NEOGOV

Key Differences Between Personality and HRIS

Last revised: 6/21/2023

Table of Contents

Preface

By making any change to this document, you agree that modifications and unchanged portions of the document are your sole responsibility, comply with legal and regulatory requirements, comply with the terms if the Service Agreement between you and NEOGOV, and you further agree to update the document as product changes are released reflecting the author of the changes.

Overview

The NEOGOV platform is a collection of modules that help you manage employees through the entire recruiting and employment process. The platform contains these modules.

Module	Description
Recruit	Use the Recruit module to attract, screen, and hire candidates. The module has these products. ● Governmentjobs.com job board (GJ). ● Insight (IN). ● Onboard (ON).
Develop	Use the Develop module to coach your employees and grow their skills. The module has these products. ● Perform (PE) – performance reviews and management. ● Learn (LE) – learning management. ● eForms (eF) – employee forms and workflow.
Manage (HRIS)	Use the Manage module for all Human Resources functions. The module has these products. ● Core HR (HR). ● Payroill (PR). ● Benefits (BE). ● Time & Attendance (TA). ● Scheduler (available late 2023).
Comply (Power DMS)	Use the Comply module for policies, training, and accreditation management for public safety.

This table shows how modules in Personality relate to modules in HRIS.

Personality	HRIS
Foundation	Core HR
Salary Admin/Position Control	Core HR
Workflow/Approvals	Core HR
Benefit Admin	Benefits
Benefit Open Enrollment	Benefits – Open Enrollment
Attendance	Time & Attendance
Time Management	Time & Attendance
Clock Integration (CMI)	Time & Attendance
Payroll	Payroll
Time Scheduling	New module available late 2023
Employee & Manager Self-Service & Logi Dashboard	Unified Suite / Core HR
Teacher Contract Processing	Not supported
Forecasting & Costing	Not supported
Labor Relations	Not supported
Safety & Health	Not supported
Talent & Performance Management	Develop module
Recruiting	Recruit module

Key Differences

Cross Platform Reporting

ℹ️ **Important**: Because HRIS uses NEOGOV's Analytics & Reporting, BI Publisher and other third-party reporting software are not available to use with HRIS. HRIS clients do not have direct access to the database.

Analytics & Reporting allows authorized users to build customized reports using fields from context-sensitive categories. You can click and drag the various fields into the report building frame and apply logic to create specific reports.

As of June 2023, the Analytics & Reporting module does not support these functions.

- Create reports that are built on multiple tables across all modules within the entire HRIS platform.
- Combine data across the entire platform (such as combining data from Perform with data from Payroll).

NEOGOV continuously develops the Analytics & Reporting module and will expand capabilities over the coming months and years.

Position-to-Position Management Reporting Structure

The position-to-position management reporting structure available in Personality is not currently available in HRIS. HRIS will receive the feature in a future update. NEOGOV recognizes the need for this functionality in the public sector and is committed to implementing it.

Customizations

Most Personality clients have used customization tools, such as creating client-specific forms and fields, and creating custom menus and labels throughout the system.

In the future, NEOGOV will introduce additional flexibility to HRIS such as the ability to customize labels. NEOGOV believes that consistent user experience supports the system overall. While you can continue to make customer-specific customizations, this will not provide clients with the same customization tools that exist in Personality.

Many Personality clients have user-defined (custom) screens. Some of those screens are handled with additional functionality available with HRIS and the NEOGOV suite.

- New Self-Service Experience: the entire self-service experience in HRIS is significantly improved over Personality.
- eForms: store and centralize personnel files, create electronic forms, convert existing forms, and build routing and approval workflows in a secure repository.

Other Differences

User Interface

The current version of Personality supports two user interfaces.

- Administrative (Professional): Uses Java Swing technologies (additional Oracle Java licenses are required).
- Browser: Located in Self-Service.

The current version of the HRIS product uses the browser for all users, which provides a consistent user experience and does not require additional Oracle Java licenses.

The unified suite combines all aspects of the solution into a portal that makes it easy to navigate through all areas of the application, including other NEOGOV modules such as Onboard and Learn.

Environments

Each client has three HRIS environments: Training, Production, and UAT.

Environment	Differences
Training	Configure and test new setups. ● Does not receive a data refresh, only application updates. ● Monthly updates are automatic
Production	HRIS receives automatic monthly updates. ● Updates are communicated to clients using release notes. ● Clients receive advanced notice of updates to allow for proper testing and acceptance using UAT.
UAT	Receives a data refresh once per year (January) with a copy of your production data. ● Data refresh is not on demand, and clients do not need to request the refresh. ● UAT receives software updates approximately six to eight business days before Training and Production.

Common Functionality Changes

Common Tools

HRIS does not support these commonly used Personality tools.

- Bookmarks.
- Custom Tables (IMCT).
- Notes.
    - HRIS provides alternative functionality using Comments on some screens.
    - Alternative functionality is also available through Journal Entries, which can be used to log notes in the Perform module.

Preferences

Preferences are site-wide items that control how the user sees the application. Some preferences also control how the application works in various areas.

HRIS supports these preferences.

- IMST (System).
- IMUS (Users).
- IMFN (Functions).

HRIS does not support these presences.

- IMRO (Roles).
- Field Insert.
    - Personality will use the most often keyed values as the default value. This is not supported in HRIS.

Translations

- In Personality, you can change labels within the software when they are pre-defined.
- All labels are fixed in HRIS. NEOGOV will add label modifications to HRIS in the future.

Quick Keys

These are the most used quick keys.

- F4: Duplicate record on a list.
- F6: Add record.
- F12: Show audit details.
    - In HRIS, use the VMCL (View Data Change Logs) screen.

Core HR

Entities

HRIS supports one entity.

Manager Hierarchy

The Personality application supports Position-to-Position and Department-to-Position reporting structures. Although HRIS does not currently support this structure, HRIS will receive the feature in a future update. NEOGOV recognizes the need for this functionality in the public sector and is committed to implementing it.

As of June 2023, Personality clients migrating to HRIS must update assignments to point directly to managers. They must manage these on an ongoing basis until NEOGOV adds the position-to-position structure.

HRIS fully supports people lists using the IMPL screen. This allows approvals to receive select position management functionality.

Terminated Employees

Currently terminated employees cannot access Self-Service in HRIS for documents like W2s, and paystubs.

Custom Modifications

Screen Enhancements

HRIS does not support screen customization. NEOGOV is redesigning the screens with new technology, removing the ability to customize. This allows for improved customer support and consistent user experience.

- User-defined screens will no longer be available.
- Screens will be delivered as-is except for user defined fields (UDF).
  - See [User Defined Fields (UDF)](#).
- User defined columns (UDC) are not supported.
  - Convert these to user-defined fields when possible.
- User formula columns (UFC) are not supported.
- Translations (label/prompt changes) are not yet supported.
  - The HRIS product team is considering future functionality to support changing a limited selection of labels.

User Defined Fields (UDF)

You can include up to 10 user-defined fields on six tables. This gives you 60 fields to include on select HRIS screens. The HRIS roadmap includes additional tables that support UDFs, but there is no specific date.

These tables support up to 10 UDFs each for a total of 60.

- Identities (EID, P2K_HR_IDENTITIES).
- Employments (EEM, P2K_HR_EMPLOYMENTS).
- Assignment Details (EASD, P2K_HR_ASSIGNMENT_DETAILS).
- Position Details (DPD, P2K_CM_POSITION_DETAILS).
- Personals (EPS, P2K_HR_PERSONALS).
- Class Specs/Jobs (DJB, P2K_CM_JOBS).

User Defined Lexicons (UDL)

HRIS supports user-defined lexicons for use with UDFs.

Payroll

Symmetry Taxation Tables

NEOGOV uses Symmetry to maintain tax rate updates as they become available. These updates are applied automatically each month.

Employee Pay Stub Processing

Most clients use a customized check and deposit print program such as UPSTUBCW and UPSTUDW in HRIS. HRIS does not support custom pay stub programs.

Personality clients migrating to HRIS must switch to the standard HRIS check and deposit print programs. During the switch, you may have to change the standard check stock.

Benefits Administration

Benefit Plans

HRIS supports all benefit plans currently used in Personality. HRIS includes additional functionality such as including Open Enrollment forms with the Benefit module.

These are available now.

Functionality	Description
Improved Open Enrollment administrative and end user experiences	- Streamlined screens, - Shopping cart for Open Enrollment,
Annual enrollment amount limits	- Maintain US Tax Rates (IPUTR) form. - Variables for Catchup Limit and Regular Limit.
Improved administrative and end user visibility	Annual contribution section, which shows the annual amount under the employee contributions section. - Employer contribution only shows when the plan type is FSA or HRS. Otherwise, this is hidden. The annual employer amount from the election table determines this amount. - Total annual contributions will show the total of the employee and employer annual amounts. This value is compared to the maximum annual limit.

Workflow

HRIS supports preconfigured workflows for email notifications in these areas.

- Timesheets.
- Leave Requests.
- Benefit Open Enrollment (OE).
- Personnel Actions (PA).

Additional preconfigured workflows are not on the roadmap but may be considered in the future.

	HRIS does not support user-defined workflows.

HRIS currently supports these workflow notifications.

Category	Trigger	Resulting Email
Timesheets	Submitted	Notify employee it was submitted
Timesheets	Ready to Approve	Notify approver it is ready to review
Timesheets	Ready to Approve – Digest	Notify approver it is ready to review
Timesheets	Approved	Notify employee it was approved
Timesheets	Declined	Notify employee it was declined
Leave Requests	Submitted	Notify employee it was submitted
Leave Requests	Ready to Approve	Notify approver it is ready to review
Leave Requests	Ready to Approve – Digest	Notify approver it is ready to review
Leave Requests	Approved	Notify employee it was approved
Leave Requests	Declined	Notify employee it was declined
Open Enrollment	OE Created	Notify employee OE is open
Open Enrollment	Submitted	Notify employee it was submitted
Open Enrollment	Ready to Approve	Notify approver it is ready to review
Open Enrollment	Ready to Approve – Digest	Notify approver it is ready to review
Open Enrollment	Approved	Notify employee it was approved

Category	Trigger	Resulting Email
Open Enrollment	Declined	Notify employee it was declined
Personnel Actions	Submitted	Notify employee it was submitted
Personnel Actions	Ready to Approve	Notify approver it is ready to review
Personnel Actions	Ready to Approve – Digest	Notify approver it is ready to review
Personnel Actions	Approved	Notify employee it was approved
Personnel Actions	Declined	Notify employee it was declined

See Appendix A for details on all HRIS Workflow notifications.

HRIS Custom Reporting

NEOGOV does not support direct database connections using third-party or ad hoc report writing software. NEOGOV uses, and continues to enhance, the Analytics & Reporting module.

NEOGOV plans to provide a library of public APIs, with many being built throughout 2023. Clients will use GET commands to query the data.

These are the areas currently in scope for public APIs.

- Departments
- Divisions
- Class Specs/Jobs
- Positions
- Employees
- Timesheet entries
- Clock entries

The Report Builder is under continuous development, and NEOGOV will expand its capabilities over the coming months and years. Currently, it cannot reach and combine data across the entire platform (such as combining data from Perform and Payroll).

HRIS Reporting and Interface Tools

Tool	Description
Analytics & Reporting Report Builder	- Fully integrated ad hoc reporting tool. - Used for current and future standard reports. - Can be used for custom reports. - Create new reports. - Edit existing NEOGOV supplied reports. - Share reports. - Filtering. - Export. - Embedded in common user workflows. - Group, sort, aggregate, and calculated fields. - Cross-product reporting. - Rich Excel templates.
Standard Interface	Inbound • LMTD – Load external data with an interface. Outbound • UEEF - Generic employee information.

Tool	Description
	- UPPHF - Pay history. - UPGLF - General ledger. - UPDIF - Disbursements. - UEHN - New hires. - UPVEND - Vendors. - UPPOSPAYW - Positive pay.
Definitions	IDIF – Define interface formats.
Currently Available Core Entity APIs	- Departments. - Divisions. - Class Specs/Jobs. - Positions. - Employees. - Timesheet entries.

API Future Roadmap

The areas are targeted for future development, prioritized based on market competitive needs.

- Employee custom fields.
- Employee premiums.
- Employee GL distributions.
- Pay stubs/earning and deduction details.
- GL entries generated by Payroll.
- Benefits enrollments/deductions.
- Leave lines.

Custom Functions and Triggers

HRIS does not support custom database functions and triggers. The functionality that custom functions and triggers provide may be replaced by other system functionality in reporting tools, interfaces, and integrations.

Appendix

Appendix A – Workflow Emails

HRIS Workflow Emails List as of April 2023

Category	Trigger	Special Conditions/Scenarios	Email Recipient	Email Subject	Email Body - Display
Timesheets	Timesheet submitted	Only sends email to the employee if the employee submits the timesheet, not if a manager or admin submits on the employee's behalf.	Employee	Your timesheet has been submitted	Hi <<EID.FIRST_NAME>>, Your timesheet has been submitted. You will receive another email notification once it has been approved or declined. Thank you, Human Resources AUTOMATED E-MAIL, DO NOT REPLY
Timesheets	Timesheet ready for approval		Approver	**ACTION REQUIRED** A timesheet is awaiting your approval	Hi <<EID.FIRST_NAME>>, A timesheet is awaiting your review with the following information: <<DAPR.REFERENCE_INFO>> Please login to NEOGOV to review the timesheet and approve or decline: https://login.NEOGOV.com Thank you, Human Resources AUTOMATED E-MAIL, DO NOT REPLY

Category	Trigger	Special Conditions/Scenarios	Email Recipient	Email Subject	Email Body - Display
Timesheets	Timesheet ready for approval	Sends batch of pending approval email when RMWF is processed.	Approver	**ACTION REQUIRED** A timesheet is awaiting your approval	Hi <<EID.FIRST_NAME>>, A timesheet is awaiting your review with the following information: <<DAPR.REFERENCE_INFO>> Please login to NEOGOV to review the timesheet and approve or decline: https://login.NEOGOV.com Thank you, Human Resources AUTOMATED E-MAIL, DO NOT REPLY
Timesheets	Timesheet approved		Employee	Your timesheet has been approved	Hi <<EID.FIRST_NAME>>, Your timesheet has been approved. Start Date: <<PTS.START_DATE>> End Date: <<PTS.END_DATE>> Thank you, Human Resources AUTOMATED E-MAIL, DO NOT REPLY
Timesheets	Timesheet declined	Generates an email to the employee whether an approver declines a submitted timesheet, or an admin resets the timesheets on IAPTSS (both result in Open status, which triggers the email).	Employee	**ACTION REQUIRED** Your timesheet has been reopened	Hi <<EID.FIRST_NAME>>, Your timesheet has been reopened for further editing: Start Date: <<PTS.START_DATE>> End Date: <<PTS.END_DATE>>

Category	Trigger	Special Conditions/Scenarios	Email Recipient	Email Subject	Email Body - Display
		To avoid employee confusion, the email subject and body reference reopening rather than declining.			Comment if entered by the approver: <<COMMENT>>

If your manager or an administrator has asked you to make changes to your timesheet, please login to NEOGOV to edit the timesheet and then submit again: https://login.NEOGOV.com

Thank you,
Human Resources
AUTOMATED E-MAIL, DO NOT REPLY |
| Leave Requests | Request Submitted | | Employee | Your time off request has been submitted | Hi <<EID.FIRST_NAME>>,

Your time off request has been submitted with the following information:

Type: <<LEAVETYPE>>
Start Date: <<AAL.START_DATE>>
End Date: <<AAL.END_DATE>>

You will receive another email notification once it has been approved or declined.

Thank you,
Human Resources
AUTOMATED E-MAIL, DO NOT REPLY |
| Leave Requests | Request ready for approval | | Approver | **ACTION REQUIRED** A time off request is awaiting your approval | Hi <<EID.FIRST_NAME>>,

A time off request is awaiting your review with the following information:

<<DAPR.REFERENCE_INFO>> |

Category	Trigger	Special Conditions/Scenarios	Email Recipient	Email Subject	Email Body - Display
					Please login to NEOGOV to review the request and approve or decline: https://login.NEOGOV.com Thank you, Human Resources AUTOMATED E-MAIL, DO NOT REPLY
Leave Requests	Request ready for approval	Sends batch of pending approval email when RMWF is processed	Approver	**ACTION REQUIRED** A time off request is awaiting your approval	Hi <<EID.FIRST_NAME>>, A time off request is awaiting your review with the following information: <<DAPR.REFERENCE_INFO>> Please login to NEOGOV to review the request and approve or decline: https://login.NEOGOV.com Thank you, Human Resources AUTOMATED E-MAIL, DO NOT REPLY
Leave Requests	Request approved		Employee	Your time off request has been approved	Hi <<EID.FIRST_NAME>>, Your time off request has been approved: Type: <<LEAVETYPE>> Start Date: <<AAL.START_DATE>> End Date: <<AAL.END_DATE>> Thank you,

Category	Trigger	Special Conditions/Scenarios	Email Recipient	Email Subject	Email Body - Display
					Human Resources AUTOMATED E-MAIL, DO NOT REPLY
Leave Requests	Request declined		Employee	Your time off request has been declined	Hi <<EID.FIRST_NAME>>, Your time off request has been declined: Type: <<LEAVETYPE>> Start Date: <<AAL.START_DATE>> End Date: <<AAL.END_DATE>> Comment if entered by the approver: <<COMMENT>> Thank you, Human Resources AUTOMATED E-MAIL, DO NOT REPLY
Open Enrollment	OE created		Employee	**ACTION REQUIRED** Your Benefits Open Enrollment period has begun	Hi <<EID.FIRST_NAME>>, Your Open Enrollment has been created with the following information: Type: <<EVENTTYPE>> Days Open: <<DAYSOPEN>> Please login to NEOGOV to complete your enrollment: https://login.NEOGOV.com Thank you, Human Resources AUTOMATED E-MAIL, DO NOT REPLY

Category	Trigger	Special Conditions/Scenarios	Email Recipient	Email Subject	Email Body - Display
Open Enrollment	Benefits submitted		Employee	Your Benefits Open Enrollment has been submitted	Hi <<EID.FIRST_NAME>>, Your Open Enrollment has been submitted. You will receive another email notification once it has been approved or declined. Thank you, Human Resources AUTOMATED E-MAIL, DO NOT REPLY"
Open Enrollment	Benefits ready to approve		Approver	**ACTION REQUIRED** A Benefits Open Enrollment is awaiting your approval	Hi <<EID.FIRST_NAME>>, An Open Enrollment is awaiting your review with the following information: <<DAPR.REFERENCE_INFO>> Please login to NEOGOV to review the enrollment and approve or decline: https://login.NEOGOV.com Thank you, Human Resources AUTOMATED E-MAIL, DO NOT REPLY
Open Enrollment	Benefits ready to approve	Sends batch of pending approval email when RMWF is processed	Approver	**ACTION REQUIRED** A Benefits Open Enrollment is awaiting your approval	Hi <<EID.FIRST_NAME>>, An Open Enrollment is awaiting your review with the following information: <<DAPR.REFERENCE_INFO>>

Category	Trigger	Special Conditions/Scenarios	Email Recipient	Email Subject	Email Body - Display
					Please login to NEOGOV to review the enrollment and approve or decline: https://login.NEOGOV.com Thank you, Human Resources AUTOMATED E-MAIL, DO NOT REPLY
Open Enrollment	Benefits approved		Employee	Your Benefits Open Enrollment has been approved	Hi <<EID.FIRST_NAME>>, Your Open Enrollment has been approved. Please login to NEOGOV to review your benefit elections: https://login.NEOGOV.com Thank you, Human Resources AUTOMATED E-MAIL, DO NOT REPLY
Open Enrollment	Benefits declined		Employee	Your Benefit Open Enrollment has been declined	Hi <<EID.FIRST_NAME>>, Your Open Enrollment has been declined. Comments if entered by the approver: <<COMMENT>> Thank you, Human Resources AUTOMATED E-MAIL, DO NOT REPLY
Personnel Actions	Action submitted	Only sends email to the employee if the employee initiated the action, not if a	Employee	Your personnel action has been submitted	Hi <<EID.FIRST_NAME>>, Your <<PATYPE> action has been submitted.

Category	Trigger	Special Conditions/Scenarios	Email Recipient	Email Subject	Email Body - Display
		manager or admin initiates on the employee's behalf			You will receive another email notification once it has been approved or declined. Thank you, Human Resources AUTOMATED E-MAIL, DO NOT REPLY
Personnel Actions	Action ready for approval		Approver	**ACTION REQUIRED** A personnel action is awaiting your approval	Hi <<EID.FIRST_NAME>>, An action is awaiting your review with the following information: <<DAPR.REFERENCE_INFO>> Please login to NEOGOV to review the action and approve or decline: https://login.NEOGOV.com Thank you, Human Resources AUTOMATED E-MAIL, DO NOT REPLY
Personnel Actions	Action ready for approval	Sends batch of pending approval email when RMWF is processed	Approver	**ACTION REQUIRED** A personnel action is awaiting your approval	Hi <<EID.FIRST_NAME>>, An action is awaiting your review with the following information: <<DAPR.REFERENCE_INFO>> Please login to NEOGOV to review the action and approve or decline: https://login.NEOGOV.com

Category	Trigger	Special Conditions/Scenarios	Email Recipient	Email Subject	Email Body - Display
					Thank you, Human Resources AUTOMATED E-MAIL, DO NOT REPLY
Personnel Actions	Action approved	Only sends email to the employee if the employee initiated the action	Employee	Your personnel action has been approved	Hi <<EID.FIRST_NAME>>, Your <<PATYPE> action has been approved, effective <<SPA.PA_EFFECTIVE_DATE>>. Thank you, Human Resources AUTOMATED E-MAIL, DO NOT REPLY
Personnel Actions	Action declined	Only sends email to the employee if the employee initiated the action	Employee	Your personnel action has been declined	Hi <<EID.FIRST_NAME>>, Your <<PATYPE> action has been declined. Comments if entered by the approver: <<COMMENT>> Thank you, Human Resources AUTOMATED E-MAIL, DO NOT REPLY

Appendix B – Revision History

Version	Changes	Release Date
1	Initial release	6/21/23