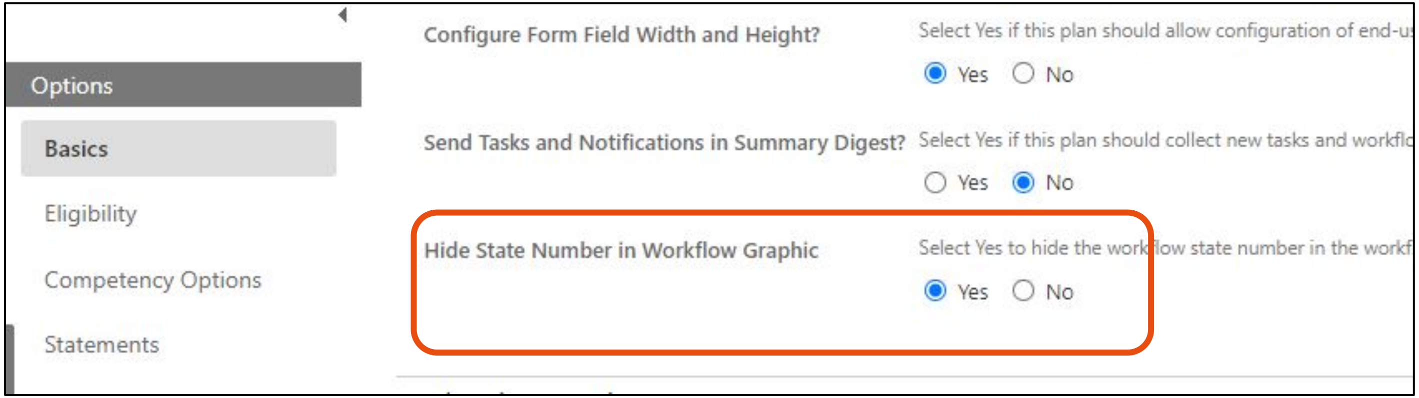
- In cases where the progressive process has prerequisite steps prior to some form of “Stage/Phase 1”, the workflow stage numbers can cause confusion

Workflow Display Option

- A new option will allow for the numbers to be hidden so that only the Display Name shows in the Workflow Status Pipeline graphic



Workflow Display Options



- Display option is controlled from a new configuration setting that is available from the Performance Plan > Basics page

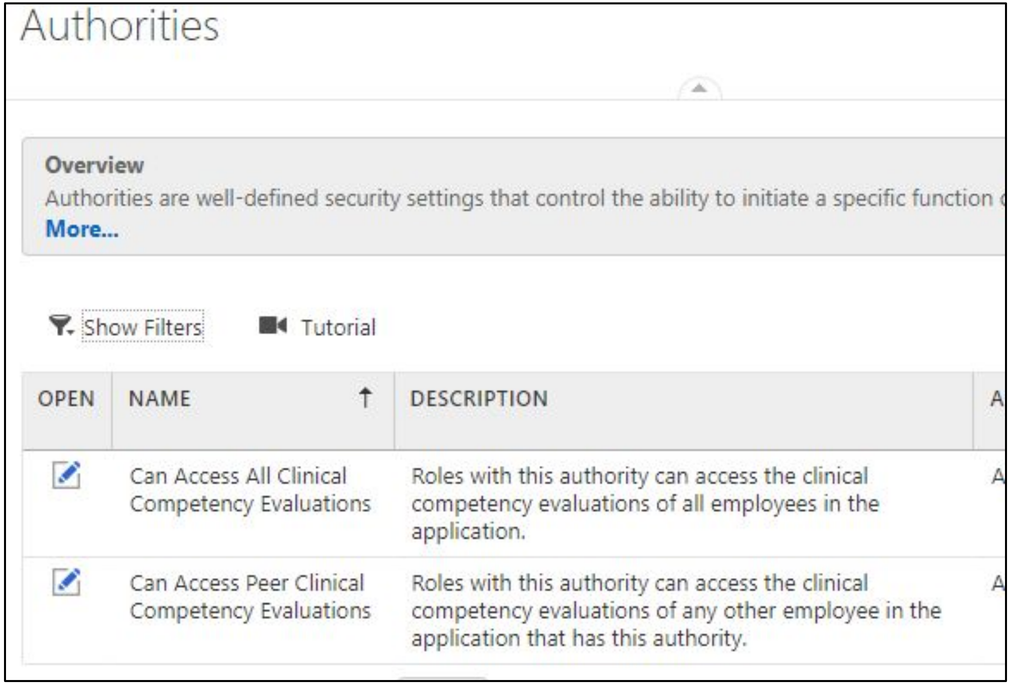
Progressive Skills Assessments - Rating Authorities

What was the Problem?

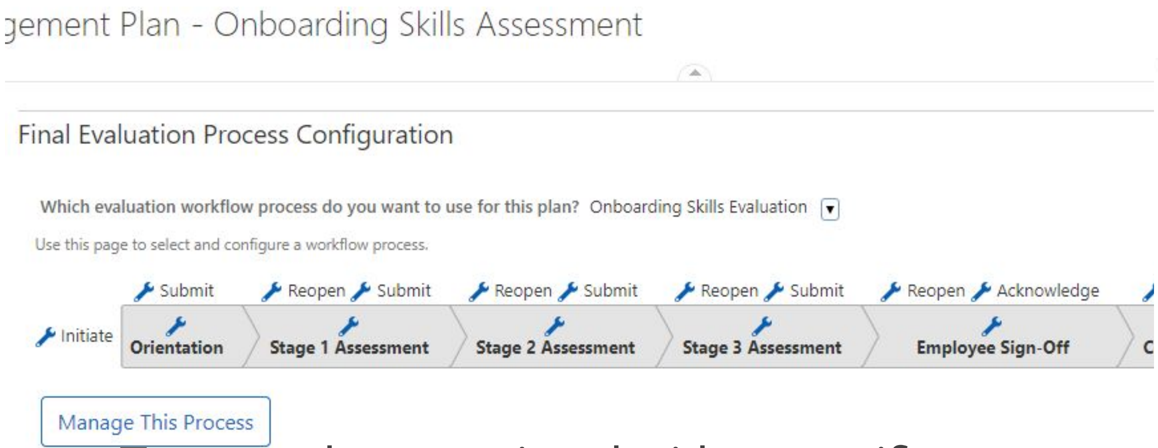
- In an “observational” scenario, there can often be individuals where the sign off for a demonstrated skill is authorized by virtue of their role in the organization (vs. any specific managerial or other relationship to a given subject being assessed.)
- Managing these broad based permissions using Stakeholder Assignments can be administratively burdensome and in some cases, risks introducing application performance degradation

How did we solve it?

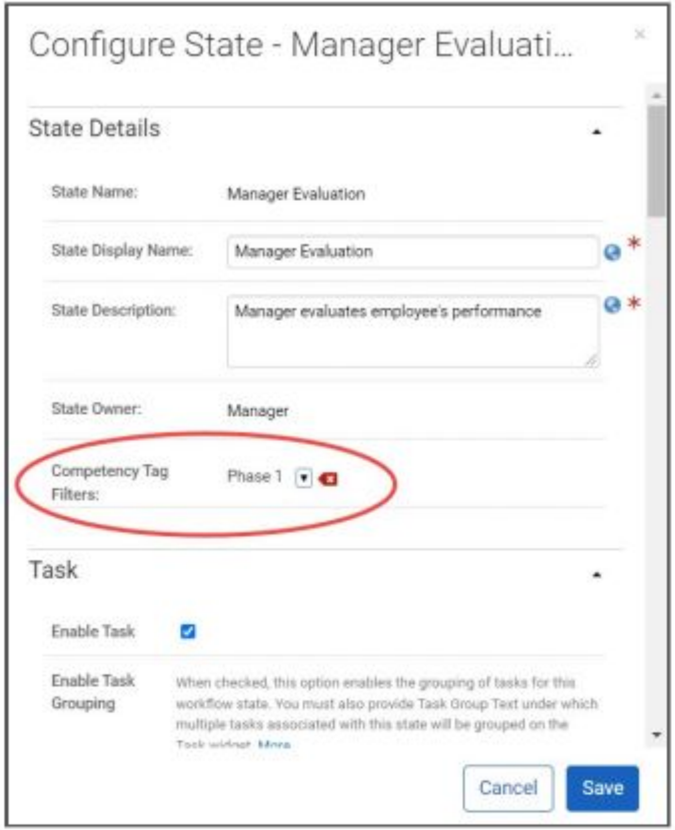
- Two new Authorities are available for use in the Security Role configuration
- The "Access All" Authority allows a user the ability to access any individual within an observational skills assessment plan
- The "Access Peer" option allows a user to access the form of any other user with the same authority assigned to them.



Progressive Skills Assessments - Competency Tags

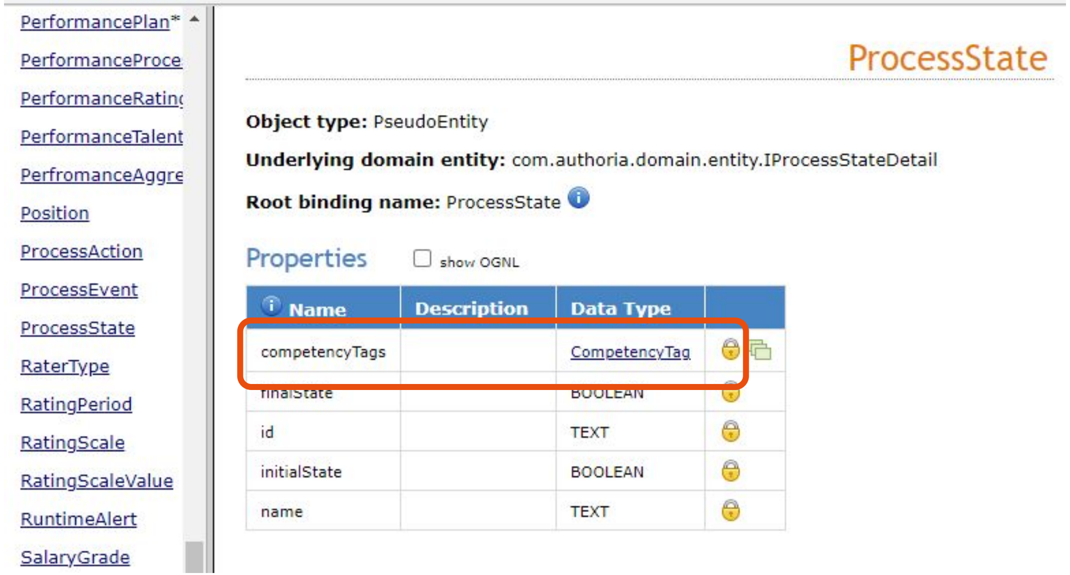


- Tags can be associated with a specific workflow step so that only the competencies with that tag are available for rating during that workflow stage
- This allows for specific competency sets to be based on the prerequisite of demonstrating all competencies or skills with a prior workflow stage



Competency Tags in PseudoModel

- Competency tag values are now available for use in Performance Plan Formulas
- This will allow for much more precise control when doing things like configuring stage-specific alerts and/or computing aggregate or average scores within a specific workflow stage



Compensation Administration

Pre Generated Compensation Statements

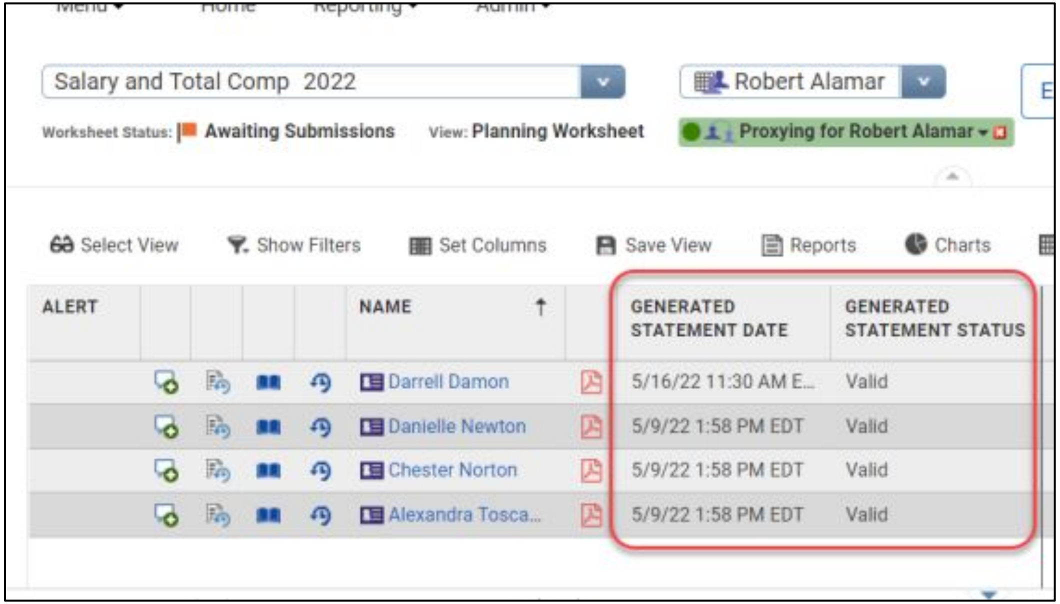
What was the Problem?

- Compensation Statements can be generated “on the fly” or can be pre-generated ahead of time in advance of the distribution process
- Pre-generating Compensation Statements leads to a superior user experience but requires investing the “up front” time to allow the system to run through the statement generation process
- Since it is common for a compensation planning cycle to have regular last minute updates to data, recommendations and approvals, the window for running the pre-generation process is often tight and last minute
- This can lead to situations where customers choose to forgo the pre-generation process (leading to a degraded user experience) or to initiate manually intensive workarounds to ensure that all compensation statements are up to date and accurate during the distribution period

How did we solve it?

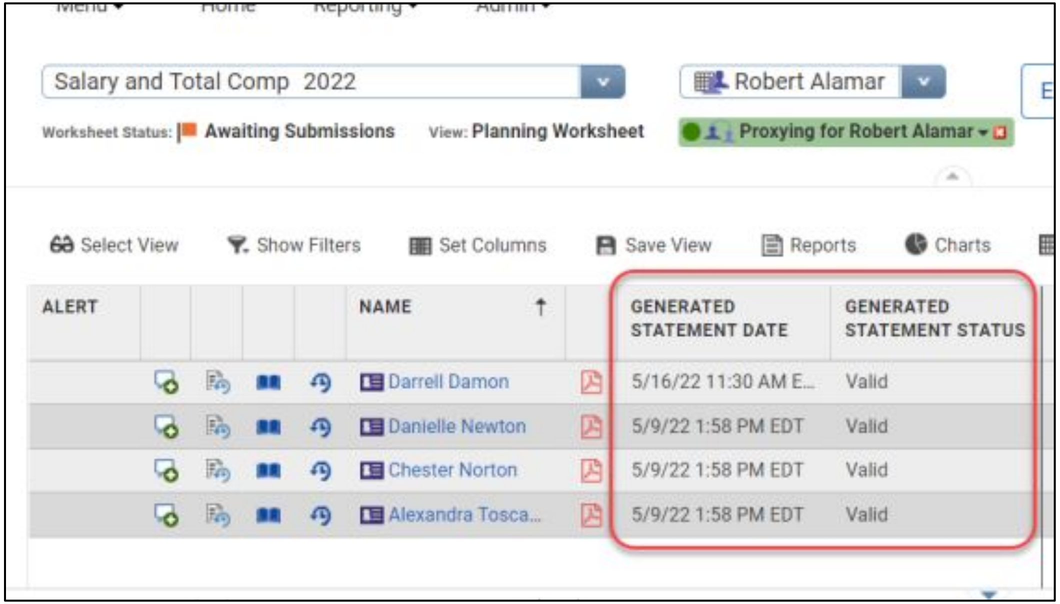
- A new set of data fields and supporting functional capabilities are available to make the process of “keeping everything up to date” something that is more seamless and can be automated with relative ease. Specific new functionality includes
  - New Timestamp Fields
  - New Statement Status Field
  - New PsuedoModel Methods
  - New Filtering Options
  - Row-Level Generation Button
  - Secondary Grid View Selection Option

New Worksheet Row Fields



- New timestamp field is available indicating when the statement was generated.
- This can be used to compare against other Worksheet Row timestamps (last calc'd, last edited, etc.) to determine any situation where the pre-generated statement should be recreated

New Worksheet Row Fields

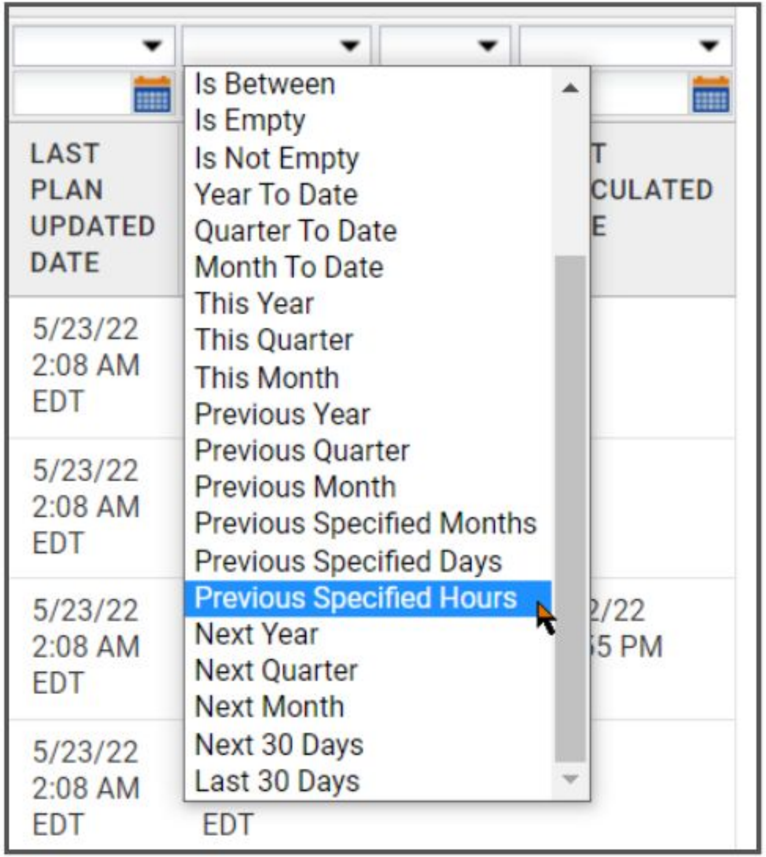


New fields are hidden by default but can be made visible to specific roles using Design Mode

- A New "Generated Statement Status" field is also available indicating whether a given Worksheet Row has a valid set of generated statements available.
- This field can be used for reporting on the "State of Statements" and is evaluated during any statement request (if the value isn't "valid" then the requested statement will be run on the fly.)

Time of Day Filter

- A new filter option is available on fields that capture a date/time stamp value
- Will allow for saving a view where data has changed during a portion of the day (e.g. “last 12 hours”)
- Intended to allow for supporting multiple targeted statement regenerations in a single day



deleteStatement Method

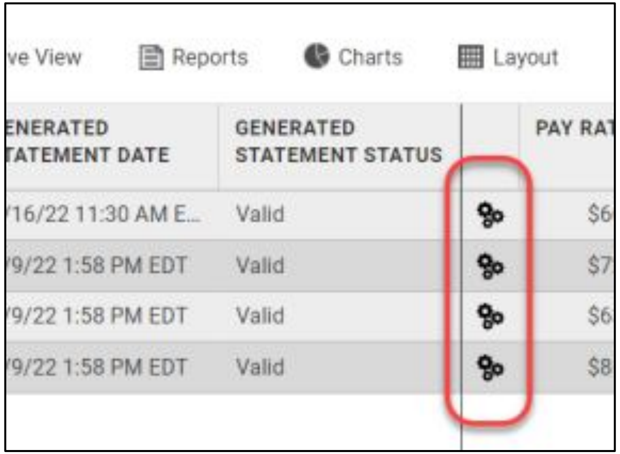
Worksheet
WorksheetLookups
WorksheetRow*
WorksheetRun
WorksheetRunBudgetPoc
WorksheetRunBudgetPoc
WorksheetRunBudgetPoc
WorksheetSummary*

Methods ☐ show Method Name

Name	Description	Parameter Data Type	Return Data Type
deleteStatements	Deletes all generated statements that are associated with this Worksheet Row as well as set the StatementRunInitialDate to null and set the StatementStatus to None.		VOID
getLatestGeneratedStatementDate			DATE
getLookups	WorksheetLookups associated with this row		WorksheetLookups

- A new WorksheetRow method is available to delete any pre-generated statements associated with that row
- This can be invoked as part of a row level formula which can evaluate for any required data condition
- This will allow for granular control when only certain data elements should be considered as rendering the statement invalid

New Worksheet Row Button

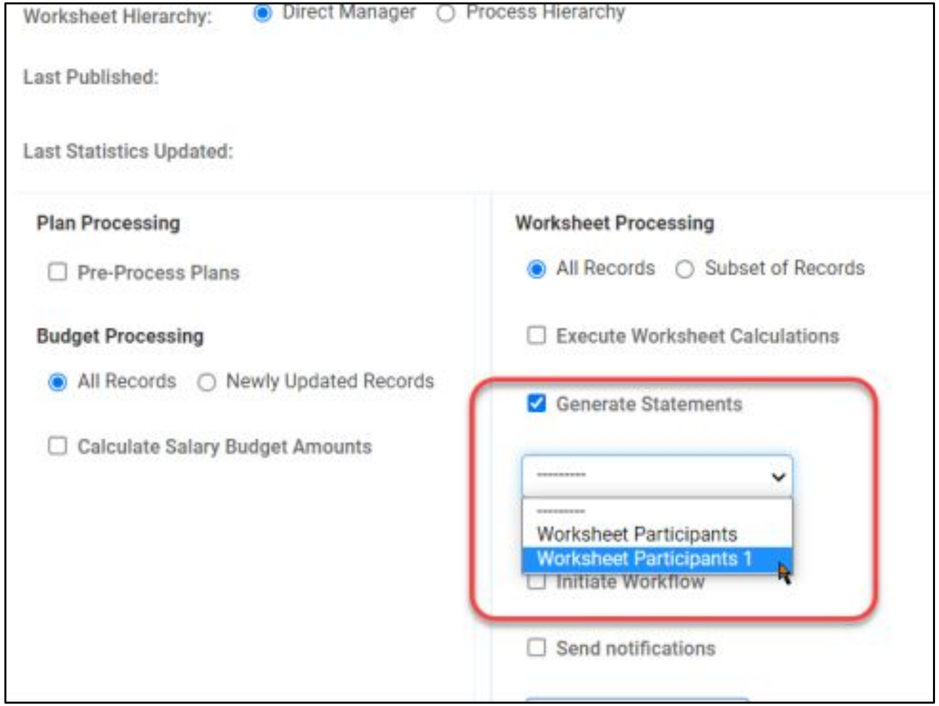


New button is hidden by default but can be made visible to specific roles using Design Mode

- Button will allow for generation of any required statements for a single worksheet record without needing to initiate from the Worksheet Processing Console
- Automatically updates the Worksheet Generation timestamp and the Generated Statement Status
- Button available on the planning worksheet as well as the Worksheet Participants screen

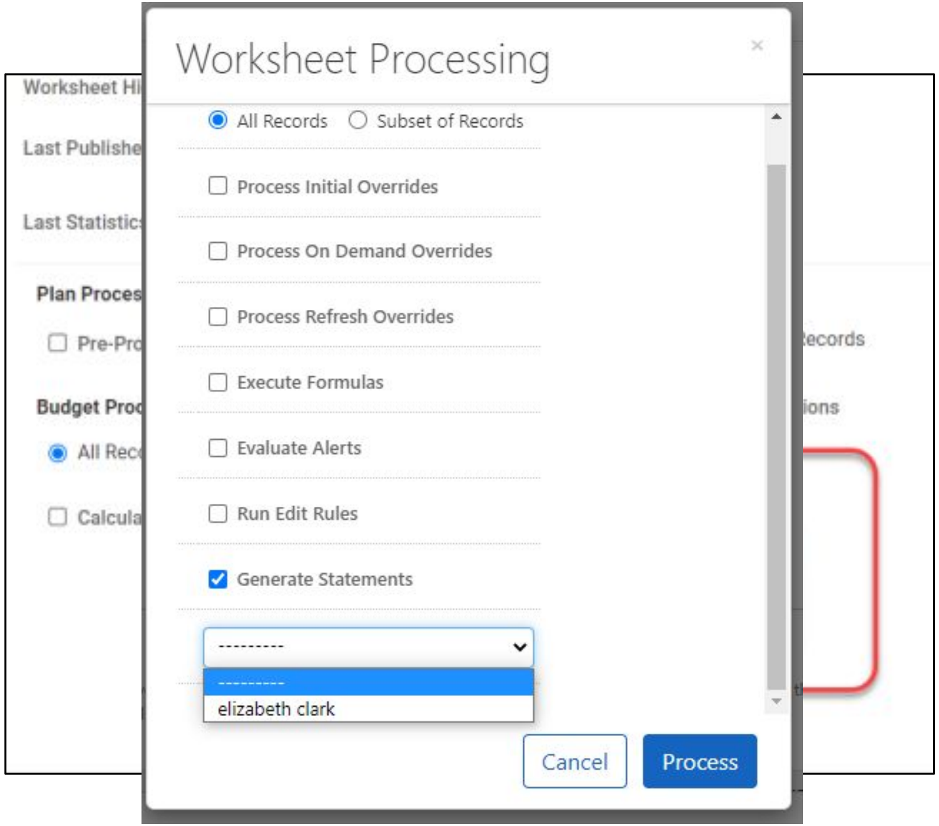
Secondary Grid View Selector

- In some cases, it is desirable for the worksheet processing to operate on a broader population for some operations (like data maps and formulas) but only need to regenerate statements for a smaller subset of records
- The statement generation option can now be configured to operate off of a separate Grid View.



Secondary Grid View Selector

- Option is available on the Publish Options page as well as the Worksheet Processing Console
- When left blank, the Generate Statements option will inherit the configuration for the broader worksheet processing operations



Administrative Efficiency

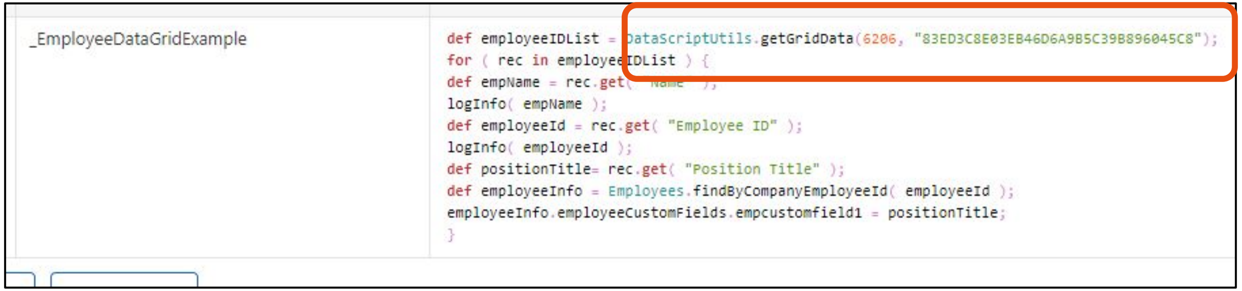
Data Processing Scripts

What was the Problem?

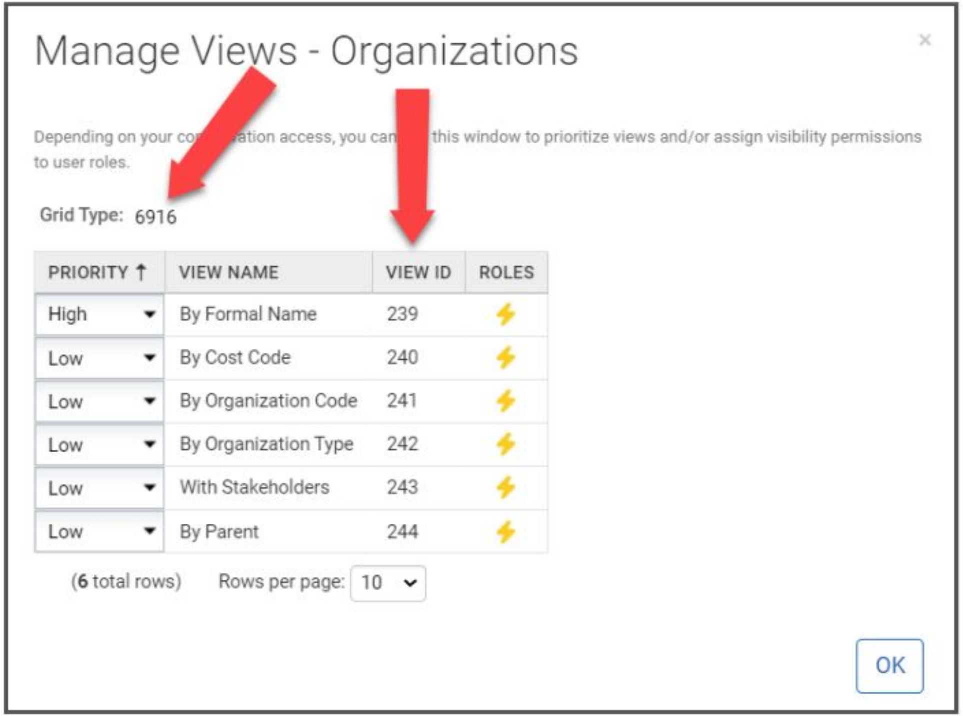
- The data processing functionality is designed to work by allowing administrators to use a spreadsheet in CSV format to upload data into PeopleFluent Talent Management and use Groovy script to persist that data wherever needed or required
- A common use case has been that the required CSV was generated by exporting data from one of the SmartGrids within the application
- This results in additional steps, opportunity for human error, persisting data on local hard drives and other sub-optimal situations

How did we solve it?

- A new “getGridData” method is available for use in any processing script definition
- This effectively replaces the operation of uploading a .csv file as the source for the Data Processing Script.



Grid and Grid View ID



- The “getGridData” method signature requires a Grid Type and View ID as parameters
- These values are now easily viewable from the “Manage Views” menu of any SmartGrid
- Parameters can be hardcoded in to the script or configured as Runtime Properties

Script Example

- Script example that will read a value (Position Title) and then write that value into a custom field

The following sample script (`SetEmployeeCustomFields`) is included out of the box on the Data Processing Scripts page to illustrate this functionality:

```
//This script will iterate through grid data and populate a custom
field.
//This script assumes that the Employee ID field is added to the My
Team > Employee Information > Position Information grid and that
there is a custom field named empcustomfield1.
//Only public views are allowed.

def employeeIDList = DataScriptUtils.getGridData(6206,
"83ED3C8E03EB46D6A9B5C39B896045C8");

for ( rec in employeeIDList ) {
    def empName = rec.get( "Name" );
    logInfo( empName );

    def employeeId = rec.get( "Employee ID" );
    logInfo( employeeId );

    def positionTitle = rec.get( "Position Title" );

    def employeeInfo = Employees.findByCompanyEmployeeId( employeeId );

    employeeInfo.employeeCustomFields.empcustomfield1 =
positionTitle;
}
```

Plan Configuration

What was the Problem?

- The configuration of Performance Plan eligibility can include explicit lists of employees for inclusion or exclusion from the plan
- In cases where employee names are similar or identical, it can be difficult to ensure the correct employee is listed
- The employee ID is listed and unique but is not always readily verifiable by the administrator performing these operations

How did we solve it?

- A new (optional) column has been made available to display the employee Login name in the Inclusion/Exclusion grids
- Login value will allow for easier distinction between employees with similar names

Inclusions

Employees listed below will be included in the plan workflow processes even though they might not meet the eligibility criteria. More...

NAME ↑	POSITION TITLE	EMPLOYEE ID	MANAGER	ORGANIZATION	LOGIN
Robert Alamar	General Manager	000000001	Neil O'Donnell	Manufacturing	robert.alamar
Kristen Ard	Customer Service Representative	000004537927	Patricia Milton	Manufacturing	kristen.ard
Tim Ballard	VP HR	897-98-2381	Susan Keeler	HR	tim.ballard

Add Delete (3 total rows) Rows per page: 10

Exclusions

Employees listed below will be excluded from the plan workflow processes even though they might meet the eligibility criteria.

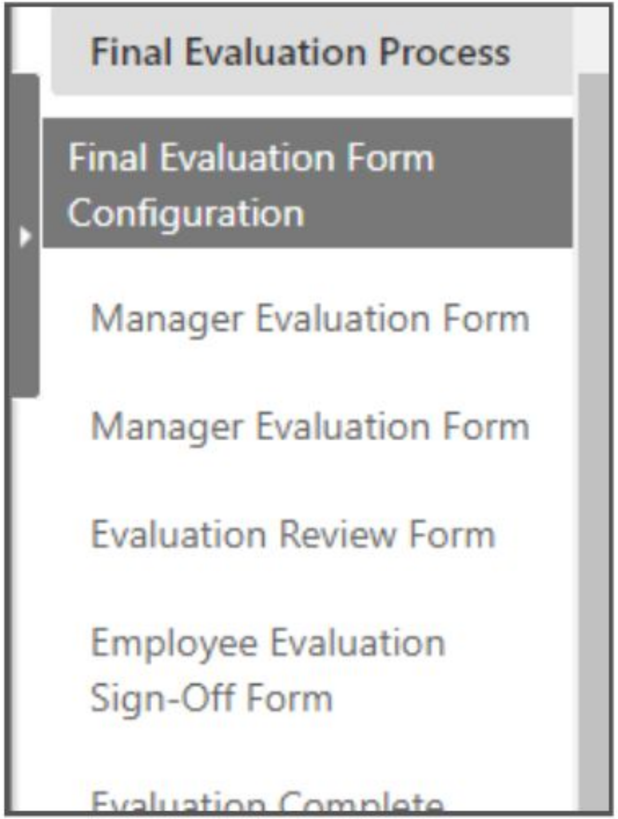
NAME ↑	POSITION TITLE	EMPLOYEE ID	MANAGER	ORGANIZATION	LOGIN
Joanna Cassidy	Cost Accountant II	000000149	Stanley Peterson	Cost Accounting	joanna.cassidy
Malcolm Cleveland	Payroll Manager	000000028	Sally Jones	Cost Accounting	malcolm.cleveland

Add Delete (2 total rows) Rows per page: 10

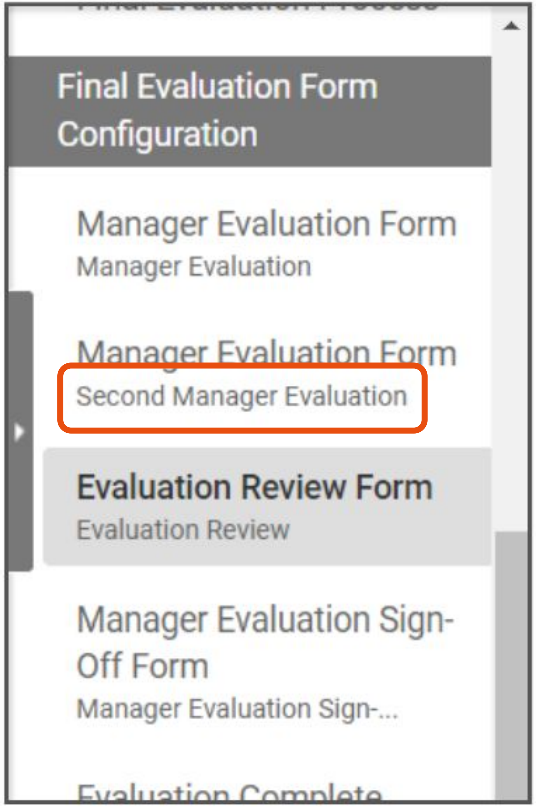
New column is hidden by default but can be made visible using Design Mode and choosing the "Select Columns" option.

What was the Problem?

- The Performance Plan configuration allows for an open ended number of form configurations – many of which are modified copies/clones of each other
- Since the form types are the same, it can be difficult to discern exactly which form you are accessing



How did we solve it



- The Form Configuration menu now shows the underlying form's Display Name beneath the Form Type
- This will allow for easier reference when looking to make incremental adjustments to the individual forms within a given Performance Plan

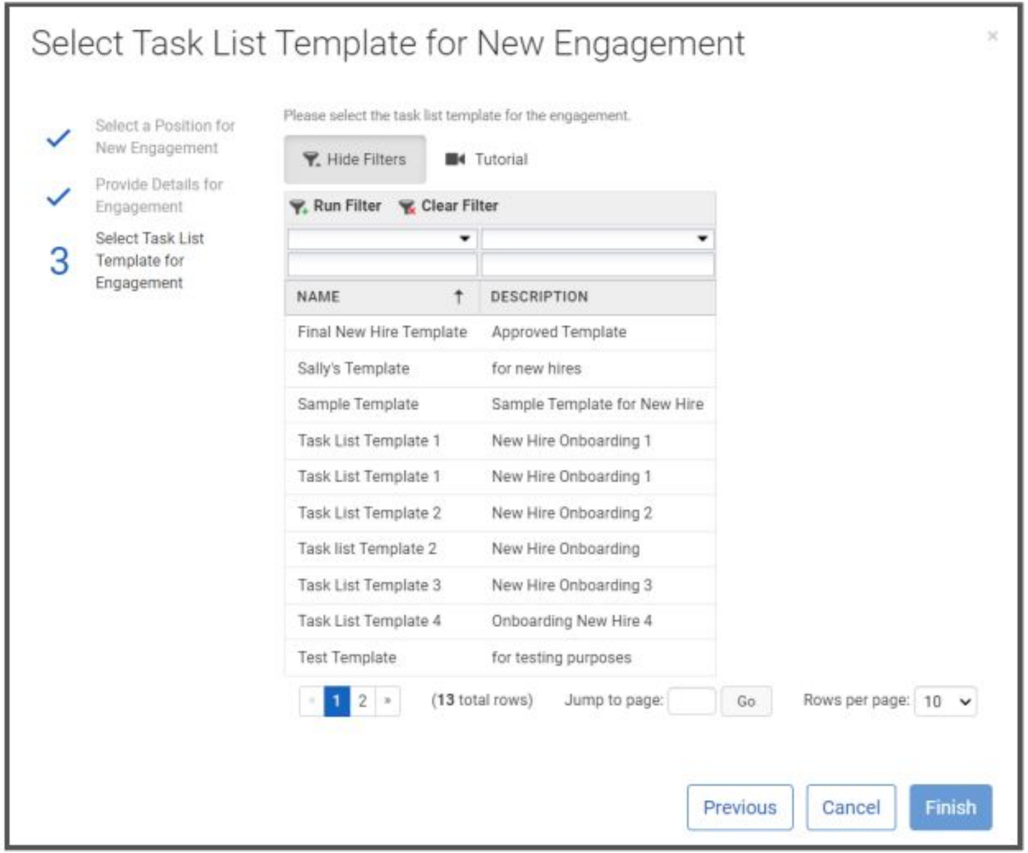
Onboarding

What was the Problem?

- The Onboarding Engagement Wizard enables the Engagement Manager to initiate an engagement and designate a specific Task List Template to enumerate the tasks to be completed as part of the Onboarding Engagement
- The selection of the Task List Template (in step 3 of the wizard) was a drop down list that showed all available Task List Templates
- In situations where this list was extensive, it was difficult to locate the desired Task List Template

How did we solve it

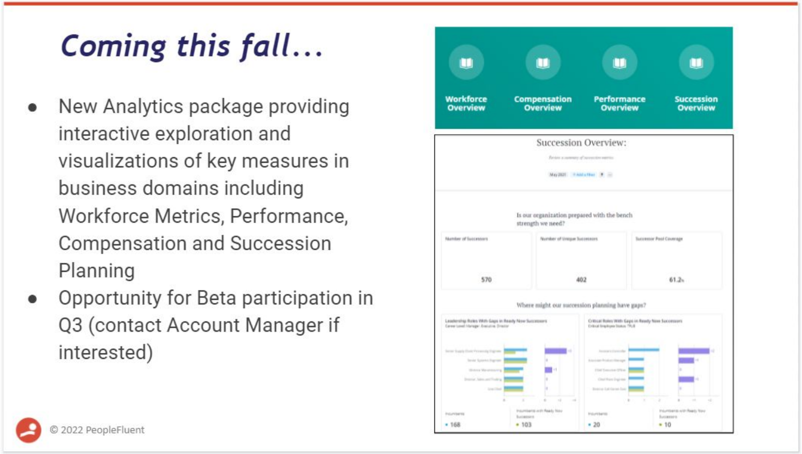
- The Task List Templates in step 3 of the wizard are now presented in standard grid that allows for sorting and grouping of the list
- This will allow users to easily search for and locate the desired Task List Template for a given Engagement.



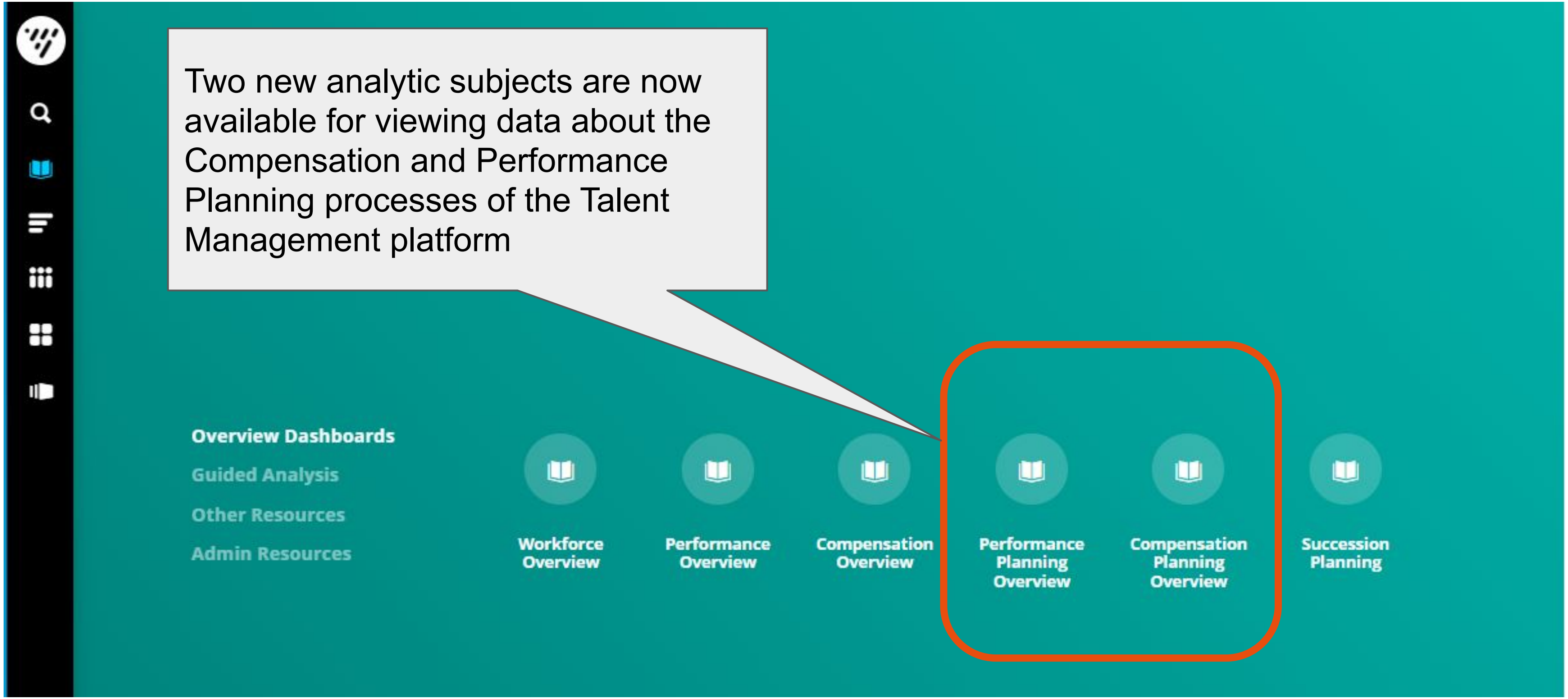
People Analytics

People Analytics

- In the 21.11 release, we announced the availability of our new People Analytics product providing a best-in-class library of analytic visualizations based on core data from the Talent Management platform
- We've continued to extend the data universe for this product by adding in new visualizations focused specifically on the planning processes that are managed with the Talent Management system

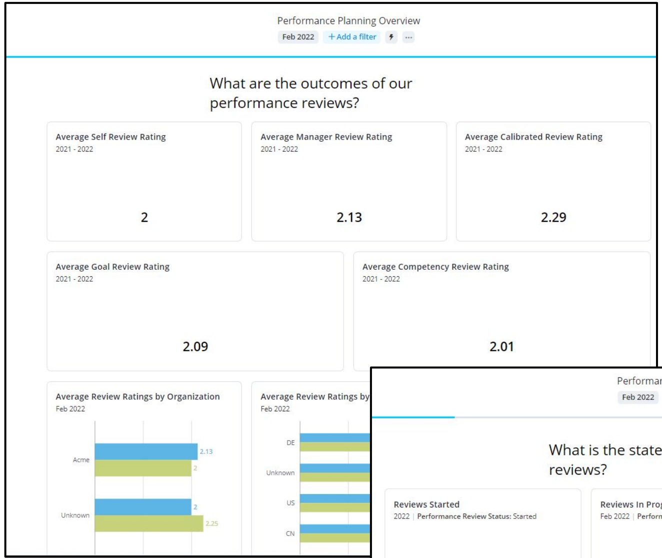


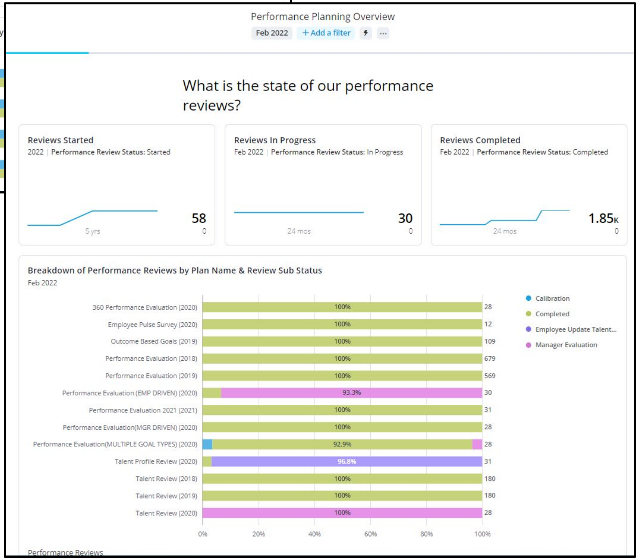
People Analytics



Performance Evaluation

- New subject for viewing analytics for one or more Performance Plans





- Provides insights around compliance and participation of the Performance Process as well as analysis of process outcomes (overall scores, distributions and gap analysis)

Compensation Planning

- New subject for viewing analytics for one or more Compensation Reward Cycles
- Provides insights around budgetary adherence and well as compensation decision outcomes (comparatio movement, bonus achievement relative to target, etc.)
- New metrics added as part of the 22.07 release

Any Questions

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Thank You