PeopleSoft HCM 9.2 is here!

A Whole New User Experience

May 21, 2013
Thank you for joining us today!

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A Global Company

- 14 Locations Worldwide
- Serving Client for over 46 years
- 1000+ Associates
- Oracle Platinum Partner
- HCM Invested Partner Community
- A growing portfolio of services
  - Oracle Fusion Applications
  - Oracle PS Enterprise
  - Oracle eBusiness
  - Hyperion & OBIEE
- Voted One of the Top 100 Places to Work by Cranes Chicago in 2012
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>
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</thead>
<tbody>
<tr>
<td>• IT Strategy &amp; Planning</td>
<td>• Oracle</td>
<td>• Cloud Strategy &amp; Planning</td>
<td>• Portfolio Analysis</td>
<td>• IT Service Mgmt.</td>
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<td>• IT Process Improvement</td>
<td>• Fusion</td>
<td>• Salesforce.com Solutions</td>
<td>• Application Advisory Services</td>
<td>• Data Center</td>
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<td>• IT Performance and Governance</td>
<td>• EBS</td>
<td>• Sales Cloud</td>
<td>• Product Development</td>
<td>• Business Application Infrastructure</td>
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<td>• Information Management:</td>
<td>• PeopleSoft</td>
<td>• Service Cloud</td>
<td>• Custom Application Development &amp; Maintenance</td>
<td>• End User Computing</td>
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<td>- Big Data</td>
<td>• EPM : Including Hyperion</td>
<td>• Marketing Cloud</td>
<td>• Package Application: Development, Maintenance &amp; Support</td>
<td>• Platforms</td>
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<td>- Analytics</td>
<td>• OBIEE</td>
<td>• Cloud Application Development &amp; Technology</td>
<td>• Mobile solutions</td>
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<td>• Mobility Solutions</td>
<td>• Microsoft</td>
<td>• Private Virtual Cloud</td>
<td>• Quality Assurance &amp; Testing Services</td>
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<tr>
<td>• Program and Project Management</td>
<td>• AX and GP</td>
<td>• Cloud Applications</td>
<td>• Managed Services, Capacity Management &amp; Staffing Services</td>
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<td>• Software &amp; Systems:</td>
<td>• BI</td>
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<td>• SAP</td>
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<td>• Functional: HCM, FM, SCM</td>
<td>• CRM</td>
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<td>• SWAT team of 45 highly skilled Strategists,</td>
<td>• 180 Specialists, including Project Managers, Architects, Consultants and Analysts</td>
<td>• Specialized team of 25 Strategists, Project Managers, Architects, and Consultants</td>
<td>• Global workforce of nearly 750 associates (approximately 250 associates based in North America)</td>
<td>• More than 100 associates providing</td>
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<tr>
<td>Architects and Consultants</td>
<td>• 10 years of experience and more than 75 projects</td>
<td>• More than 90% certified</td>
<td>• Provided more than 6.3M hours of application development and maintenance services.</td>
<td>data center, compute, network and storage related services</td>
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<td>• Expert team of Big Data, business intelligence</td>
<td>• Expert team of Big Data, business intelligence and analytics professionals</td>
<td>• 62 Customers &amp; 112 engagements</td>
<td>• Special expertise in Business Analysis and Testing (among other things)</td>
<td>• Value Add Reseller providing full device lifecycle management services for more than 30 years</td>
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<td>and analytics professionals</td>
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<td>• IT Service Mgmt. BU having supported more than 70 distinct clients</td>
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<td>• More than 300 ERP &amp; CRM projects completed</td>
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<td>• Platforms</td>
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</table>
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>Offerings</th>
<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>
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<tr>
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<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 Indications, Reports</td>
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<td>• Existing application enhancements and integration</td>
<td>• Business Process Design and Redesign</td>
<td>• Business Process Design and Redesign</td>
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<td>• Packaged Application Development, Maintenance and Support</td>
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<td>• Project Management</td>
<td>• Managed Services</td>
<td>• Ad-Hoc Analysis</td>
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<td>• Customer Training for end-users and Administrators</td>
<td>• QA &amp; Testing</td>
<td>• QA &amp; Testing</td>
<td>• Application Support</td>
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<td>• Application Advisory Services</td>
<td>• QA &amp; Testing</td>
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<td>• Proactive Intelligence Delivery and Alerts</td>
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<td>• Application Support</td>
<td>• Application Advisory Services</td>
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<td>• Upgrade Planning Assessments</td>
<td>• Upgrade Planning Assessments</td>
<td>• Application Support</td>
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<td>• Hyperion Planning and its modules</td>
<td>• PeopleSoft</td>
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<td>• Fusion HCM</td>
<td>• PeopleSoft</td>
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<td>• HFM (Hyperion Financial Management) and its modules</td>
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<td>• Data Relationship Management (DRM)</td>
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<td>• General Ledger</td>
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<td>• Procure to Pay</td>
<td>• Payroll Processing</td>
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<td>• Projects &amp; Contracts</td>
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<td>• Financial Analysis &amp; Reporting</td>
<td>• Time &amp; Labor</td>
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<td>• Financials and HCM</td>
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<td>• JD Edwards Financials</td>
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<td>• Siebel</td>
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PeopleSoft HCM Consultant Experience

• Oracle Certified consultants
• Average 10+ years of experience
• Implementations & upgrades
• Breadth and depth of competencies
• Focused on best practices with deep industry expertise
• Intelligence Centers utilized to promote knowledge transfer
• Extensive HCM 9.1 experience
• Roles:
  – Business Analysts, Consultants, Developers, Functional & Technical Leads, Upgrade Specialists, Project Managers, Engagement Managers
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.
PeopleSoft 9.2

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

Industry-specific capabilities
End-to-end business processes
Reduced need for customization

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

- **PeopleSoft 9.2**
  - 9.2 Feature Packs
  - 2013
- **PeopleSoft 9.3**
  - 9.3 Feature Packs
  - 2016
- **PeopleSoft 9.4**
  - 9.4 Feature Packs
  - 2019

- **PeopleTools 8.53**
- **PeopleTools 8.54**
- **PeopleTools 8.55**
- **PeopleTools 8.56**
- **PeopleTools 8.57**
- **PeopleTools 8.58**
- **PeopleTools 8.59**

**Ongoing Delivery of Off-Cycle Capabilities**

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

**Major Releases Every ~3 Year**
PeopleSoft HCM Roadmap: Customer Options

- PeopleSoft HCM 9.2 | Released March 2013
- Feature Packs
  - Off-cycle delivery between major releases
  - Delivered via individual release, maintenance pack, bundle, or PeopleSoft Update Manager
- Talent Management Integration
  - Leverage 9.x Talent Management functionality with prior releases
  - No upgrade required
- Fusion Co-Existence Model
  - Leverage Fusion Talent Management and Workforce Compensation modules with your current PeopleSoft solution
  - No upgrade required
PeopleSoft 9.2 Upgrade Paths

• Release 9.2
  – Direct upgrade path to 9.2
    • HCM 9.0 and 9.1 – Not 8.9
    • Financials from 8.9, 9.0 and 9.1
  – Focus on making PeopleSoft:
    • More Intuitive for end users via Activity Guides / Train Stops
    • Access to Actionable Information via Pivot Grids
    • Increased User Effectiveness with WorkCenters
    • Enable your mobile workforce
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
      on 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
Key 9.2 Enhancements
Secure Enterprise Search

- Application and Component Search Capabilities
  - Keyword search
  - One-click actions from search results
  - Results based on security configuration to protect data
  - Enhanced component searches
Pivot Grids

- Advanced reporting technology
- Self-service analytics providing ability to drill-down and filter data as well as provide visualization of data
- Similar to Pivot Tables in Excel
- Leverage Query tool to gather data and display results
- Pivot grid wizard can be utilized to create new charts
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 PeopleSoft Query
- Chart and grid are synchronized
Display Components

• View data in 3 different visualizations:
  – Grid only
  – Chart only
  – Grid and chart

• 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

ORACLE

PEOPLESOFT ENTERPRISE
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
Business Process Map (BPM)

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

- PeopleSoft continues to deliver hosted documentation and downloadable PDFs, making every option is as easy and informative as possible.
Announcements & Notifications

- Configurable announcements that can be sent to numerous recipient types including a single individual, groups, or all HCM system users.
- Ability to view on homepage
- Configurable options include delivery method, links/attachments, recurrence and notification expiration
WorkCenter 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
WorkCenter Overview

Without Portal Technology

- Analytics
- Navigation
- Search
- Transaction
- Reports

With WorkCenter Pages

Can include Navigation, Tasks, Reports/Queries, Analytics, and Transactions

Can also include a variety of related content services pagelets
WorkCenter Overview

- 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
WorkCenter 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
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
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
Mobile Applications – Approvals

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

- Easily access and transact directly from dashboard
- Configurable options to personalize view
Recruiting
Candidate Gateway Configuration

• Configurable Career Site
  – Welcome page branding to allow consistent branding with organization’s website without customization

Are you looking for a challenge? A career dedicated to improving lives and making a difference? A career that can impact people around the world? A career where you can do well by doing good?

We employ individuals from diverse social and academic backgrounds into a full range of career fields and positions. We offer many exciting opportunities in a variety of career paths.

Are you up to the challenge? Are you someone who can assist us in accomplishing our mission? If so, we encourage you to apply!

Our company is committed to diversity. We are an Equal Opportunity/Affirmative Action employer.
Candidate Gateway Guided Application Process

- Visual representation of application process
- Increase completion rate
Candidate Gateway Account Management

- First and last name requirement
- Require applicant to provide email configuration option
- Enhanced password security

Password Controls

<table>
<thead>
<tr>
<th>Password Control</th>
<th>Password Strength</th>
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<tbody>
<tr>
<td>Enabled</td>
<td>Minimum length</td>
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<td></td>
<td>Special characters</td>
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<td>Digits</td>
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<td>Lowercase</td>
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<td>Uppercase</td>
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Password Expiration

- Never Expires
- Expires In [90] Days

Password May Match

- User Name
- Primary Email

Last Updated: 01/04/2012 7:24AM  By: SYSTEM

Save  Refresh
Candidate Gateway Enhancements

• Overall Usability Enhancements
  – Search enhancement
  – Apply button for each job opening
  – Updated interface for online job offers and associated documents
  – Improved notifications

<table>
<thead>
<tr>
<th>Job Title</th>
<th>Job ID</th>
<th>Location</th>
<th>Posted Date</th>
<th>Save Job</th>
<th>Apply</th>
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<tr>
<td>1 Systems Analyst</td>
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<td>Multiple Locations</td>
<td>09/15/2012</td>
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<td>Apply</td>
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<td>2 Director of Finance</td>
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<td>08/30/2012</td>
<td>Save Job</td>
<td>Apply</td>
</tr>
<tr>
<td>4 Assisted Living Supervisor (Ref. 504022)</td>
<td>504022</td>
<td>Texas</td>
<td>08/30/2012</td>
<td>Save Job</td>
<td>Apply</td>
</tr>
</tbody>
</table>
Talent Acquisition Manager Dashboard

• Redesigned recruiting dashboard
  – Utilizes pagelets to present data to recruitment staff and hiring managers
Talent Acquisition Manager Pivot Grids

- Job Opening & Close Trend Chart
- Job Opening Aging Analysis
- In Process Applicants Chart
- Time to Fill Chart
Talent Acquisition Manager Enhancements

• Related Content Framework
  – Applications Received vs Applications Rejected by Job Opening
  – Recruiting Phases Chart

• Manage Applicant Page Redesign
  – One click Actions
  – Key Summary Applicant Information

• New Manage Application Page
  – Unified view of all recruiting activity for an applicant for a job opening.
Talent Acquisition Manager Enhancements

• Usability Enhancements
  – Refined Cloning Process for Job Openings
  – Insite into Questionnaires needed to be completed for linked applicants
  – Summary Results for Screening
  – Comments included in Routing Emails
  – Redesign of Interview Calendar
  – Mark Offers as Accept or Reject with one click.

• SES search replaces Verity
Human Resources/Compensation
Smart HR

- Formally referred to as SmartHire or Template-Based Hire
- Leverage templates for any personal, job, or profile transaction in the system
- Multiple data types can be consolidated into a single template (i.e. personal and job data, job and profile data, etc.)
Headcount Pivot Grids

• Utilize Pivot Grid functionality to enhance headcount reporting
• Accessible via Direct Line Reports pagelet as well as traditional menu navigation
• Delivered grids

<table>
<thead>
<tr>
<th>Grid</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Administrator – Headcount Movement</td>
<td>Displays all job actions that occurred during the specified reporting period</td>
</tr>
<tr>
<td>Administrator – Current Headcount</td>
<td>Current snapshot of the distribution of workers by organizational relationship</td>
</tr>
<tr>
<td>Manager – Headcount Movement</td>
<td>Displays job actions of the managers’ reports during the specified reporting period</td>
</tr>
<tr>
<td>Manager – Current Headcount</td>
<td>Current snapshot of the distribution of workers by job code</td>
</tr>
</tbody>
</table>
Profile Management

- Changes as a result of the SES search functionality:
  - New scoring algorithm for search/match results
  - Direct reporting relationships are included in the index build process thus no additional process is required to maintain the profile indexes
- Profiles allow custom properties to be added to templates
- Related item icons available in the search and compare process to provide supplemental search capabilities
- Integration between the Profile Management profile and Smart HR
• Open cycle job changes
  – Configurable options to determine exception handling for mid-cycle job changes
  – Support changes to salary, currency, and HR status
  – Provides configurable alerts to notify cycle participants of mid-cycle changes
## Compensation Pivot Grids

- Delivered grids

<table>
<thead>
<tr>
<th>Grid</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Salary Analysis</td>
<td>Compare compensation by position, location and department</td>
</tr>
<tr>
<td>Compensation Distribution</td>
<td>Distribution of current employee salary information by salary range relative to minimum, maximum, and midpoint</td>
</tr>
<tr>
<td>Salary Increase by Performance</td>
<td>Average proposed salary increase in percentage that is given to employees by performance rating</td>
</tr>
<tr>
<td>Variable Compensation by Performance</td>
<td>Total proposed amount of cash-type variable compensation given to employees by performance rating</td>
</tr>
<tr>
<td>Cycle Guideline Alert</td>
<td>Number of approved allocation proposals that fall in as well as outside the recommended salary increase guidelines</td>
</tr>
<tr>
<td>Cycle Tracking</td>
<td>Provides visibility into the real-time progress and status of proposals in open compensation cycles</td>
</tr>
</tbody>
</table>
Compensation Self-Service

- Streamlined ad hoc salary change process

- Reformatted compensation history statement and chart
ePerformance WorkCenter

- Combines workcenter and activity guide to provide a single page for users to view and edit documents in a guided process
- Each step outlined including current progress and due date
Mid Period Reviews

- Interim feedback/comments during review cycle
- Provide open and continuous dialogue about performance
ePerformance Enhancements

• Integration with Outlook
  – Kudos
  – Tasks

• Integration with Career and Succession Planning
  – Allows Managers easy access to employee’s Career and Development data while completing evaluations

• Tighter Integration with Profile Management
  – Measure against competencies, skills and attributes
Benefits Life Events

- Guided process for life events across multiple modules
- Configurable welcome page
- Document upload process
- Preliminary summary page to view updates
- Life event rules to configurable new events
- Life event cloning tool
Benefits Analytics

• Health benefit enrollment statistics

Source: Oracle
Outlook Integration

- Initiate absence requests directly from Outlook
- Manage requests and approvals without logging into application

Source: Oracle
Time and Labor
Time and Labor Enhancements

• Intuitive Usability
  – Time and Labor WorkCenter

• Strengthened Self Service Experience
  – Reconfigured Time Reporting

• Comprehensive Capabilities
  – Real-Time Rules and Validations
Time and Labor WorkCenter

- Role-based workcenter provides access to all information and links a user needs to complete time and labor processing in system
Time and Labor Pivot Grids

- Timesheet by status
- Attendance Violations
- Absence Type (Base Benefits)
- Absence Type (Absence Management)
Reports Using BI Publisher

- Print Timesheet enable users to print their timesheet from within the employee and manager Timesheet page
- Reported Time Audit Report provide an audit trail for all add, update, and delete to the employee’s reported time
- Leave and Compensatory Time Report provide a monthly view of all leave and/or compensatory time reported and balances
HR Notification

• Create on-the-fly or recurring announcement and/or email notification to a list of recipients
• Announcements pagelet available on the Home Page or within the Time and Labor WorkCenter
• Enable role-based security for Recipient Type
• Provide an option to add a link to a PeopleSoft component or URL
• Provide an option for file attachments
Real-Time Rules & Validations

- Configurable view of all relevant time data on the timesheet
- Apply rules function to allow users to identify any input errors and make immediate correction
- Configurable option to determine if use Apply Rules button or apply upon submit
- Generate up-to-date payable time
Time Reporting Enhancements

• Timesheet Lockdown
  – Allows administrators to lock out users to prevent them from updating timesheets during critical periods during the payroll processing cycle
  – Allows view only access to timesheets during lockdown period
Time Reporting Enhancements

Timesheet Key Pieces

1. “Real-Time Rules”
2. “Real-Time Validation”
3. Page Tab framework used to organize the content
4. Added configurability; who gets to see and who gets to do what?
5. Adding key information (“related content”) using pop-up. (Real estate is expensive).
Time and Labor Enhanced Configuration

- Determine data that appears on the timesheet
- Restrict Time Reporting Codes for time entry on the Timesheet
- Configurable legal statement to display at timesheet submit
- Configurable control to prevent users from modifying the employee’s timesheet
- Configurable chunk size on Manager Search Options
Paycheck Modeler

- Employees can simulate changes to their paycheck
- Create “what if” changes using actual data
- Model changes to earnings, deductions and tax withholding status
Recap and Next Steps
HCM Version 9.2 Summary

• Enable users to own data and processing with the 9.2 enhancements:
  – Improved usability leveraging enhanced searches, embedded help, modal windows, related actions, announcements, and alerts
  – Simplified processing through tools such as workcenters, activity guides, and forms builder
  – Improved reporting and analytics in a single source with Pivot Grids
Next Steps as you Research 9.2

• Additional Replays of this presentation
  – Additional showings of this presentation to inform other members of your organization

• Upgrade Planning Workshop
  – Assess upgrade impacts specific to your organization and PeopleSoft footprint
  – Determine the best roadmap for you
Thank you for your time!