A Real-Life Example of Fusion HCM with Oracle E-Business Suite HRMS Co-Existence

Presenter:
Gustavo Gonzalez, CTO
gfgonzalez@itconvergence.com
@ggonza4itc
A Real-Life Example of Fusion HCM

Presenter

Gustavo González
IT Convergence,
Chief Technology Officer

McGraw-Hill / Oracle Press
More about Gustavo

- Oracle ACE Director Specialty Applications
- More than 15 years Oracle Applications Experience
- Head of IT at IT Convergence since 2006
- Technical Editor “Oracle Fusion Applications Development and Extensibility Handbook”
- Member of the Oracle EBS Customer Advisory Board
- Member of the Oracle Usability Advisory Board
- Project Manager of the R12 Upgrade at IT Convergence
- Project Manager of R12.2 Beta Program & Early Adopter
- Project Manager of Fusion Apps Implementation at ITC
About IT Convergence

- Premier Global Oracle Services Company
- Consulting, Education, Development, Testing, Hosting & Managed Services
- International Staffing / Delivery Model
- Deep relationship with Oracle Development – 12.2 Beta Partner
- Oracle Platinum Partner and OAUG Star Partner Level Five
- Recognized by Gartner
- 80+ R12 Upgrades Plus Roll Outs and Training Workshops
- Focus is Long-Term Business Relationships
- Full-Service Oracle Provider with 850+ FTE’s globally
Global Reach, Local Expertise
Taking Our Own Medicine

- Used the E-Business Suite since 2004
- Upgraded to R12 in January 2009
- Implemented OBIEE in January 2010
- R12.2 Beta Program in January 2012
- Oracle Fusion Applications in 2012

And we host our systems running Oracle VM
INTRODUCTION
How do me manage talent?

- Larry’s memory (Oracle story)
- The best, average, below average
- Best combination
- Let’s see an example
Introduction to Football
IT Role in the selection

▪ Balance
▪ Features
▪ Capabilities
▪ Sustainability
▪ Support
## Oracle Fusion Applications

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<tr>
<th>Application Platform</th>
<th>User Experience</th>
<th>Technology Adoption</th>
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<tbody>
<tr>
<td>Standards</td>
<td>Web 2.0</td>
<td>Cloud/SaaS</td>
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<tr>
<td>SOA</td>
<td>Embedded Intelligence</td>
<td>Modularity</td>
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</table>
New Standard for Innovation

Lower Cost IT Talent

- 11x more Java programmers than ABAP programmers

Lower Cost Integration

- 50% lower maintenance costs with standards-based integration

Upgrade-Friendly Customization

- Extensive configuration options with zero impact on upgrades
Fusion Applications’ experience

- Is the product ready?
- What can I do now to acquire technical knowledge to my team?
- How easy will be the installation?
- How can I start preparing now?
- Wait, is Oracle calling Fusion with a new name?
Fusion Applications Architecture
Fusion Applications Concepts

- **Customization**: Changing a standard Oracle Fusion Applications artifact
- **Extending**: Create a completely new Oracle Fusion Applications artifact
- **SAR File**: A SOA archive deployment unit. A SAR file is a special JAR file that requires a “sca_” prefix
- **SOA Composite Application**: An assembly of service components and service/reference binding components designed and deployed in a single application
- **Artifact**: A file included in the SAR file of the SOA composite application
Metadata Services (MDS)

- Base application deployed
- Onstte branding
- LOB branding
- User personalization and more…
Simplified User Interface for Cloud Applications

Simple
  Move easily from navigation to action.

Current
  Designed for any modern browser.

Productive
  Your key quick-entry tasks, sitting on top of the full functionality of industrial-strength cloud applications.
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UX Design Patterns: Oracle Process

- Best of Oracle applications
- Proven scientific usability
- Informed by consumer expectations
- Deep understanding of Oracle toolkit
- Public UX design patterns website
- Productivity for Oracle applications developers
- Result: Consistent, high-quality user experience built by Oracle applications enterprise community

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The New Standard for Work

- How easy or difficult is to use the tool?
- How can I train my team?
- How are we going to manage reporting?
  - Essbase, OTBI, BI Publisher…
CO-EXISTENCE OPTIONS
## A Real-Life Example of Fusion HCM

### Choice of Scenarios

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<thead>
<tr>
<th>Existing Apps</th>
<th>Co-Existence</th>
<th>Fusion Apps</th>
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<tr>
<td><strong>1 - Current customer</strong>&lt;br&gt; No plans to adopt Fusion Applications at this time.</td>
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<td><strong>2 - Current customer</strong>&lt;br&gt; Adopt Fusion Apps alongside existing Oracle apps with no interoperability.</td>
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<td><strong>3 - Current customer</strong>&lt;br&gt; Adopt Fusion Apps alongside existing Oracle apps with loose interoperability.</td>
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<td><strong>4 - Current customer</strong>&lt;br&gt; Adopt Fusion Apps alongside existing Oracle apps with tight interoperability.</td>
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<tr>
<td><strong>5 - Current customer</strong>&lt;br&gt; Replace existing Oracle apps with Fusion Applications pillar or suite.</td>
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<tr>
<td><strong>6 - Current customer</strong>&lt;br&gt; Replace 3rd party apps by adopting Fusion Apps pillar or suite.</td>
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</table>
Choice of Functionality
Integration Patterns

Fusion
ERP, SCM, HCM, CRM
Single instance
Unified data model

Fusion
HCM
Separate instance
separate data model

Siebel
CMR
Separate instance
separate data model

E-Business Suite
ERP
Separate instance
separate data model

…possibly some legacy, Homegrown, or Custom Solution(s)
Coexistence: Modern Integrated Procure-to-Pay

Comprehensive end-to-end procurement and payables
Coexistence: Contemporary Reporting Hub
Real-time multi-dimensional reporting / analytics for your existing General Ledger
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**Project Execution Coexistence**

PROJECT AND TASK MANAGEMENT

- Project Management
- Scheduling
- Progress

![Diagram showing project execution coexistence with Oracle E-Business Suite, Fusion Applications, PeopleSoft Enterprise, and Legacy systems.](image)

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Project Execution Coexistence

PROJECT RESOURCE MANAGEMENT

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Coexistence: Simplified Revenue Compliance
Automate complex IFRS and VSOE revenue recognition requirements
### Co-existence Strategy

<table>
<thead>
<tr>
<th>Department</th>
<th>Applications</th>
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</thead>
<tbody>
<tr>
<td><strong>FINANCIAL MANAGEMENT</strong></td>
<td>Hyperion, Fusion GRC, Fusion Accounting Hub</td>
</tr>
<tr>
<td><strong>PROCUREMENT</strong></td>
<td>Fusion Shared Service Procurement</td>
</tr>
<tr>
<td><strong>PROJECT PORTFOLIO MANAGEMENT</strong></td>
<td>Primavera, Fusion project Portfolio Management</td>
</tr>
<tr>
<td><strong>HUMAN CAPITAL MANAGEMENT</strong></td>
<td>Fusion Talent Management, Fusion Incentive Compensation, Fusion Workforce Compensation</td>
</tr>
<tr>
<td><strong>SUPPLY CHAIN MANAGEMENT</strong></td>
<td>Agile PLM, Transportation management, Warehouse management, VCP</td>
</tr>
<tr>
<td><strong>CMR</strong></td>
<td>Siebel CRM, CMR On Demand, Fusion Sales Planning, Fusion Incentive Compensations, Fusion Customer Hub</td>
</tr>
</tbody>
</table>
Fusion Applications HCM – Coexist options

- HR to HR Interface
- File Base Data Loader
- Spread Sheet Loader
- HCM Extracts
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Fusion Applications HCM – Coexist Options

**Hybrid Landscape**

- Cloud-based Applications
- Flat file data

**Capabilities Needed**

- Bulk Data
- Files, CSV, XML
- Data Conversion
- On-going Updates, Delta
- Web Services Integration
- Process Integration
- Business Events
- Extracts
- Reporting
- Data Warehouse

**Implementation Steps**

1. Setup /Initialize
   - Create Initial Enterprise Structures e.g. Legal Entity ...
2. Data Migration
   - Setup and Configuration
   - Data Conversion / Import Indicative
3. Coexistence/Integrations
   - HR system of records
   - 3rd Party Systems
4. Mass Changes
   - Mergers Acquisitions, Org Changes
5. Operational/Transactional
   - Day to day usage, Reporting

**Cloud-based Applications**

- ORACLE PeopleSoft Enterprise
- SAP

**Flat file data**

- Data Ware House

**Integration**

- Web Services
- Process Integration
- Business Events

**Hybrid Landscape**

- Internet
- Firewall

**Data Warehousing**

- Bulk Data Files, CSV, XML

**Data Conversion**

- On-going Updates, Delta

**Process Integration**

- Business Events

**Extracts**

- Reporting

**Data Warehouse**

- Staging Area
- Core HR
- Benefits
- Performance Mgmt
- Talent Compensation
Human Capital Management Coexistence overview

- Retains the existing HCM Application as system of record for Core HR Business Objects
- Includes simplified Fusion HCM Setup
- Enables:
  - An initial “full load” of HCM data from the existing HCM Application into the Fusion HCM Application
  - Ongoing data synchronization processing for subsequent changes
HR2HR Coexistence - Map
A Real-Life Example of Fusion HCM

HR2HR Coexistence - Highlights

- Available for Applications Unlimited
  - PeopleSoft 8.9, 9.0, 9.1
  - E-Business Suite 11.5.10, 12.1.X, 12.2.X

- Deployment options for coexistence
  - SaaS, Hosted, On-premise

- Fully supported solution for integrating your current PeopleSoft Enterprise/E-Business Suite HCM and Fusion HCM

- Retain current HCM Application as HR System of Record using the Fusion HCM’s new Talent and Compensation functionality
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FBL Coexistence - Scope

- Work Structures
  - Business Units
  - Locations
  - Job Families
  - Jobs
  - Grades
  - Grade Rates
  - Positions
  - Departments
  - Dept Hierarchy

- Transaction Data
  - Person
  - Work Relationship

- Workforce compensation
  - Salary Basis
  - Salary
  - Pay Element entries

- Talent Management
  - Content Items
  - Rating Models
  - Establishments
  - Profiles
# A Real-Life Example of Fusion HCM

## FBL – Fusion Data Exchange

### Oracle Fusion Applications

![Oracle Fusion Applications](image)

**Tasks:**
- Submit an HCM Process
- View an HCM Process
- Extract Definitions
- Manage HCM Extract Definitions
- Refine HCM Extracts

**Import Data:**
- Load Batch Data
- Load HCM Data
- Load HCM Extracts

**Payroll Batches:**

<table>
<thead>
<tr>
<th>Process ID</th>
<th>Action</th>
<th>Process Status</th>
<th>Start Time</th>
<th>Finish Time</th>
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</thead>
<tbody>
<tr>
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</table>

**Search:**
- Process ID
- Start Time
- Finish Time
- Process Status

**Search Results:**
- Process ID
- Process Status
- Scheduled Time
- Start Time
- Finish Time
- Action
- Total Batches
- File

**Details:**
- Batches
- Processes

**View:**
- Export
- Refresh
- Detach

**Detach Name:**
- Business Object
- Relish Status
- Total Objects
- Successful Objects
- Failed Objects
- Pending Objects

- No data to display.
- Columns Hidden: 2

- No data to display.
- Columns Hidden: 5
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Spreadsheet Loader Solution - Map
Spreadsheet Loader Solution - Overview

- Supported solution model to bulk load data into Fusion
- Simplified data loading to Fusion HCM from standard spreadsheets via flattened row format
- Initial scope is list of Foundation objects supported for HR2HR
- Use for initial data creation only – no updates
- No support for loading history
- Best for limited volumes of data
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Spreadsheet Loader – Fusion Data Exchange
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Spreadsheet Loader – Support for DFF
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HCM Extracts
Outbound Interface Map
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HCM Extracts – Outbound Interface - Overview

- Create Outbound Interfaces
  - HR/ Payroll data to another application in coexistence
  - HR and Payroll data to 3rd party service providers
- Complex Reporting and processing
  - Payslips to employees
  - Letters for mass processes like promotion, salary review
  - Update employees’ e-document repository
- Ability to extract ‘changes only’ data
- Statutory Reporting
- Data Archiving
HCM Extracts – Outbound Interface – Overview

- Metadata based Extract definition setup
- Extract data based on given Parameter values
- Integration with BI Publisher for Bursting and Output delivery
- High Volume data extraction with multi-threaded processing
- Output in variety of formats (pdf, csv, eft, xml, Excel etc.)
- Delivery of output in various modes (ftp, email, fax etc.)
- Ability to extract ‘changes only’ data
Integration Takeaways

- Fusion Applications can be used with your current Applications Unlimited
- On-premise and SaaS are available now
- Co-existence works for both options
- Find the a strong knowledgeable partner
WHY TALENT MANAGEMENT IS DIFFERENT
Talent Management

- Goal Management
- Talent Review
- Performance Management
- Profile Management
Goal Management

- Types of Goals
- Performance Goals
- Organization Goals
- Development Goals
Goal Management Features

- My Goals page is a one-stop page that allows the workers to manage all their goals including performance, development and personal goals
  - Due to a configurable set up, Goal Management allows the users to use all or certain features easily to meet their specific business needs
- Goal Management also provides flexible approval processes and configurable email/work list notifications
  - Users can print out workers’ goals in PDF or HTML format
  - Goal Management integrates with other Talent Management applications
- The integration between Goals and Talent Review is rather one-way. End users can add goals in Talent Review
Performance Management

- Create performance documents for direct reports
- Set goals and competencies in a performance document
- Evaluate the goals and competencies and rate them
- Share documents, record review meetings and process approvals
- Maintain worker performance documents
Talent Review

- Setting Up Configuration Templates
- Controls the general layout of the box chart matrix
- Set different data options

Oracle Fusion Talent Review
A Real-Life Example of Fusion HCM

Mobility
A Real-Life Example of Fusion HCM

Mobility
## Conclusion

<table>
<thead>
<tr>
<th>Global HR</th>
<th>Benefits</th>
<th>Talent Review</th>
<th>Performance and Goal Management</th>
<th>Compensation</th>
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<tbody>
<tr>
<td>Role-based self service</td>
<td>Simplify benefits process</td>
<td>Talent analytics</td>
<td>Cascading goals guidance and decision support</td>
<td>Total compensation view</td>
</tr>
<tr>
<td>Reduce administrative hurdles</td>
<td>3rd party provider integration</td>
<td>Talent review meetings (past performance review and kudos)</td>
<td>monitoring and managing of the overall performance management</td>
<td>Talent management integration</td>
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<td>Global workforce management</td>
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### Fusion Applications

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<tr>
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<th>CRM</th>
<th>HCM</th>
<th>Financials</th>
<th>Sourcing, Spend &amp; Contracts</th>
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How to get in touch

Gustavo Gonzalez, CTO @ IT Convergence

gfgonzalez@itconvergence.com
tgo@itconvergence.com
+1 (415) 962-8604 // +54 (11) 4000-8484

Twitter: @ggonza4itc  LinkedIn: bit.ly/ggonza4itc

Twitter
@IT_Convergence

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