



# PeopleSoft 9.1 Features and Benefits (FSCM & HCM)

By

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## About ERP Analysts

- ERP Analysts is a specialized application service provider headquartered in Dublin, Ohio
- Privately held since 1999, consistent and financially stable
- Over 200 W2 Employees dedicated to PeopleSoft, Oracle, SAP and other technologies
- 60% of Staff are Oracle Certified in PeopleSoft
- 90% of the revenues are generated by our own W2 staff
- ERP Analysts provides onsite and remote services at competitive rate





# ERPA Services

- Project Management
- Solutions Implementations
- Application Major and Minor Upgrades in PeopleSoft
- Upgrade and Implementation Assessment
- Database Management and Administration
- Performance Tuning, Data Archiving and Purging
- Oracle License Reseller
- Staff Augmentation



# ERPA Methodology

- **On-Site Methodology**
  - We bring expertise directly to you
  - Our staff visit your company in person
- **Remote Methodology**
  - On Time, On Budget deliveries with low cost
  - You can employ skilled consultants in larger numbers at lower costs and reach deliverables in less time
- **Hybrid Methodology**
  - Will have direct interaction between client and remote development team
  - Save on high consulting costs, travel expenditure



# Remote Enterprise Support Team (R.E.S.T)

- Our managed solutions are delivered by dedicated staff with over 8 years of consultative experience and 10 or more engagements
- Provides access to a blend of resources
  - PM; Functional; Technical; DBA; System Admins
- Have a ability to use necessary skills as you need and when you want at a flat rate
- Maximize your billable hours with senior resources considered experts in their area
- On average our remote bill rates are 20 to 25% lower than our competitors





# ERPA Awards and Certifications

- Oracle Platinum Partner
- Platinum Sponsor for HEUG
- Apprised at CMMI Maturity Level 3
- ISO 9001 & 27001 certified Corporate
- SBA 8(a) Certified Company
- GSA Schedule 70 holder (GS-35F-0474U)
- Minority Business Enterprise (MBE)
- Inc 500 Fastest growing privately held company
- Deloitte Fast 500 Company





Our Clientele . . .				
Federal	State & County	Universities	Commercial & Internationals	
				
Department of Energy	County of Placer	University of North Carolina	Papa John's	Piggy Wiggly
				
Federal Aviation Administration	State of North Carolina	University of Southern Mississippi	CarMax	Fletcher Allen
				
B & W PANTEX	State of Florida	The University of Iowa	TSTT	Amazon
				
United Space Alliance	City of Seattle	North Dakota University	Google	Oracle
				
Battelle	Lower Colorado River Authority	Montclair State University	Alliant Energy	Gillard Sciences
				
WAPA	State of South Carolina	Chicago Public Schools	Microsoft	PCAOB
 <b>ERP Analysts</b> We do IT				
		TCNJ	Wendy's	Great Western Malting



# Agenda

- **PeopleSoft 9.1 Overview**
- **PeopleSoft FSCM 9.1 Features and Benefits**
- **PeopleSoft HCM 9.1 Features and Benefits**
- **Q & A**





# PeopleSoft 9.1 Overview

## Key Features

- PeopleSoft 9.1 is developed based on feedback from more than 150 customers
- Includes 21 new solutions
- 1,350 New Features
- More than 28,000 pages enhanced with Web 2.0 capabilities
- 300 new web services
- 200 Industry specific enhancements





# PeopleSoft 9.1 Overview

## Key Benefits

### Flexibility

- Offers ability to configure your applications the way you do business
- Seamlessly Integrate with other applications
- Takes advantages of next generation tools and technologies

### Intelligent Business Execution

- Enables decision support tools in the hands of the decision makers
- Allows to take informed recommendations and take timely and appropriate actions

### Organizational Effectiveness

- Delivers intuitive applications to facilitate broader adoption throughout an enterprise
- Enhancements to core business process functionalities to minimize administrative responsibilities





# PeopleSoft 9.1 Overview

## Areas of Enhancements

- User Interaction and Web 2.0
- PeopleSoft SmartNavigation
  - Hierarchical Data Navigation; Related Actions; Persistent Search Results;
- Related Content Enhancements
- Embedded Help
- WorkCenter Framework
- Org Chart Improvements

**HEUG Webinar: PeopleTools 8.51**

**Features and Benefits**

ERP Analysts 03/09/11



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# PeopleSoft FSCM 9.1 Features and Benefits



I see everything you  
change  
How???



I can't see all the  
ChartField values  
Why???

Join the  
League  
PO,AP,GL



By the way I am  
Eprocurement

PeopleSoft 9.1



# PeopleSoft FSCM 9.1 Features and Benefits

- **Cross-Pillar Enhancements**
  - Extending Approval Framework among various modules
  - ChartField Security
  - Financial Audit Framework
  - Messaging and Alerts Framework
- **SCM Features and Benefits**
  - Procurement Contracts
  - Purchasing
  - Order Management
- **Financial Features and Benefits**
  - General Ledger
  - Payables
  - Receivables and Billing





## Extended Approval Framework

- Approval Workflow Engine was first introduced in PeopleSoft 8.4 for eProcurement module
- PeopleSoft Financials 9.1 extends the use of the Approval Framework for Purchasing, Payables, Receivables, Billing, General Ledger and other modules
- Approval Framework replaces Virtual Approver and puts most configuration control in the hands of the business analyst
- This feature is promised to deliver
  - **Flexibility** – Notification and Time outs
  - **Configurability** – Monitor configuration page
  - **Control** – Audit report

## Chartfield Security

- ChartField security enhancement provides a flexible mechanism for configuring and maintaining data level security
- ChartField security restricts user access
  - Online transactions containing unauthorized ChartField values
  - Access to accounting data containing unauthorized ChartField values in the inquiry components
  - Access to unauthorized ChartField values during data entry



# Chartfield Security

Security Options | **Products**

## ChartField Security

**Security Method**

☒ No Security  
☐ User ID  
☐ Role  
☐ Permission List

**Component Security Action**

'When user has partial access: Deny Access ⓘ

**Secured Fields** Customize | Find | View All | First 1-10 of 10 Last

Secured Fields | Security Records | Inquiry Views

Active	Field Name	Secure Affiliate Chartfield	Affiliate Chartfield		
<input checked="" type="checkbox"/>	Account	<input type="checkbox"/>		<input type="button" value="+"/>	<input type="button" value="-"/>
<input type="checkbox"/>	Alternate Account	<input type="checkbox"/>		<input type="button" value="+"/>	<input type="button" value="-"/>
<input type="checkbox"/>	Operating Unit	<input type="checkbox"/>	Operating Unit Affiliate	<input type="button" value="+"/>	<input type="button" value="-"/>
<input type="checkbox"/>	Fund Code	<input type="checkbox"/>	Fund Affiliate	<input type="button" value="+"/>	<input type="button" value="-"/>
<input type="checkbox"/>	Department	<input type="checkbox"/>		<input type="button" value="+"/>	<input type="button" value="-"/>
<input type="checkbox"/>	Program Code	<input type="checkbox"/>		<input type="button" value="+"/>	<input type="button" value="-"/>

- Leverage PeopleSoft tree nodes and ranges, and uses permission lists and roles to configure security rules

## Financial Audit Framework



- Financials Audit Framework provides efficient tracking and auditing of transaction processing
- The framework provides a centralized structure that allows customers to identify the statuses of transactions.
- Provides online views into the audit results, which can be accessed by source, transaction, and user.
- Currently available for AP,AR,GL,BI and AM modules
- Provides the ability to Archive and Purge Audit logs



## Financial Audit Framework

- Provides option to select only the events we want to track

Document Name: Voucher ☐ Include Archive

Events		Customize   Find     First <span>1-21 of 21</span> Last
Enable	Event Name	
<input type="checkbox"/>	Voucher Approval	
<input type="checkbox"/>	AP Load Asset Request	
<input type="checkbox"/>	Complete Registered Voucher	
<input type="checkbox"/>	Create Voucher	
<input type="checkbox"/>	Dispatch Debit Memo	
<input type="checkbox"/>	Document Tolerance	
<input type="checkbox"/>	Landed Cost Extract	
<input type="checkbox"/>	Matching	
<input type="checkbox"/>	Open Item	
<input type="checkbox"/>	Apply Voucher to Prepayment	
<input type="checkbox"/>	Quick Invoice	
<input type="checkbox"/>	Self Billed Invoice	
<input type="checkbox"/>	Summary Invoice	
<input type="checkbox"/>	Close Voucher	
<input type="checkbox"/>	Voucher Delete	

## Messaging and Alerts Framework

- Providing the tools to be more proactive in discovering potential problems in the system before they occur
- An easy-to-use set of tools enables you to create a new query or use one of your existing queries to monitor conditions in your enterprise
- Provides option to schedule the query to run at intervals and notify appropriate individuals via email or worklist entries when further action is required





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## Procurement Contracts

- PeopleSoft Purchasing Release 9.1 enhances procurement contracts by providing improved capabilities for:
  - Handling large volume contracts
  - Flexible framework for audit tracking and Contract Versioning

### Audit Tracking

- Maintain Audit of Who did What, When and Why on Contracts
- Tracks the changes once the Contract is approved
- Configurable change template has fields to keep track of changes
- Different Change templates for different process options
- Users will be prompted for reason code for changes made
- Optional and independent of versioning

# Procurement Contracts

## Contract Versioning

- Ability to create different versions History, Current and Future over the life time of a contract
- Not effective dated and full visibility into prior versions of the Contract
- Allows the current version to remain active and available for transacting while you are working on draft version
- Only one current version available at a time. Draft becomes Current, Current becomes history
- Ability to cancel contract lines on future versions and deleting draft contract itself

## Miscellaneous

- Ability to search for specific lines on a contract which improves performance when managing large volumes of data
- Zero dollar item is supported on a Contract line



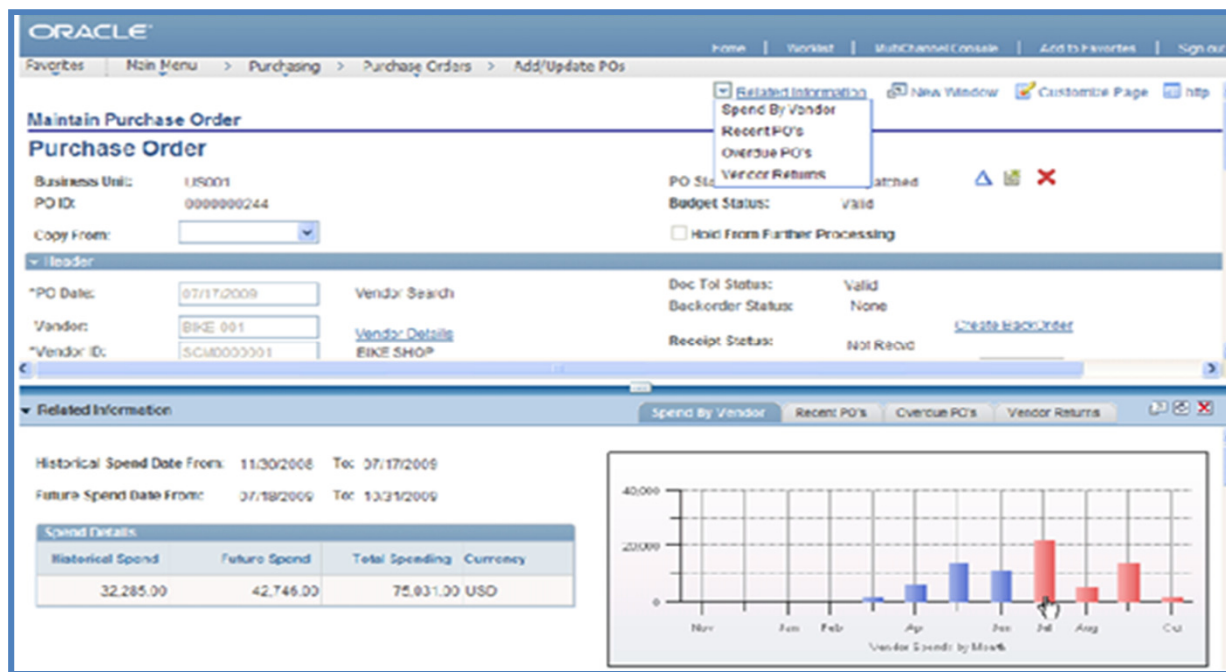
Platinum  
Partner



# Purchasing

## Related Content

- Option to configure and enable content framework to bring relevant content and services onto your transactions



- Introduced with PT 8.50 that enables customers to provide transaction pages with collaborative, analytical and informational content

# Purchasing

## Provisional Budget Checking

- An option to make sure if your transaction will pass funds check
- This kind of check does not actually commit the amounts against Ledger
- Returns with a status of either provisionally valid or error

## XML Publisher for PO Dispatch

- Easy to make/modify templates by avoiding time intensive approach
- Easy for customers to create and use different templates based on business need
- Can still continue with POPO005 SQR
- PO dispatch template can be selected at BU level and can be overridden at the PO Dispatch Run control

# Order Management

## Credit Checking Enhancements

- Offers an option for organizations to include backlog days, deposits and payments for credit checking at the corporate customer level

## Return Material Authorizations

- Credit card chargeback for returned items
- Value-added tax (VAT) defaulting
- Flexible ways of populating the RMA form with returned goods information

## Credit Card Security

- Capturing of CVV code and information is passed to Credit Card vendor during online authorizations



Platinum  
Partner





# Order Management

## Saving money on freights

- Ability to shop for freight rates and the best method of shipment based on freight cost or delivery date
- Tracking number sent to PeopleSoft and maintained in delivered tables

## Miscellaneous

- Use of Customer Alias enabling customers to identify their products by their own nomenclature
- Option to include Non-OM invoices in the credit checking algorithm





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## General Ledger

- Enhanced General Ledger to Subsystem Reconciliation
- Provides Integration with Hyperion Planning and Budgeting
- GL to PC interface is enhanced to include distribution status flag on the Journal line level.
- Project Costing ChartFields are added for selection on speed type page.
- Mass deletion of Speed types is an added feature
- Approval Framework for Journal Processing
- Provide support for the architectural changes done by Excel 2007

## Payables

**Automated Accrual Processing** - Enables users to determine

- Which transaction status should be accrued
- How accounting entries are created
- View, delete and re-post the accrual entries online
- Option to maintain and track the Vendor name changes
- Check for duplicate Vendors on the field option values
- Feature to send email remittance advices for suppliers on Paycycle
- Viewing Bank details from the Voucher pages
- Users can now attach documents at Vendor and Voucher components

## Receivables and Billing

- Enhanced Credit and Re-bill process with Approvals Workflow and ChartField combination editing process
- Ability to view Invoices online when using XML Publisher format
- Ability to email Invoice as an attachment to save time and money sending paper copies on invoices
- Ability to confirm the account information before making a payment with direct debit pre-notes
- ACH PPD file format for Direct Debit
- Several Usability enhancements on the payment worksheet
- Graphical representation to show multi-level hierarchy for customers as defined in the customer records

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# PeopleSoft HCM 9.1 Features and Benefits

- Human Resources
- Payroll for North America
- Time and Labor
- Absence Management

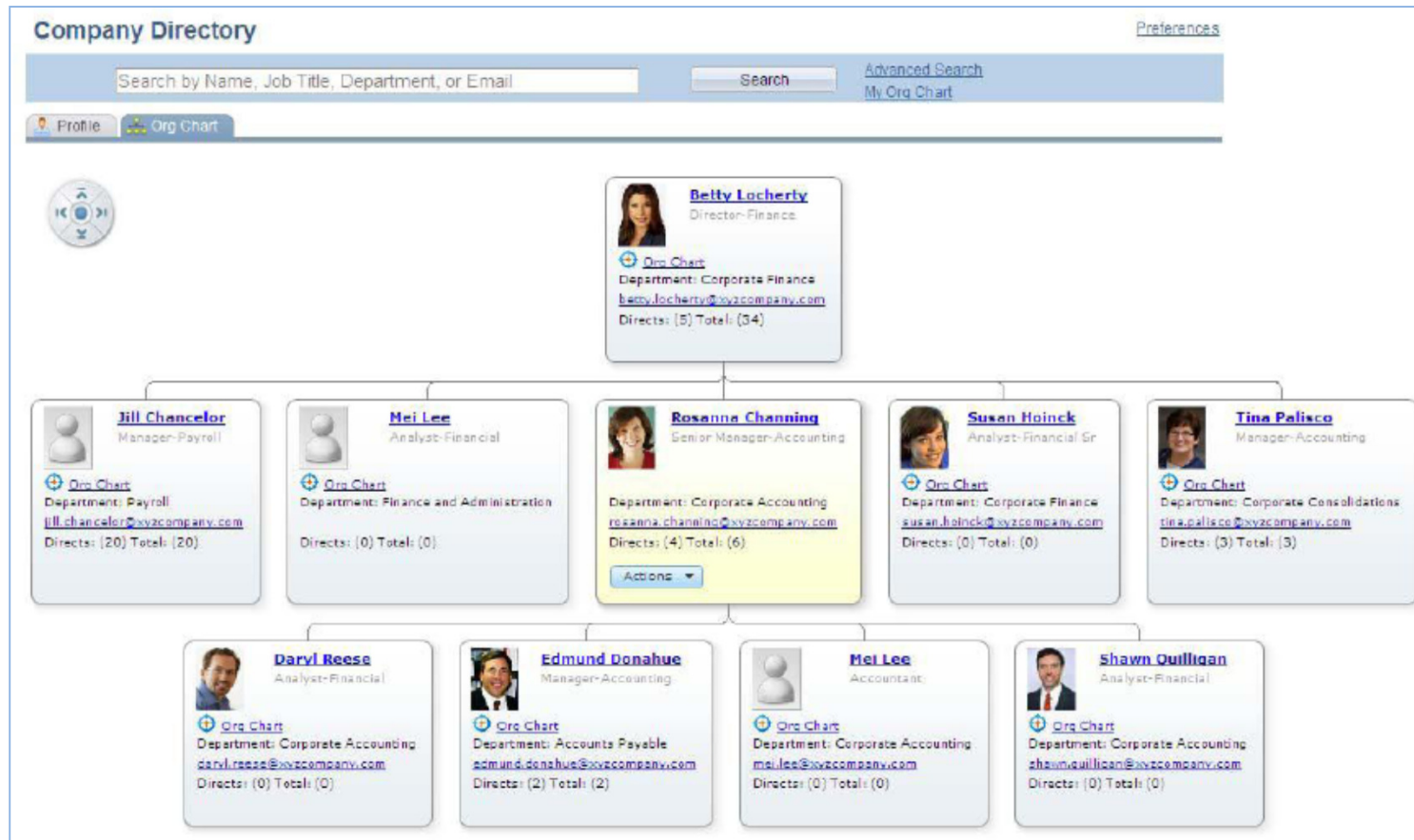


# Human Resources

- **Enhancements to SmartHire (Template-Based Hires)**
  - Addition of address, ethnic, and religious information to support China and Thailand data
  - Ability to include a link to the Contract page
- **PS Human Resources 9.1 delivers Company Directory**
  - Enables employees and managers to search for people across the organization.
  - Visual representation of organization based on a hierarchical structure up to three levels.
  - Initiate Self service transactions from the chart.



# Human Resources



- Organizational reporting structure appears on the Org Chart page of the Company Directory as a three-leveled treelike structure.

# Human Resources

- **Enhancements in HR for China**
  - Track Hukou Type and Location, and Working Life
  - Update National ID feature
- Increased functionalities to support Military Rank Change
- Approval Processing for U.S. Federal Self-Service Transactions using Approval Framework
- Integration of Human Resources with Oracle Workforce Scheduling
- Integration of Human Resources with Clairvia

# Payroll for North America

- Additional Contract Pay Options for education and government organizations.
- **Increased Flexibility for retro pay**
  - New configurable, user-defined trigger table
  - Retro on Retro functionality
  - Component Interfaces can now create Retro Pay Triggers
  - Improved the Retro Reports and selection criteria
- Field and Array size expansion



# Payroll for North America

- **Enhancements to Pay Sheet load process**
  - Can load paysheet data with an Excel Spreadsheet using component interface.
  - Ability to inactivate paysheet transactions online so that no SQL update is needed.
- **More detailed ChartField Integration**
  - Expanded to include the five additional ChartFields for project costing.
  - Business Unit, Activity, Source Type, Category, Subcategory.



# Time and Labor

## ➤ Approval Workflow Engine

- PeopleSoft Approval Workflow Engine and HCM Delegation Framework are adopted for Time and Labor
- Ability to specify multiple levels of approvals
- Configure approvals for reported and payable time on workgroups and time reporting codes

## ➤ Ability to Import, Export and Recompile Rules

- Ability to migrate rules across databases
- Eliminates need to reenter the rules





# Time and Labor

- **Enhanced Project Costing Chartfields**
  - New chartfields business unit, project, activity, source type, category, and subcategory now available
- **Enhanced Mass Time Reporting**
  - Filter common time reporting codes based on select groups of employees.
  - Prevents invalid TRC exception generation for reported time via Mass Time.
- Integration with Oracle Workforce Scheduling
- Integration with Clairvia

# Absence Management

## ➤ Extended Leave Framework

- Enables users to deploy documents in complaint formats
- Can track information related to extended absence requests
- Integrates with approval workflow engine for leave approvals

## ➤ Leave Donations

- Donate accrued leave hours to other employees
- Use self-service interface to request donated leave, donate leave, return unused leave, and stop participation

# Absence Management

- **Time and Labor Timesheet Integration with Approval Workflow Engine**
  - Can setup approval rules and use them when reporting absences in the timesheet
  - Ability to request absences that require multiple levels of approvals on the timesheet
  - Modify absence events entered in Absence Management Self Service using timesheets
- Integration with Oracle Workforce Scheduling (OWS)



## Questions ?

### Contact US

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