PeopleSoft 9.1 Features and Benefits (FSCM & HCM)

By
Ranjith Yengoti, PMP, Delivery Manager
Dick Kelley, VP & Director of Sales
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

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![Logos of various companies and organizations]
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 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
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
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
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
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
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
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
Receiveables 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.
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

Ranjith Yengoti, PMP
Delivery Manager
ERP Analysts, Inc.
(877) 666 ERPA x7050
ryengoti@erpanalysts.com
www.erpanalysts.com

Dick Kelley
VP, Director of Sales
ERP Analysts, Inc.
(877) 666 ERPA x7005
dkelley@erpanalysts.com
www.erpanalysts.com