

PeopleSoft Upgrade Planning



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8.9/9.0 Key Enhancements



- HCM Application Enhancements
 - Person Based Model
 - Core HR Enhancements
 - Talent Management Enhancements
 - T&L Enhancements
 - Minor Enhancements to Benefits
 - Enhancements to Row Level Security
 - Compensation Enhancements
 - ePerformance Enhancements
 - Union Workforce Management Functionality
 - Absence Management
- Technical Enhancements
 - Fusion Architecture
 - Integration Broker
 - Grid Control Enhancements
 - Changes to Navigation
 - Enhanced Search Capabilities

8.9/9.0 Key Application Enhancements



- **Person Based Model**
 - Manage Person Organization Relationships
 - Employee
 - Contingent Worker
 - Person of Interest
 - Emplid Continues to be the reference ID and remains same for all current employees
- **eRecruit Enhancements**
 - Technology Enhancements
 - Person Model – Data Model Changes
 - Open Integration Framework
 - Job Board Posting (Monster, Recruit USA, etc.,)
 - Background Screening (HireRight, ChoicePoint, etc.,)
 - Resume Processing (Mohomine, Magnaware, etc.,)
- **Usability Enhancements**
 - Minimized the number of clicks
 - Consolidation of Pages, Context provided on same page
 - Configurable Message Catalog, Text Messages and Labels
 - Enhanced Applicant Experience
 - Enhanced Recruiter/Manager Experience
- **Core HR Enhancements**
 - Profile Management.
 - SmartHire
 - Mass Update enhancements
 - HCM Event Manager
 - HCM Interface Registry
- **Minor Enhancements to Benefits**
 - Effective Dated Dependent and Beneficiaries data
 - Multiple Annual Base Benefits Rate
 - ERISA Enhancements
- **Enhancements to Row Level Security**
 - Real Time Synch with Fast Security Views
 - Assign Multiple Row Security Permission Lists to Roles
 - Manage Security access for different Person Types
- **Compensation Enhancements**
 - Improved Manager Desktop Interface
 - Individual Salary Change Request

8.3 to 8.9 Key Enhancements



■ ePerformance

- Create and Manage Performance Documents
- Capture and Maintain Performance Review Notes
- Work Flow Notification and Approval Process
- Integrate with other PeopleSoft modules like Salary Planning

■ Union Workforce Management Enhancements

- Maintain Labor Agreements
- Assign Job Codes to Labor Agreements
- Maintain Wage Progression plans associated with Job Codes
- Maintain Facilities for the Agreement
- Maintain Employee Seniority Dates by the Agreement
- Maintain Recall Plans
- Wage Progression Process
- Layoff and Recall Process

■ T&L Enhancements

- Enhanced Self Service
 - Time Reporting, Approval
 - Overtime Management
 - Open Calendar Views
- Enhanced HRMS – Financials Integration
- Enhanced Scheduling
- Improved Performance of Time Admin Process

■ Absence Management

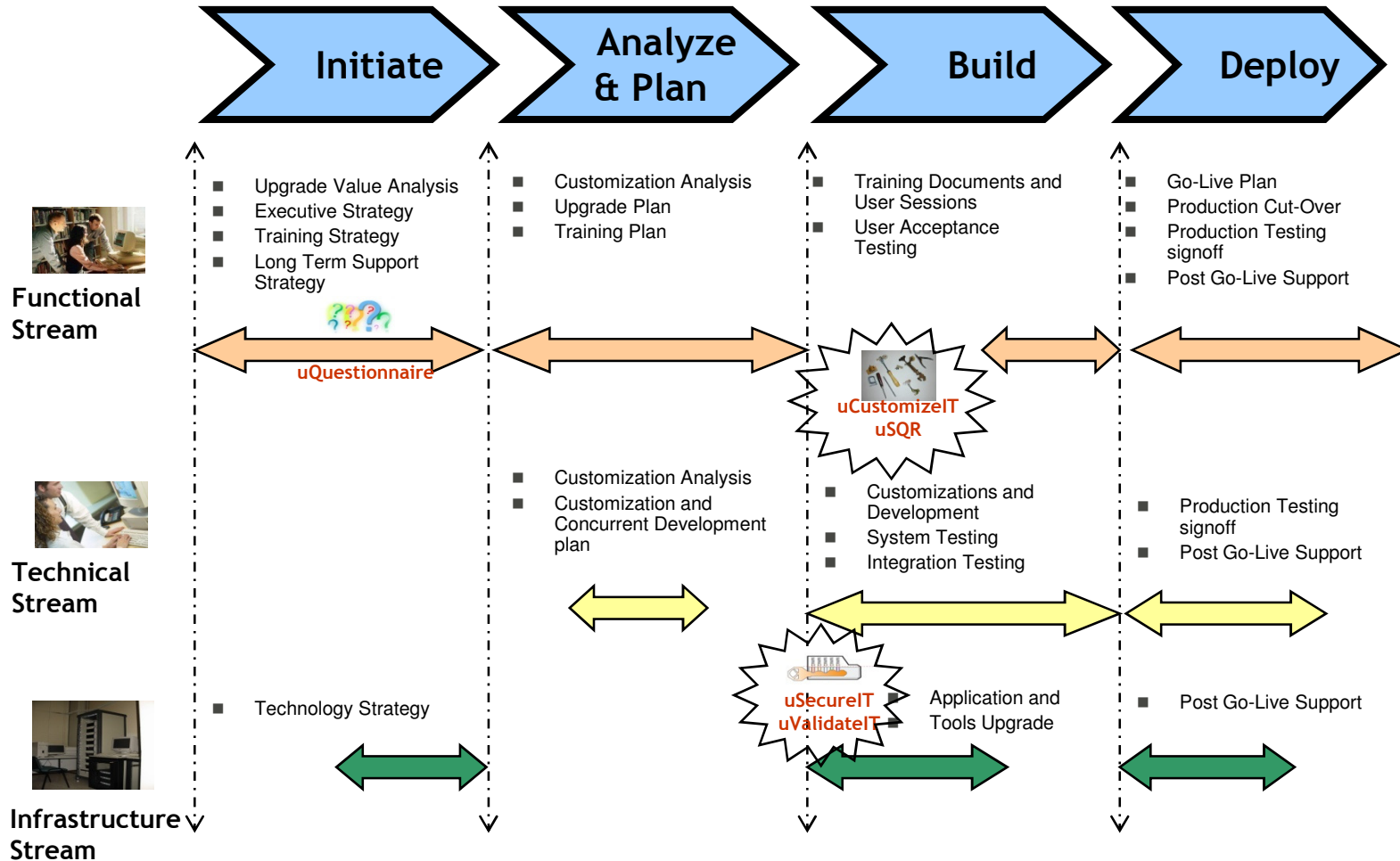
- Rules Based Leave Accrual Process
- Rules Based Leave Processing
- Configurable Request Approval Process
- Multiple Approval and Alternate Approval Process
- View Current Balances
- Forecast the Accrual Balances
- Integrate with T&L Schedules and Payable Times
- Integrate with PeopleSoft NA Payroll

8.9 Key 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

Accelerated Upgrade Approach



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

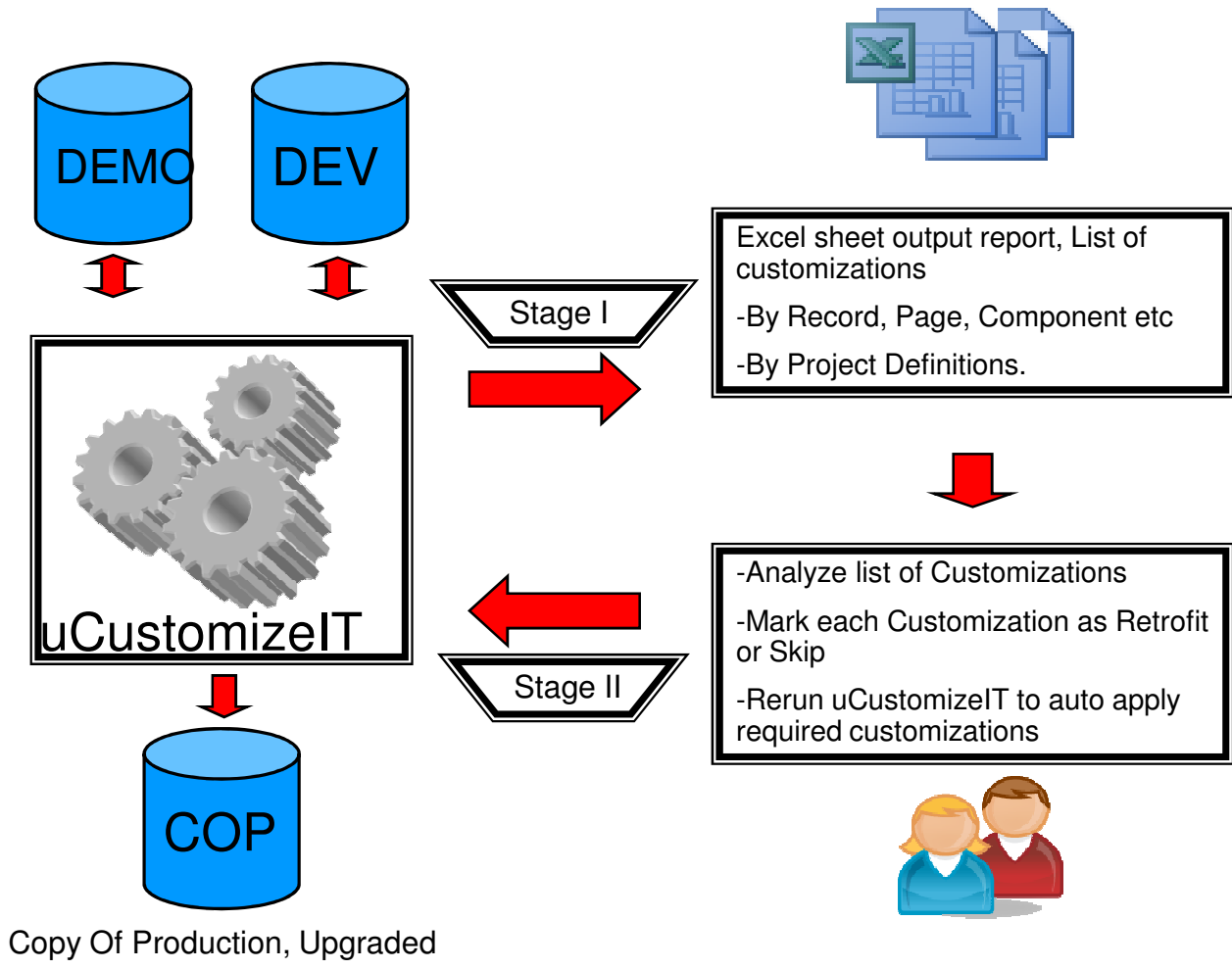
- General
 - Client Contacts, Project sponsor contacts, Upgrade readiness, Geographical location etc
- Administrative
 - Availability of Hardware, Licenses, procurement, Infrastructure for onsite-offshore model etc.
- Environmental
 - Application release, Tools release, type of OS, Database, etc.
- Functional
 - 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



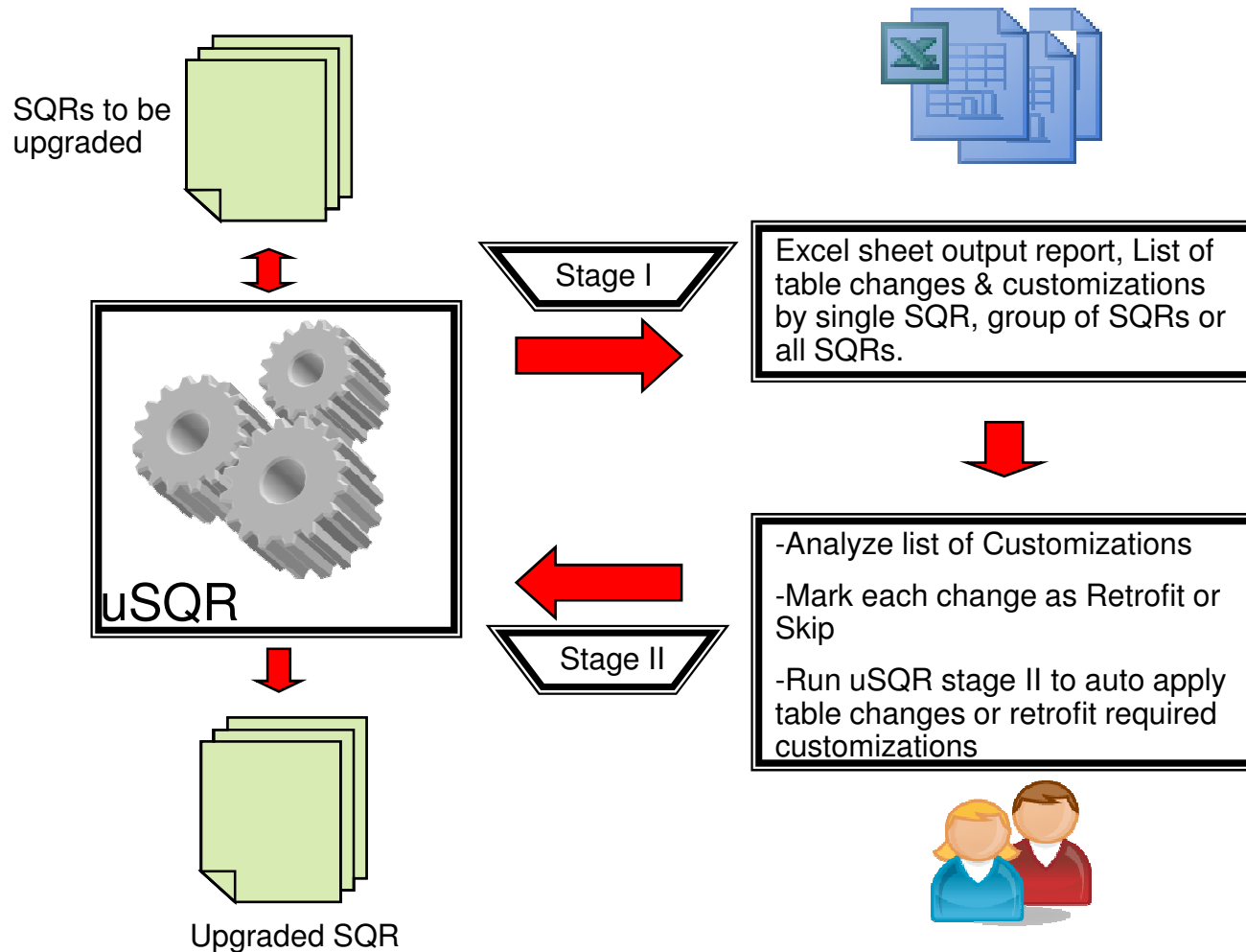
uSQR

- 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.

Methodology



uSecureIT



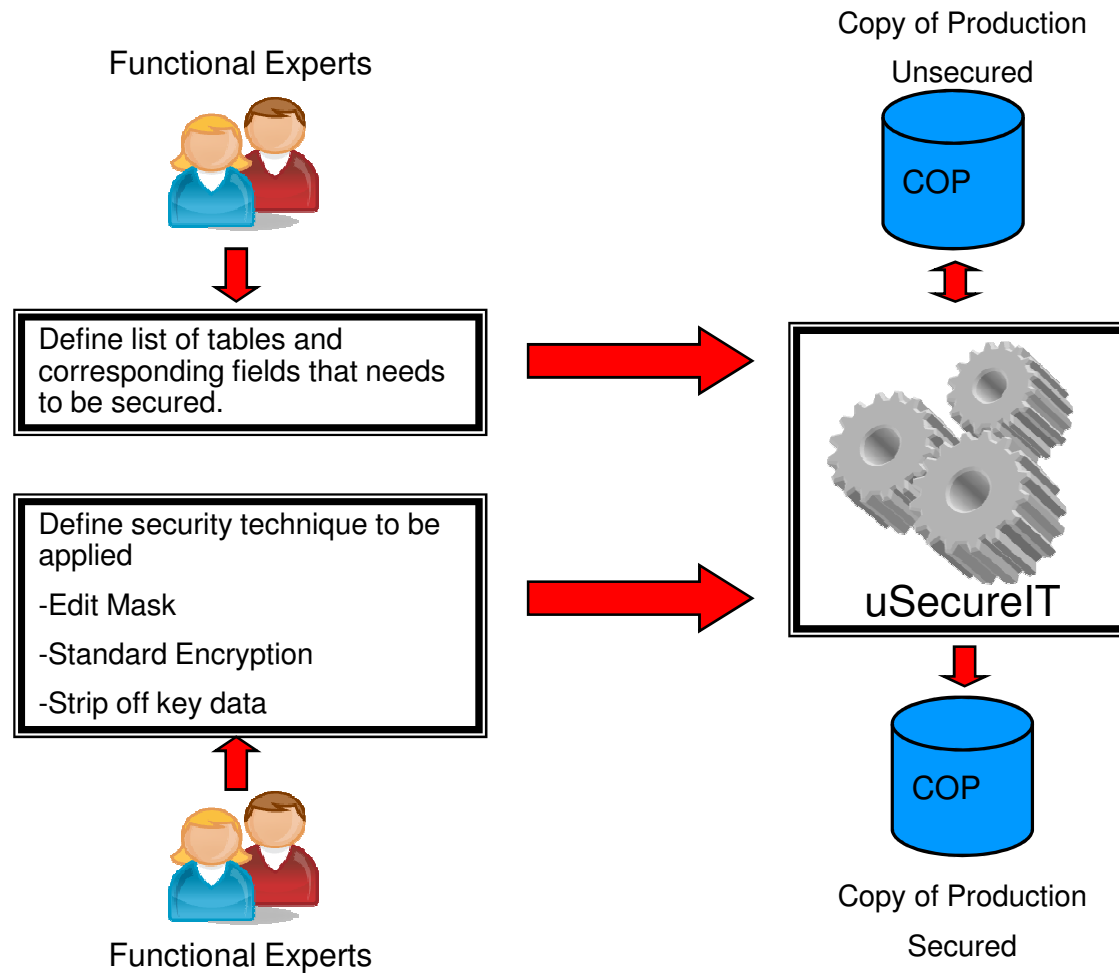
- Secures key application data in Copy of Production database before being handed over to development team for lab upgrades.
- Ensure key data like SSN, Account Codes, email ids, Bank details etc are not exposed to external project team.
- Setup driven tool
 - User chooses list of tables and fields that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