ABOUT EMTEC ®

Emtec is the right size provider of technology-empowered business solutions for world-class organizations. Our local offices, highly-skilled associates, and global delivery capabilities ensure the accessibility and scale to align your technology solutions with your business needs. Our collective focus is to continue to build clients for life: long-term enterprise relationships that deliver rapid, meaningful, and lasting business value.

PACKAGED APPLICATION SERVICES

Emtec is a leading implementer of Packaged Applications. We help reduce costs by streamlining processes and providing application package expertise. We partner with our clients to provide subject matter expertise around the entire lifecycle of your application. Our specialty practices include, Microsoft Dynamics, Oracle Fusion, PeopleSoft, eBusiness Suite, Hyperion, OBIEE and SAP.

- ERP
- HCM
- CRM
- BI
- Planning
- Financial Management

A global leader in credit information and information management services was operating on v8.9 for both PeopleSoft HCM and Financials. With the release of v9.1, both applications were nearing the end of product support.

CHALLENGE

The client's PeopleSoft implementation was highly customized, which made performing parallel upgrades to version 9.1 for both applications more complex. In addition, the HCM team determined they wanted to deploy the HCM solution globally. This deployment was run concurrently with the upgrade. It required Unicode conversion to support international languages since they operate in 33 countries, serve more than 45,000 businesses, and maintain credit histories on more than 500 million consumers around the globe.

FIT-GAP ANALYSIS

The Emtec team, working alongside members of the client's IT team, performed a "fit-gap" analysis to examine all existing customizations. Through this careful review process, they were able to determine if the customizations had been incorporated into the latest PeopleSoft version or if modifications were required to make the customizations work with the latest version.

Emtec educated their business leads on new features along with ways to improve their existing processes, providing implementation effort and organizational impact so the business could prioritize what to include in the upgrade and what features would be implemented in the future. Emtec optimized the project(s) by leveraging resources across PeopleSoft applications along with strategic staffing plans.

They elected to introduce new functionality for both HCM and Financials during the upgrade, most of which was configuration driven. Some new custom coding was required to support the new functionality.

MANAGING COMPETING PROJECTS

The client was engaged in a number of competing initiatives that were going live at the same time the PeopleSoft 9.1 applications were moving into production. The Strategic Refresh project included new implementations of Siteminder for PeopleSoft; system-wide changes to shared file servers; and system-wide changes to Access Control Procedures/Security. All of these areas significantly impacted the PeopleSoft 9.1 HCM and Financials upgrade project.

Some of the challenges included:

- First time implementing Siteminder with PeopleSoft applications

- New architecture design for Shared File servers; and was different between HCM and Financials

- New security design for Access Control procedures

VALUE OF A FIT-GAP ANALYSIS

When performing an upgrade, conducting a fit-gap analysis can help minimize maintenance costs associated with customizations.

The analysis can reveal which customizations have been incorporated in the latest software version as well as determine if any modifications are needed to make the customization work with the latest version.

RESULTS

The client had several manual processes that were automated during the upgrade to improve timeliness and accuracy for their Financial and HCM operations. Some of the processes implemented included:

- Modifying existing General Ledger Equitization and Consolidation rules to accommodate their increasingly complex ownership structure and multi-currency transactions

- Using delivered PeopleSoft to automate Subsystem/Subledger Reconciliation comparing transactions in Receivables, Payables, and Asset Management to General Ledger activity

- Using new Accounts Receivable Work Bench to view customer history and links enabled for users to automate taking action on other items

- Accounts Payable Period End Accruals, new to 9.1, which allowed for unposted vouchers in certain statuses to be accounted for at the end of the month

- A new Asset Management feature that enables users to be able to track the fair value of assets for the revaluation process; further, it streamlines and eases the process of mass asset revaluation

- Calculation of capitalized interest in Project Costing and integration with General Ledger

- An automated benefits confirmation statement emailed to employees once benefits entry has been completed and processed

- SmartHire (template based hire) deployment for Global HR, central processing and security coordinators to reduce time to onboard employees and consultants.

- Workflow Notifications for HCM Disability and Disciplinary Actions

- HCM Manager Dashboard to provide managers with visibility to their workforce when initially logging into PeopleSoft

- An automatic reminder through Workflow for newly hired and rehired Associates who have not finalized their benefits

- Mouse-Over Pop-Up Feature that enables users to quickly see additional associate information by pausing on a person's name or ID

- Org Chart Viewer that enables associates and managers to search for people across the organization, to see a visual representation of the organization based on defined hierarchical structures

SEPARATE GO-LIVE DATES

HCM and Financials had separate go-live dates that required performing integration testing between HCM 9.1 and Financials 8.9 for one week. Extensive system/integration testing and UAT testing were performed to verify results. HCM and Financials each had their own cutover plan to aid the go-live tasks.

NEXT STEPS

The HCM and Financials upgrade project also laid the foundation to expand their global footprint. Emtec is in the process of expanding PeopleSoft Financials globally, focusing on 15 Latin American countries for initial deployment.