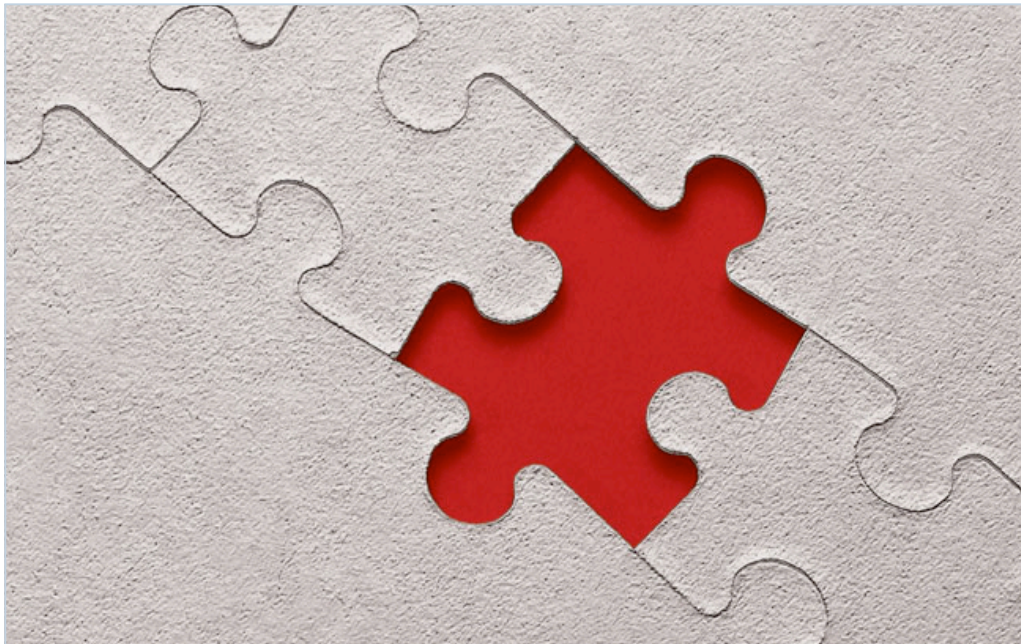


Upgrading to PeopleSoft HCM v8.9



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OBJECTIVES

Review major relevant functional and technical changes and enhancements

Discuss significant impact areas

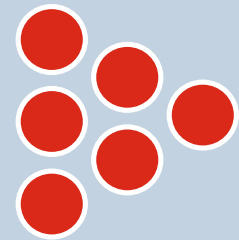
Review questions



- » Introduction
- » HCM v8.9 Functional Comparison to HCM v8.8
- » HCM v8.9 Technical Comparison to HCM v8.8
- » New Technologies Available with PeopleTools v8.46x
- » Major Impact Areas
- » Optimum's Keys To a Successful HCM v8.9 Upgrade
- » Q&A Session

Introduction

Optimum's Unique Qualifications



Corporate Snapshot

SERVICE OFFERINGS

Business Process / Knowledge
Transfer Approach

Centers of Excellence: Oracle,
PeopleSoft, JDE, Siebel

CRM, HCM, Financials, SCM,
EPM, Portal, Business
Intelligence

Industry leading Optimum
MethodSM Toolkit and
ExcelerateSM Methodology

LifelineSM Production Support



Optimum Solutions is a full-service consulting firm, specializing in enterprise system implementation and integration solutions.



Selected Clients by Industry



OUR SOLUTIONS CENTER

Optimum's Enterprise Solutions Center has six practices, each consisting of practitioners, methods and tools focused to deliver optimum results within that discipline.

Each practice can provide assistance across a full spectrum of services, from assisting in project definition and return on investment analysis through project implementation and post production support.



A Complete Integrated Solution

Our tools, methodologies, specialists and resources provide an **INTEGRATED SOLUTION**



Oracle and PeopleSoft have long recognized Optimum's industry domain expertise and leadership position in target markets, viewing Optimum practitioners as trusted business advisors and industry thought leaders.



Oracle E-Business

Optimum has been working with Oracle applications since the introduction of release 9.3. We have seen the product evolve and mature from an initial release of core functionality to today's robust ERP solution. As a result, we know how to maximize the benefits of Oracle and deliver exceptional added value to the enterprise.



PeopleSoft Enterprise

We have significant experience with the newest releases of PeopleSoft Enterprise including working with v8.9 since late 2004 and continuing through our numerous implementations to date – a claim few can make.

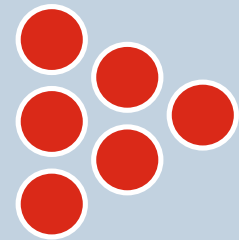


Siebel CRM & Analytics

Our consultants have been working with Siebel applications since its earliest releases. As a result, we know how to maximize the benefits of Siebel CRM applications and help provide insightful customer data, leading to more intelligent decisions.

HCM v8.9 Comparison

Functional Comparison



EXPECTED BENEFITS

Opportunity to reduce a number of customizations with enhanced functionality and more configurable options.





Major improvements in user experience with enhanced navigation and more intuitive user interfaces.

Significant functional enhancements including:

- » Navigation
- » Core HR
- » Labor Relations
- » Benefits
- » NA Payroll
- » Compensation
- » Absence Management
- » Time and Labor
- » Collaborative Applications
- » ePerformance
- » Security
- » Recruiting Solutions

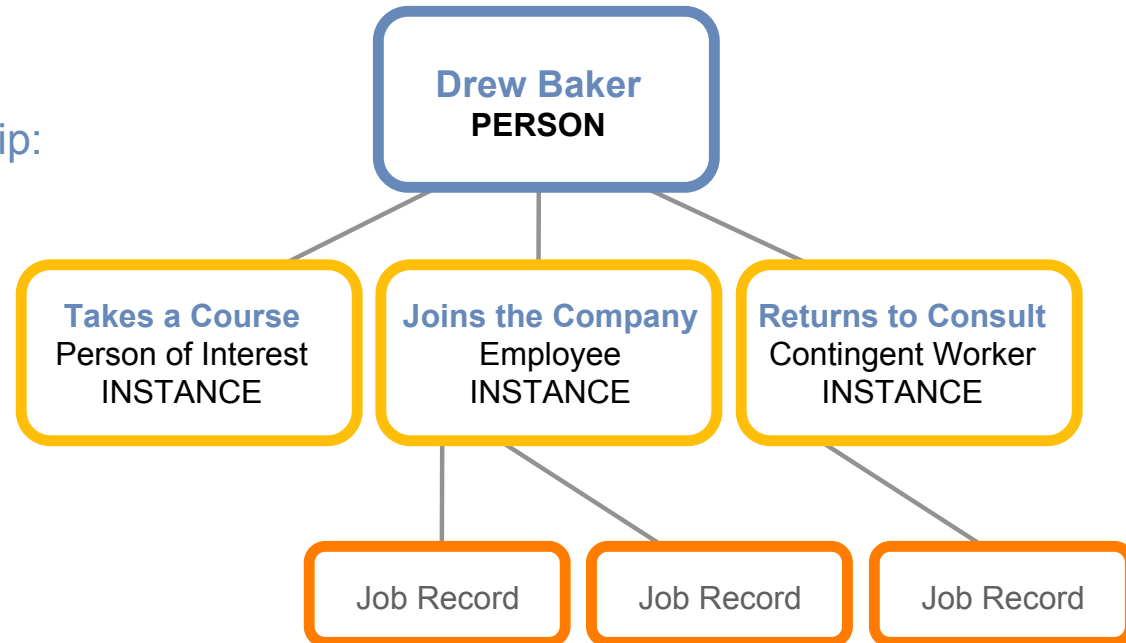
Collection Based Navigation pages (called DFANs [Default Functional Application Navigation] pages)

- » Minimal number of clicks
- » Synchronized with the main menu architecture
- » Alternative to the main menu navigation

 Manager Self Service Navigate to self service information and activities for people reporting to you. <ul style="list-style-type: none">Time ManagementJob and Personal InformationCompensation and Stock2 More...	 Recruiting Manage and administer the recruiting process. <ul style="list-style-type: none">Pending ApprovalsFind ApplicantsAdd New Applicant9 More...	 Workforce Administration Hire employees, add non-employees, maintain personal and job data, administer global assignments, labor relations, absence and vacation. <ul style="list-style-type: none">Personal InformationJob InformationGlobal Assignments10 More...
 Benefits Select benefit plans, track company cars & FMLA, calculate leave accrual & annuity, maintain primary job, NDT, FSA details, auto enrollment, COBRA, and merchants. <ul style="list-style-type: none">Employee/Dependent InformationReview Employee BenefitsEnroll In Benefits13 More...	 Compensation Manage Salary Planning, Variable Compensation, Total Compensation and compensation related processes. <ul style="list-style-type: none">Base CompensationVariable CompensationTotal Compensation4 More...	 Stock Manage stock participation, maintain stock details, create grants, identify dispositions, reprice options, purchase stocks, and determine refunds. <ul style="list-style-type: none">Add a PersonModify a PersonDaily Prices12 More...

More **robust model** for tracking complete workforce (Person Model)

- » Person maintains same ID throughout system
- » Clear organizational relationship: Employee (EMP), Contingent Worker (CWR), Person of Interest (POI)
- » Instances are differentiated by PER_ORG field and distinguished by Employee Record Number



Significant Record Changes

- » EMPLOYMENT record was removed, data elements were moved to other records

Additional Ethnic Groups (e.g., Pacific Islander) to support EEO reporting

Configurable Search/Match

Configurable Actions/Action Reasons

- » Actions moved from translate table to their own table with new setup pages
- » Effective Dates
- » Ability to limit use of actions by org relationship

Redefined Status Definition (HR Status in addition to Payroll Status (currently EMPL_STATUS))

Wage Progression

- » Rules Based
- » Wage Advancement Approvals, exceptions and adjustments

Labor Agreement Enhancements

- » Wage Progression rules
- » Multiple Seniority Dates
- » Job Codes

Layoff and Reinstatement Management

Effective Dating of Dependent/Beneficiary. DEPENDENT_BENEF record is broken out into several effective dated dependents records

Multiple Annual Benefits Base Rates

ERISA related enhancements

- » Recent changes to ERISA around “Consistency Rule” of Section 125
- » Growth of self-service
- » Permit only election consistent with gain or loss of eligibility
- » Only allow FSA election changes consistent with Family Member eligibility gains or losses

Alternative Overtime (California regulation)

Standard ChartField Configuration

- » Consistent Use of ChartFields between General Ledger and Payroll
- » Synchronization of ChartField configuration between two systems

Significant enhancements in Salary Planning

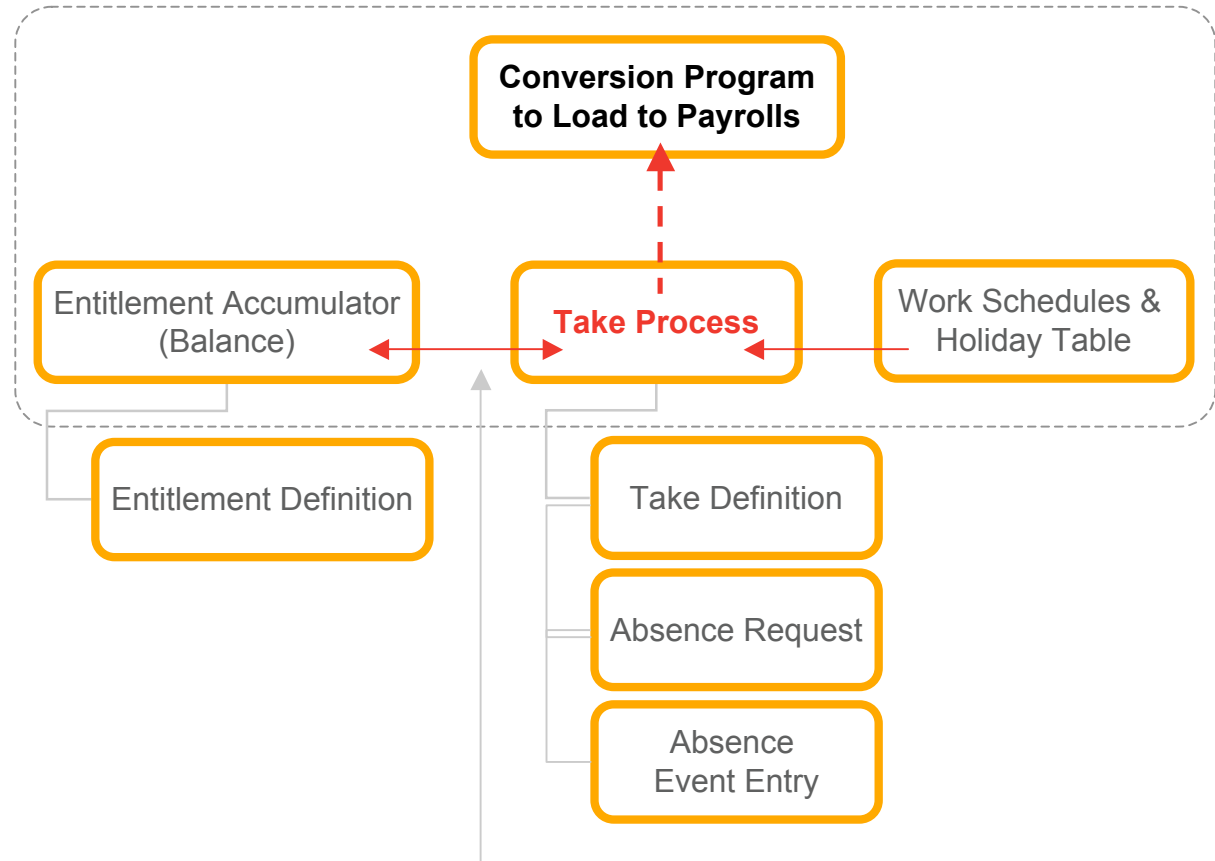
- » 'Plan Salaries' module renamed 'Manage Base Compensation and Budgeting'
- » New Population Management functionality that allows for simpler creation of group definitions
- » Ability to track market pay for a particular job across different geographical regions on the Job Code table
- » Increase in configurable pay matrices functionality
- » Budget enhancements
 - Ability to attach a Salary Increase Guidelines matrix to a budget
 - Ability to define custom budget amounts and budget types for each budget

Rich Absence functionality

- » Entitlement definitions
- » Take processing
- » Self-service
- » Integrated with PI, NAPPY, T&L, GP

Flexible and Configurable

- » Rules-based architecture
- » Global Architecture
- » Flexible Absence Request/Approval Self-service
- » Highly configurable workflow processing



Reduces input to generate Paid and Unpaid Units

Scheduling

- » Support for Rotating Rosters and 24 hours schedules
- » Open architecture for better integration with external scheduling applications
- » Graphical representation of employee schedules in which temporary schedule changes can be made
- » Employee View of Monthly schedule
- » Creation/assignment of ad-hoc schedules by Managers

Timesheet functionality

- » Replaces Weekly Elapsed, Weekly Punch and Report by Time Period

Workflow

- » Reported time approval life-cycle workflow, including time submittal and approval/denial.
- » Manager/employee notifications for exceptions, submitted time, approved time, denied time, and adjustments.
- » Visibility and alerts to critical information such as overtime, schedule deviations, and absences.

eProfile Manager Desktop

- » Direct Reports Interface Enhancements
- » Enhanced Hierarchy Navigation. Managers can access and transact on the direct reports of terminated supervisors or open positions
- » Configurable text including instructions, labels, button names, warnings, email subject and text

Employees, Managers or HR Admin are able to initiate the performance review process

Ability to modify Evaluation Criteria

Ability to delete performance documents

Multisource functionality (360 degree review)

- » Option to nominate multiple reviewers in addition to Employee and Manager
- » Ability to drill down into summarized ratings and to incorporate feedback from all participants into the manager's evaluation

Enhanced Writing Tools

- » Performance Notes
- » Results Writer
- » Development Tips
- » Other Evaluator Comments

Improved Administrative Capabilities

New Notifications

More flexible row-level security definition

- » Row-level security is not restricted to Department Security Tree
- » Can be defined using any field such as Business Unit, Location, Job code
- » Department Security based and new row level security model can co-exist

Faster Security Views

- » Security tables (join tables) are updated in real time
- » PeopleCode automatically updates security tables when permission lists are modified

New Architecture and Packaging of Recruiting Solutions

- » Talent Acquisition Manager
- » Candidate Gateway

Configuration Flexibility

- » Use of multiple Site IDs to enable separate business rules and recruitment content
- » Ability to define what sections appear on each page
- » More robust approval processes
- » Recruiting Location table
- » More configurable options through message and text catalogues

Enhanced Applicant Experience

- » Careers Home Page
- » Simplified application process; elimination of “wizard” approach
- » Ability to submit multiple applications on the same day
- » Ability to save drafts of applications and reuse prior applications

Enhanced Recruiter/Manager Experience

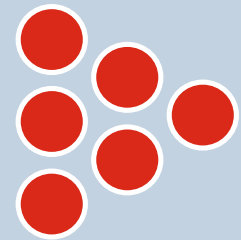
- » 360 degree views
- » Manage Applicant page
- » Continuous Job Opening – no need for job requisition
- » Applicant Lists
- » Recruiting teams
- » Better contact management
- » More enhanced hiring process

Enhanced Search Capability

- » Latest version of Verity software utilized to enhance search functionality for all parties
- » Ability to search by more fields
- » Internal applicants can search by specific Recruiter or Hiring Manager

New Technologies Available

PeopleTools v 8.46x



HCM v8.9 MP1 requires PeopleTools v8.46

HCM v8.9 MP1 cannot exist on the same Windows environment as your v8.8 HCM environment due to conflicting WebServer and Tuxedo versions

New WebServer, Tuxedo versions

Wizard driven installation provides a rapid and simple configuration

Significant enhancements in reporting technologies

- » Improved Web Query function with scheduling of queries
- » Support for outer joins

Visual Compare for page definitions

- » Side by Side page views highlighting differences

Text Merging

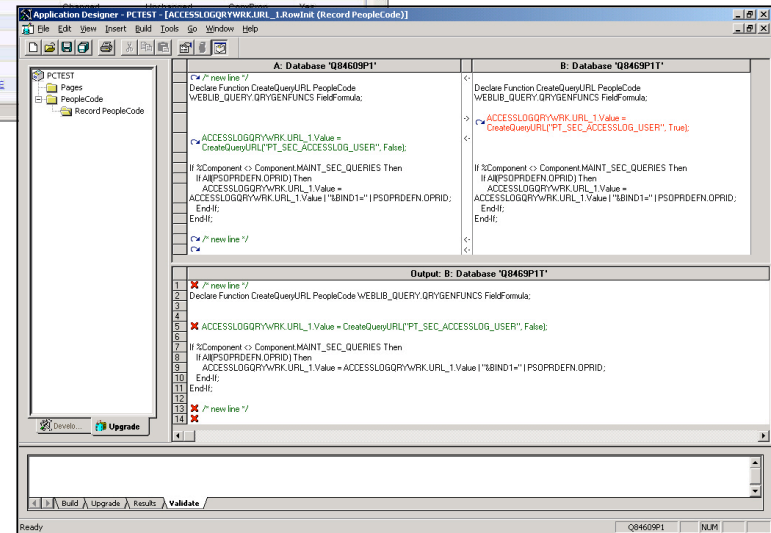
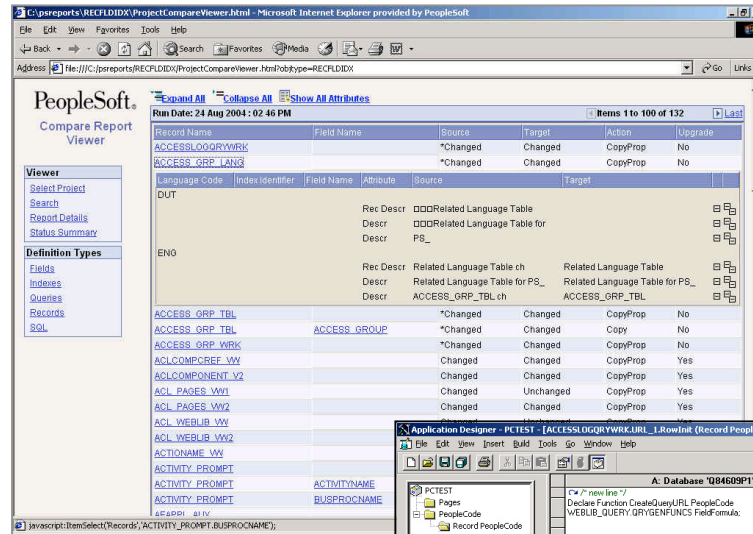
- » Visually Compare, then manual merge
- » PeopleCode, SQL, HTML Objects

HTML Compare Report Viewer

- » Online access to compare reports
- » Drilldown capabilities

Compare From File

- » Compare Support for All Object Types



An Implementation Utility

- » Users view features by product or by business process
- » Setup Manager generates a task list that helps users
 - Configure: Define the Configuration Options for a business process, product or feature
 - Identify: Identify a list of setup tasks based on the Configuration Options
 - Define: Define the setup data based on the list of setup tasks
 - The task list provides hyperlinks that link to specific setup pages within the application

Benefits of the Setup Manager

- » Stores table loading sequence/configuration transactions as metadata
- » Builds task lists across all PeopleSoft Applications
(can be downloaded into Excel)
- » Allows end users to set up and maintain control data thus reducing support issues
- » Provides a tracking tool

Performance Monitor

Monitors performance throughput of entire system

Works with both test and production systems

- » Monitors all servers
- » Indicates inactive servers

Works with multiple PeopleSoft applications

Application logic is measured

Track performance bottlenecks in real time

Analyze historical data

CPU overhead about 3.5% for tool

It is an additional install and separate physical database

PeopleSoft®
Home | Worklist | MultiChannel Console | Personalize Trace

System Performance ⚠ Warning: State Agent Data Detected

System ID: 1 Database Name: Q845104B Last Page Refresh: 04/05/2004 2:54:50PM Refresh

Performance Indices

User Sessions: 6 [Current User Sessions](#)

Tuxedo Requests Queued: 0

PMUs in Past Hour: 551 [Open PMUs](#) [Completed PMUs](#)

Alarms in Past Hour: 1 [Alarm History](#)

Batch Jobs in Process: 0 [Master Scheduler](#)

Batch Jobs in Queue: 0

Today's Averages [View in Grid](#)

■ Average □ Std. Dev.

Category	Average (ms)	Std. Dev. (ms)
User Response	~2,500	~1,500
Jolt Request	~500	~300
Application Server	~400	~200
SQL	~300	~150

Web Servers Custom

Name	Agent Date/Time	Host/Port	Filter Level	Sessions in Web-App	%JVM Memory Used	Execute Thru
⚠ peoplesoft	04/01/2004 6:44:39PM	bfu040803:180:543	<div style="width: 100%; height: 10px; background-color: #ccc;"></div>	0	90.2672	
peoplesoft	04/05/2004 2:51:54PM	bfu040803.corp.peoplesoft.com:180:543	<div style="width: 100%; height: 10px; background-color: #ccc;"></div>	1	73.9755	

Application Servers Customize | Find | First 1 of 1 Last

Name	Host/Port	Filter Level	%CPU Used	%Memory Used	Hard Page Faults/Second	Total Tuxedo Connections	Total Tux Requests Que
Q845104B	BFU040803:19000	<div style="width: 100%; height: 10px; background-color: #ccc;"></div>	9.68	45.86	90.6	5	

Process Schedulers Customize | Find | First 1 of 1 Last

Name	Host/Port	Filter Level	%CPU Used	%Memory Used	Hard Page Faults/Second
Q845PRCS	BFU040803:	<div style="width: 100%; height: 10px; background-color: #ccc;"></div>	4.59	45.29	46.9

BENEFITS

Drill down capabilities to see specific server statistics.

Web Server Snapshots System Performance Last Page Refresh: 03/16/2004 3:22:49PM Refresh

JVM Status

Metrics Events and PMUs

%JVM Memory Used	Max JVM Memory Available	Sessions in Web-App	Execute Threads	Busy Threads	Domain Count
89.9007	343932928	2	65	0	1

Sites

Customize | Find | First 1 of 1 Last

Metrics Events and PMUs

Site Path	Requests to all Servlets	Servlet Requests (last minute)	Avg Request Time (last minute)	Time in all Servlets (ms)	Current Sessions
HR88TGT	221	1	90	211114	0

Network Status

Customize | Find | First 1 of 1 Last

Metrics Events and PMUs

Time Wait Sockets	Close Wait Sockets	Established Sockets	JOLT Traffic (bytes/sec)	HTTP (bytes/sec)
23	0	14	2378	0

Active Servlets

Customize | Find | First 1-3 of 3 Last

Metrics Events and PMUs

Servlet Name	Requests to this Servlet	Servlet Requests (last minute)	Avg Request Time (last minute)	Time in this Servlets (ms)
/psc	148	1	90	195700
/psp	12	0	0	10649
/cs	61	0	0	1765

Return to Search Notify

A new process and tool to expedite problem resolution:

- » Administrator generates diagnostics of a perceived problem with the system
- » This information is emailed to the PeopleSoft Global Support Center
- » PeopleSoft support analyst inspects diagnostics information
- » PeopleSoft support analyst connects via VPN to customer system
- » Time required to resolve the issue is reduced

Change Assistant

- » Improved Fix management
- » Introduced with PeopleTools v8.44
- » Automates selection and download of fixes
- » Identifies all fixes relevant to your environment
- » Looks **similar to Upgrade Assistant**
- » Automatically applies fixes to target database
- » Applies pre-requisites in correct order without intervention
- » Record of fixes stored on **PS_MAINTENANCE_LOG**

The screenshot shows the Change Assistant application window. The left pane displays a tree view of tasks for 'softwareupdate.TESTPROJECT1B.(ee3730c...)' with 'CopyUpdateProject' selected. The main pane shows a table of tasks and a detailed view of the selected task.

Description	Start Time	End Time	Duration	Total Duration	Status
CopyUpdateProject	Oct 31, 2003 12:32:51 PM	Oct 31, 2003 12:32:59 ...	00:00:08	00:00:08	Completed

General Information on Installing Application Updates

PeopleSoft application updates may contain database object revisions, data changes, database code revisions, and batch file updates.

Code objects include database objects, scripts, DAT files, COBOL programs, and so on. Code objects are generally delivered in a single archive. The folder structure of the objects contained in the archive will match that of the folder structure on your PeopleSoft CD.

Non-code objects include installation instructions or additional supporting documents for this update. Non-code objects are

Activity

```

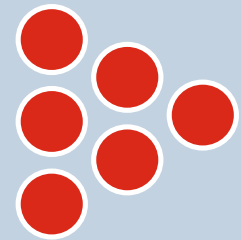
Application Upgrade Copy started: 2003-10-31-12.33.00
File References Application Upgrade Copy ended: 2003-10-31-12.33.00

Total 6 items processed.

Command line process successfully completed.
    
```

softwareupdate.TESTPROJECT1B.(ee3730c0-0a65-11d8-8a2c-937aef340750) Loaded | softwareupdate.Q844901B.(ee3730c0-0a65-11d8-8a2c-937aef340750) | Idle

Major Impact Areas



Major Impact Areas

Current Interfaces, Reports, Queries & Customizations

- » Major Architectural Changes due to PERSON model (e.g., EMPLOYMENT record removed)
- » New HR_STATUS field on JOB may impact some custom items
- » Impact of Dependent Beneficiary record changes on interfaces and reports
- » Potential impact on GL interface due to Chartfield changes

Configuration

- » Additional analysis and configuration in Core HR (POI types, Actions, Ethnic Groups, etc.)
- » Search/Match Configuration
- » Additional ESS/MSS configuration (text, Direct Reports Interface and Workflow Config)
- » Additional configuration for Talent Acquisition Manager and Candidate Gateway
- » Configuration for Chartfield functionality
- » Configuration of coverage codes, ABBRs, calc rules and event rules

Security

- » POI Security Access Type
- » New row-level security model

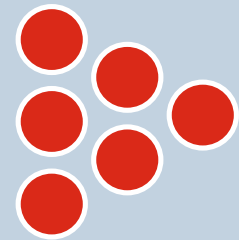
Business Process

- » Opportunity to manage entire workforce including contingent workers in PeopleSoft; potential introduction of new processes
- » Impact on New Hire process
- » Search/match functionality
- » Opportunity to provide access to more users
- » Ability to define Event Rules more granularly

Change Management & Training

- » Improved User Interfaces
- » Impact on ESS, MSS and core users
- » Hire process is replaced by Adding a Person and specifying Org relationship
- » Training documentation due to major functionality delta

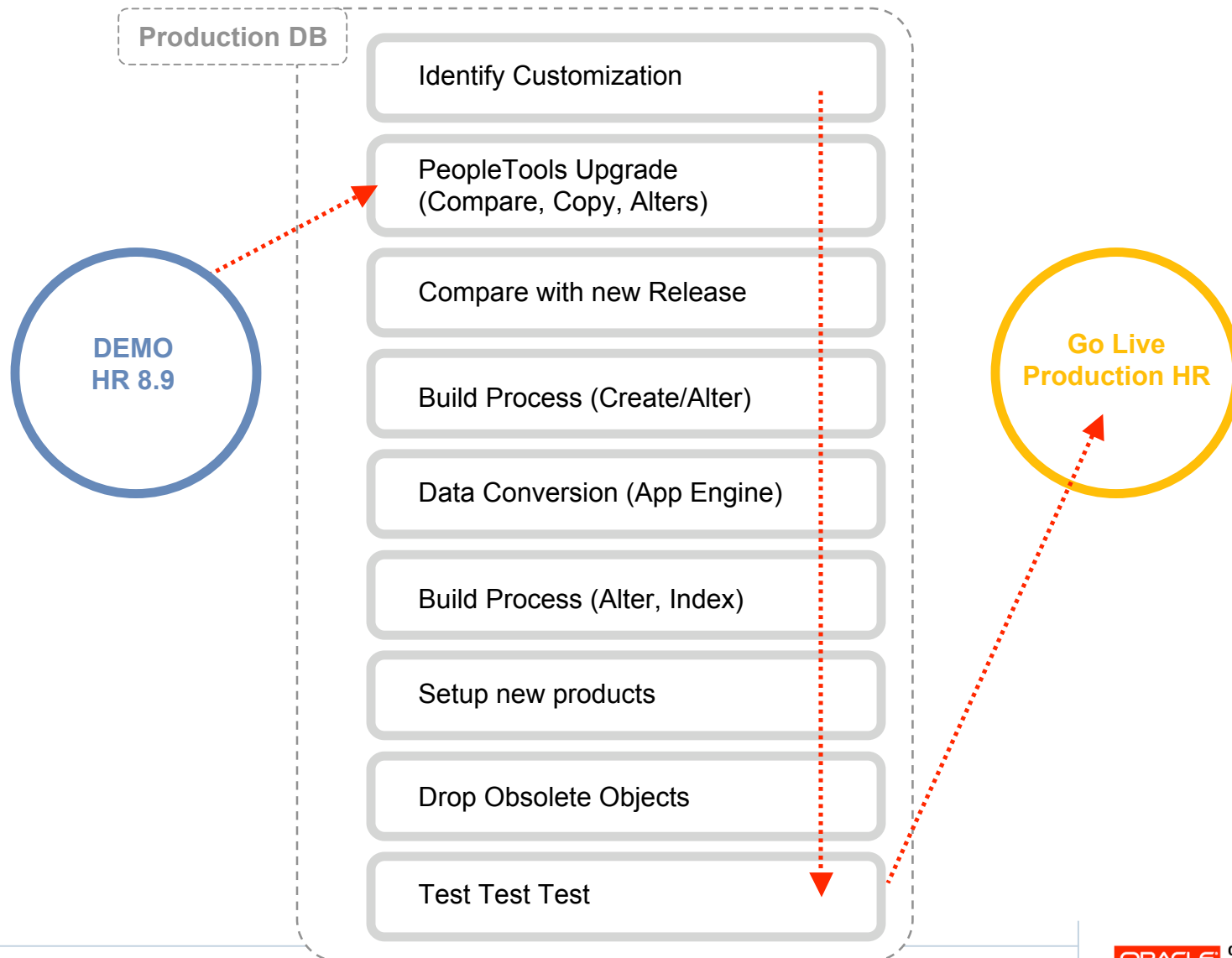
Optimum's Keys to a Successful HCM 8.9 Upgrade



Key Areas

- » Understanding the Upgrade Process
- » Infrastructure readiness
- » Resource scoping and readiness
- » Project scoping and planning
- » Pre-Upgrade Activities

Application Upgrade Process



May require Hardware Procurement for Development and Production

May require new:

- » Database Application release
- » Windows Operating System release
- » Patches for install on all 3rd party applications
- » Additional PeopleSoft databases (besides DEMO and DEV)

Resource Scoping and Readiness

- » Significant functionality release will have a major impact on end-users
- » Allocate resources to address impact on current business processes
- » Having a functional and technical resources who are familiar with the v8.9 changes is critical to the upgrade success
- » Identify security resource

Project Scoping and Planning

Define high-level project scope and charter

- » Focus on critical functionality and upgrade itself

Develop project plan

Define Environments Strategy

- » Potential need for multiple test environments

Gather requirements for new functionality

Conduct Fit/Gap Analysis

Functional and Technical Design

Retrofit/Development and Unit Testing

Upgrade Tasks

- » Plan to have 2-4 upgrade cycles plus a “dress rehearsal”

Training

System Integration and User Acceptance Testing

Cutover

Pre-Upgrade Activities

Complete as much of the Infrastructure Readiness as possible

Setup required PeopleSoft environments

Identify all customizations, custom queries, reports, interfaces, etc...Confirm that custom items are required to move forward

Have IT resources attend the new PeopleTools/Change Assistant training (Also offered via WebCast)

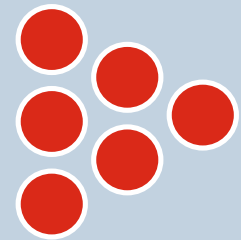
Review v8.9 Release Notes

Create a roadmap

- » Focus on upgrade first
- » Prioritize enhancements

Gather any additional requirements for new functionality

Questions & Answers



*“Quite simply, Optimum
is the best ERP implementer
in the marketplace.”*

— G. Abatjoglou
CFO, ChartOne, Inc.

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Thank You

