



NEW POINT ELECTRONIC SOLUTIONS
IT MADE SIMPLE



NEWPOINT ELECTRONIC SOLUTIONS

Middleware & Apps

Oracle Taleo Performance Management Cloud FSO

SaaS

Author:	Shawn Geingob
Creation Date:	20 May 2015
Last Updated:	1 June 2015
Version:	1.0

Contents

Company Profile	3
Experience	3
Specialist Certification	3
Business Challenges.....	3
Business Objectives	4
Business Benefits	4
Solution Proposal.....	5
Scope Modules	5
Application Scope	6
Scope Modules: Key Features & Benefits.....	6
Employees	6
Reviews.....	7
Users	8
Reports	9
Position Control.....	10
Organization	10
Goals Management	12
Competency Library.....	12
Employee Self-Assessment.....	13
Performance Agreement Review Template (GRN Example).....	13
Implementation Approach	15
Implementation Plan	17
Project Plan and Time Frame	17
Key Assumptions and Exclusions	17
Other Activities and Related Assumptions	19
Implementation Team Structure	19
Customer Responsibilities	20
Implementation Team Responsibilities.....	20

Company Profile

New Point Electronic Solutions PTY Ltd (New Point) is a leading Information Technology (IT) company in Namibia which provides end-to-end business solutions that leverage technology. New Point has intimate understanding of the Namibian market and provides solutions and services to some leading institutions especially in the Public Service vertical.

Headquartered in Windhoek (Namibia), established in 2007 as an Oracle Gold Certified Partner, This Namibian Company has been spearheaded by experienced Professionals dedicated to provide total IT solutions under one roof. New Point operates and is fully involved in cutting edge technology with the most knowledgeable and experienced hands to offer State of Art Solutions.

Experience

- The implementation of the current HCMS solution for GRN
- The BPM and SOA implementation and integration for AgriBank
- The payroll pilot for GRN
- The implementation of Oracle Financials for NBC
- Ministry of Agriculture Business Intelligence

Specialist Certification

- Oracle EBS Sales and Support Specialist
- Oracle EBS implementation Specialist
- Oracle Business Processing Management Specialist
- Business Intelligence Cloud Service Specialist

Business Challenges

- Concerned with measurement of results and review of progress in the achievement of set targets
- Concerned with defining business plans in advance for shaping a successful future
- Striving for continuous improvement and continuous development by creating a learning culture and an open system
- Concerned with establishing a culture of trust and mutual understanding that fosters free flow of communication at all levels in matters such as clarification of expectations and sharing of information on the core values of an organization which binds the team together
- Concerned with the provision of procedural fairness and transparency in the process of decision making

Business Objectives

- Keeping employees motivated and challenged
- To enable the employees towards achievement of superior standards of work performance
- To help the employees in identifying the knowledge and skills required for performing the job efficiently as this would drive their focus towards performing the right task in the right way
- Boosting the performance of the employees by encouraging employee empowerment, motivation and implementation of an effective reward mechanism
- Promoting a two way system of communication between the supervisors and the employees for
- clarifying expectations about the roles and accountabilities, communicating the functional and organizational goals, providing a regular and a transparent feedback for improving employee performance and continuous coaching

- Identifying the difficulties to effective performance and resolving those difficulties through constant monitoring, coaching and development interventions
- Creating a basis for performance based payment
- Promoting personal growth and advancement in the career of the employees by helping them in acquiring the desired knowledge and skills
- To Enable departments within organizations to achieve high quality work
- Measuring employee time delivery of productive work
- To Enable managers and employees to establish quantitative and qualitative employee goals, define expectations, and align them to organizations development plan

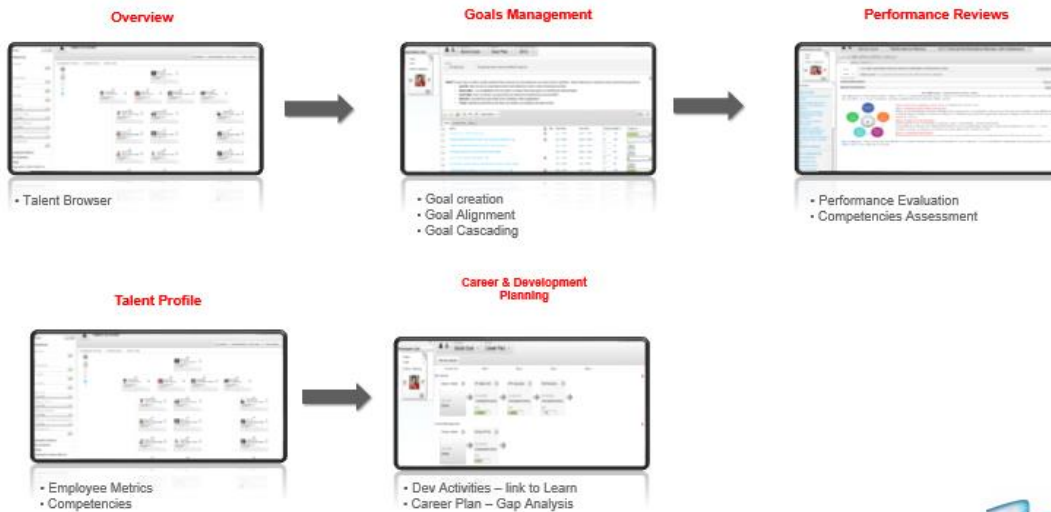
Business Benefits

- All employees are treated fairly by implementing standardized procedures that promote consistency throughout an organization
- The bottom line of an organization improves significantly by increasing employee productivity and quality of work leading to improved business profit
- Communicating realistic but challenging job expectations and making employees accountable for their decisions and actions result in noticeable improvements in employee tardiness, absences, and organizational commitment
- Employees experience greater job satisfaction because they become more successful
- Enables the organization to compare an employee's performance against others
- The platform helps managers write and keep track of performance reviews electronically – as well as set benchmarks that aligns with the company's goals

Solution Proposal

Oracle Taleo Performance Management Cloud Service to retain the best people, align them to company objectives, and develop their skills to drive superior business results. Oracle Taleo Performance Management Cloud Service meets the talent management needs of the largest and most demanding enterprises with global consistency and local flexibility.


A view into the performance management of employees



- Gain strategic talent insights with a single view of talent across all processes.
- Find, hire, and onboard the best talent available
- Align your people to organizational objectives, measure performance, and follow up with and strengthen your talent.
- Career planning to help your employees advance and you retain quality talent.
- Succession planning that allows your company to always be ready to fill needs quickly.

Scope Modules

Taleo  BUSINESS EDITION


[Employees](#)
[Reviews](#)
[Compensation](#)
[Users](#)
[Reports](#)
[Position Control](#)

Module Name	Key Features
Employees	<ul style="list-style-type: none"> ➤ Employees ➤ New employees ➤ Employee Fields ➤ Org Charts

Reviews	<ul style="list-style-type: none"> ➤ Reviews ➤ Review Templates ➤ Review Cycles ➤ Competency Library
Users	<ul style="list-style-type: none"> ➤ Users ➤ New Users ➤ User Roles
Reports	<ul style="list-style-type: none"> ➤ Employee based ➤ Performance Review based
Position Control	<ul style="list-style-type: none"> ➤ Positions ➤ New Positions ➤ Position Profile Library
Organization	<ul style="list-style-type: none"> ➤ Company Profile ➤ Region, Location, Division and Department Settings ➤ System & Email Settings ➤ Security Level ➤ Company Goals
Goals Management	<ul style="list-style-type: none"> ➤ Create, edit and view Employee goals
Competency Library	<ul style="list-style-type: none"> ➤ Create & Categorize competencies
Employee Self-Assessment	<ul style="list-style-type: none"> ➤ Employee Self-assessment

Application Scope

Scope Modules: Key Features & Benefits

Employees

Feature	Benefits
Employees	Employees are all of the people employed by your company who you want to track in Taleo Perform and Onboard.
New Employees	To add a new employee, select the New Employees
Employee Fields	Each Employee record stores information such as name, address, contact information, employee status, department, location, etc. For each employee you can view employee goals, performance reviews, comments, attachments, tasks, and track all activity.

	<p>The Employees page gives you visibility into all of your employees. You can sort and filter your employees by clicking a column header or by using the Search tool.</p> <p>You can view, edit and enter detailed information on each employee to whom you have access (i.e. direct and indirect reports) by choosing the following links on the Employees menu:</p>
Org Chart	<p>Displays a list of all Org Trees available based on the Org Chart filter settings. The employee listed is at the top of the Org Tree is the highest in the hierarchy allowed by the Org Chart filter. You can click an Org Tree to navigate to the top of the Org Tree. The name of the top-level employee in the Org Tree displays, along with their Job Title and their number of subordinates, excluding Indirect Reports, and total number of employees in that Org structure.</p>

Reviews

Feature	Benefits
Reviews	<p>Reviews are all of the performance reviews you want to track for employees in Taleo Perform. Each performance review stores information such as employee name, an employee's status within the organization, assigned goals, and performance review details. For each employee you can view both current and past performance reviews, collect and review manager ratings, review employee self-assessments, and monitor the status of performance review approvals.</p>
Review Templates	<p>Configurable and flexible review templates and business processes allow companies to define and monitor the full employee review cycle. With goals management and a behavioral competencies library, managers can quickly and easily initiate the review</p>

	process from their desktops and support employee self-assessments and manager assessments.
Review Cycles	<p>Review cycles can be thought of as containers that define certain review parameters and are tied to any number of reviews. There are three types: a Scheduled Review Cycle, an Anniversary Date Review Cycle, and an Introductory Review Cycle.</p> <ul style="list-style-type: none"> ➤ Scheduled cycles are set with a specific date in mind and, once completed, they close. ➤ The Anniversary Date and Introductory review cycles are based on either the start date or the hire date contained within the Employee record. Both of these cycle types remain open, and will systematically check data contained within an Employee record to determine if a review assignment is necessary.
Competency Library	The Competency Library allows Taleo Business Edition user with the Administrator and HR Administrator roles to create and manage competencies to be used in performance review templates by users.

Users

Feature	Benefits
User	Administer the roles, features and functionality for the users of your Taleo Business Edition system.
New User	Create New Users for the system.
User Roles	Administrator: This role has access to everything, including all global settings such as organization structure, data backup services, as well as customization rights to features and functionality of Taleo Business Edition. Administrators can view all employee records, and other confidential



	<p>information. Only administrators can create new users and reset user passwords. Administrators are the only users with access to the Administration menu.</p> <p>HR Administrator: This role has access to all records, and access to Customize Perform. It does not have access to Global Settings, Organizational Setup, or On-Demand Backup Service.</p> <p>Hiring Manager: This role can search through the employee database, but only has full access to employees who report to them.</p> <p>Passive User: This role can view a summary list of employees and assigned employee goals. Passive Users do not have access to the detailed Employee record. If a Passive User has been designated as a performance review approver, the Passive User also has access to the performance review(s) that has been assigned.</p> <p>No Access: This role is used when you want to temporarily prevent a user from accessing the system. The No Access role cannot be assigned as an Approver.</p>
--	---

Reports

Feature	Benefits
Employee based	This are reports run for employee specific information, Example you wish to run a report outlining all the goals a certain employee has been assigned to, then you can use this specific section to run such a report on the system.
Performance Review Based	This are reports run for employee review specific information, Example you wish to run a report outlining the status of assigned performance reviews to employees, then you use this section to run such a report.

--	--

Position Control

Feature	Benefits
Position	Position Control is a module that enables you to build your organizational structure in a position-to-position relationship within Taleo Business Edition
New Position	Create new positions in the system, but first create a position profile.
Position Profile Library	The first step in implementing Position Control is to build your organizational structure in the Position Profile Library. The position profiles contain the required competencies and characteristics for each position, which are inherited into positions associated to the profile and leveraged in performance review templates.

Organization

Feature	Benefits
Company Profile	In the Company Information section enter your company name, address, and contact details. The only required field is company name, but the more information you can provide, the more you can take advantage of content re-use in the system (merge fields in email templates, for example). The State/Territory and Country picklists are populated with default values pulled from the Employee fields
Region, Location, Division and Department Settings	➤ Regions are comprised of one or more locations within your organization. Creating regions enables you to group locations together and assign approval privileges for multiple locations to regional/territorial managers



	<ul style="list-style-type: none"> ➤ Divisions are comprised of one or more departments within your organization. Creating divisions enables you to group departments together and assign approval privileges for multiple departments to division managers. ➤ Departments are comprised of users within your organization. Creating departments enables you to group jobs together within a location and allow you to assign specific groups of jobs to a user in the system
System & Email Settings	<ul style="list-style-type: none"> ➤ Sort locations by: Specify the sort order in which you want locations to display. By default locations are sorted by Name. Locations can also be sorted by State, then City and by Country. ➤ Outbound Email: This setting controls whether or not the system sends out email. The default is Email Engine is engaged, which means that emails are sent by the system as expected. Email Engine is disengaged means that no emails are sent by the system. If you are working in a test zone or trying out a new feature, you can disable the sending of emails, but otherwise you do not need to change this setting. When the email engine is disengaged, no emails are queued up and send out later once the email engine is engaged once again. The log file continues to show that emails are sent out, but they are not sent or queued while this setting is set to disengage.
Security Level	<p>Select your desired Taleo Business Edition security level: you can choose between four security levels (Low, Medium, High, and Custom) based on how strictly you want to handle user passwords, unsuccessful login attempts, data locks, and session expiration due to inactivity or maximum amount of time logged in.</p>
Company Goals	<p>Performance management begins with defining performance expectations. Taleo Perform delivers goal management that provides the framework</p>

	<p>companies need to establish quantitative and qualitative company goals, define expectations, and align employee goals to their broader company goals, leading to improved productivity and a more engaged workforce.</p>
--	---

Goals Management

Feature	Benefits
<p>Create,edit,view Employee goals</p>	<p>Performance management begins with defining performance expectations. Taleo Business Edition Perform delivers goal management that provides the framework managers need to establish quantitative and qualitative employee goals, define expectations, and align employee goals to broader company goals leading to improved productivity and a more engaged workforce.</p>

Competency Library

Feature	Benefits
<p>Create & Categorize Competencies</p>	<p>With the Competency Library, administrators and HR administrators have the ability to create custom competencies and associate up to six sub-factors with each competency; you can clone existing competencies to create custom competencies; you can change the status of standard competencies; and you can import custom competencies through a CSV file.</p>

Employee Self-Assessment

Feature	Benefits
Employee Self-Assessment	Employees can conduct a self-assessment on the Employee Website. The employee Website has access to basic employee data, assigned goals, performance reviews, and the ability to submit employee self-assessments online is delivered through a secure Employee Website. This capability helps to ensure performance expectations are in alignment and that information and feedback is accessible to all stakeholders.

Performance Agreement Review Template (GRN Example)

Performance Planning

Managers can derive their strategic objectives from the organization's vision and mission, and break it down to cascade down the organizational structure.

Performance Improvement

Based on the enterprise personal development plan, the users will be able to define items like goals, to improve their current process improvement and process re-engineering.

Performance Review

Users can use the system to setup appraisals, measurement and evaluation methods.

Strategic Theme	Strategic Public Service management objective
Strategic Objective	Ensure an effective design and equitable grading structures.
Risks and assumption Factors	Social economic situation, Financials impacts, Training, Organization resources
Weight	1 = Important (25%) 2 = Very important (35%) 3 = Critical (40%)

Total = 6 (100%)							
Outputs	Weight	KPIs	Target				
			Q1	Q2	Q3	Q4	Action Steps
Organizational design policy and guidelines developed	3	<p>% of work done on the development of the policy and guidelines</p> <p>All the policy guidelines consultations and policy to be reviewed in the 1st quarter</p>	75%	90%	100%		<p>Finalize support by an expert</p> <p>Engage in expert Organizational development</p> <p>Conduct a seminar with key stakeholders in with the organization</p> <p>Review and finalize policy, model and toolkits</p> <p>Submit document on management discussion</p>

								and endorsement
								Present policy and guidelines to approval committee
Objective Timeline	1 Jan 2012 – 30 Apr -2012							
Expected goal completion	2 nd Quarter, with a training extension in the 3 rd Quarter							

Organizations can use their preferred KPIs to align objectives of the company with its operations. With the use of the top-down approach to cascade the flow of the objectives to the last level of the organizations, operations departments. The performance compensation calculation method will be based on the objectives achieved out of the objectives assigned in the employee’s performance agreement. This method can be reviewed, by defining a yearly plan distributed across four quarters on the system, and managers can track the progress of the plan and the progress of the objectives assigned to the employee.

Implementation Approach

New Point uses OUM Cloud Approach for implementation. This is based on the same principles as Oracle’s Unified Method (OUM) to allow consistent approach across all SaaS products. This is specifically designed for implementing Oracle Cloud applications, according to well defined and tested activities and deliverables. Salient Features of this method includes:

- An easy to follow framework of activities that allows efficient, step by step project implementation centered around few and essential activities and deliverables
- Short, well-structured implementation cycles
- Iterative configuration
- Best practice suggestions for all business decisions avoiding customizations

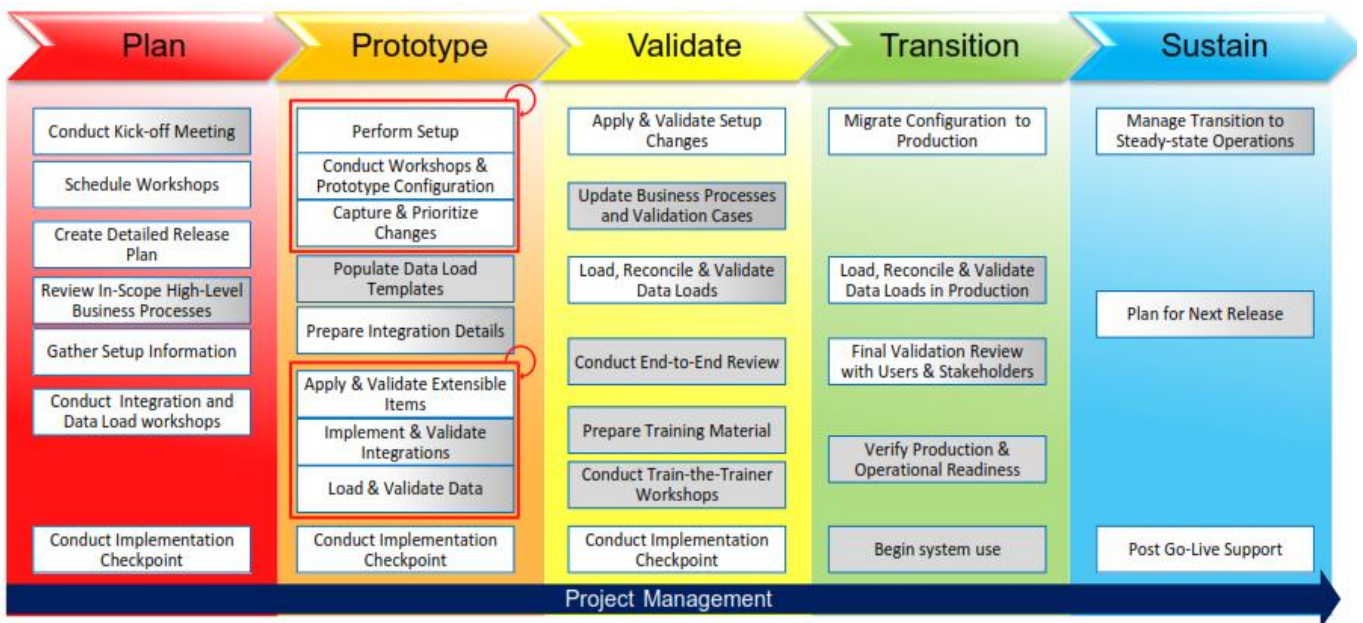
The implementation uses Cloud Applications Toolkit which has predefined, value-adding materials to reduce workload.

Key Features:

- Configuration of pre-approved scope
- Fully provisioned & working system in a Rapid time frame
- Processes are from Out of box – Best Practices
- Adopt and not Adapt
- Continuous engagements for configuring additional modules/ functionalities of future releases

Benefits:

- Faster Deployment of Essential Functions
- Faster Time to Value
- Weeks and Not months
- Better Governance and Higher success rate



Implementation Plan

Project Activities	Week 1	Week 2	Week 3	Week 4
Project Planning	█			
Familiarization Session		█		
Data Loading		█ █		
Validate			█	
End-user Training			█	
Go Live Support				█ █

Project Plan and Time Frame

Project Phase	Plan	Prototype	Validate	Transition	Sustain	Post Go Live Support
Week	1	2	3	3		4
Analysis & Workshops	x					
Modular Setup	x	x	x			
Data Upload		x	x			
Documentation			x	x	x	x
Project Management	x	x	x	x	x	x

Focus: Capacity Building, operational efficiency, increase market share, increase retention rate

Key Assumptions and Exclusions

- This will be a solution-driven solution and not requirement driven following standard process and focusing on the business benefit.
- Oracle OUM for Cloud implementation approach will be used for the implementation which is an iterative based implementation.
- The client is responsible for computer literacy of its system users.
- Organization change management will be the client's responsibility.
- The client is responsible for making sure all the required data & documentation needed for the implementation is available.

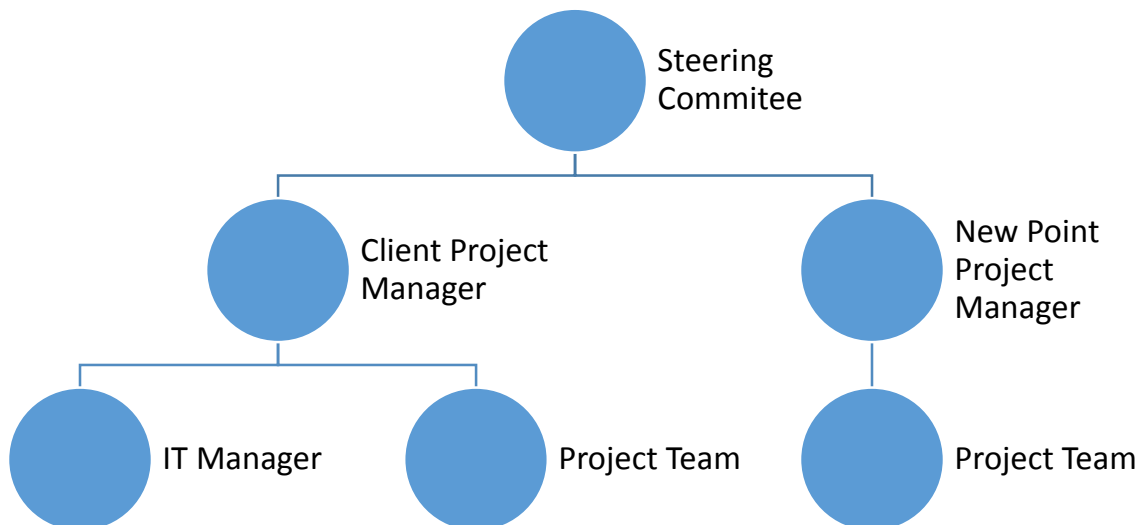


- The client should have a defined and proactive project team & manager empowered to make decisions.
- The client must make sure all business policy that will affect the implementation have been revised and a work around is available to prevent delay in the implementation of the system.
- In cases where the client project manager is not available for decision making, the client should provide an acting project manager to prevent the implementation delay or standstill.
- It's the clients responsibility to make sure that the users understand the new solution by ensuring that system users make use of the provided training tools
- Top management intensive engagement and support is a key success factor in this project to maintain tight control as this is a short duration project.
- The implementation is based on the Cloud deployment model, hosted at Oracle
- In the Cloud deployment model, two project environments are available: A sandbox and a production environment.
- Application customization, personalization, custom reports are not offered by the FSO, but offered as additional services.
- Migration of historical data and integration to other legacy systems are not offered by the FSO, but as additional service.
- Open periods on the current system will be migrated as part of the new setup, in the provided template.
- The client is responsible for cleansing and extracting data from their previous system and should be provided in the templates provided by Newpoint.
- Newpoint may opt to provide cleansing and data extraction as an additional service but not part of the FSO.
- All client data and documentation should be delivered in English language & signed off as the correct data material.
- The client is responsible for submitting the wrong data in case of the wrong data uploaded hence the delay in implementation and cleansing the system of incorrect data.
- Any approvals or feedback from the customer will be the clients responsibility and must not exceed three work days since the delivery date
- The client should ensure that the required infrastructure is in place and dedicated to the implementation.
- Customer will accept providing the service remotely
- Requirements not part of the original requirement scope may be treated as additional services.
- Change to requirements will only be considered if it is any benefit to the business.
- It is the responsibility of the client to make sure they understand these assumptions and exclusions.

Other Activities and Related Assumptions

Activity	Assumptions
Go-Live support	2 weeks one week after each release
Training Project team	New Point will organize a training for the customer's core project team members delivered by New Point consultants, in a lecture/demo format workshop. Training is assumed to be one workshop per application, for up to 10 attendees
Familiarization session	New Point will organize a session of maximum 4 hours, to make the customer familiar with the standard Taleo navigation and personalization's
Interfaces	Not included in scope of current project
User Guide	Not included in scope of current project
Administration Guide	Not included in scope of current project

Implementation Team Structure



Customer Responsibilities

For the project to be successful, the Customer must fulfil the following obligations:

- Order Taleo prior to project start.
- Assign a project manager to lead your staff's efforts
- Assign experienced and empowered business and IT users to work closely with New Point's consultants according to the project plan (full-time allocation may be necessary at times).
- Perform certain project tasks according to the project plan such as
 - Provide data in format specified by New Point
 - Customer side of integration
 - End user training
- Arrange for a project executive sponsor and project steering committee
- Accept that part of the work performed by New Point will not be on-site

Project Manager:

- Managing internal communication and project team
- Involved in the project full-time, from kick-off to Go-live
- Sign off deliverables and acceptances

Implementation Team Responsibilities

Gathers business and functional requirements and maps them to application functionalities.

- in-deep functional expertise and experience to the design of Oracle Taleo Solution
- Application configuration
- Deliverable creation
- Key user training
- In-deep technical expertise and experience to the design best solution
- Works with technical team to ensure optimal system access for the end users

Project Manager

- Responsible for day-to-day project activities
- Weekly status reports / milestone
- Issue and risk escalation