

# PeopleSoft HCM OnBoarding

## Getting Started

ORACLE TECHNICAL BRIEF | AUGUST 2024





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## Introduction

This technical brief is a practical guide for technical users, installers, system administrators, and programmers who implement, maintain, or develop applications for your PeopleSoft system. In this technical brief, we discuss guidelines on how to implement and use the PeopleSoft HCM OnBoarding feature.

Much of the information in this document originated within the Oracle Global Support Center and is therefore based on “real-life” problems that have been encountered in the field. Although this document does not address every conceivable problem that one could encounter with PeopleSoft OnBoarding, the issues that appear in this document are the problems that prove to be the most common or troublesome.

## Structure of This Technical Brief


This technical brief provides guidance for PeopleSoft HCM OnBoarding.

Oracle updates this document as needed so that it reflects the most current feedback from the field. Therefore, the structure, headings, content, and length of this document may vary with each posted version. To see if the document has been updated since you last downloaded it, compare the date of your version to the date of the version that is posted on My Oracle Support.

## Related Materials

This paper is not a general introduction to PeopleSoft technologies and is written for experienced IT professionals with a good understanding of the PeopleSoft Internet Architecture. To take full advantage of the information in this document, you should have a basic understanding of system administration, basic Internet architecture, integration technologies, relational database concepts and SQL, and how to use PeopleSoft applications.

This document does not replace the PeopleTools 8.5x product documentation. Before you read this document, you should become familiar with the PeopleSoft Internet Architecture information in the PeopleTools product documentation to ensure that you have a well-rounded understanding of the technology.



The following product documentation discusses many of the fundamental concepts that are related to the PeopleSoft Internet Architecture:

- » PeopleTools: Getting Started with PeopleTools
- » PeopleTools: System and Server Administration
- » PeopleTools: PeopleSoft Application Designer Developer's Guide
- » PeopleTools: PeopleSoft Integration Broker
- » PeopleTools: PeopleSoft Integration Broker Administration
- » PeopleTools: PeopleCode API Reference
- » PeopleTools Installation for your database platform
- » PeopleTools Hardware and Software Requirements

Additionally, you should be familiar with the documentation that is delivered with Oracle Tuxedo, Jolt, and WebLogic.

## Overview

PeopleSoft HCM OnBoarding is built upon PeopleSoft Activity Guide Composer. OnBoarding allows employers to set up configurable activity guide templates to guide an employee through a number of activities starting on or before the first day of employment. The phase of this process prior to the first day of employment is referred to as PreBoarding. The OnBoarding phase of this process begins on the employee's first day of employment. These activities can include both PeopleSoft and non-PeopleSoft steps. Each step within the activity can be given rules such as due dates and/or required order of completion. As part of this technical brief, we will review parts of Activity Guide Composer as it relates to PeopleSoft OnBoarding. This technical brief is not intended to be a comprehensive look at Activity Guide Composer but is meant to supplement PeopleSoft online documentation for OnBoarding as it may pertain to Activity Guide Composer or the OnBoarding process that was delivered.

### Who Should Read This Document?

Those involved in the implementation of PeopleSoft OnBoarding in your organization should read this technical brief. Both, technical and functional individuals will find value in understanding the concepts outlined in this document. As you read this document, keep in mind that depending on your unique organization and the separations of duty within your organization certain steps may be performed by an IT resource while other steps may be performed by a HRIS or functional resource. An understanding of both PeopleSoft HCM as well as the business process of onboarding will be important as you move forward in your implementation.

### Before You Begin

You should review the PeopleSoft Video Feature Overview for OnBoarding as well as PeopleSoft online documentation (PeopleBooks) prior to reading this document. Many of the concepts may be reiterated in this technical brief, however this document should be used to supplement the official documentation, not replace it.

### Common Terms

The following table provides definitions for some of the common terms that are used in this guide.

#### COMMON TERMS

Term	Definition
PreBoarding	PreBoarding is defined as that time prior to an employee hire date. The employee would have a Person record as well as a Job record.
OnBoarding	OnBoarding is defined as that time after an employee is hired. The employee would have a Person record as well as a Job record.
Activity Guide Composer (AGC)	Activity Guide Composer is a utility and framework that allows organizations to create and maintain activity guides through a simple GUI interface within PIA.

## Getting Started

Starting in PeopleSoft HCM image 23 both PeopleSoft Activity Guide Composer as well as PeopleSoft OnBoarding was made generally available. With PeopleSoft image 24, we enhanced OnBoarding by adding a manager's view to the process of OnBoarding. PeopleSoft image 28 delivered administrators access to these activity guides, allowing for completion, deletion, or cancellation of a process that is in-progress. OnBoarding Insights were delivered in image 49 and provide dashboards to the manager and administrator to monitor and analyze the progress and trends of these activity guides. We will continue to enhance the OnBoarding functionality through the use of PeopleSoft Update Manager and the future PeopleSoft continuous delivery methodology. PeopleSoft OnBoarding does require a minimum tools release of PeopleTools 8.55

## Validation and Feedback

This section documents the real-world validation that this technical brief has received.

### Customer Validation

Oracle is working with PeopleSoft customers to get feedback and validation on this document. Lessons that are learned from these customer experiences will be posted here.

First customer went live within 3 months of PUM 23 being released.

## Authors

Jeremy Pelley is the PeopleSoft HCM Strategy Director responsible for the OnBoarding product.

## Revision History

### REVISION HISTORY

Date	Change
March 2018	Created document.
August 2024	Revised to incorporate PreBoarding

## Activity Guide Composer - Categories

To start to understand the OnBoarding functionality, you must first understand certain aspects of Activity Guide Composer. First, Activity Guide Composer is made up of multiple parts. The starting point for Activity Guide Composer is the categories. You can navigate to the category by opening the navigator menu and selecting:

Enterprise Components > Activity Guide Composer > Categories

You will find that Oracle has delivered a category for use with OnBoarding as system data. The 01/01/1900 row cannot be modified by the customer; however, you are able to add a new effective dated row to make the category more in line with your organizational needs. Oracle's PeopleSoft HCM application has also provided you a Clone Category utility if you would prefer to clone the category and make your changes to your own category. Which option you choose is completely up to you and your own organizational needs. Either way, Oracle will continue to



update the delivered category of *ONBOARDING* in future PeopleSoft images, but we will only update the 01/01/1900 row and will not modify effective dated rows entered by the customer.

## AG Composer Categories

**Category**   Security   Context   Actions   Images   Assignees   Steps   Notifications

Activity Guide Category   ONBOARDING

**Category Attributes** ?

\*Effective Date

01/01/1900

\*Description

OnBoarding

\*Long Description

Category for OnBoarding activity guide templates

\*Root Package ID

HR\_OBD

\*Path

OnBoardingProcessor

\*Instance Creation Class Id

InstanceProcess

\*Instance Create Method

InstanceCreation

Object Owner ID

Human Resources

Data Type Code

System Data

As you can see in the above screen shot, the Category component is made up of multiple pages, but Assignees and Notifications are not used at this time. PeopleBooks goes into more detail as to the individual fields on the pages. Often the category is configured by someone who is more technical in the organization. Category setup is the most technical component in configuring the OnBoarding process. For this paper, we will focus on the **Steps** page.



Category

Context

Actions

Images

Steps

Activity Guide Category ONBOARDING

Category

Effective Date 01/01/1900

Description OnBoarding

Steps

\*Step ACA\_1095\_CONSEN

\*Description ACA 1095-Consent

\*Long Description The employee will provide consent using Form 1095-C Consent

\*Service Type Application Class

\*Service Id OBD\_ACA\_SS\_CONSENT

☒ Fluid

▶ Post Processing PeopleCode

▶ AWE Integration

▶ Related Data

▶ Additional Step Context

▶ Step Actions

Save

Return to Search

Add

Update/Display

Include History

Correct History

The **Steps** page is where all available pages to be used in OnBoarding must be setup. For example, in a very simple organization doing business in two countries such as the US and Canada you would include steps for all your US and Canada tax pages, even though no single employee would go through both sets of pages.

This will make more sense once we start defining the templates for OnBoarding, but at this point understand that you will need a step in your OnBoarding category for every step that you will conceivably want to use in any template you define. Having your technical team define the steps during this part of the process does not mean you have to use the step in the template you define later, it simply means you can use the step in a template you define later.

Many organizations have found that it benefits them to work with their technical team to define a multitude of steps upfront, including video steps that may have different content as well as welcome steps that may have differing content. There is no perfect number of steps to have defined in your category. Each organization will differ in the total number of steps.

## Activity Guide Composer - Templates

If Activity Guide Composer categories are the most technical aspect of OnBoarding, then templates are the most functional aspect of OnBoarding. Activity Guide Composer uses the templates to define the process exposed to the individual when entering the activity guide. For OnBoarding, this is the list of activities that the employee will be presented upon launching the OnBoarding process.

You may have only one template that your entire organization will use. Or, you may have multiple templates that are defined, and differing groups of employees will be assigned different templates based on some criteria within the database. We will look at this later in the section on Template Assignment. You navigate to Activity Guide Composer templates by opening the navigator menu and selecting:

Enterprise Components > Activity Guide Composer > Templates

Template	Category	Description	Long Description	Active	Update Template	Clone Template
EF_A1FF	Life Event	Adoption Event	Adoption Event	Yes		
EF_B2FF	Life Event	Birth Event	Birth Event	Yes		
EF_D3FF	Life Event	Divorce Event	Divorce Event	Yes		
EF_M4FF	Life Event	Marriage Event	Marriage Event	Yes		
OBDCAN1	OnBoarding	OnBoarding for Canada	OnBoarding for Canada	Yes		
OBDSND	OnBoarding	Standard OnBoarding	Basic OnBoarding steps	Yes		
OBDUSA1	OnBoarding	OnBoarding for USA	OnBoarding for USA	Yes		

You can see, based on the above screen shot, that OnBoarding is not the only feature to use AGC. Life Events was also redelivered as part of PeopleSoft HCM image 23 utilizing AGC. Depending on your current image, you may see even more templates than what is seen in the preceding screen shot.

For this document, we will focus on the templates for OnBoarding. Oracle has delivered four templates as system data for OnBoarding. You may use these as a starting point, or you may start from scratch and build your own template. If you chose to use our template as a starting point, please note that the category in the existing template cannot be changed. Therefore, if you created your own custom category to use with OnBoarding, you will need to start from scratch when building your template. You can still review our delivered templates to see how they are constructed and items you may find useful to include in your organizations template.

Oracle delivers the following four system data templates for PeopleSoft HCM:

Template	Steps
OBDUSA1	Includes USA specific steps (I-9, Benefits, North American Payroll)
OBDCAN1	Includes Canada specific steps
OBDSND	Includes basic steps (Attachment and Personal Details)
OBDPRBD	Includes both PreBoarding and OnBoarding specific steps

Understand that these are meant to be a guide and not inclusive of delivered content or functionality. For example, the Canadian template would need to be modified for Quebec by changing out the Quebec tax forms for the Canadian general tax forms.

If you enter this page and there are too many templates for the system to display what you are looking for, or you simply want to see a subset of templates, there is a filter icon in the upper left-hand corner that will allow you to filter the list of templates displayed on the screen.

We will walk though setting up a template from scratch.

First, you will need to select the **Add Activity Guide Template** button at the top left of the page.

Birth Event Yes

Divorce Event Yes

**Add Activity Guide Template**

Cancel Continue

\*Template US\_EXEC x

\*Effective Date 01/01/2001

Assign your template a 7-digit alphanumeric code for the identifier and an effective date.

Activity Guide Composer conveniently uses an activity guide to guide you through the process of template creation.

**Activity Guide Composer**

Template OBDSTND

Effective Date 1900-01-01

Next >

**Introduction**

● Visited

**General Information**

☐ Not Started

**Activity Guide Type**

☐ Not Started

**Security**

☐ Not Started

**Additional Actions**

☐ Not Started

**Sub Banner**

☐ Not Started

**Introduction**

Welcome to the Activity Guide Template Composer!

**The Activity Guide Template accessed is system data. System data is delivered and maintained by Oracle. You will only be able to view options and parameters defined for this template.**

To modify this template, you can exit the Activity Guide Template Composer and update the template by inserting a new effective dated row. You also have the option of cloning this template to create a completely separate template.

When you move to the **General Information** step, you will have the opportunity to give your template a more meaningful description.

Activity Guide Composer

Template OBDSTND  
Effective Date 1900-01-01

Introduction  
Visited

General Information  
Visited

Activity Guide Type  
Not Started

Security  
Not Started

Additional Actions  
Not Started

Sub Banner  
Not Started

General Information

The Activity Guide Template accessed is system data. System data is delivered and maintained by Oracle. You will only be able view the options defined for this step.

The Description entered here is displayed to the user in the Fluid Activity Guide Banner.

The Category selected will control the available options you can specify for the template. For example, the Category will control the steps you can add to the template.

Description Standard OnBoarding  
Long Description Basic OnBoarding steps

Selected Category

Category	Description
OnBoarding	Category for OnBoarding activity guide templates

< PreviousNext >

In this step, you will also associate your template with your *OnBoarding* category. This is an important step. Make sure that you chose your custom category if you have created one, otherwise you will choose the delivered *OnBoarding* category. Many of the pages will need to be saved as you move through this activity guide. Select Save before moving forward.

All system data OnBoarding activity guides are setup as *Vertical Non Sequential*; however, we have had customers who have created onboarding templates in all the delivered activity guide types.

Activity Guide Composer

Template OBDSTND  
Effective Date 1900-01-01

Introduction  
Visited

General Information  
Visited

Activity Guide Type  
Visited

Security  
Not Started

Additional Actions  
Not Started

Sub Banner  
Not Started

Select Steps

Activity Guide Type

The Activity Guide Template accessed is system data. System data is delivered and maintained by Oracle. You will only be able view the options defined for this step.

To understand more details about the activity guide type selected, select the View Example button.

Selected Type

Activity Guide Type	Description	View Example
Vertical Non Sequential	Presents unnumbered steps vertically in the side panel of the fluid activity guide.	

For the activity guide, you have the option to enable auto save for each step. Auto save will identify if any data has changed on a step and save those changes when the user navigates away from the step.

If you do not want this option, then the system will generate a message indicating unsaved data exists for the step and allow the user to determine if they want to save their changes or not.

Auto Save No

< PreviousNext >

Keep in mind that using a horizontal activity guide should be limited to templates with less than four steps in the process as the screen real estate may be a factor in displaying the content correctly.

The **Auto Save** option is important when using AGC for onboarding templates as users who are going through onboarding are not familiar with PeopleSoft in many cases. Enabling auto save will prevent data loss during a page transition.

Although you may have selected **Auto Save** in this step, that configuration pertains to the template you are creating and not the activity guide you are currently going through. If you fail to save prior to moving through the steps, you will be notified that you have unsaved data on the page.

If you select vertical, you will also be asked if you want to display the side panel for navigation purposes. By default, this is selected and should remain on to allow for ease of navigation through the process. This also allows for employees to see where they are in the process as they move along step by step.

Click **Next** to move to the **Security** page.

**Activity Guide Composer**

Template: OBDSTND  
Effective Date: 1900-01-01

< Previous   Next >

**Introduction**  
● Visited

**General Information**  
● Visited

**Activity Guide Type**  
● Visited

**Security**  
● Visited

**Additional Actions**  
☐ Not Started

**Sub Banner**  
☐ Not Started

**Select Steps**

**Security**

The Activity Guide Template accessed is system data. System data is delivered and maintained by Oracle. You will only be able view the options defined for this step.

Security is defined by specifying the following security types and associating them to a security role:

- Administrator - Responsible for maintaining and managing updates to the activity guide template configuration.
- Contributor - Responsible for utilizing the activity guide process.

**Security Roles**

Security Type	Role Name	Description
Administrator	OnBoarding Administrator	OnBoarding Administrator
End User	OnBoarding Employee	OnBoarding Employee

Oracle delivers two security roles to you for OnBoarding; however, we know that many organizations take our roles and clone them to make their own roles. If you have created your own OnBoarding employee and/or OnBoarding administrator roles, you will want to assign those here. This will ensure that the administrator can access the template for maintenance and that the employee can access the template to perform the OnBoarding activities. Employees and administrators will still need menu level security within the roles to ensure they have access to the needed pages and components to perform the OnBoarding tasks outlined in the template.

Click **Next** to access the **Additional Actions** page.

**Activity Guide Composer**

Template: OBDSTND  
Effective Date: 1900-01-01

< Previous   Next >

**Introduction** ● Visited

**General Information** ● Visited

**Activity Guide Type** ● Visited

**Security** ● Visited

**Additional Actions** ● Visited

**Sub Banner** ○ Not Started

### Additional Actions

The Activity Guide Template accessed is system data. System data is delivered and maintained by Oracle. You will only be able view the options defined for this step.

For the Activity Guide Type, **Vertical Non Sequential**, the user will have the following visible actions by default:

- Previous
- Next
- Exit

**Selected Actions**

Description	Long Description	Action Label
Mark Complete	Mark Template Instance Complete	Mark Complete
Exit	Exit OnBoarding Template	Exit

Here you will decide if you want to add the actions of **Mark Complete** and **Exit**. For onboarding activity guides, it is highly recommended that both options be enabled. Depending on the length of the activity guide, the ability to exit and come back may be essential to the successful completion of the onboarding process. Furthermore, there are many times when the completion of a step cannot be programmatically determined. The user may need to manually mark the step complete.

The **Action Label** field also allows for you to override the label for these actions if there is something that is more meaningful within your organization.

Click **Next** to move to the **Sub Banner** page.

**Activity Guide Composer**

Template: OBDSTND  
Effective Date: 1900-01-01

< Previous   Next >

**Introduction** ● Visited

**General Information** ● Visited

**Activity Guide Type** ● Visited

**Security** ● Visited

**Additional Actions** ● Visited

**Sub Banner** ● Visited

**Select Steps** ○ Not Started

### Sub Banner

The Activity Guide Template accessed is system data. System data is delivered and maintained by Oracle. You will only be able view the options defined for this step.

The sub banner displays below the fluid activity guide banner, which displays the title of the activity guide. The sub banner can be configured to display an image and up to three fields. The image and fields available for you to select are determined by the Activity Guide Category for this template, which is **OnBoarding**.

This configuration is optional, but the information that can be displayed in the sub banner may provide context for who or what the activity guide steps are pertaining to.

Use the View Example to review the layout and format of the selected option. Use the Configure Sub Banner button to view the image and/or fields selected for the sub banner.

**Selected Type**

Configure Sub Banner

Sub Banner Type	Description	Popup Display Option	View Example
Image with 1 Primary Field	The sub banner will display an image with a maximum of three fields with no labels. One field can be marked as primary and will be displayed in bold.	No	

Sub banners are used to display information consistently in the top left-hand corner as you move through an activity guide. Usually for onboarding, this is the employee photo followed by their name and title. In this step, you define what is included in the sub banner. Keep in mind that any data element that you use in the sub banner as well as image location will need to be setup as part of the category that you defined earlier.

Click **Next** to move to the **Select Steps** page.

**Activity Guide Composer**

Template: OBDSTND  
Effective Date: 1900-01-01

[< Previous](#) [Next >](#)

**Select Steps**

The Activity Guide Template accessed is system data. System data is delivered and maintained by Oracle. You will only be able view the options defined for this step.

The Category specified for this Activity Guide is **OnBoarding** and the different steps that can be included for this template are displayed.

Total Steps for Template: 10

**Available Steps** 44 rows

Add Step	Added Step Count	Step Definition Description	Long Description
Add Step	0	ACA 1095-Consent	The employee will provide consent using Form 1095-C Consent
Add Step	0	Acknowledgement	Employee needs to acknowledge this step before they can review/edit sensitive information
Add Step	0	Banking	Enter your bank account and payment distribution information.
Add Step	0	Benefits Enrollment	Start benefits enrollment and enroll for available benefits.
Add Step	0	Fluid Benefits Enrollment	Start fluid benefits enrollment and enroll for available benefits.

The **Select Steps** and **Organize and Configure Steps** are the two most critical pieces of an onboarding template. Depending on the number of templates your organization chooses to deploy may depend greatly on the number of steps in any given template.

On the **Select Steps** page, you will select from the available steps that were defined in the category as to which steps should be included in this template. It is very important that you plan before getting to this step. You will want to have an idea of how many templates your organization will use and what steps are in each template. By selecting the **Add Step** button, you are adding a single instance of that step to your onboarding template. Don't forget to add the **Summary** step to each template, as this is where the employee will actually complete the onboarding process and move the status to complete.

Don't worry if you add a step by mistake, you will be able to remove it in the next step.

Once you have selected your steps, click **Save** and then **Next** to move to the **Organize and Configure Steps** page.

**Activity Guide Composer**

Template: OBDSTND  
Effective Date: 1900-01-01

[< Previous](#) [Next >](#)

**Organize and Configure Steps**

The Activity Guide Template accessed is system data. System data is delivered and maintained by Oracle. You will only be able view the options defined for this step.

Each step can have additional attributes and/or dependencies between certain steps to control the order of how the steps are completed.

**Selected Steps** 11 rows

Step Type	Move Up	Move Down	Step Description	Configure Group Step	Configure Attributes	Configure Dependencies	Configure Page Text	Step Details	Delete Step
Step		▼	Before you Start		⚙️	🔗	📄	🔍	🗑️
Step	▲	▼	Welcome		⚙️	🔗	📄	🔍	🗑️
Step	▲	▼	Attachments		⚙️	🔗		🔍	🗑️
Group Step	⚙️	⚙️	Personal Details	⚙️	⚙️				🗑️
Sub Step		⏸️	Verify Name		⚙️	🔗		🔍	🗑️

On the **Organize and Configure Steps** page you can organize your template to display in the most logical order for your organization. Utilizing the arrows before the step description you can move steps up and down. You can also



use the **Add Group Step** button at the upper left-hand corner of the grid to create groupings for certain steps. Once you create a group step you will use the **Configure Group Step** icon to select which steps to include in the group. You can only include a step in a single group, therefore, if you do not see the step available to be added to the group, it has probably already been added to another group on the activity guide and therefore no longer available.

Select the **Configure Attributes** icon to setup many of the individual step properties.

The screenshot shows the 'Configure Attributes' dialog box. It has a title bar with 'Cancel' and 'Done' buttons. The main content area is divided into several sections: 'Step Controls' with 'Required', 'Disable AWE Status Update', and 'Lock Step After Complete' (all set to 'No'); 'Start Date' with 'Start Date Option' (None) and 'Start Date Field' (dropdown); 'Due Date' with 'Due Date Option' (None), 'Due Date Field' (dropdown), 'Add Days to Due Date' (0), and 'Inactivate Step After Due Date' (No); and 'Step Question' with a text area labeled 'Question'.

This is where you will be able to set steps as required or set a due date for a particular step within the activity guide. In the US, the I-9 form has a due date specified as it needs to be completed on the first day of employment.

The **Organize and Configure Steps** page has other icons to set dependencies or configure page text, if available, to the step you have selected.

You can also delete a step on this page. This is useful if you have started by cloning a template and you need to delete a few steps, or if you have accidentally added a step that you no longer need when going through the configuration process.

Click **Next** to access the **Display and Processing** page. This page is not used in the OnBoarding activity guides as we have delivered a tile for employees to access the OnBoarding activity guide from Employee Self Service as well as a delivered OnBoarding dashboard. The OnBoarding activity guide is intended to be accessed for a defined period of time, therefore, having continued access through the My Processes page is not a best practice.

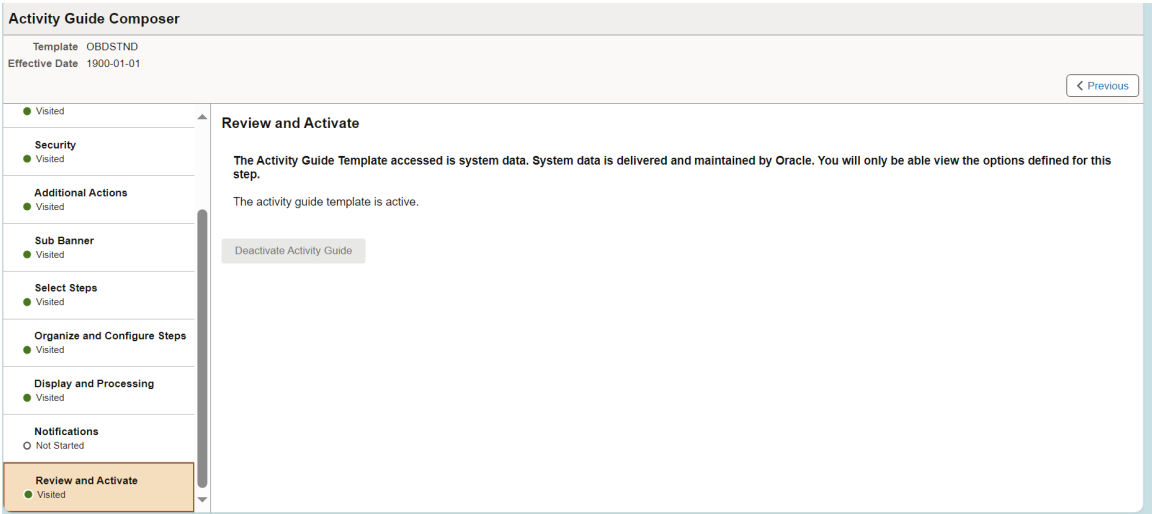
---

**Important:** It is important that the OnBoarding activity guide is always accessed in this manner, especially when implementing a template that includes preboarding steps.

---

We have also delivered a notification that you can have sent upon hire to the new employee's email address, given that the email has been setup at the time of hire. This will allow for the employee to access the OnBoarding dashboard by linking directly to it from the email they receive, bypassing any other tiles and actions within the PeopleSoft Employee Self Service homepage. The **Notifications** page in the template is not currently used for OnBoarding as the notifications process is controlled by special OnBoarding logic.

Once you finish you may choose to activate your template on the **Review and Activate** page.



Please note that simply activating a template does not mean the template will be assigned to a new hire. We will next look at the processes where you can either utilize the Template Assignment engine or set up a default template for your entire organization.

## Template Assignment

Activity Guide Composer has delivered a robust assignment engine that you can use to assign templates to the correct employee. Note, if your organization utilizes only one onboarding template then you do not need to use the template assignment engine. Instead, you will setup which template to assign on the OnBoarding Installation table as a default template.

To navigate to the Template Assignment engine, start at the navigator menu.

Enterprise Components > Activity Guide Composer > Activity Guide Utilities > AC Composer TmplT Asgnmt

To define a new Template Assignment definition, you will select **Add a New Value**.

General

Template Assignment

Template Assignment

ONBOARDING

\*Description

Assigning of Onboarding templates

\*Activity Guide Category

ONBOARDING

OnBoarding

Last Update User ID

Last Update Date/Time

Search Keys

1-1 of 1

View All

Search Key	Description	Source Foreign Key 1	Source Foreign Key 2	Source Foreign Key 3		
<div></div>					+	-

Save

Add

Update/Display

General

Template Assignment

You will need to give the template assignment a name as well as a description. You will also need to attach a category to the assignment. Please note that if you have created a custom category you will want to ensure that the custom category you created is referenced here. You will also want to make sure that this category matches the category on the templates that you will be assigning.

When defining your template assignment, you will use multiple key fields in the PeopleSoft database. Oracle has delivered 19 search keys for you out of the box, but you may expand those by adding to the search key list and modifying the delivered view, if necessary for your organization.

The delivered search keys are seen here.

**Look Up Search Key**

Search by: Search Key begins with

**Search** **Cancel** [Advanced Lookup](#)

**Search Results**

View 100 1-15 of 15

Search Key	Description
BENEFIT_PROGRAM	Benefit Program
BUSINESS_UNIT	Business Unit
COMPANY	Company
DEPARTMENT	Department
EMPLOYEE_TYPE	Employee Type
FULL_PART_TIME	Full/Part Time Indicator
GRADE	Salary Grade
JOBCODE	Job Code
JOB_FAMILY	Job Family
JOB_FUNCTION	Job Function
LOCATION	Location
PER_ORG	Organization Relationship
POSITION	Position
REG_REGION	Regulatory Region
UNION	Union

**Note:** When defining a new search key, it is important to select a record and field that has been updated when the new hire or assignment addition has been processed.

As seen in the following screen shot, you can select any number of fields to help in defining the assignment process.

Activity Guide Templates
Template Assignment

General

Template Assignment

Template Assignment

ONBOARDING

\*Description

Assigning of Onboarding templates

\*Activity Guide Category

ONBOARDING

OnBoarding

Last Update User ID

Last Update Date/Time

Search Keys

REG\_REGION

Regulatory Region

REG\_REGION

COMPANY

Company

COMPANY

JOB\_FAMILY

Job Family

JOB\_FAMILY

Save

Add

Update/Display

General

Template Assignment

After you select the fields, select the **Template Assignment** page tab.

Activity Guide Templates
Template Assignment

General

Template Assignment

Template Assignment

ONBOARDING

Description

Assigning of Onboarding templates

Template Assignment Table

1-4 of 4

View All

-Priority	-Template	Description	Edit	Regulatory Region	Company	Job Family		
1	US_EXEC	United States Executive Template		USA	GBI	KEXEC	+	-
2	OBDUSA1	OnBoarding for USA		USA	GBI		+	-
3	OBDCAN1	OnBoarding for Canada		CAN			+	-
4	OBDSTND	Standard OnBoarding					+	-

Save

Add

Update/Display

General

Template Assignment

The system will evaluate the criteria that is defined on this page in priority order. It is essential that you review your organizational rules prior to setting up this page. In the previous example, a new employee who works in Germany would pass through to the last priority due to not matching on any of the above criteria. However, a new employee who is not an executive would match on the 2<sup>nd</sup> priority, resulting in a different template being assigned to the employee. It is recommended that you have one template with the highest numeric priority (being evaluated last) as

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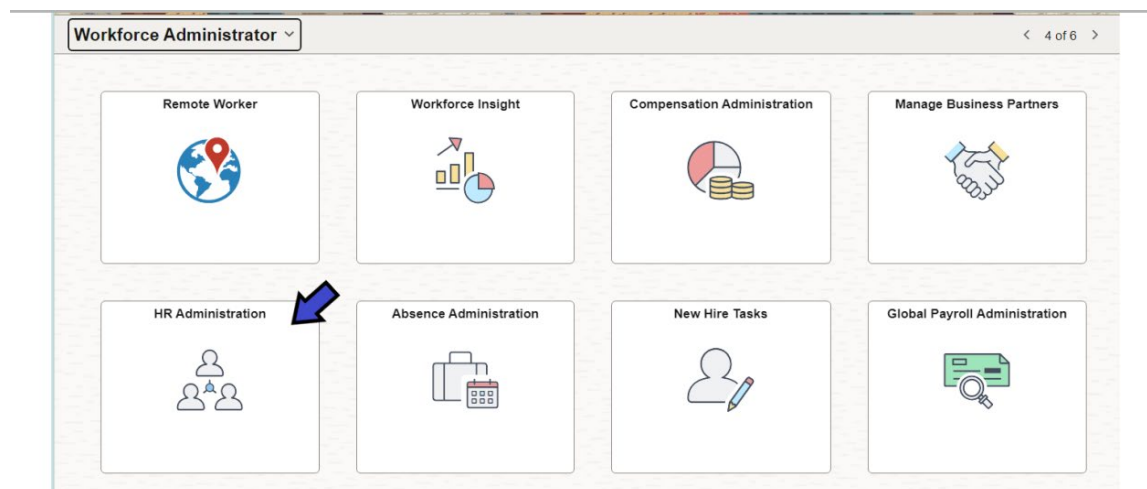
a catchall that does not have any key fields defined. This will ensure that every employee is assigned a template when they move through the template assignment engine. This would in essence be the “default” template.

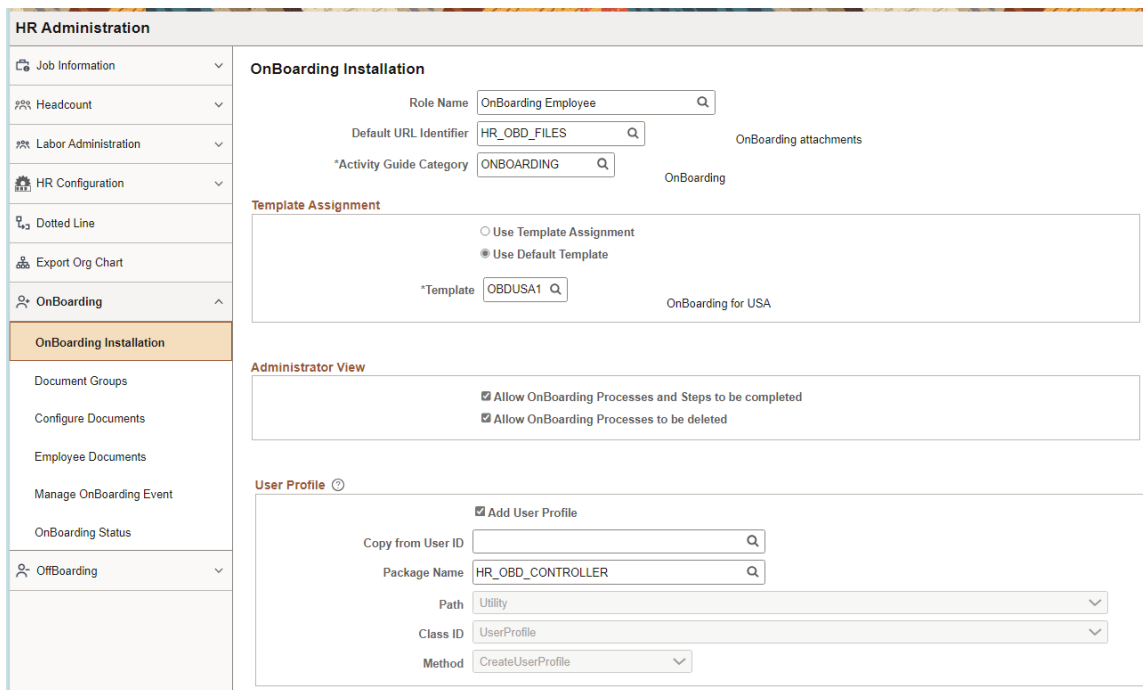
The Template Assignment engine is where many organizations have found they need to spend more time and make sure the information is correct. The more templates you have in your organization, the more complex the assignment profile will be.

OnBoarding is also compatible with organizations who use multiple jobs. If a single employee has multiple templates assigned to them, they will see a view of the different jobs and related templates upon launching the **OnBoarding Activities** page.

## OnBoarding Installation Table

The **OnBoarding Installation** table can be found by navigating to the fluid homepage for Workforce Administrator and clicking the **HR Administrator** tile.





Here you will again define the role your organization will utilize for OnBoarding employees. This is set up here as well as at the template level.

The default URL identifier is used with the OnBoarding attachments step. This will tell the system where you wish to store attachments. You may set this URL up under PeopleTools > Utilities > Administration > URL Maintenance.

The **Activity Guide Category** field value needs to match the category that you have used to create your templates. If you have created a custom category, be sure to enter that custom category here as well as within the templates.

---

**Note:** OnBoarding only supports the use of one category.


---

Template Assignment leverages the Template Assignment engine discussed earlier. If your organization has only one template, then you may choose to assign a default template to individuals upon hire. If this is the case, you will define the default template directly on the **OnBoarding Installation** page.

The **Administrator View** settings control the behavior of the administrator **OnBoarding Status** page. The actions of activity guide deletion and completion will be available to the administrator if selected on this page.

A new user profile for the person being hired can be generated automatically during the automated OnBoarding trigger creation. To do this, select **Add User Profile** to update the following options:

- **Copy from User ID:** The new user profile will get all the same security roles, in addition to the OnBoarding role.
- **Application package:** The delivered default method *CreateUserProfile* in application class *HR\_OBD\_USER\_PROFILE:UserProfile* will create a new user profile for the employee using employee ID as the user ID and a randomly generated password.



If you do not wish to use the delivered application class method to create the new user profile, you can create your own application class under your own application package. Once this is created, the new application package, path, class, and method will be available to be selected on this page.

The application class must extend the *HR\_OBD\_USER\_PROFILE:UserProfile* class and must have at least one of two methods: *CreateUserProfile* or *GetUserProfileParameters*.

The *CreateUserProfile* method will create a new user profile and return an array of string with exactly two values: the new user ID and the new user password, so that they can be in the notification sent to the person being hired.

The *GetUserProfileParameters* will return an array of string with exactly three values, which will be used to create the new user ID:

1. New user ID. If this is empty, the employee ID will be used as the new user ID.
2. New user password. If this is empty, a randomly generated password will be used.
3. Existing employee's user ID, from which the new user profile will be based and assigned the same security roles. This will override the default user ID specified in the **Copy from User ID** field, if one is specified, thus allowing for new users to get different security roles, based on their position in your organization. If this is empty, the **Copy from User ID** will be used, if one is specified, otherwise the new user will only get the OnBoarding security role.

The generated user profile will be assigned the OnBoarding security role specified on this page.

When a new user profile is created, a notification is sent to the employee. The Notification Composer Notification IDs *OnBoardingStartNewUser* and *OnBoardingStartNewLogin* can be overridden by defining a new notification ID and then specifying this new notification ID as the override for the notification event.

Refer to the PeopleSoft Human Capital Management 9.2 chapter *Working with Notification Composer* for more information on creating a new notification ID and then specifying this new notification ID as the override for the notification event.

## Configuring Documents

With the release of OnBoarding, PeopleSoft added the ability to define documents needed in the OnBoarding process. Under the **HR Administration** tile, **OnBoarding** tab, you will see several pages dedicated to this



document feature. Document configuration is a required step for defining the documents that can be downloaded and acknowledged in OnBoarding.

The screenshot displays the 'Configure Documents' interface within the HR Administration module. The left-hand navigation pane includes sections for Job Information, Headcount, Labor Administration, HR Configuration, and OnBoarding. The OnBoarding section is expanded, showing options like OnBoarding Installation, Document Groups, and 'Configure Documents', which is currently selected. The main content area shows the configuration for a document with ID KU10001. Fields include:
 

- \*Effective Date:** 01/01/2016
- \*Document:** Employee Handbook
- Description:** Document detailing company policies
- \*Status:** Active
- \*URL Identifier:** HR\_OBD\_FILES
- URL:** record://HR\_OBD\_FILES

 Below these fields are two sections:
 

- Employee Action Required:** A group of radio buttons where 'None' is selected.
- File Attachment:** A table showing details for 'Employee\_Handbook.pdf', including its last update date/time (06/26/2017 7:01:47PM) and the user who attached it (RCHANNING). Below this table are 'View Document' and 'Delete Document' buttons.

 At the bottom of the interface is a row of action buttons: Save, Return to Search, Previous in List, Next in List, Add, Update/Display, Include History, and Correct History.

Upon setting up a document, you will first determine the effective date of the document. The effective date of the document is directly related to the hire date of the employee. If the document is effective as of the hire date of the employee, the employee will see that effective date of the document that you have defined. For this reason, you will want to be very careful before entering an effective date for a document that occurs prior to today's date. As a best practice, new versions of documents should always be entered with a future effective dated row to ensure that every individual starting on that day forward receives the same version of the document.

When defining a document, the administrator has the option of setting the required action for that document. Actions that are available are **None**, **Acknowledge Document**, or **Upload Document**. Each action will determine what the user must do after downloading the document. If **None** is selected, then the user will not be prompted to take any action after downloading the document. If **Acknowledge Document** is selected, the employee will be prompted to acknowledge the document. The system will store the date and time of the acknowledgement under the Employee Documents component. If the action of **Upload Document** is selected, the employee will be prompted to upload the document upon the completion of such document. PeopleSoft allows for users on a mobile device to utilize the device camera to upload documents to the system, or the user can scan the document and upload in a more traditional way.

After the document is configured, the administrator will need to define the template and (optionally) groupings in which to include the documents.

Note that Document Groups is available as of PeopleSoft image 26.

The screenshot shows the 'HR Administration' interface with the 'Template Assignment' tab selected. The left sidebar contains a navigation menu with 'OnBoarding' expanded. The main content area has a 'Documents' tab and a 'Templates' tab. The 'Assign Activity Guides' section displays the following information:

- Document Id: KU10002
- Effective Date: 01/01/2016
- Document: Confidentiality Agreement
- Category: ONBOARDING

Below this, the 'Activity Guides' section shows a table with the following data:

Template	Description	Document Group	Description
OBDUSA1	OnBoarding for USA	DAY 1	Day 1 Documents

At the bottom, there are buttons for 'Save', 'Return to Search', 'Previous in List', 'Next in List', 'Add', 'Update/Display', 'Include History', and 'Correct History'.

Document groupings allow organizations to have multiple document steps within a single template. This may be useful to group documents by time frame or by category.

Administrators can use the **Employee Documents** page to view uploaded and acknowledged documents.

The screenshot shows the 'HR Administration' interface with the 'Employee Documents' tab selected. The left sidebar contains a navigation menu with 'Employee Documents' highlighted. The main content area has a 'Find an Existing Value' button and a 'Search Criteria' section. The search criteria are as follows:

- Empl ID: begins with [ ]
- Empl Record: = [ ]
- Name: begins with [ ]
- Last Name: begins with [ ]
- Second Last Name: begins with [ ]
- Alternate Character Name: begins with [ ]
- Middle Name: begins with [ ]
- Template Category: begins with [ ]

There is a checkbox for 'Case Sensitive' and buttons for 'Search', 'Clear', 'Basic Search', and 'Save Search Criteria'.

# OnBoarding Process Start

## Automated OnBoarding Trigger Creation

When a new job assignment is added, an Event Manager event *AssignmentAdded* is raised. A handler for this event has been defined for OnBoarding. The handler creates an OnBoarding trigger record with the template assignment for the person who has been hired, rehired, or had an assignment added.

This handler is delivered as inactive and must be activated if OnBoarding is used. To access the handler, navigate to:

Enterprise Components > Events and Notifications > Event Framework > Event Registry

Select the event name *AssignmentAdded*.

← | ⌚ | ♥

Search in Menu

Event Manager - Registry

Define Events

Registered Handlers

Event Name

AssignmentAdded

Event Status

Active

☐ Logging Enabled

Handler Implementation

Handler Options

Logging/Trace

⌵

*Sequence Number	*Package	*Application Class Path	Description	*Status	
20	HR_OBD_EM_HANDLERS	Handlers>CreateTriggerOBD	Add OnBoarding Trigger	Inactive	+ ⌵

Change the **Status** value to *Active* on the **Registered Handlers** page and save.

For more information of the Event Framework, refer to the HCM PeopleBooks chapter *Events & Notifications Framework*.



Managing OnBoarding Events

Use the **Manage OnBoarding Event** page to add, delete, or update the OnBoarding trigger record. The trigger record contains the template assignment for an employee. Administrators can use this page to see the template assigned or modify the template assigned to an employee. The administrator can also delete the template that is assigned. Deleting or changing the template will also result in the deletion of the activity guide instance (if that exists).

Template Assignment

HR Administration

Job Information

Headcount

Labor Administration

HR Configuration

OnBoarding

OnBoarding Installation

Document Groups

Configure Documents

Employee Documents

Manage OnBoarding Event

Dotted Line

Manage OnBoarding Event

Template Assignment

Empl IDKU0121David Ho

Empl Record0

TemplateOBDUSA1OnBoarding for USA

DeleteSave

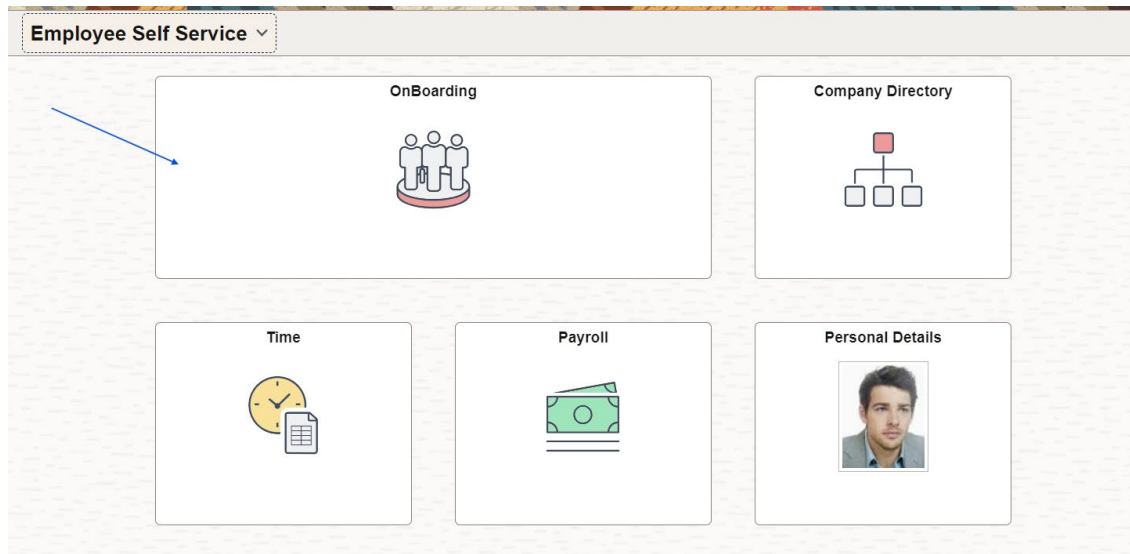
Return to Search

Notify

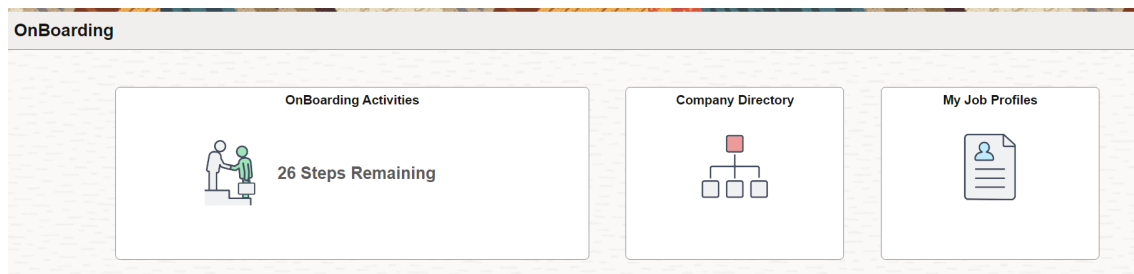
Add

Update/Display

## OnBoarding in Employee Self Service



Oracle's PeopleSoft HCM delivers a 1 by 2 tile that organizations may choose to place on the Employee Self Service homepage to help in the accessing of OnBoarding. This tile will take the employee to the OnBoarding dashboard to select the **OnBoarding Activities** tile and launch the OnBoarding process. You may choose to put the **OnBoarding Activities** tile directly on the Employee Self Service homepage and not utilize the dashboard at all. However, before doing this, consider why and how the OnBoarding dashboard may be beneficial to your organization.



This dashboard serves two primary purposes:

First, it is less cluttered than the Employee Self Service homepage and is intended to have only the critical information that is needed by the new hire during onboarding. This dashboard is intended to be modified and built out by our customers to ensure that it meets each organization's unique needs.

Second, if you utilize the new hire notification for OnBoarding, the new hire receives a notification that links directly to this dashboard, bypassing any other pages in PeopleSoft once they sign on. This can be important to ensure that employees are going to the OnBoarding process rather than searching for individual tiles or components prior to clicking the **OnBoarding Activities** tile.

Upon entering the dashboard for the first time the employee will see the *Get Started* message. This tile is a dynamic tile and will update with the number of steps needed to be completed after starting. It will also notify the employee directly on the tile if any due dates have been missed.

## PreBoarding Configuration

Employees whose hire date is in the future will be able to access steps in the OnBoarding process based on how the step is defined. While the entire guided process is called OnBoarding, when an organization desires for some or all the steps to occur prior to hire, we call that the *PreBoarding phase* of this guided process. The *OnBoarding phase* of this guided process occurs on or after the employee's first day. PreBoarding can include steps that are also sometimes found as part of OnBoarding phase but typically include steps that are needed prior to the first physical day of employment.

### Configuration of the OnBoarding Category

All steps that are included in the delivered OnBoarding category will support the processing of a future dated hire (PreBoarding). When a step is defined for PreBoarding only, that step will be available to the employee before their first day. If the step is defined as required and has not been completed by their first day, it will continue to appear in the activity guide. If the PreBoarding step is not required, then it will no longer display on or after their first day. When a step is defined for OnBoarding only, that step will not display until the employee's first day of employment.

By default, all steps, other than the following steps, will be available for both the *PreBoarding phase* (future-dated hire) and *OnBoarding phase* (current employee):

Step Name	Description	PreBoarding/OnBoarding Only
ONBOARD_DOC	OnBoarding Document Acknowledgement	OnBoarding
ONBOARD_INSTR	OnBoarding Instructions	OnBoarding
PREBD_SUMMARY	PreBoarding Summary	PreBoarding
PREBOARD_DOC	PreBoarding Document Acknowledgement	PreBoarding
PREBOARD_INST	PreBoarding Instructions	PreBoarding

The above instructions and document acknowledgement steps are provided as an example of the setup required when defining a template to support PreBoarding and OnBoarding phases. These steps can be configured with the text and documents required for the organization.

The **PreBoarding Summary** is a special step that should only be included in the template if there are some (but not all) OnBoarding-only steps included. This step provides a summary of all steps in the activity guide and allows the user to mark the PreBoarding phase as complete while the activity guide status is still in-progress.

PreBoarding Summary

Complete PreBoarding

The following steps are needed to complete your OnBoarding activity. Complete all steps that are available now, then select the **Complete PreBoarding** button to validate your current entries and receive information for your next steps.

There are steps marked as "Available on First Day" that cannot be completed at this time. Those steps will be available on your first day, 8/5/2024.

Please return to this OnBoarding activity at that time and complete the remaining steps.

Steps

13 rows

Step	Status	Required	Mark Complete	Go to Step
PreBoarding Instructions	● Visited	No	Mark Complete	Go to Step
OnBoarding Instructions	Available on 8/5/2024	No	Mark Complete	Go to Step
Welcome	○ Not Started	No	Mark Complete	Go to Step
PreBoarding Document Acknowledgement	○ Not Started	Yes	Mark Complete	Go to Step
OnBoarding Document Acknowledgement	Available on 8/5/2024	Yes	Mark Complete	Go to Step
Attachments	○ Not Started	No	Mark Complete	Go to Step
Verify Name	○ Not Started	No	Mark Complete	Go to Step
Photo	○ Not Started	No	Mark Complete	Go to Step
Verify Addresses	○ Not Started	No	Mark Complete	Go to Step
Verify Contact Details	○ Not Started	No	Mark Complete	Go to Step

A special configuration pattern exists in the *OnBoarding* category in Activity Guide Composer to support PreBoarding. The **Additional Step Context** section of the **Category – Steps** page requires the addition of a parameter that defines whether the step is for PreBoarding only (*PROCESS\_TYPE = P*) or for OnBoarding only (*PROCESS\_TYPE = O*). If no Process Type parameter is defined, then that step applies to both phases. The following are examples of the parameter specification:

**PreBoarding Only**

Additional Step Context

Input Context Parameters

1-1 of 1

View All

Parameter Name	Service Parameter Name	Parameter Type	Parameter Value	Parameter System Value
PROCESS_TYPE	PROCESS_TYPE	Fixed Value	P	

**OnBoarding Only**

Additional Step Context

Input Context Parameters

1-1 of 1

View All

Parameter Name	Service Parameter Name	Parameter Type	Parameter Value	Parameter System Value
PROCESS_TYPE	PROCESS_TYPE	Fixed Value	O	

The usage of this parameter in the category step requires that the related content service definition passes the *PROCESS\_TYPE* parameter. All delivered category steps support the parameter, but if a new step is added then the related content service definition must have the following Service URL Parameter defined.:

PeopleTools > Portal > Related Content Services > Define Related Content Service

Note: parameter names are case-sensitive.

Service URL Parameters

Parameter Name	Required Flag	Description
1 PROCESS_TYPE	<input type="checkbox"/>	Process Type

Consideration needs to be given to the template setup to determine if there is a requirement to segregate steps between PreBoarding and OnBoarding phases.

If there are some steps that should be completed during the *OnBoarding phase*, the step should be defined with *PROCESS\_TYPE=O*.

The following are guidelines for the template configuration based on the organization's scenario:


Processing Scenario	Category/Template Requirements
All steps can be completed during either phase.	No steps should be defined with the <i>PROCESS_TYPE</i> parameter. Include the <i>Summary</i> step.
There are some steps that should be completed during the OnBoarding phase. All others can be completed at any time.	Add <i>PROCESS_TYPE=O</i> to those steps. Include the <i>PreBoarding Summary</i> step. Include the <i>Summary</i> step.
There are some steps that should be completed during the PreBoarding phase. All others can be completed at any time.	Add <i>PROCESS_TYPE=P</i> to those steps. Include the <i>Summary</i> step.
There are some steps that should be completed during the PreBoarding phase and some that should be completed during the OnBoarding phase.	Add <i>PROCESS_TYPE=P</i> to the PreBoarding steps. Add <i>PROCESS_TYPE=O</i> to OnBoarding steps. Include the <i>PreBoarding Summary</i> step. Include the <i>Summary</i> step.




## PreBoarding Template Example

The template *OBDPRBD* provides an example for defining an activity guide that supports both the PreBoarding phase and the OnBoarding phase of this process. This illustrates the last of the above scenarios.

### PreBoarding Phase

Standard PreBoarding
 <b>Pam PreBoarder</b> Analyst-Human Resources
<b>PreBoarding Instructions</b> <input checked="" type="radio"/> Visited
<b>Welcome</b> <input type="radio"/> Not Started
<b>* PreBoarding Document Acknowledgement</b> <input type="radio"/> Not Started
<b>Attachments</b> <input type="radio"/> Not Started
<b>▶ Personal Details</b> <input type="radio"/> Not Started
<b>PreBoarding Summary</b> <input checked="" type="radio"/> Visited

### OnBoarding Phase

Standard PreBoarding
 <b>Pam PreBoarder</b> Analyst-Human Resources
<b>OnBoarding Instructions</b> <input checked="" type="radio"/> Visited
<b>Welcome</b> <input type="radio"/> Not Started
<b>* OnBoarding Document Acknowledgement</b> <input type="radio"/> Not Started
<b>Attachments</b> <input type="radio"/> Not Started
<b>▶ Personal Details</b> <input type="radio"/> Not Started
<b>Overall Summary</b> <input type="radio"/> Not Started

Prior to the first day of employment, the guided process includes those steps that are marked for PreBoarding-only and those that have no designation (will be included in both phases). On the first day of employment and moving forward, this guided process will display those steps marked as OnBoarding-only and those without any designation. In addition, any PreBoarding-only step defined as required that has not been completed will also show. The **Overall Summary** step is also automatically displayed.

---

**Note:** The OnBoarding activity guide must always be started from the delivered OnBoarding Activities tile. The creation of the activity guide instance includes special processing that is mandatory for the successful transition between the PreBoarding and OnBoarding phases.

---

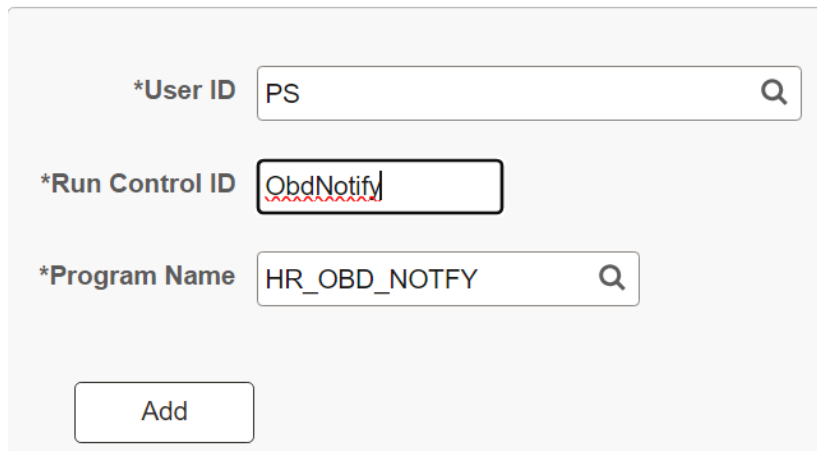
## OnBoarding Batch Notification Process

An App Engine process *HR\_OBD\_NOTIFY* (delivered in image 50) generates a reminder notification to those employees on their first day of work if they previously had completed PreBoarding steps and there are OnBoarding steps remaining in the activity guide. This process can be run on a regularly occurring interval and can be submitted as follows:

PeopleTools > App Engine > Submit AE Process Requests

Add a new value for process *HR\_OBD\_NOTIFY*.

### Add a New Value



The screenshot shows a web form titled "Add a New Value" with a light gray background. It contains three input fields, each with a label and a search icon (magnifying glass) to its right. The first field is labeled "\*User ID" and contains the text "PS". The second field is labeled "\*Run Control ID" and contains the text "ObdNotify", which is underlined with a red squiggly line. The third field is labeled "\*Program Name" and contains the text "HR\_OBD\_NOTIFY". Below these fields is a rectangular button with the text "Add".

Specify Process Frequency = *Always* and select the **Run** button.

**Application Engine Request**

User ID: PS

Run Control ID: ObdNotify

Run

Program Name: HR\_OBD\_NOTFY OnBoarding Batch Notifications

**Last Run**

Process Origin: Other

Process Instance:

Status: Pending

Process Frequency: Always Market: As Of Date:

Parameters

State Record: \*Bind Variable Name:

Value:

Date:

Select the Process Name of the Process Scheduler Request page and select **OK** button at the bottom.

Process Scheduler Request						
<input type="checkbox"/>	HR_MTRX_MEMB	HR_MTRX_MEMB	Application Engine	Web	TXT	Distribution
<input checked="" type="checkbox"/>	HR_OBD_NOTFY	HR_OBD_NOTFY	Application Engine	Web	TXT	Distribution
<input type="checkbox"/>	WC Automatic Approval	HR_WC_APPR2	Application Engine	Web	TXT	Distribution
<input type="checkbox"/>	Portal Prof Security Sum	PORTAL_CSS	Application Engine	Web	TXT	Distribution

The process will be scheduled.

The reminder notifications use the Notification Composer definition *OnBoardingContinue*.

This notification ID can be tailored towards your organization's needs and can be overridden by defining a new notification ID and then specifying this new notification ID as the override for the notification event *OnBoardingContinue*.

Refer to the PeopleSoft Human Capital Management 9.2 chapter *Working with Notification Composer* for more information on creating a new notification event.

## Edit Notification Event

### \*Notification Event Description

Complete OnBoarding events available on first day



## Notification Override

Q



## Conclusion

PeopleSoft HCM OnBoarding has a robust set of features that allow organizations to define guided processes to lead new employees through the hiring process in a timely manner. As we work with customers through their implementations of OnBoarding, we continue to enhance the process to ensure that it is both functional and usable to our customers.



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