



PeopleSoft Can Do That?

Webinar

December 11, 2012

Agenda

Emtec Overview

PeopleSoft Update

Reporting

User Experience

Operational Enhancements

About Emtec

- 14 Locations Worldwide
- 850 Associates
- \$250MM IT Services Provider
- Publicly Traded: OTC/ETEC
- Management Team
 - Growth Oriented
 - Successful Track Record
 - Consistent Profitability
- A growing portfolio of services
- Emerging Solutions acquired by Emtec in August 2011

North America



India



What Makes Emtec Different

The Right Size

Big enough to address market needs – Small enough to care

Localized Expert Pool

Enables rapid and meaningful impact and results

True Management Access

Ensures flexibility and alignment

CLIENTS FOR LIFE:

Built on more than 45 years of delivering client success

Emtec Services

CONSULTING SERVICES

- IT Strategy & Planning
 - IT Performance & Governance
 - Project Management
 - IT Process Improvement
 - BI Consulting
-

INFRASTRUCTURE SERVICES

- ITSM
 - Business Application Infrastructure
 - Platforms
 - Data Center
 - End User Computing
-

PACKAGED APPLICATION SERVICES

- Oracle PeopleSoft
 - Salesforce
 - E-Business Suite
 - Fusion Applications
 - Hyperion
 - Microsoft Dynamics
-

CLOUD TECHNOLOGIES

- Salesforce Solutions
 - Private Virtual Cloud
 - Cloud Applications
 - Force.com
 - Cloud Strategy & Planning
 - Cloud Development & Technology
-

APPLICATION DEVELOPMENT & MANAGED SERVICES

- Custom Development
 - Managed Services
 - Testing Services
 - IT Staffing
-

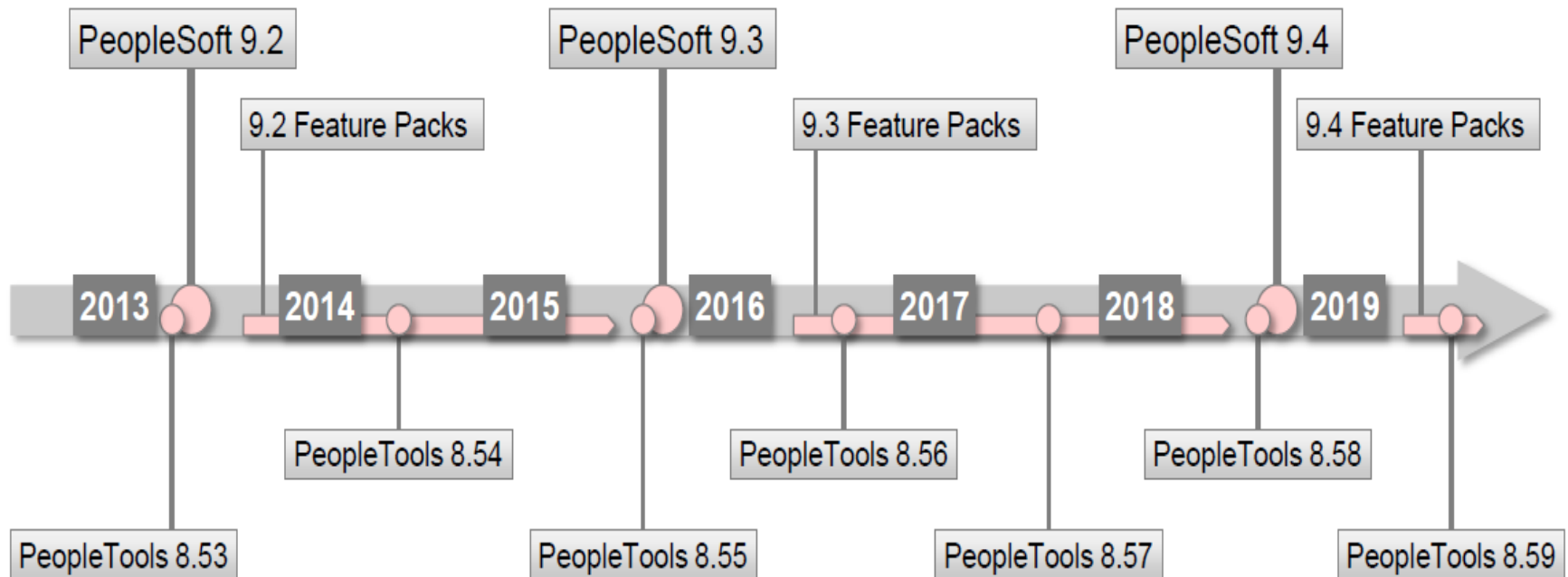


PEOPLESOFT UPDATE

PeopleSoft Update

- Release 9.2
 - Expected release first half of 2013
 - Direct upgrade path 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
- PeopleTools 8.53
 - Expected late 2012 / early 2013

PeopleSoft Roadmap



Ongoing Delivery of
Off-Cycle Capabilities

PeopleTools Releases &
Feature Packs 12 -18 Months

Major Releases
Every ~3 Year



REPORTING

PeopleSoft Pivot Grid

PeopleSoft Pivot Grid

- Overview
 - Similar to Pivot Tables in Excel
 - Advanced reporting technology that enables users to visually display data
 - Performs operations such as pivoting and filtering
 - Uses data sources like PeopleSoft Query
 - Can view data in 3 different visualizations:
 - Grid only
 - Chart only
 - Grid and chart
 - Chart and grid are synchronized

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*
 - Pivot Grid uses the result set that was retrieved while populating the grid for chart display
 - Chart only display option
 - Users can drill down on the chart by clicking the data points of the chart to display details
 - Drill out option is available as a locator link at the top of the chart. Clicking the drill out link restores the chart to its earlier state



REPORTING

PeopleSoft
Business Intelligence Publisher


Business Intelligence (BI) Publisher

- Overview
 - Also known as XML Publisher
 - New reporting platform standardized across all PeopleSoft applications (i.e. Fusion, Hyperion)
 - Reporting solution to manage and deliver reports
 - Enables users to view reports online
 - Design and create report layout templates with the more common desktop applications
 - Single template can generate reports in many formats (PDF, RTF, Excel, HTML) and in many languages
 - Approach reduces report maintenance, templates, and translations
 - Allows document and template branding

BI Publisher Benefits

- Lower report and form generation development costs
- Eliminate the need to reverse engineer government forms into Crystal or SQR
- Separation of report data (logic) from report format
- Re-use report data into multiple formats
- Ability for end users to create report layouts from familiar desktop applications
- Integrated data extracted from PS Query
- Templates can be branded or content can be modified to fit an organization's needs


BI Publisher Branding Examples



Emtec
Business & Technology Empowered

9/26/2012

Departmental Salary Report



Emtec
Business & Technology Empowered

Pay Group: KU1-US Weekly
 Pay Begin Date: 04/24/2000
 Pay End Date: 04/30/2000


Global Business Institute 9999
 500 George Washington Pkwy
 New York NY 07666

Business Unit: US001
 Check #: 00000000001785
 Check Date: 04/28/2000

Colin Davidson 107 Skull Creek Drive Hilton Head Island SC 29928	Employee ID: KU0103 Department: 55000-Lab Facility Location: New Jersey Operations Job Title: Manager-Project Pay Rate: \$5,000.67 Monthly
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HOURS AND EARNINGS			
Description	Rate	Current	
		Hours	Earnings
Regular	28.850000	40.00	1,154.00
General Credits			23.08
Medical Credits			15.00
Dental Credits			0.92
Holiday (Statutory)			0.00
Vacation Sell			0.00
TOTAL:		40.00	1,193.00

BEFORE-TAX DEDUCTIONS			AFTER-TAX DEDUCTIONS		
Description	Current	YTD	Description	Current	YTD
Basic Medical Deduction	17.08	307.44	Basic Domestic Partner Med		
Dental Plan	4.15	74.70	Domestic Partner Dental Plan		
Vision Plan	2.50	45.00	Domestic Partner Vision Plan		
401(k) Savings	57.70	1,015.52	New York Life Supplemental Li		
Standard US Pension	28.85	507.76	Dependent Life (EE Choice)		
Vacation Sell Deduction	-4.44	-79.92	Supplemental AD&D		
			Long Term Disability		
TOTAL:	105.84	1,870.50	TOTAL:		



Emtec
Business & Technology Empowered

24 September 2012

NAME FIRST_NAME sample data LAST_NAME sample data
 ADDRESS1 sample data
 ADDRESS2 sample data
 ADDRESS3 sample data
 ADDRESS4 sample data
 CITY sample data
 STATE_DESCR sample data POSTAL sample data
 COUNTY sample data

Dear NAME_TITLE sample data LAST_NAME sample data

I am pleased to offer you a position at PeopleSoft. Your compensation package is composed of the following components:

Offer Component	Offer Amount	Currency	Frequency
DESCR sample data	2,500	USD	Biweekly



% Salary by



REPORTING

PeopleSoft Connected Query

Connected Query

- Connected Query enables you to create a single XML file based on a set of queries with parent-child relationships
- User create a set of linked simple queries to collect data from multiple tables instead of creating a complicated query with multiple equal, outer joins, and grouping conditions
- When two or more SQL statements are linked with left outer join to the same query.
- Connected Query enables you to collect data similar to query performing left outer joins. In contrast to query, Connected Query enables you to link multiple queries to a single parent query.
- As a tool in the process of replacing Crystal reports (that use subreports) with XML Publisher reports.



USER EXPERIENCE

**PeopleSoft
Related Content**

Related Content

- Linking application pages with collaborative, analytical, and informational content
 - Essentially extra information related to a transaction
 - Discussions, Links (intra-portal or external), Tags
- Related Action
 - Ties additional actions to transactions
 - Modal window – no need to leave transaction page
 - Appears as red glyph in designated field
- Related Content Benefits
 - Eliminates customizations
 - Open Framework
 - Customers develop services
 - Interactive
 - Secure

Related Content – HCM examples

Org Chart Viewer

Preferences

Company Directory | Direct-Line Reports

Search by Name

Interface Employee Table

Profile | Betty Locherty | EMP | ID: KU0007 | Empl Record: 0

Find | View All | First | 1 of 1 | Last

Chart | List

Payroll

*Effect

*System

PI Em

ne Palmer
stant-Administrativ

Org Chart

cation: Corporation Headquar.

Actions

Betty Locherty
Name: Betty Locherty
Title: Director-Finance
Department: Corporate Finance
Company: Global Business Institute 9999
Title: Director-Finance
E-Mail: lochertyb@gbitest.com
Phone: 555/123-4567

Development

Performance Management

Career Planning

Succession Planning

View Performance Documents

View Development Documents

Rosanna Channing
Senior Manager-Accounting
Org Chart
Location: Corporation Headquar...

Sus
Ana
Org Chart
Location: Co

Related Content – Future Enhancements

- PeopleSoft 9.2 enhancements to Related Content
 - Embedded operational metrics
 - Order fulfillment effectiveness
 - Average time to pick/pack/ship
 - Contracts
 - Bill Plans
 - Revenue Plans
 - Contract Terms
 - Inventory analytics
 - Incorporated anywhere as Related Content
- Related Actions on Pivot Grids in 9.2

PS 9.2 release notes: https://blogs.oracle.com/peoplesoft/entry/peoplesoft_hcm_and_fscm_9



USER EXPERIENCE

PeopleSoft Pagelets

Pagelet Information

- User-defined independent component on a PS page
- Types of Pagelets
 - Homepage Pagelets
 - 2 or 3 column view on user's homepage
 - Some options – wide and narrow versions of pagelets
 - Workspace Pagelets
 - Used for members of collaborative workspaces
 - Virtual team room
 - Used for projects
 - Template Pagelets
 - Added to a PeopleSoft template
 - Portal template – organization and layout of pagelets on portal
 - Multiple template Pagelets make up a portal template
- Personalization
 - Dragging and dropping under Personalize Layout page
 - 2 or 3 columns, with as many pagelets as user desires

Pagelet Example – Homepage Pagelets

The screenshot displays three overlapping pagelets on a web page:

- Emtec RSS**: A pagelet titled "Emtec Inc. -- RSS feed" containing a list of job opportunities with links to details and "#jobs".
- CNN Pagelet**: A pagelet titled "CNN.com - World" showing the CNN logo and a list of news items.
- Emtec Stock Ticker**: A pagelet titled "NASDAQ.com Stock Tracker" displaying stock information for ETEC.

Emtec RSS

Emtec Inc. -- [RSS feed](#)

- [I'm hiring! Senior Developer/Architect – LAMP Stack Chicago Area #jobs](#)
- [I'm hiring! Data Engineer - Big Data at Emtec Inc. - #jobs](#)
- [Sr. QA Tester \(Manual\)](#)
- [Microsoft Dynamics CRM Pr](#)
- [Application/Solution Archite](#)
- [Job opportunity: Sr. Java De Area #jobs](#)
- [Job opportunity: QA Test Le; #jobs](#)
- [Job opportunity: Senior HFM Chicago Area #jobs](#)
- [Job opportunity: Program Q; Area #jobs](#)
- [SAP and Salesforce Integral](#)
- [Job opportunity: Senior Busi #jobs](#)
- [Job opportunity: http://t.co/C Greater Chicago Area #jobs](#)
- [Job opportunity: Senior Busi #jobs](#)
- [CRM and cloud computing -](#)

CNN Pagelet

CNN.com - World Wed, 26 Sep 2012 12:10:39 EDT

- [Meet the top 10 CNN Heroes of 2012](#)
- [The top 10: In their own words](#)
- [Disabled athletes aspire for more](#)
- [Tough economy hurts dogs, too](#)

Emtec Stock Ticker

[NASDAQ.com Stock Tracker](#)

Track your favorite stock and link to NASDAQ.com for the full details.

- [26 Sep 2012 12:34:28 EDT - The latest stock information is now available for your stocks](#)

ETEC	
Last	1.14
Change	unch
% Change	unch
Volume	0

As of: 26 Sep 2012 12:34:28 EDT

View: [Stock Quote](#) | [News](#)

Pagelet Example – HCM Pagelets

Recruiter Alerts

New Applicants: 0

Unconfirmed Interviews: 0

Interviews Today: 0

My Job Openings

Job Opening	Title	Hiring Manager	Actions
503712	Corporate Controller	Betty Locherty	<input type="text"/>

[Full List](#)

Questionnaire Request.

Find Job Openings

With Status of:

Created Within:

Pagelets – Future Enhancements

- PeopleSoft 9.2 Pagelet enhancements
 - Standard Delivered Pagelets
 - My Work
 - My Links
 - Queries
 - Reports & Processes
 - Staffing
 - Rapid action staffing
 - With Related Actions, modal window capability

PS 9.2 release notes: https://blogs.oracle.com/peoplesoft/entry/peoplesoft_hcm_and_fscm_9

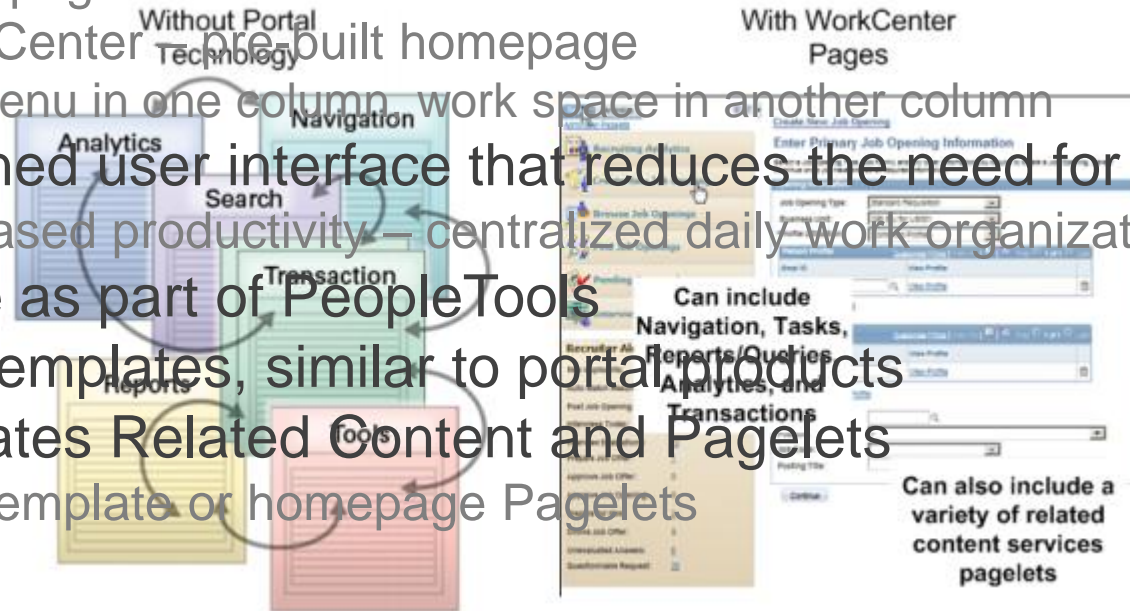


USER EXPERIENCE

PeopleSoft
WorkCenters

WorkCenter Pages

- User portals for specific roles; role-based homepage
 - Homepage – User customized
 - WorkCenter – pre-built homepage
 - Menu in one column work space in another column
- Streamlined user interface that reduces the 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



Oracle White Paper, April 2011

<http://www.oracle.com/us/products/applications/peoplesoft-enterprise/tools-tech/peoplesoft-applications-portal-359196.pdf>

WorkCenter Pages - 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

Oracle White Paper, April 2011

<http://www.oracle.com/us/products/applications/peoplesoft-enterprise/tools-tech/peoplesoft-applications-portal-359196.pdf>

WorkCenter Pages - Samples

ORACLE

Home | Worklist | MultiChannel Console | Add to Favorites | Sign out

Favorites | Main Menu > ES Demo Workcenter

ES Demo Workcenter

ES Accordion Demo

- Vendors
- Request Items
- Purchasing
- Accounts Payable
- General Ledger
- Reporting Tools

Journals in Error

Date	Unit	Journal ID	Year	Period	Source	Errors
2012-12-31	US001	TD00000005	2012	12	TD	V
2009-04-09	US003	AR00000095	2009	4	AR	E
2009-06-12	US003	AR00000161	2009	6	AR	E
2011-12-12	US001	0000000181	2011	12	CFO	V
2011-12-12	US141	0000000181	2011	12	CFO	V
2012-08-14	US001	0000000182	2012	8	CFO	V
2012-08-14	US600	0000000182	2012	8	CFO	V
2012-08-14	US001	0000000183	2012	8	CFO	V
2012-08-14	US600	0000000183	2012	8	CFO	V

Open Item

AR Open Items

General Ledger Center

Access General Ledger.

- Journals**
Create, import, review, process, and archive journal entries.
 - Create/Update/Copy/Import
 - Standard Journals
 - Subsystem Journals
 - 8 More...
- Allocations**
Set up and perform allocations
 - Define and Perform Allocations
 - Reports
- Reporting**
Create general, federal, and XBRL reports.
 - General Reports
 - Federal Reports
 - Cash Flow Statement
 - XBRL
- Monitor Background Process**
Unlock journals and non-shared tables; review shared table statistics; report on background process.
 - Journal Unlock
 - Non-Shared Table Maintenance
 - Shared Table Statistics
 - 2 More...
- Ledgers**
Define ledger structure and run summary, closing, ADB, import, export and archive ledger process.
 - Definition
 - Summary
 - Closing
 - 5 More...
- Consolidate Financial Data**
Configure and run Consolidation or Equitization processes.
 - Consolidation
 - Equitization
 - Load Ledgers
 - 2 More...
- Inquiry**
Run inquiries on journals, ledgers, and accounting entries.
 - Journals
 - Ledgers
 - Accounting Entries
- Regulatory Ledger Reports**
Define and create regulatory ledger reports.
 - Definition
 - Mapping Structure
 - Mapping Rules
 - 7 More...

WorkCenters – Future Enhancements

- PeopleSoft 9.2 WorkCenter enhancements
 - Four standard delivered pagelets
 - My Work, My Links, Queries, Reports & Processes
 - Pre-configured by user roles
 - Payables
 - Billing
 - Receivables
 - General Ledger
 - Supply and Demand
 - Staffing
 - Contracts
 - Grants
 - Projects
 - Supplier Admin
 - SRM Buyer Admin

PS 9.2 release note: https://blogs.oracle.com/peoplesoft/entry/peoplesoft_hcm_and_fscm_9



ENHANCEMENTS

PeopleSoft Approval Framework

Approval Framework

- Also known as the Approval Workflow Engine (AWE)
- Configurable Workflow
 - Setup for approvals, rules and routings maintained online
 - Enables Email based approvals
- Enhancements
 - *Functionality extended to new modules*
 - *Approval through Outlook email – some mobile support*
 - *Configured online, rather than in App Designer*
 - *Approval Monitor – tracks document throughout process*
 - Setup workflow by Business Units
 - Approval at Header or Line level, rather than by accounting field
 - User-defined approval hierarchy; dynamic roles list
 - Easily configurable Timeout Options
 - Ad Hoc reviewers and approvers

Example – PS Monitor → Email → HTML Approval

Timesheet

Allan Martin

Employee ID: KU0012

Job Title: Director - Customer Services

Empl Record: 1

Instructions

Financial Transactions

*View By: Week

Date: 01/31/2011

Monitor Approvals

Approval Process: Requisition
Business Unit: 00000
Requisition Date: [dropdown]
Approval Process: Requisition
Definition ID: SHARE
Business Unit: 00000
Requisition ID: 0000079315
Requester:

Allan Martin is not a registered time
Reported time on or after 01/02/11
From Monday 01/31/2011 to Sunday

Mon 1/31	Tue 2/1	Wed 2/2

HCM

Save for Later

Reported Time Status

Date	Reported Status
02/04/2011	Needs Approval
02/05/2011	Needs Approval
02/06/2011	Needs Approval

Line Details

Business Unit: 1 00000

Reassign Pending Tasks

The selected approver does not
must manually select an alternate

Reassign To: [dropdown]

Reassign

Administrative Approve/Deny

Act on behalf of the approver se
will apply to all tasks pending for

Approve

eProcurement Approve

2011 Ogilvy Ba
CDW_ACCT_APPROVA

Approved
Bruce Delahome
Route by ACT to all
05/05/11 - 12:00 PM

Message

Reply Reply Forward IM
to All to All Call

Delete Move to Create Other
Folder Rule Actions

Respond Actions

From: PeopleSoft eProcurement Email Approval System [ex_emo]
To: Fine, Jen
Cc:
Subject: .Requisition '0000000152' has been sent for your Approval

Message | ApprovalForm.html (7 KB)

Please detach and run attachment ApprovalForm.html
Upon selecting the Submit button, your default browser will open the
1) Automatically send your response
2) Create an email and need you to hit the submit button

Requisition Approval

Business Unit: US001
Requisition ID: 0000000152
Priority: Medium
Req Name: 0000000152
Total: \$144000.00 USD
Requester: Kenneth Schumacher
Entered on: 2010-08-30
Status: Pending Approval
Justification: test
Action:
 Approve
 Deny
 Pending

1 3 Season Mummy Bag, Long

Enter Approver Comments:

Enter Approver Comments:

Submit



ENHANCEMENTS

PeopleSoft Testing Framework

PeopleSoft Testing Framework

- Overview

- Record and playback tool
- Automates tasks within the PeopleSoft application
- Included in Tools 8.51
- Replicates actions of a single user executing functional tests against the PeopleSoft application
- Users record manual test procedures and save them within the framework
- Stored in database as App Designer Objects
- Assists with Change Impact Analysis

PTF Benefits and Limitations

- Benefits

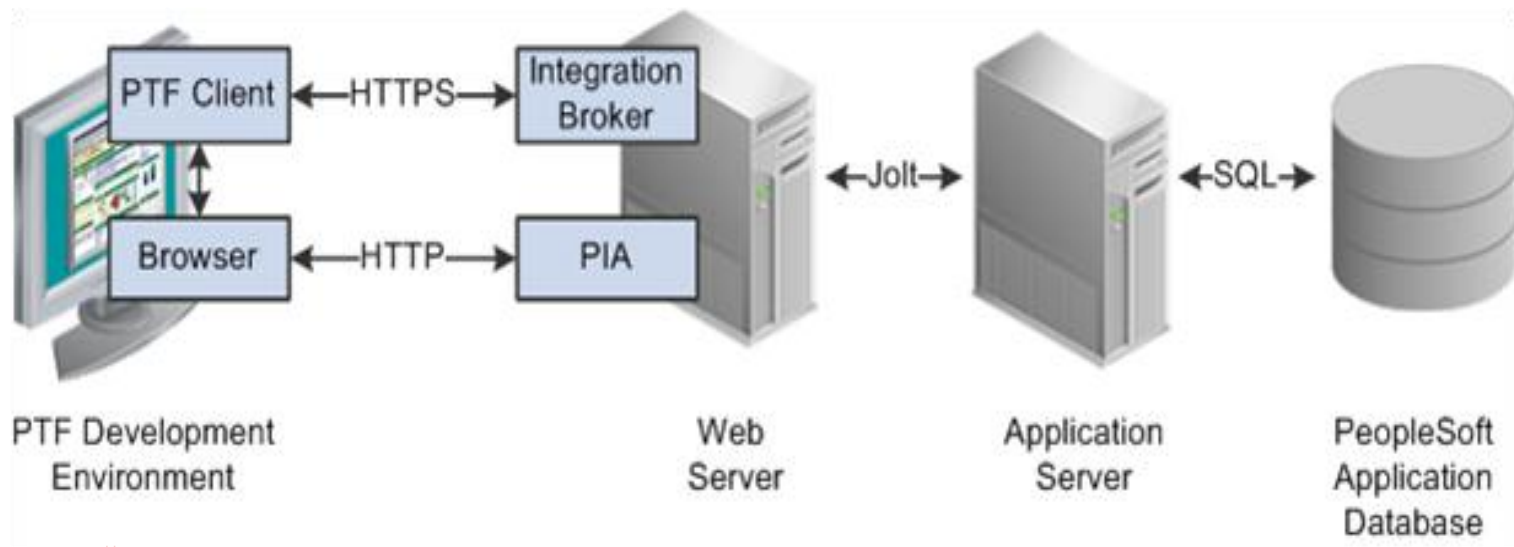
- Automates testing to increase efficiency and accuracy
- Ensures coverage of functionality
- Reduces testing time and resources
- Easily migrate test assets between environments
- No additional software costs
- Differs from other record and playback tools

- Limitations

- Unable to validate image appearance, position of data and online objects
- Not a load testing tool
- Lacks certain user functions, like drag and drop
- Recognize/validate objects in 3rd party applications

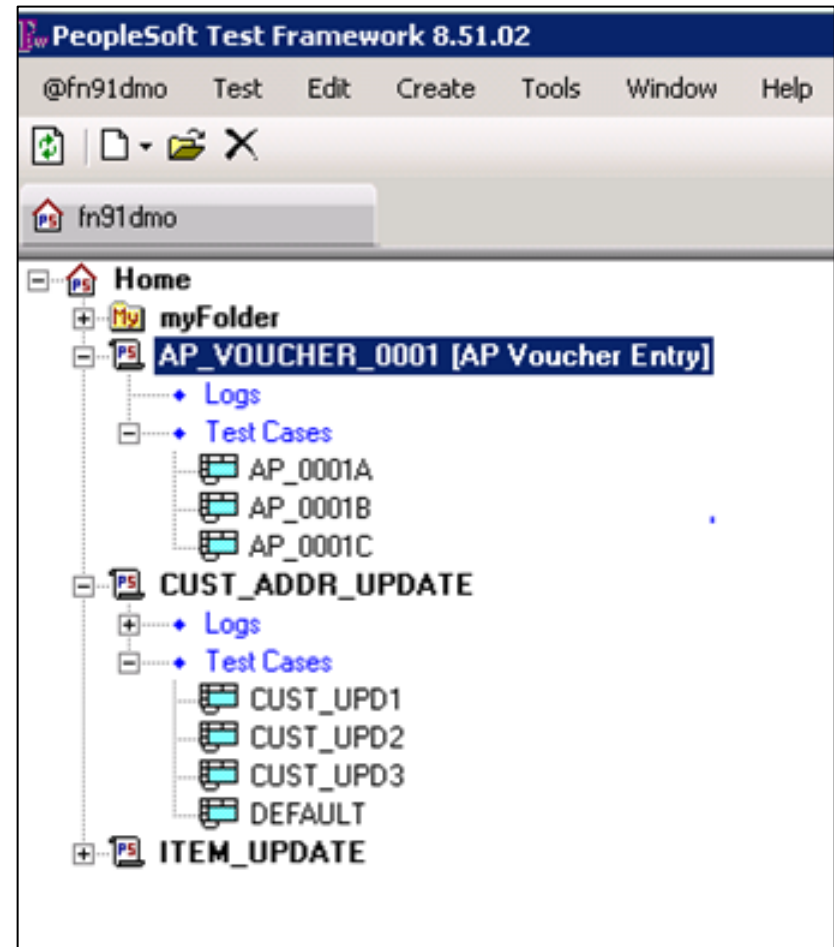
PTF Architecture

- Standalone program that runs on a Windows workstation
- Connects to the PS application database using a secure HTTPS connection through Integration Broker Web Services
- Connects to the PS application that is to be tested through a IE browser session



PTF Explorer

- Access to PTF Test Assets
 - Tests
 - Test Cases
 - Libraries
 - Logs
- Tree Structure
- Used to create/delete tests and folders, copy and move tests, and open test assets



PTF Test Editor

- Record and edit test scripts
- Add, copy and delete test steps
- Create and edit test cases
- View both test and test case in a single window
- Debug tests

The screenshot displays the PeopleSoft Test Framework 8.51.02 interface. The main window is titled "Test: CUST_ADDR_UPDATE*" and contains two panels for configuration: "Test Information" and "Test Case Information".

Test Information:

- Name: CUST_ADDR_UPDATE
- Descr: (empty)
- Library Test:
- Use Error Handling:
- Error / Message Definitions: (empty)

Test Case Information:

- Name: [4] DEFAULT
- Descr: (empty)

Below the configuration panels is a toolbar with options like Cut, Copy, Paste, Active All, Insert Row, Delete Row, and Line Information. The main area contains a table of test steps:

Seq	ID	Active	Scroll ID	Type	Action	Recognition	Value
1	19	<input checked="" type="checkbox"/>		Browser	Start_Login		
2	5	<input checked="" type="checkbox"/>		Link	Click	Name=EPCO_CUSTOMERS innerText=Customers	
3	6	<input checked="" type="checkbox"/>		Browser	FrameSet	TargetContent	
4	7	<input checked="" type="checkbox"/>		Link	Click	Name=default innerText=General Information	
5	8	<input checked="" type="checkbox"/>		CheckBox	Set_Value	Name=#ICCorrectHistory	Y
6	9	<input checked="" type="checkbox"/>		Text	Set_Value	Name=CUST_AL_SRCH_CUST_ID	1000
7	10	<input checked="" type="checkbox"/>		Button	Click	Name=#ICSearch	
8	11	<input checked="" type="checkbox"/>		Text	Set_Value	Name=CUST_ADDRESS_ADDRESS1\$0	20 N Wacker
9	12	<input checked="" type="checkbox"/>		Text	Set_Value	Name=CUST_ADDRESS_ADDRESS2\$0	Suite 1870
10	13	<input checked="" type="checkbox"/>		Text	Set_Value	Name=CUST_ADDRESS_CITY\$0	Chicago
▶ 11	14	<input checked="" type="checkbox"/>		Text	Set_Value	Name=CUST_ADDRESS_STATE\$0	IL
12	15	<input checked="" type="checkbox"/>		Text	Set_Value	Name=CUST_ADDRESS_POSTAL\$0	60606
13	16	<input checked="" type="checkbox"/>		Page	Save		
14	17	<input checked="" type="checkbox"/>		Browser	FrameSet		
15	18	<input type="checkbox"/>		Link	Click	id=pthdr2logout	
*		<input checked="" type="checkbox"/>					

Leverage PTF in your next project

- Identify and plan PTF usage early
 - Will take time to migrate scripts to PTF
- Train end-users and development staff on how to utilize PTF record and playback features
- Focus on key business processes first
- Make sure test cases ready for Unit Testing and System Testing
 - Provides opportunity to “test” testing framework prior to UAT

When to use PTF

- New Implementation projects
- Limited/No existing testing documentation
- Limited functional resources to participate in testing
- Highly customized environment
- Significant ongoing development projects
- Routinely deploying patches and fixes
- Committed to PS Platform

PTF Best Practices

- **Consistent Naming Conventions**
 - Be descriptive by including module, priority, and project name in description
- **Record test whenever possible**
 - Record every testing step to be more accurate than manually constructing through Test Editor
- **Clean Up Tests**
 - Review tests to remove unnecessary steps in process
- **Use Process Object Types**
 - Eliminates need for steps in run processes
- **Dynamic Tests**
 - Reserved words, variables, conditional logic

PTF in Action

- Demo



Questions?