Agenda

- Emtec Overview
- Oracle’s Investment in PeopleSoft
- PeopleSoft 9.2
- Upgrade Considerations
Emtec… ‘Big enough to do the work, small enough to care’

**EMTEC THE COMPANY**

- Serving clients for over 46 years
- 14 locations, including 8 development centers
- Over 1,000 full-time professionals
- Voted One of the Top 100 Places to Work by Crain’s Chicago in 2012
- Our consultants have an average of 14 years of experience. Nearly 45% have advanced certifications
- 73% of our PMs, Architects & Consultants worked at Tier 1 consultancies in a previous life
- $255M IT Services Provider
- Regularly compete & win against larger IT service providers

**EMTEC SERVICES AT A GLANCE**

- Emtec has completed more than 1,100 Package Application engagements, including:
  - 200+ Oracle clients with more than 415 engagements
  - 206 EPM / Hyperion & OBIEE clients and 323 engagements
  - 186 Microsoft Dynamics and more than 255 projects
- Emtec is a premier provider of SaaS and Emerging technologies consulting, including 51 Salesforce Clients with more than 75 engagements, Including Sales Cloud, Service Cloud and Custom Cloud
- Emtec has performed more than 6.3M hours of application development and maintenance work ranging from Business Analysis to Product Development
- Emtec has served more than 565 Infrastructure services clients where we have:
  - Deployed more than 1.85M servers, personal computers, tablets and mobile devices
  - Installed or provided more than 925 exabytes of storage (That’s a whole lot…)
  - Triaged more than 30,000 L1 support incidents
  - Implemented service management solutions for more than 125 clients

**EMTEC AROUND THE WORLD**

**US Locations**
- Radnor, PA (HQ)
- Atlanta, GA
- Chicago, IL
- Dayton, Ohio
- Fremont, CA
- Jacksonville, FL
- Herndon, VA
- Minneapolis, MN
- Springfield, NJ
- St. Louis, MO

**Global Offices**
- Toronto, Canada
- Ottawa, Canada
- Pune, India
- Bangalore, India
Emtec’s five practice areas offer focused solutions to help our clients solve complex business & IT challenges

From up-front strategy & consulting all the way to application, infrastructure & procurement services, Emtec’s 1,000 professionals are what makes us special, and we invite you to see the difference for yourself.

<table>
<thead>
<tr>
<th>Consulting Services</th>
<th>Package Application Services (PAS)</th>
<th>Cloud Technologies</th>
<th>Application Development &amp; Management Services (ADMS)</th>
<th>Infrastructure Services</th>
</tr>
</thead>
</table>
| • IT Strategy & Planning  
• IT Process Improvement  
• IT Performance and Governance  
• Information Management:  
  - Big Data  
  - Business Intelligence  
  - Analytics  
• Mobility Solutions  
• Program and Project Management | • Oracle  
  - Fusion  
  - EBS  
  - PeopleSoft  
  - EPM : Including Hyperion  
  - OBIEE  
• Microsoft  
  - AX and GP  
  - BI  
  - CRM  
• SAP  
  - Functional: HCM, FM, SCM | • Cloud Strategy & Planning  
• Salesforce.com Solutions  
  - Sales Cloud  
  - Service Cloud  
  - Marketing Cloud  
  - Force.com  
• Cloud Application Development & Technology  
  - Private Virtual Cloud  
  - Cloud Applications | • Portfolio Analysis  
• Application Advisory Services  
• Product Development  
• Custom Application Development & Maintenance  
• Package Application: Development, Maintenance & Support  
• Mobile solutions  
• Quality Assurance & Testing Services  
• Managed Services, Capacity Management & Staffing Services | • IT Service Mgmt.  
• Data Center  
• Business Application Infrastructure  
• End User Computing  
• Platforms |

**OFFERINGS**

**PRACTICE FACTS**

- SWAT team of 45 highly skilled Strategists, Architects and Consultants
- 10 years of experience and more than 75 projects
- 180 Specialists, including Project Managers, Architects, Consultants and Analysts
- More than 300 ERP & CRM projects completed
- Expert team of Big Data, business intelligence and analytics professionals
- Specialized team of 25 Strategists, Project Managers, Architects, and Consultants
- More than 90% certified
- 62 Customers & 112 engagements
- Global workforce of nearly 750 associates (approximately 250 associates based in North America)
- Provided more than 6.3M hours of application development and maintenance services.
- Special expertise in Business Analysis and Testing (among other things)
- More than 100 associates providing data center, compute, network and storage related services
- Value Add Reseller providing full device lifecycle management services for more than 30 years
- IT Service Mgmt. BU having supported more than 70 distinct clients
Emtec’s six Oracle practice areas offer focused solutions to help our clients solve complex business needs using Packaged-Based applications.

<table>
<thead>
<tr>
<th>EPM Enterprise Performance Management</th>
<th>Financial Management</th>
<th>Human Capital Management</th>
<th>Fusion Human Capital Management</th>
<th>Enterprise Technology</th>
<th>Oracle Business Intelligence</th>
</tr>
</thead>
<tbody>
<tr>
<td>- Oracle EPM application implementations and upgrades</td>
<td>- Packaged Application Implementations and Upgrades</td>
<td>- Packaged Application Implementations and Upgrades</td>
<td>- Cloud / SaaS Based Implementations and Upgrades</td>
<td>- Implementation and Upgrade Services</td>
<td>- Enterprise Reporting: Dashboards, Key Performance Indicators, Reports</td>
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<tr>
<td>- Business Process Design and Review</td>
<td>- Project Management</td>
<td>- Project Management</td>
<td>- Packaged Application Implementations and Upgrades</td>
<td>- Managed Services</td>
<td>- OBIA</td>
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<tr>
<td>- Project Management</td>
<td>- Managed Services</td>
<td>- Managed Services</td>
<td>- Business Process Design and Redesign</td>
<td>- Packaged Application Sizing, Infrastructure, Hardware Planning, Installation and Support</td>
<td>- OLAP Analytics</td>
</tr>
<tr>
<td>- Application Support</td>
<td>- Application Services</td>
<td>- Application Advisory Services</td>
<td>- Project Management</td>
<td>- Database Administration</td>
<td>- Real-Time Analytics</td>
</tr>
<tr>
<td>- Customer Training for end-users and Administrators</td>
<td>- Lab-Based Services</td>
<td>- Lab-Based Services</td>
<td>- Managed Services</td>
<td>- Application Administration</td>
<td>- Ad-Hoc Analysis</td>
</tr>
<tr>
<td></td>
<td>- Upgrade Planning Assessments</td>
<td>- Upgrade Planning Assessments</td>
<td>- Application Support</td>
<td>- Performance Tuning</td>
<td>- Scorecards</td>
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<td></td>
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<td></td>
<td>- QA &amp; Testing</td>
<td></td>
<td>- Proactive Intelligence Delivery and Alerts</td>
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<td></td>
<td></td>
<td></td>
<td>- Application Advisory Services</td>
<td></td>
<td>- Mobile BI</td>
</tr>
</tbody>
</table>

Packaged Applications
- Hyperion Planning and its modules
- HFM (Hyperion Financial Management) and its modules
- Essbase
- FDQM (Financial Data Quality Management)
- Data Relationship Management (DRM)
- Hyperion Reporting Tools

Business Process
- General Ledger
- Procure to Pay
- Credit to Cash
- Asset Management
- Projects & Contracts
- Financial Analysis & Reporting
- Plan to Procure

Business Process
- Hire to Retire
- Payroll Processing
- Workforce Management
- Talent Management
- Workforce Service Delivery
- Time & Labor
- Benefits

Packaged Applications
- PeopleSoft
- EBS
- Fusion

Packaged Applications
- Fusion HCM

Packaged Applications
- PeopleSoft
- EBS
- Fusion

Packaged Applications
- PeopleSoft Financials and HCM
- EBS Financials and HCM
- Fusion Financials and HCM
- SAP Financials
- JD Edwards Financials
- Siebel
Oracle Partnership

Specializations

- PeopleSoft PeopleTools
- Essbase
- PeopleSoft Financial Management
- Hyperion Financial Management
- PeopleSoft HCM
- Hyperion Planning

Platinum Partnership Criteria

- Employee Certifications
- Multiple client reference checks
- Partner investment in technology
- Recognized Thought Leaders
From an Emtec perspective, there are four primary service delivery models for our Clients to consider

<table>
<thead>
<tr>
<th>Service Delivery Model</th>
<th>Insourcing (aka Do it Yourself)</th>
<th>Staff Augmentation</th>
<th>Project / Co-Source (aka Capacity Services)</th>
<th>Outsource/Managed Services</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Overall Description</strong></td>
<td>• Internal control to establish protection of intellectual property, privacy and enhanced strategic reaction</td>
<td>• Lower costs, yet maintaining responsibility for application support and maintenance activities</td>
<td>• External cost structures benefits are rendered while maintaining suitable control by client.</td>
<td>• All IT Services/Programs/Projects are transitioned to external organization specializing in the core skill for a project, program or IT service.</td>
</tr>
<tr>
<td><strong>Primary Benefits</strong></td>
<td>• Not applicable</td>
<td>• Labor Arbitrage (LOW)</td>
<td>• Instill resources available for defined projects and/or to manage discrete systems (i.e. Legacy applications) Labor Arbitrage (MED)</td>
<td>• High labor arbitrage</td>
</tr>
<tr>
<td></td>
<td>• Assurance that all intellectual property and privacy is maintained and ability to enhance strategic reaction</td>
<td>• Supply low-cost labor near-shore or offshore, creating an extension of internal IT</td>
<td>• Program Management Included</td>
<td>• YoY efficiency improvements</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>• Supplier Process &amp; Methods</td>
<td>• Predictable pricing</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>• Open resources for strategic work</td>
<td>• Supplier Process, Metrics &amp; Tools</td>
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<td></td>
<td></td>
<td></td>
<td>• Influence Outcomes</td>
<td>• Accountable for Outcomes</td>
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<tr>
<td></td>
<td></td>
<td></td>
<td>• Joint Accountability</td>
<td>• Demand &amp; Service Management</td>
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<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>• Integrated delivery Model</td>
</tr>
<tr>
<td><strong>Risk v. Reward</strong></td>
<td>• Full Client Ownership</td>
<td>• Client Owned &amp; Directed</td>
<td>• Collaboration with client.</td>
<td>• Collaboration with client.</td>
</tr>
<tr>
<td></td>
<td>• Emtec provides qualified resources with agreed timeframes</td>
<td>• Client owns deliverables and bears risk</td>
<td>• Emtec responsible for quality of our scope of work</td>
<td>• Emtec owns deliverables and bears risk</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>• Application and/or System performance SLAs</td>
</tr>
<tr>
<td><strong>Sample SLAs</strong></td>
<td>• N/A</td>
<td>• Quality Resources</td>
<td>• Delivery Quality</td>
<td>• Milestone and/or Functional Responsibility</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Resource turnaround times</td>
<td>• Quality of Resources</td>
<td>• Application Performance</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>• Resource turnaround times</td>
<td>• Estimation Accuracy</td>
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<td></td>
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<td></td>
<td>• System Performance</td>
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<td>• Delivery Quality</td>
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<td>• Resource turnaround times</td>
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</tbody>
</table>
Oracle’s Investment in PeopleSoft
CONTINUOUS INNOVATION

No one likes to be left behind.

Stay current and protect your investments like the 65% of PeopleSoft customers using Release 9.1.

1990 Release 1.0
2000 Release 8.0
2010 Release 9.1
FUNCTIONALLY ROBUST SOLUTIONS

Over 1,000 enhancements delivered in PeopleSoft 9.2

- Human Capital Management
- Financials
- Procurement and Supply Chain Management
- Project and Asset Lifecycle Management
- Enterprise Performance Management
- Customer Relationship Management
- Campus Solutions
- Reduced need for customization
- End-to-end business processes
- Industry-specific capabilities

* Follows continuous release model
PeopleSoft 9.2 Can *Lower* Your Total Cost of Ownership

- Reduce testing with PeopleSoft Test Framework
- Stay current for less with PeopleSoft Update Manager
- Manage changes with the Data Migration Workbench
- Manage environments for less with Oracle Virtualization
- Affordable operation using Oracle Cloud Services
PeopleSoft Roadmap

- **PeopleSoft 9.2**: 2013
  - 9.2 Feature Packs
- **PeopleSoft 9.3**: 2015
  - 9.3 Feature Packs
- **PeopleSoft 9.4**: 2018
  - 9.4 Feature Packs
- **PeopleTools 8.53**: 2013
- **PeopleTools 8.54**: 2014
- **PeopleTools 8.55**: 2015
- **PeopleTools 8.56**: 2016
- **PeopleTools 8.57**: 2017
- **PeopleTools 8.58**: 2018
- **PeopleTools 8.59**: 2019

**Ongoing Delivery of Off-Cycle Capabilities**

**PeopleTools Releases & Feature Packs 12 -18 Months**

**Major Releases Every ~3 Year**
Oracle’s Upgrade Themes

• Simplicity
  – New interaction and navigation concepts
    • Activity Guides, Train Stops, Related Actions, Embedded Help
  – Greater user focus on primary daily job function
  – Less need for training and help desk inquiry

• Productivity
  – New capabilities and functionality
    • WorkCenters enabling power users to focus
    • Combining transactions, analytics, workflow, and reports
  – Feature-rich, flexible, role-based user experience

• Lower Total Cost of Ownership
  – Eliminating costly customizations
    • Further planned enhancements
    • Expanded integrations
PeopleSoft 9.2 Upgrade Paths

• Release 9.2
  – Direct upgrade path to 9.2
    • Financials from 8.9, 9.0 and 9.1
    • HCM 9.0 and 9.1 – Not 8.9
PeopleSoft 9.2 – Key Enhancements
SES and Global Search

• Search across multiple, related components
• User interface similar to faceted searches on consumer internet sites
• Secure access to organization’s data sources
• Advanced search capabilities available as well as user-defined search groupings
PeopleSoft Pivot Grid Overview

- Advanced reporting technology
- Provides interactive, analytical grids and charts
- Similar to Pivot Tables in Excel
- Performs pivoting and filtering operations
- Uses data sources like PeopleSoft Query
- Chart and grid are synchronized
- View data in 3 different visualizations:
  - Grid only
  - Chart only
  - Grid and chart
Display Components

- **Grid Display Component**
  - Based on existing PS analytic grid
    - Has 3 axes—row, column, and filter
  - Enables multilevel display and drag-and-drop operation

- **Chart Display Component**
  - *Grid and chart display option*
    - Uses the result set retrieved while populating chart display
  - Chart only display option
    - Drill down on the chart to display details
    - Drill out option restores the chart to its earlier state
Pivot Grid Demo

• <DEMO>
Embedded Help Overview

- Select information icon on group boxes, grids, or scroll areas
- Helps explain how to complete a specific task or transaction
- Message appears in modal window that can be moved around page

Source: Oracle's PeopleSoft FMS, ALM, ESA, SRM, and SCM 9.2 Release Notes
Business Process Map (BPM)

- Links available throughout various stages in business process flow take users directly to help documentation for corresponding page

Source: Oracle’s PeopleSoft FMS, ALM, ESA, SRM, and SCM 9.2 Release Notes

- PeopleSoft continues to deliver hosted documentation and downloadable PDFs, making every option is as easy and informative as possible
PeopleSoft Update Manager (PUM) Overview

• Lifecycle management tool and patching delivery mechanism
• Uses Update Manager PIA interface to identify updates
• Generates custom change package definitions
• Updates include bug fixes, patches and new features
• PeopleSoft Images are cumulative and contain updates from previous application releases
• Tool reduces time, effort, and maintenance costs
Lifecycle Management

• What are the benefits of PUM?
  – You select the number and size of the updates
  – Creates a custom change package tailored to your environment
  – Control of the patching schedule
  – Quick and easy to download current PS Image running on Oracle VirtualBox technology
  – Provides ability to search for specific updates by bugID or specific object reference
PeopleSoft Patching Process

How does it work?

1. Periodically download the latest fully patched PeopleSoft image from My Oracle Support

2. Use PeopleSoft Update Manager to generate a tailored Change Package Definition

3. Use Change Assistant to apply your tailored Change Package

4. Apply your customization once to the tailored Change Package

Your PeopleSoft Environments
- Development
- Staging/Test
- Production
PeopleSoft iOS Certification Overview

• Use tablet devices to access your PeopleSoft applications

• Certified on the Safari browser on an iOS running version 4.2 or later

• Safari browser offers ability to use dashboards and WorkCenters

• Unlimited potential for accessing PeopleSoft application content from mobile device
Approval Framework

• Formerly AWE

• Improvements & Extensions
  – Add on an ad-hoc approver during approval cycle
  – Add comments and attachments to transaction during the approval cycle
  – Commitment Control Budget Journals supported
  – Specific Treasury and Asset Management flows supported
  – Time and Labor, Recruiting, eProfile Manager, ePerformance supported

![eProcurement Approval Diagram](image-url)
Attachments

• Attachment framework provided in version 9.1

• PeopleSoft 9.2 extends capability to additional transactions
  – Expenses
  – Receivables
  – eBill Payment
  – Payables
  – Asset Management
  – Treasury
  – Absence Management
  – Candidate Gateway/Talent Acquisition Manager
  – ePerformance
  – Global Payroll
WorkCenters – Overview

• User portals for specific roles; role-based homepage
  – Homepage – user customized
  – WorkCenter – pre-built homepage
    • Menu in one column, work space in another

• Streamlined user interface that reduces need for navigation
  – Increased productivity – centralized daily work organization

• Available as part of PeopleTools

• Built on templates, similar to portal products

• Incorporates Related Content and Pagelets
  – Use template or homepage Pagelets
WorkCenters – Overview

Without Portal Technology:
- Analytics
- Navigation
- Search
- Transaction
- Reports
- Tools

With WorkCenter Pages:
- Can include Navigation, Tasks, Reports/Queries, Analytics, and Transactions.
- Can also include a variety of related content services pagelets.

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WorkCenters – Benefits

• One location
  – Consolidated delivery of actionable info
  – Less navigation, fewer open windows

• Interruption mitigation
  – All PeopleSoft work saved on one page
  – Less work lost upon interruption of a task
  – Increased efficiency in switching tasks
    • Within and outside of PeopleSoft

• Complete picture view
  – View transactions throughout entire process
WorkCenters – Enhancements

• WorkCenters included:
  – Payables
  – Billing
  – Receivables
  – General Ledger
  – Supply and Demand
  – Project Costing
  – Staffing
  – Supplier Administration
  – SRM Buyer Administration
  – ePerformance
  – Time and Labor
WorkCenters – Enhancements (cont.)

• Standard delivered pagelets:
  – My Work
    • Personalized user-specific work items for review or completion
    • Critical daily tasks
  – My Links
    • Important application components
    • Personalized
  – Queries
    • Access queries or pivot grids
    • Output viewed in transaction pane
  – Reports and Processes
    • Reporting console, key reports
WorkCenters

• <DEMO>
Forms and Approval Builder

• Configurable tool to create forms and specify approval process to follow
• Eliminates paper and email-based approvals
• PeopleSoft forms are:
  – Auditable
  – Electronically Approvable
  – Immediately Accessible
Mobile Applications

• Applications accessible from mobile devices:
  – Approvals
  – Expenses
  – eProcurement

• Navigation: Employee Self-Service > Mobile Applications
Mobile Applications – eProcurement

- Mobile eProcurement
  - Requisitions on the go – add and manage
  - Recent items, search catalogs, add items to cart
  - Database automatically updated after completing requisition
  - Note: WiFi connection required; no AppStore install required
Mobile Applications – Approvals

- Mobile Approvals
  - View transactions pending approval from a mobile device
    - Approve
    - Deny
    - Push back
  - View attachments to transactions, and add comments
Mobile Applications – Approvals

- Mobile Approvals
  - View transaction approval flow (other approvals, comments)
  - View Approvals homepage:
Mobile Applications – Expenses

• Mobile Expenses
  – Expense reports
    • Enter, maintain, submit (with business rule validation)
    • Link to Mobile Approvals
    • History: Reports and Statuses for past 6 months
    • Delivered analytics and metrics
  – My Wallet
    • Add, review, or edit transactions
  – Alerts for travel advisories, expense policy changes, and more
  – Review past expenses
    • Managing timesheets, cash advances, and travel authorization not included
Mobile Applications

- Mobile Expenses
  - Sign-in page:
  - Homepage:
Data Migration Workbench for Application Data

• Compare, validate, and copy application configuration data between databases
  – Application Data Sets (ADS)

• Alternative to Data Mover scripts
  – Greater visibility and control of managed changes
  – PeopleSoft Pure Internet Architecture (PIA)
    • Similar to copy and compare process of managed objects

• New functionality for applications:
  – Allocations
  – WorkCenters
  – Accounting Rules
Manager Dashboards

- Easily access and transact directly from dashboard
- Configurable options to personalize view
Upgrade Considerations
Timeline Factors

- Upgrade Approach – Transactional vs Transformational
  - Changing Business Processes
  - Adding new modules or functionality
  - Configuration updates

- Customizations

- Integrations

- Resource availability

- Competing projects or business-driven timings

- User readiness and training approach

- Testing approach
**Project Resources**

- Steering Committee
- Project Management
- Upgrade Specialist
- PeopleSoft Functional Specialists
- Technical Lead
- Developers
- Engagement Manager
- Client SMEs
- Infrastructure Support
Upgrade Best Practices

• Be Prepared
  – Identify your upgrade path
  – Prepare your organization
  – Ensure the quality of your data
  – Identify all modifications, interfaces, custom reports, hardware, etc..

• Identify and mitigate project risks

• Determine upgrade approach

• Build your team with right mix of skills

• Identify customizations for retirement
Upgrade Best Practices

• Start initial upgrade pass immediately
• Define and control project scope
• Ensure management and user community buy-in through effective Change Management
• Retire customizations whenever possible
• Perform at least one cycle of system testing
Upgrade Best Practices

• Treat upgrade as formal company project by leveraging proper project management
• Perform multiple “moves to Production”
• Leverage existing documentation
• Define test strategy and participants early
• Train your end-users
• At Go-live weekend, copy PRD environment to TST so users can run reports if required
• Incorporate production hardware into testing phase
Retrofit Best Practices

• Organize objects by project
• Generally best to accept new vendor code
• Take the path of least resistance
  – Did PeopleSoft modify the object more than you did?
• Use new compare and merge tools
• Always migrate bolt-on customizations
• Let developers drive retrofitting estimates
• Single point of contact for migration of objects
• If code not documented, do it now
• Use detailed logging of changes
Recap and Next Steps

- 9.2 offers significant application enhancements
- Determine your upgrade philosophy – Transactional vs Transformational
- Emtec Upgrade Planning Workshop
  - Assess upgrade impacts specific to your organization and PeopleSoft footprint. Determine the best upgrade and module roadmap for you
- PeopleTools Upgrade Assessment
  - Determine if a Tools-only upgrade is a good first step
- www.PeopleSoft92.com