

# PS-HCM v9 Upgrade in 24 Weeks



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# Agenda

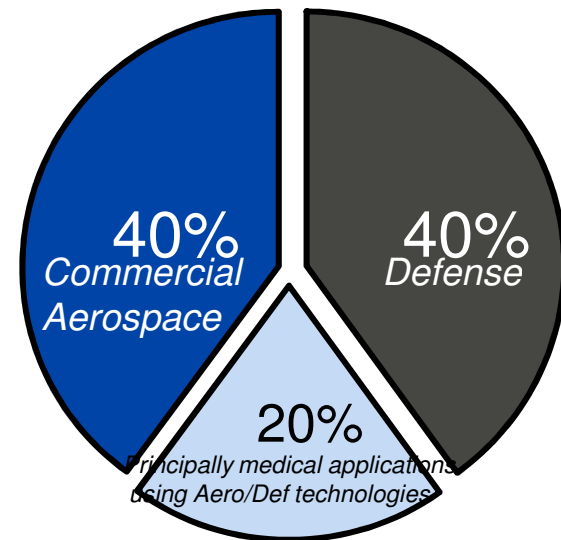


- Company Profile
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# Customer Company Profile



- NYSE Listed Company
- Manufacturer of Aerospace & Defense Controls
  - Advanced Materials
  - Engineered Materials
  - Energetic Materials
  - Sensors & Systems
  - Avionics & Controls
- 8,700 employees (3,900 International)
- 30 locations



# PeopleSoft Footprint



- HCM 8.8
  - Core HR, Base Benefits, Payroll Interface, Pension Administration, Workflow
  - 160 SQRs
  - 450+ Public Queries
  - ?? Customized objects
- PeopleTools 8.48
- Database Platform: SQL Server 2005
- Multi Language
- Country Functionality – US, France & Germany
- Citrix client used to access Crystal Reports



# PeopleSoft Upgrade Scope

- HCM 9.0 bundle #3
  - Core HR, Base Benefits, Payroll Interface, Pension Administration, Workflow
  - New Functionality:
    - Persons of Interest
    - Template Based Hire
    - Profile Management
    - Job Opening Template
  - 160 SQRs
  - 450+ Public Queries
  - ?? Customized objects
- PeopleTools 8.49
- Multi Language addition – French Canadian
- Country Functionality addition - Canada



# Upgrade Objectives and Strategy

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- Move to supported version
- Seamless to the business
- Like to like + new some new
- Desire new functionality for future rollout
- Minimize cost through use of offshore development

# Blended Team



- Customer
  - Project Management and Functional SMEs
  - Testing
  - Training
- PeopleTechGroup
  - Functional Lead
  - Technical Lead and Onsite / Offshore Developers
  - DBA
  - Upgrade Passes

# Approach

- Analysis
  - Impact Analysis - existing functionality
    - Compare 8.8 production to 9.0 demo
    - Completed prior to first data pass
    - Provided a delta document
    - Document was a reference throughout project
      - Customization keep/drop
      - New requirements
    - New functionality analysis
      - Template Based Hire
      - Person of Interest
      - Profile Management
  - Analysis and planning of Canadian functionality

# Approach

- Four Upgrade Passes
  - Initial
  - Test (2)
  - Production
- Customer QA of code changes & knowledge transfer
- 90% SQR and public query development offshore
- Minimal security changes

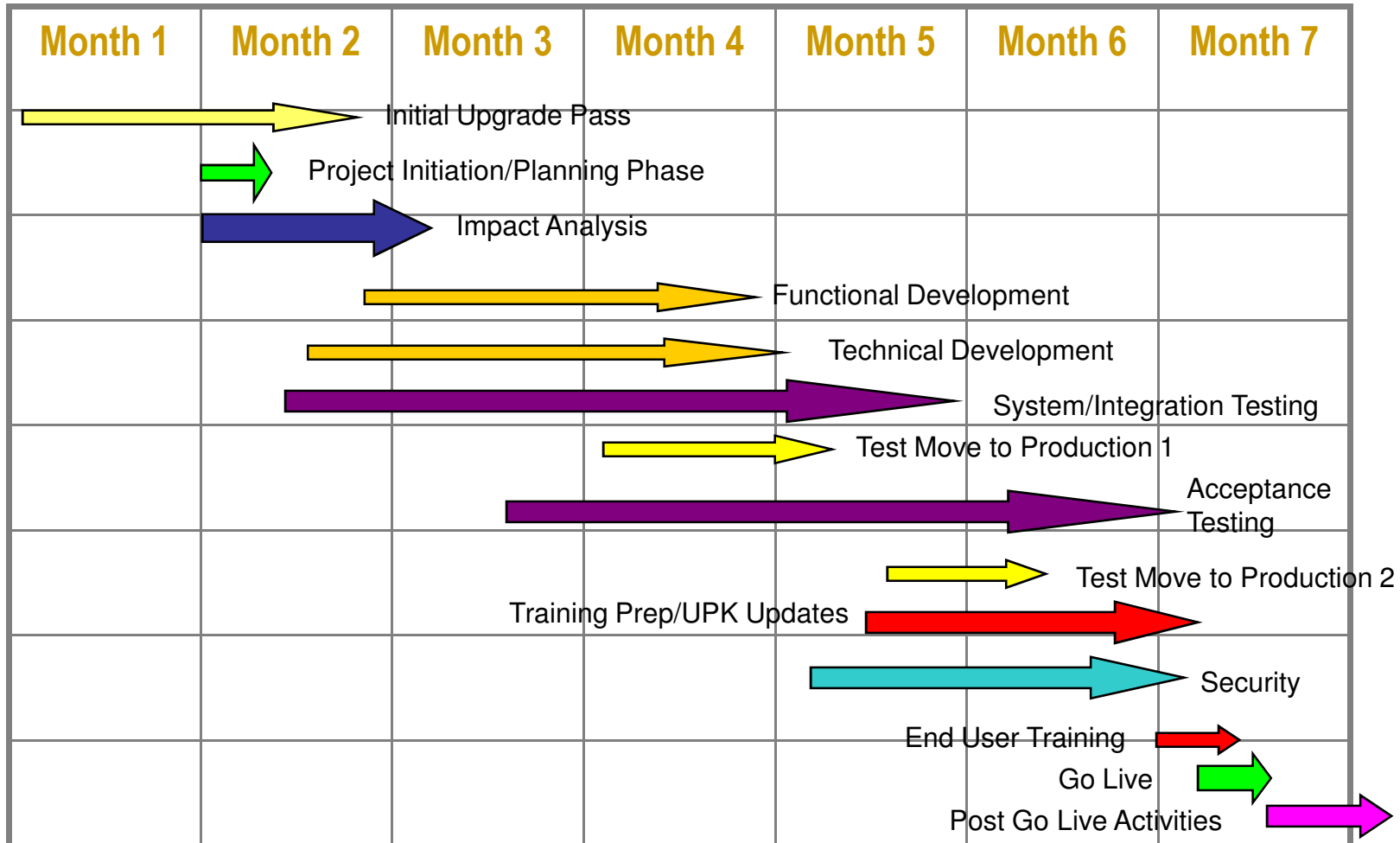
# Approach



- Training with UPK and WebEx
- PeopleSoft Upgrade Portal Site (SharePoint)
  - Document Repository
  - Team Task Lists
  - Issue / Decisions Tracking
  - Go live count down
- **Demo of Portal Site**
  - Project site
  - Tracking spreadsheet

A screenshot of a SharePoint portal site for the "PeopleSoft 9.0 Upgrade Project" (October 2007 - February 2008). The page features the Oracle PeopleSoft Enterprise logo, a breadcrumb trail (Home &gt; Resources &gt; HR &gt; Peoplesoft Upgrade), and several sections: "Announcements" (no active announcements), "Key Contacts" (listing companies like ACS, Auxitrol, Esterline, and Sierra Systems), and "Document Library" (listing folders like ACS, Canadian Functionality Analysis, etc.). On the right, there is a "Calendar" section (no items shown) and "Useful Links" (including Aglera FTP Site, PeopleSoft 8.8 UPK Link, etc.).

# Timeline



# Successes



- Completed in 24 weeks
- Smooth transition for users
- Status Meetings
- Person Model
  - Person of Interest
  - PER\_ORG added to custom reports & run control pages
- Forgotten Password Setup
- Updated testing documents



# Template based Hiring



## Template-Based Hire

### Enter Employee Information

Enter the following employee or contingent worker information. If you cannot enter all of the person's information select Save for Later.

Previous

Save and Submit

Save for Later

Cancel

Hire Template Information	
Template:	ESL_EMP_HIRE - ESL Hire - USA Employees
Effective Date:	05/16/2008

Hire Details	
Name: Be sure that the name you enter in this section matches the employee's SSN card.	
Name Prefix:	<input type="text"/>
*First & Middle:	<input type="text"/>
*Last Name (No Suffix):	<input type="text"/>
Name Suffix:	<input type="text"/>

Home Address	
Address Type:	Home
*Address Line 1:	<input type="text"/>
Address Line 2:	<input type="text"/>
*City:	<input type="text"/>
*State:	WA <input type="text"/>
*Postal Code:	<input type="text"/>
County:	<input type="text"/>

Preferred Phone Number	
*Phone Type:	Home <input type="text"/>
*Telephone:	<input type="text"/>
<input checked="" type="checkbox"/> Preferred	

# Template based Hiring...



Additional Phone Number (Optional)	
Phone Type:	<input type="text" value=""/> <input type="button" value="v"/>
Telephone:	<input type="text" value=""/>
Phone Extension:	<input type="text" value=""/>

Email Address	
*Email Type:	<input type="text" value=""/> <input type="button" value="v"/>
*Email Address:	abc@xyz.com

Biographical Information	
*Date of Birth:	<input type="text" value=""/> <input type="button" value="B"/>
*Gender:	Unknown <input type="button" value="v"/>
*Highest Education Level:	A-Not Indicated <input type="button" value="v"/>
*Marital Status:	Single <input type="button" value="v"/>
*Marital Status Date:	<input type="text" value=""/> <input type="button" value="B"/>
*Language Code:	ENG <input type="button" value="Q"/>
Alternate Employee ID:	<input type="text" value=""/>
<input type="checkbox"/> Full-Time Student	

Social Security Number	
*National ID:	<input type="text" value=""/>

Citizenship	
Country of Citizenship:	USA
*Citizenship Status:	<input type="text" value=""/> <input type="button" value="Q"/>

Ethnic Group : Use the Modify Person/Regional page to indicate multiple ethnic groups.	
Regulatory Region:	USA
*Ethnic Group:	<input type="text" value=""/> <input type="button" value="Q"/>

Personal Data - United States	
<input checked="" type="checkbox"/> Eligible to Work in U.S.	Military Status:
<input type="checkbox"/> Disabled Veteran	<input type="text" value=""/> <input type="button" value="v"/>

# Template based Hiring...



Referral Source	
Referral Source:	<input type="text"/>
Employee Referral ID:	<input type="text"/>
Specific Referral Source:	<input type="text"/>
<input type="checkbox"/>	Applicant is a family member
<input type="checkbox"/>	Previously Employed by an Esterline Company

Job Information			
Regulatory Region:	USA	Business Unit:	ESTER
*Department:	<input type="text"/>	Company:	ESL
SBU:	NOSBU		
*Job Code:	<input type="text"/>	*Supervisor ID:	<input type="text"/>
*Full/Part Time:	Full-Time	*Regular/Temporary:	Regular
Employee Classification:	<input type="text"/>	*Regular Shift:	1 - Day
*Standard Hours:	40.000000	*IC Eligible:	<input type="text"/>

Job - Payroll Information			
*Pay Group:	BW1	*Employee Type:	<input type="text"/>

Job Compensation - Pay Components			
Comp Rate Code:	NAHRLY	*Compensation Rate	<input type="text"/>
Currency Code:	USD	(Max 4 decimal places):	
		Compensation Frequency:	H

Benefit Program - Participation	
*Benefit Program:	ESL

▸ Comments

\*Required Fields

Previous

Save and Submit

Save for Later

Cancel

# Successes



- Customer Process/Development Changes:
  - Dynamically fetch interface file location from a table based on the database name
  - Add all custom fields into a sub-record for easier future upgrades
  - Keep all the custom menu items in a custom menu instead of inserting into delivered menu
  - Hide the page controls through PeopleCode rather than through property so that the customization effort can be reduced
    - Run Control pages

# Learnings

## ■ Employment

### ■ View not a table

- Queries that use JOB & EMPLOYMENT do not process efficiently
- Deleted all private queries

### ■ Dates

- Rehire date now Last Start Date
  - Rehire date no longer null
  - Impacts reports and queries
- Termination Date
  - Payroll interface not including future dated terminations
  - Impacts to reports

# Learnings

- Template Based Hire
  - High effort to implement
  - Buggy until Bundle #5
  - Customizations are complex
    - Component Interfaces and Application Package Services
  - Architecture is well suited for integration with 3<sup>rd</sup> party ATS
  - Very limited documentation
  - Custom validations available through user exists

# Learnings

## ■ Benefits

- Dependent Beneficiary Effective Dates
  - Issues with data conversion
  - No correction mode for name and address page
- Coverage Formula Table
  - Configurable Calculation rules
  - Impacts custom reports calculating coverage amounts (Life Benefits)
  - Solution:
    - BEN100A – Benefit Snapshot
    - Updated custom reports

# Learnings

- Job Opening Template
  - Available from TAM but additional licensing not required
  - New tables requires additional analysis
- Inserting NULL dates from SQR in a SQL environment
  - Dates defaulted to 1/1/1900
  - Impacted SQR's extra review, programming & testing
  - Depends on the configuration of your SQL environment
- Avoid duplicate components by registering the same under a required portal folder.
  - Examples: Navigator for New Hire & Payroll Interface Process

# Learnings

- Setup data was migrated through scripts thereby reducing time on Go Live Day to do setup
- Kept default portal navigation
  - Delete Favorites
- User “Customize Page”
  - Customized Tab order
  - Restore default

# Future Projects



- Contingent Workers
- Wage Progression
- Competency Management
- Global Assignments

# Q&A