

PeopleSoft Upgrade Planning



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Agenda

- 9.0 Upgrade Value Proposition
- 9.0 Key Enhancements
- Technology enhancements
- Upgrade Methodology
- Accelerated Upgrade Tools
 - uQuestionnaire
 - uCustomizeIT
 - uSQR
 - uSecureIT
 - uValidateIT

Upgrade Value Proposition...

9.0 Upgrade - A Value Proposition



- Protecting your investment
 - Support current products
 - Ensure upgrade paths to future applications
- Extending the Value
 - Adding customer driven features & enhancements
 - Increasing involvement in industry standards
 - Adapting next generation capabilities.
- Evolving to next generation
 - Evolving to information-age application
 - Providing clear and supported upgrade path to Fusion products.

9.0 Key Enhancements...

9.0 Key Enhancements

- Campus Solutions Enhancements
 - Campus Community
 - Recruiting and Admissions
 - Student Records
 - Student Financials
 - Financial Aid
 - Contributor Relations
- Technical Enhancements
 - Fusion Architecture
 - Oracle Application Server
 - Management Console
 - XMLPublisher
 - SOA Capabilities
 - Integration Broker
 - Grid Control Enhancements
 - Changes to Navigation
 - Enhanced Search Capabilities

Campus Community



■ 3C Enhancements

- Enhanced letter generation with XML publisher
- Template formats in PDF, RTF, XSL
- Enhancement to Communication process
 - Preview output prior to print/email.
 - Send output to printer
 - Email the output

■ Population Selection

- PeopleSoft Query
 - Inbuilt PS Security
- Equation Engine
 - Built-in Security features
 - Ability to manipulate selected data
- External File
 - Batch process/bulk process

■ Population Update

- Allows to update certain records and fields of defined population.

■ External Organizations

- Effective Dated External Organizations, location, contacts & departments
- External System org id
- Enhanced Contact Type

■ Service Indicators

- Mass Release Batch Process
- Service Indicators extended external organizations
- Mass Assigning and release service indicators.

■ Self Service

- Personal Data Summary Page
- Configurability
 - Type of Address, Phone, email
 - Service Indicators/Checklists

Recruiting and Admissions



- Academic Program, Plan, Subplan Deactivation Control
 - Transaction Pages
 - De-activated effective dated plans remain active for existing students.
 - Add/Update applications
 - Program Additions
 - Enrollment Targets
- External Education Component
 - Number of pages reduced to three, reduce # of tabs.
 - Free form comment field at transcript level
 - Better usability for data entry of external courses
- Prospect and Application Deletion Process
 - Two new processes, Prospects as well as Applications
 - Two separate transaction tables to specify prospects or applications to be deleted
 - Better control on holding the transactions.
 - Delete Prospect even if application is tied to the prospect.

PeopleSoft Student Records



■ Self-Service Usability

- Faculty Center Enhancements
 - Student Photos on Roster
 - Restricted grade values
 - Ability to view final exam schedules
- Student Center Enhancements
 - Student Grades in Self Service
 - Searching for Classes and Courses
 - Setup to Support Class Searches
 - Shopping Cart
 - My Academics Tab
 - Student Center Weekly Schedule
 - Configuration Options

■ Flexible Transcripts

- Enhancements to Transcript Production
 - Replace COBOL with new App Engine
- Processing Batch Transcript Requests
 - New run control page to select batches of transcripts, population selection etc.
 - Student Select list option. – Flexibility.
- Transcript Type Component Enhancements
 - New page called View Sort – Single location
 - GPA Page – Academic Program, GPA Plan, Grade Points

■ Class Permissions

- Configure and override Closed Class session, Required consent, Career Restrictions etc

■ Academic Advisement

- The Enrollment Backpack: My Academic Requirements
 - Degree Audit Report
 - Details Student Progress Card
- Enrollment Backpack: My Planner
 - Ability to plan short term and long term plan
- Program Guide
 - Definitions using one or more course list
 - Visibility on self service with course links
 - Listing courses on My Academics

■ Academic Data Enhancements

- Term and Cumulative Statistics and Grade Point Tracking
 - Term GPA for Transfer Credits
 - Cumulative GPA for Transfer Credits
 - Cumulative GPA for Institution Credits
 - Cumulative Units contributing to the Transfer Credits GPA
- Repeat Checking
 - Repeat Classes on the Academic Advisement Report
 - Repeat Logic Extended
 - Transfer Credit External Course Grade Setup

PeopleSoft Student Financials



- **Late Fee Processing**
 - New Late Fee Process
 - Use of Item type Tree nodes
 - Enables defining threshold amount
- **Payment Plans and Third-Party Contracts**
 - **Batch Data Entry Page**
 - Allows multiple students to a payment plan
 - Simplified receivables and payment plans.
 - **Batch Assignment Using Population Selection**
 - Assign specific population of students to a payment plan.
 - **Mass Cancellation**
 - **Self-Service Enrollment**
 - Self enrollment in a payment plan using self service
 - Streamlined enrollment and receivables management
- **Billing**
 - Use of enhanced Oracle XML Publisher to produce PDF.
- **Miscellaneous Purchases**
 - Available via Self Service
- **(USA) Self-Service 1098-T Forms**
 - New page to support better
 - Consent and eSignature - mandatory
 - Easy access to complete 1098T forms

PeopleSoft Financial Aid



■ External Award Feature

- New Functionality
- Ability to define and maintain separate layouts
- Identify student payment as external award.
- Loading of external award thru staging table and review by Aid Administrator.

■ Packaging

- Auto Select Packaging
- Mass Packaging Query Definition
 - Extended Equation Engine
 - Package Selection using PS Query, External ID, or Equation Engine.
- Repackaging

■ Self Service

- Report External Awards
- View and Print Financial Aid Award Notice
- Select a Lender
- Access Loan Counseling
- Authorize Application of Financial Aid Funds for Non-Allowable Charges

■ Population Update and Population Selection

PeopleSoft Contributor Relations



- **External Organizations**
 - Effective Dated External Organizations, location, contacts & departments
 - Enhancement to Contact Type
 - Expanded choices on communication Generation
 - New External System Organization ID, table driven, associated with people, organization or both.
- **Usability Improvements**
 - Consistent user interfaces
 - Foundation data entry fields
 - Link between Involvement Codes, Types, & Categories.
 - Effective Dated Rules
 - Prospect Management
- **Searches**
 - Enhanced Search/Match Capability
- **Academic Summary**
 - Single page to display all degree information.
- **Tender Detail Extensions**
 - Tender type detail page to support gift-in-kind and securities
- **Matching Gift Extensions**
 - Create matching gift when unexpected match is received.
 - Check matching gifts prior to balancing the session.
- **Session Extensions**
 - Tree Structure to view Session Details
 - Deposit Number Field to align session with Bank Deposit.

Population Selections



- Ability to identify group of individuals or organizations for a variety of purposes
 - Easy to use tool to dynamically create groups
- Configurable tools to create group by Employee IDs, Organizations, or any set of data using
 - PS Query
 - Equation Engine
 - External file load (MS Excel)
- Population Selection used by batch processes like
 - Audiences
 - Initiatives
 - Membership Organizations
 - 3C Engine
 - Communication Assignment
 - Service Indicator assignment and removal

Technology Enhancements...

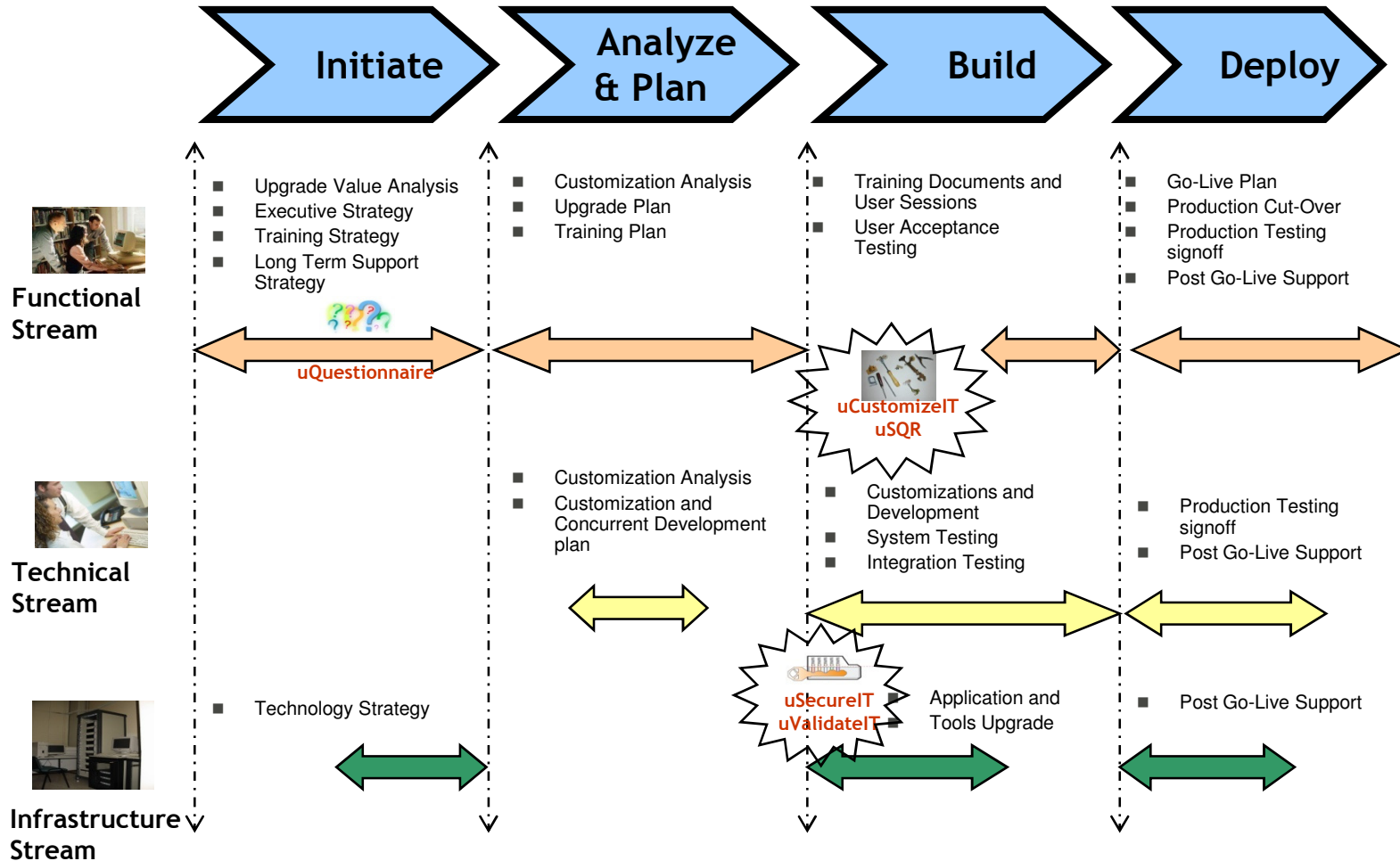
Technology Enhancements



- **Fusion Architecture**
 - Oracle Application Server
 - Management Console
 - XMLPublisher
 - SOA Capabilities
- **Changes to Navigation**
 - Portal Based Navigation
 - Verity Search
- **Integrations**
 - Enhanced Real Time Integrations abilities using Integration Broker
 - Delivered EIP's
 - Delivered Integrations with Several Vendors
 - Enhanced Partner Integration Framework
- **Data Archive Manager**
 - Archive Objects, Templates
 - Archive Jobs etc.,
- **Grid Control Enhancements**
 - Sort by Columns
 - Export to Excel
 - Personalize the Grid
- **Query Builder**
 - No Two Tier Query Builder
- **Upgrade Tools**
 - Change Assistant
 - Online Comparisons of PeopleSoft Objects in Source and Target DB

Upgrade Approach...

Accelerated Upgrade Approach



Accelerated Tools...

uAssist Tool Set - Executive Summary



- uAssist – Collection of tools to assist various tasks in an upgrade project.
- Expedites the upgrade process.
- Tools developed using Java, PeopleTools, PL/SQL or SQR.
- Some Tools Uses Internal Knowledge base database.

uAssist - Toolkit



- **uQuestionnaire**
 - Questionnaire for initial Upgrade Assessment
- **uCustomizeIT**
 - Analyzes and automatically upgrades Customizations
- **uSQR**
 - Analyzes and automatically upgrades table changes in an SQR
- **uSecureIT**
 - Secures key data in newly built PeopleSoft instance before being released to development team.
- **uValidateIT**
 - Validates PeopleSoft Environments

uQuestionnaire

- Set of questions aimed to collect all the information to initiate an upgrade project.
- Questions help understand customer's PeopleSoft environment.
- Questions originated from various business case studies and covers many aspects of an upgrade project.

Broader categories of Questions

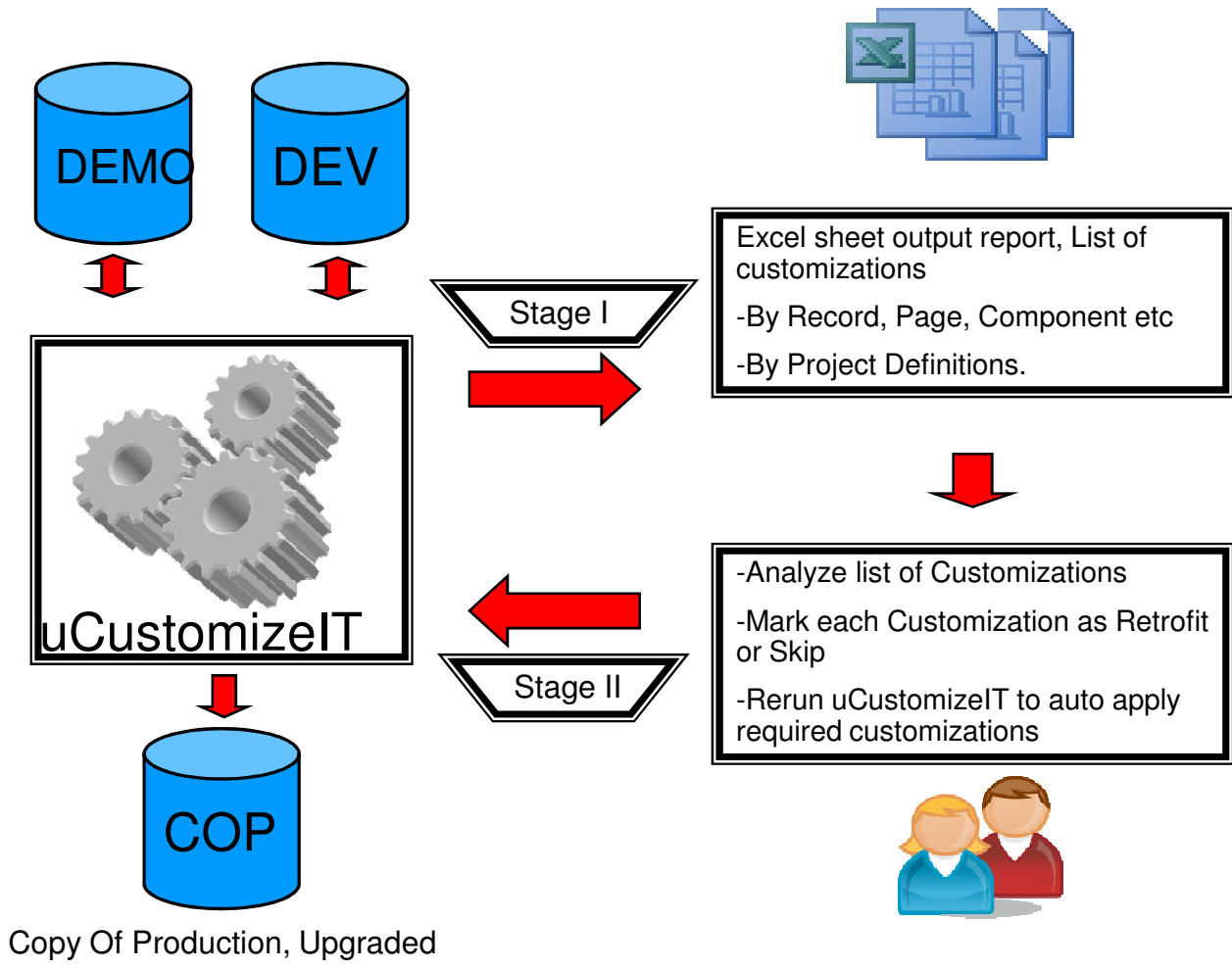
- General
 - Client Contacts, Project sponsor contacts, Upgrade readiness, Geographical location etc
- Administrative
 - Availability of Hardware, Licenses, procurement, Infrastructure for onsite-offshore model etc.
- Environmental
 - Application release, Tools release, type of OS, Database, etc.
- Functional
 - List of modules, external interfaces, volume of transactions, Size of the project team etc.

uCustomizeIT



- Automated tool to identify and retrofit documented as well as undocumented customizations in an Peoplesoft environment.
 - Two stage approach
 - Stage I – Identify customizations
 - Stage II – Auto-apply customizations
 - Excel sheet output
 - Efficient way to do fit-gap analysis.
 - Multiple Output Types
 - By Object Type - like by records, pages, people code, components etc.
 - By Project Definitions.
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Methodology



uSQR

- Automated tool to identify and apply table structure changes to a custom SQR process or report.
- Tool also extends functionality to identify and retrofit customizations to a delivered SQR process or report.
- Two stage Approach
 - Stage I – Identify changes
 - Stage II – Auto apply/Retrofit changes.

uSQR Continued...

- Excel sheet output
 - Efficient way to do analysis
- Functional Consultant can mark each customization as Retrofit or Skip before going for stage II
- uSQR can be run for
 - A single SQR
 - Group of SQRs by Project or
 - All SQRs on file server.
- Inputs comments in SQR at header level as well as for each customization re-applied.

uSecureIT



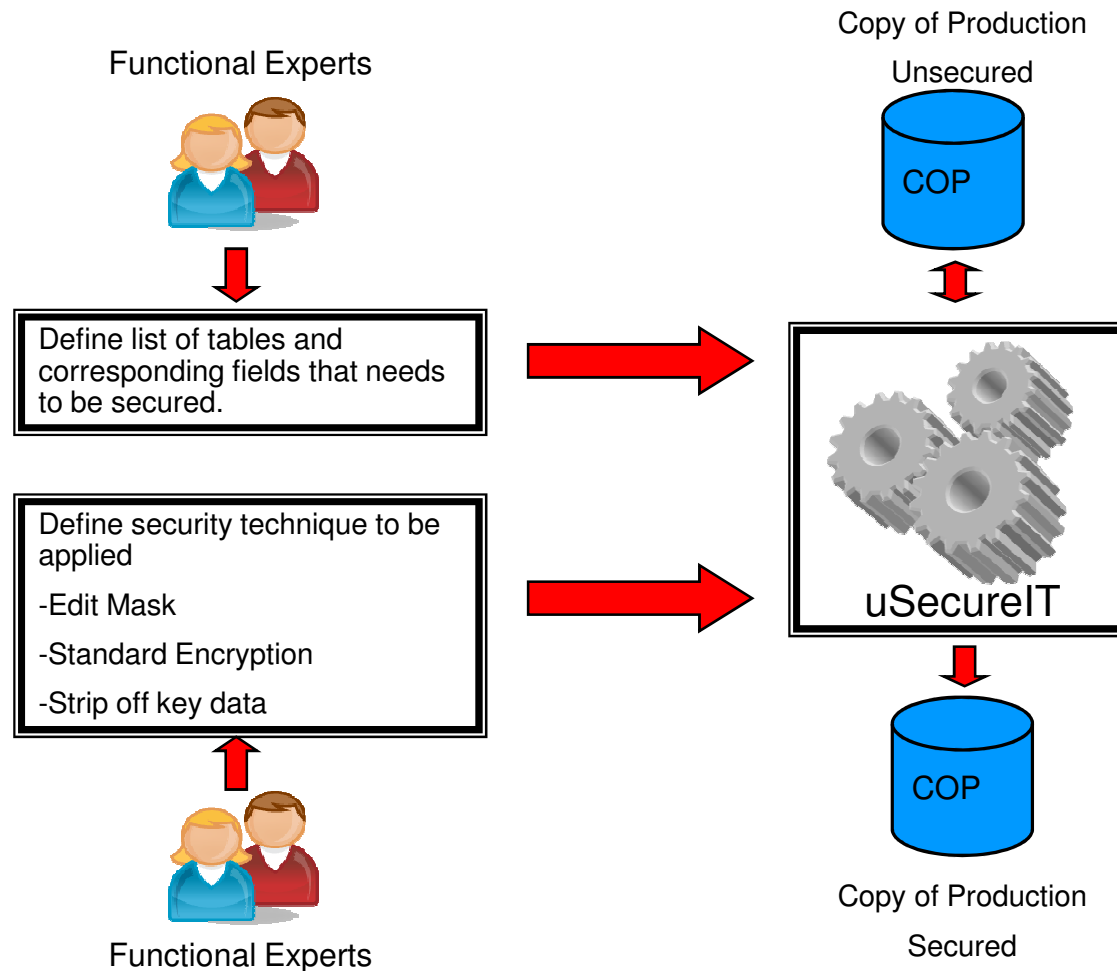
- Secures key application data in Copy of Production database before being handed over to development team for lab upgrades.
- Ensure key data like SSN, Account Codes, email ids, Bank details etc are not exposed to external project team.
- Setup driven tool
 - User chooses list of tables and fields that needs to secured.
 - uSecureIT reads user's preference and secures the data.

uSecureIT Continued...



- Allows multiple techniques of securing the data based of level security
 - Edit Masking
 - Less secured, uses predefined edit mask to secure the data
 - Hacker can analyze the edit mask and strip off the masking
 - Data Encryption
 - Highly secured
 - Uses standard encryption techniques
 - Strip off the key data
 - Permanently deletes the key data
 - May not be useful for system, load or any other type of testing environments

Methodology



u ValidateIT



- Validates all aspects of newly created Peoplesoft instance
- Ensures all PIA components like App Server, web server, DB, Batch server and file servers are aligned with the new instance.
- Compares DDDAUDIT, SYSAUDIT and UPGCOUNT reports to validate the instance.
- Generates detailed verification document that can be used as exit criteria before handing over the instance to development team.

Q&A