The following is intended to outline our general product direction. It is intended for information purposes only, and may not be incorporated into any contract. It is not a commitment to deliver any material, code, or functionality, and should not be relied upon in making purchasing decisions. The development, release, and timing of any features or functionality described for Oracle’s products remains at the sole discretion of Oracle.
Agenda

• Examining Current Trends

• PeopleSoft HCM Roadmap

• Supporting HCM Beyond PeopleSoft
What’s on Your Mind??
*Talent Management Drivers*

**Shrinking Workforce**

- 1950s: 1.1%
- 1960s: 2.6%
- 1970s: 1.7%
- 1980s: 1.6%
- 1990s: 0.8%
- 2000s: 0.4%
- 2010s: 0.2%
- 2020s: 0.3%
- 2030s: 0.2%
- 2040s: 0.2%
- 2050s: 0.0%

*Labour Force Growth (Population = 16-65)*

**Multiple Generations**

**Disengaged Employees**

**Leadership Development**
HCM Challenges Today Are Broad and Diverse

Global Capabilities: Configurable Service Across Cultures

Organizations must be prepared to manage talent globally.
Business Challenges Today

- What customers are telling us…
  - “Help me cut costs.”
  - “I need to adapt to changing business conditions.”
  - “We need to access information to make better decisions.”
  - “My business needs to be secure, available and protected.”
  - “We must achieve stated business results.”

Having the right talent in the right roles drives future success!
Provides Organizations with Challenges and Opportunities
Agenda

- Examining Current Trends
- PeopleSoft HCM Roadmap
- Supporting HCM Beyond PeopleSoft
Oracle’s Applications Strategy

Applications Unlimited Delivers More…

✔ More **Choice**
  - Upgrade To New Releases
  - Deploy Additional Modules
  - Remain On Existing Applications
  - Adopt Next-Generation Technology

✔ More **Value**
  - Dedicated Development Teams
  - Continued Product Enhancement

✔ More **Visibility**
  - Customer-Driven Product Roadmaps

✔ More **Time**
  - No Forced Upgrades
  - Oracle Lifetime Support
Oracle’s Applications Strategy
Applications Unlimited

Oracle’s plan to continue providing ongoing enhancements to current HCM applications beyond the delivery of Oracle Fusion Applications

- PeopleSoft
  - Latest Release: Version 9.0
  - Next Release: Version 9.1
  - Unlimited

- E-Business Suite
  - Latest Release: Version 12
  - Next Release: Version 12.1
  - Unlimited

- Fusion
  - Latest Release: Unlimited
  - Next Release: Unlimited
Continued Product Releases

*Working with Our Customers*

PeopleSoft HCM Customer Advisory Board

- Purpose: Validate future roadmap choices with the customer community
- Customers from various industries and all sizes
- Over 50 customer members

![Logos of Payless, Boeing, CSU, Ascension Health, Cox Communications, JEFFCO Public Schools, American Express, Toyota, and Credit Suisse]
Human Capital Management (HCM)

Global Special Interest Users Groups (SIGs)

PeopleSoft & JD Edwards
- Benefits SIG
- ELM SIG
- ePerformance SIG
- JDE HCM SIG
- Payroll for N.A. SIG
- Recruiting SIG
- Staffing SIG
- Global HCM SIG
- Australia/New Zealand SIG

Oracle E-Business Suite
- Time & Expense SIG
- Tutor & UPK SIG

PeopleSoft & Oracle E-Business Suite
- Global HCM SIG

(formerly GPUG)
Working with Customers to Deliver Value

Customer Interactions for PeopleSoft 9.1

- Customer Site Visits / Remote Meetings: 1178
- Oracle Corporate Visit Center Meetings: 402
- User Group Meetings: 215
- Focus Groups: 62
- Customer Advisory Board Meetings: 32
Human Capital Management Themes

- Integrated Talent Management
- Managing a Global Workforce
- Employee Engagement
- Measure Impact of Human Capital
- HCM Transformation
- HCM Leadership
# PeopleSoft HCM

## Product Portfolio

### Business Intelligence
- Interactive Dashboards
- Reporting & Publishing
- Ad-hoc Analysis
- Proactive Alerts
- Disconnected Analytics
- MS Office Plug-in
- Web Services

### Enterprise Talent Management
- Talent Acq Mgr
- Candidate Gateway
- ePerformance
- Learning Management
- eComp Mgr
- Oracle Incentive Comp
- Profile Manager

### Workforce Service Delivery
- eCompensation
- eProfile
- eDevelopment
- eBenefits
- ePay
- HRMS Portal Pack
- Help Desk for HR

### Global Core & Workforce Mgmt
- Absence Mgmt
- Time & Labor
- Core HR
- Benefits Admin
- Pension Admin
- Resource Mgmt
- North American Payroll
- Global Payroll
- Payroll Interface
- Stock Admin
- Workforce Scheduling
- Services Procurement

### User Productivity Kit

---

**Oracle**
PeopleSoft HCM 9.1
Release Summary

HCM Investment Strategy

• Demonstrated Thought Leadership
  – Succession Planning
  – Career Planning
  – Expansion of Talent Management

• Commitment to Customer Satisfaction
  – Manager Self Service Compensation
  – Greater Usability

• Expansion in Industry & Global Markets
  – Contract Pay
  – ELM Localizations

• Legal and Regulatory Updates

• Integration to Other Oracle Solutions

• Ongoing Adoption of Fusion Technology Components
Talent Management
Improving The Talent Management Lifecycle

- Ensure business continuity through workforce planning with succession planning using real-time visualization.
- Integrated compensation and performance enables “pay-for-performance” and motivates and retains workers.
- Dashboards personalize a user's widgets and streamline processes.
- Talent Pools to facilitate collaboration for managing your talent.
- Operationalize business plans faster through goal alignment.
- Integration to Microsoft Outlook to streamline recruiting processes.

Talent Management
Profiles & Objectives
Planning
Measure & Report
Compensation
Reward
Analyze
Advance
Career Development
Succession Planning
Develop
Learning
Evaluate
Recruiting
PeopleSoft HCM 9.1
Success with Recruiting Solutions

• Integrations
  ▶ Microsoft Outlook Calendar
  ▶ PeopleSoft Profile Manager
  ▶ PeopleSoft Services Procurement

• Online Job Offers
  ▶ Candidates View and Accept Job Offers via Candidate Portal

• Screening and Questionnaire Enhancements
  ▶ Knock-out Questions
  ▶ Default Question Sets

• Better Usability
  ▶ Improvements for Both Candidates and Recruiters
  ▶ Print Job Openings and Resumes

Better and More Efficient Recruiting
PeopleSoft HCM 9.1

Maximizing Performance with ePerformance

GOAL ALIGNMENT
• The ability to identify and visually display multiple levels of organizational goals

EMPLOYEE ACCESS
• Grant employees access to relevant organizational goals
• The ability for employees to adopt or create related objectives

OBJECTIVE DISTRIBUTION
• The ability for managers to create and push specific objectives to one or more employee performance documents

USABILITY ENHANCEMENTS
• Streamlined documentation creation process
• Additional performance document configuration options
2007 Business Objectives for the Employee Benefits Organization

Department: 12000 – Employee Benefits
Period: 01/01/2007 thru 12/31/2007

Welcome to the objectives website for the Finance and Legal Organization. This site is to help you gain clear insight into the top priorities the Finance organization has on its list for 2007. Please review the mission critical objectives that my organization has as top priorities for 2007.

Clara J. Cereza
Director Employee Benefits

Use these Objectives   Find Different Objectives

Expand All Sections   Collapse All Sections

▼ Section 1 - People
Description: People are very important to the wellbeing of our organization. This section focuses on our increasing and maximizing the level within our employee population.

Expand All Objectives   Collapse All Objectives

Objective 1: Review Employee Health Care Benefits
Objective 2: Increase Employee Dental Benefits
Objective 3: Increase Employee Retention

▼ Section 2 - Technology

Expand All Objectives   Collapse All Objectives
PeopleSoft HCM 9.1

Learning Management Enhancements

- Improved Usability
- Adoption of PeopleSoft Approvals Framework
- Enhanced Notifications
- Learning Portfolio Management
- Learning Objectives

Increase Flexibility Needed to Managing a Developing Workforce
PeopleSoft HCM 9.1

Career Planning for Your Talent

- Review Learning Needs and Enrollment
- Review Development Plan
- Employee Self-Service Career Planning

Ability to Define a Career Path and Develop a Career Plan
Deploy an Integrated, Standardized Compensation Process Globally
PeopleSoft HCM 9.1

Compensation Summary - Administrator

Allocate Various Compensation Types

Plan Compensation Based on Budget
PeopleSoft HCM 9.1
Compensation Summary - Manager

**Compensation Task**

**Update Compensation**

Below are the Direct Reports for Operations. You may enter your proposals here or click the link to view the employees comparative data and enter proposals.

Edward Heal

**Cycle:** 2007 Year End Merit Cycle
**Cycle Period:** 01/01/2007 - 12/31/2007
**Group:** Operations - In Progress

**Display Currency:**

**Display Individual's Data In:**

- **Chart:** Salary Funding Comparison

**Compensation Summary**

<table>
<thead>
<tr>
<th>Plan Funded</th>
<th>My Direct Funded</th>
<th>My Direct Changes</th>
<th>My Direct Balance</th>
</tr>
</thead>
<tbody>
<tr>
<td>Merit</td>
<td>0</td>
<td>0</td>
<td>244,000</td>
</tr>
<tr>
<td>Promotion</td>
<td>0</td>
<td>10,000.00</td>
<td>25,000.00</td>
</tr>
<tr>
<td>Bonus</td>
<td>0</td>
<td>0.00</td>
<td>76,000.00</td>
</tr>
<tr>
<td>SAR</td>
<td>2500.00</td>
<td>0.00</td>
<td>0.00</td>
</tr>
<tr>
<td>ISO Stock</td>
<td>50,000</td>
<td>0</td>
<td>50,000</td>
</tr>
</tbody>
</table>

**Direct Reports**

<table>
<thead>
<tr>
<th>Name</th>
<th>Notes</th>
<th>Exclude</th>
<th>Rating</th>
<th>Currency</th>
<th>Current Salary</th>
<th>Other Changes</th>
<th>Change Amount</th>
<th>Change Percent</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ana Rodriguez</td>
<td></td>
<td></td>
<td>3-Average</td>
<td>USD</td>
<td>90,000.00</td>
<td>10,000.00</td>
<td>11.11%</td>
<td>100,000.00</td>
</tr>
<tr>
<td>Aisha Williams</td>
<td></td>
<td></td>
<td>2-Exceeds Expectations</td>
<td>USD</td>
<td>95,000.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
</tr>
<tr>
<td>Michael Brown</td>
<td></td>
<td></td>
<td>1-Outstanding</td>
<td>USD</td>
<td>50,000.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
</tr>
<tr>
<td>Joel Hermansson</td>
<td></td>
<td></td>
<td>2-Exceeds Expectations</td>
<td>USD</td>
<td>110,000.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
</tr>
</tbody>
</table>

**Compensation Allocation Decision Making Tools**

- Plan Compensation Based on Performance
- Leverage a Grid-Like User Interface
PeopleSoft HCM 9.1
Succession Planning Using Real-Time Visualization

- Employee Search
- Collapse Sub-Screens As Needed
- Flag Key Persons
- View Organizational Hierarchy
- View Potential Successors in a Configurable “Rating Box” (i.e. 9 Box)
PeopleSoft HCM 9.1

Expanded North America Payroll Functionality

Flexible Pay
- Configurable Retroactive Pay
- Contract Pay to Accommodate Varying Compensation Models (e.g. Education)

Integration
- Greater Synchronization and Integration Between HCM and Financials

Data Loading
- Additional Flexibility to Load Data into Paysheets from Microsoft Excel

Expanded Balances
- Increase the Accumulated and Check Dollar Balances for Earnings and Taxable Wages

Increase Flexibility Needed to Managing a Developing Workforce
PeopleSoft HCM 9.1

Expanded Global Payroll Functionality

**Templates**
Support the Basic Positive Input Interface

**Temp Tables**
Maintaining and Cleaning-up Global Payroll Core Temp Tables Through the Global Payroll Core Process

**Batch Processing**
Stop Earnings/Deductions Through the Batch Process

**Country Extension**
Planned Enhancements to Global Payroll – China
New Country Extension for Global Payroll – Thailand

*Increase Flexibility Needed to Managing a Developing Workforce*
PeopleSoft HCM 9.1
*Time & Labor Improvements*

- Integration with Oracle Workforce Scheduling
- Adoption of PeopleSoft’s Robust Approval Framework for Approvals and Delegations
- Provide Time Reporting Codes to Enhance Mass Time Reporting
- Import/Export Rules via an Online Tool
- Greater Synchronization and Integration Between HCM and Financials with Full Project ChartField Integrations

*Improve Workforce Productivity*
*Increase User Satisfaction*
PeopleSoft HCM 9.1
Absence Management Enhancements

- Absence Management Integration with Oracle Workforce Scheduling
- Administer the Start and End Time in:
  - Absence Event Entry*
  - Absence Employee and Manager Self Service*
- Extended Leave Framework (e.g. support FMLA)
- PDF and Document Attachments
- Leave Donations
  *Using Oracle Workforce Scheduling

Reduce Administrative Overhead Associated with Managing Absences
Taking the user experience to the next level...

Lower Training Costs and Foster User Adoption
New Look and Feel with PeopleTools 8.50
Navigation Menu Only Appears When Pulled Down
Includes Search
Tagged Objects Show Actionable Information
Type Ahead Searching
Modal Search Windows

New Grid with Scrolling, Locked Columns, Drag-&-Drop...
### Related Content: Threaded Discussions

**Update Salary Plan Information - 2008**

- Expected reassignment
- Data reviewed - no change needed for fiscal '07
- Update Salary Plan Information
- Initial Job Record added
Related Content: Analytics in Context
No Flashing "Processing" in Upper Right Corner
PeopleSoft HCM 9.1
Leveraging Web 2.0

Comprehensive Integrated Policies and Practices
Profiles Recruiting Performance Learning Development Compensation
Develop Continuously Identify Opportunities Connect Performance

Unified Context Aware User Experience
Wikis Blogs Forums Chats Documents Content Collaborative Space
Maximize Productivity Eliminate Context Shifts Connect People

Improved Productivity
Delivery Update on PeopleSoft 9.1

Release Progression

- Identify and Define Requirements
- Create Release Plan
- Design
- Code
- Test
- Deliver

In Progress

Requirements From:
- User Groups
- Direct from Customers
- PeopleSoft Customer Advisory Boards
- PeopleSoft Strategy Councils
- Industry & Global Product Strategy
  - Support
  - Market Factors

Planned Release Timeline

PeopleSoft Release 9.1 and PeopleTools 8.50 Target Rollout

2008

2009
Future Upgrade Options

Planned Upgrade Options For PeopleSoft 9.1

Upgrade Scripts Available on Customer Connection After GA
Agenda

• Examining Current Trends

• PeopleSoft HCM Roadmap

• Supporting HCM Beyond PeopleSoft
HCM Applications for Customers

Continued Innovation

• New HCM Applications to Support Oracle Customers
  • Applications can be leveraged by more than one Oracle Application product line as well as multiple versions
    • Talent Pool Management
    • HCM and Business Intelligence
  • Allows for ongoing delivery and more frequent releases around HCM innovation
  • Enabled to allow easy deployment, maintenance, and upgrades

• Cross-Product Integration
  • HCM and CRM crossover to deliver Employee Engagement Solutions
  • Oracle Incentive Compensation (OIC) integrated to PSFT HCM
  • HCM HR Helpdesk Integration to HCM EBS
  • iPhone for Recruiting
HCM Applications for Customers

Continued Innovation

• New HCM Applications to Support Oracle Customers
  • Applications can be leveraged by more than one Oracle Application product line as well as multiple versions
    • Talent Pool Management
    • HCM and Business Intelligence
  • Allows for ongoing delivery and more frequent releases around HCM innovation
  • Enabled to allow easy deployment, maintenance, and upgrades

• Cross-Product Integration
  • HCM and CRM crossover to deliver to deliver Employee Engagement Solutions
  • Oracle Incentive Compensation (OIC) integrated to PSFT HCM
  • HCM HR Helpdesk Integration to HCM EBS
  • iPhone for Recruiting
Introducing Talent Pool Management

*Communicate, Measure, Develop*

**Recruiting Challenges**
- Expand recruiting reach
- Convert more prospects to applicants
- Increase the percentage of qualified applicants
- Reduce time and cost to fill posted jobs

**Addressed Through Talent Pool Management**
- Build and maintain a pool of current and future candidates using social networking and prospect communication tools
- Foster ongoing prospect relationships through and contact management and easy-to-use campaigns
- Quickly empower recruiters and hiring managers
Functionally Deep Applications

Talent Pool Management

Campaign Analysis
Quick Link Task Icons
Campaign Status List
Campaign Activity Feed
Functionally Deep Applications

**Talent Pool Management**

- Carousel Viewing of Library Items
- Filter Using Tags
- Template Social Data
- Key Word Tagging
- Overall Template Response Rates
HCM Applications for Customers

Continued Innovation

• New HCM Applications to Support Oracle Customers
  • Applications can be leveraged by more than one Oracle Application product line as well as multiple versions
    • Talent Pool Management
    • HCM and Business Intelligence
  • Allows for ongoing delivery and more frequent releases around HCM innovation
  • Enabled to allow easy deployment, maintenance, and upgrades

• Cross-Product Integration
  • HCM and CRM crossover to deliver to deliver Employee Engagement Solutions
  • Oracle Incentive Compensation (OIC) integrated to PSFT HCM
  • HCM HR Helpdesk Integration to HCM EBS
  • iPhone for Recruiting
HR Organizations Struggle to Understand the Workforce

**KEY CHALLENGES**

| **No Accurate View of Workforce Profile** | Unable to agree on a uniform definition of Headcount  
Lack of insight into HR data to understand overall Workforce  
Inconsistent business processes lead to inconsistent data |
| **Lack of Visibility into the Effectiveness of HR Programs** | Unable to correlate workforce performance to HR programs  
Difficult to create a historical profile of the workforce  
Difficult to correlate compensation to employee performance |
| **Poor Alignment of Talent Management Strategy with Corporate Strategy** | Difficult to correlate recruiting program effectiveness to corporate performance  
Difficult to measure effectiveness of training programs relative to employee performance |
| **Time Wasted Gathering Data to Manage and Report** | Continued reliance on management-by-spreadsheet  
Scattered data in multiple systems  
No single source of the truth |
**HCM Analytics to Support Your Workforce**

*NEW* Talent Management and Recruiting Dashboards

- **Configurable tool** that brings talent-related reporting and analytics data to the desktop with a specific focus on key metrics that cross products and/or processes.
- Provides organizational leaders, line managers and HR professionals insight into talent issues.
- Guided navigation, graphical displays and tools allow ability to analyze and react to business issues.
- Receive early warning of potential problems that could impact their ability to meet business objectives.
- Enables linkage of Talent Management initiatives to business objectives and results.
- Provides deep insight into Recruiting business processes.
- Leveraging OBIA platform.
- Support for PeopleSoft 8.9 and 9.0.
Configurable Dashboards

Drill Down Capability

Multi-Dimensional Analysis of Workforce Performance
HCM Applications for Customers

Continued Innovation

• New HCM Applications to Support Oracle Customers
  • Applications can be leveraged by more than one Oracle Application product line as well as multiple versions
    • Talent Pools Management
    • HCM and Business Intelligence
  • Allows for ongoing delivery and more frequent releases around HCM innovation
  • Enabled to allow easy deployment, maintenance, and upgrades

• Cross-Product Integration
  • HCM and CRM crossover to deliver to deliver Employee Engagement Solutions
  • Oracle Incentive Compensation (OIC) integrated to PSFT HCM
  • HCM HR Helpdesk Integration to HCM EBS
  • iPhone for Recruiting
Hearing the Employee Voice

Enabling Employee Engagement with Workforce Connect

• An Engaged Workforce = A Retained and More Product Workforce
• Deploy coordinated, targeted surveys to the workforce to gauge and understand:
  • Employee Satisfaction & Engagement
  • Offboarding – Reasons for departure
  • Onboarding – Developing relationships, building communities
• Identify trends in feedback, segmented by workforce demographics like Department, Location, Job, Years of Service
• Take action to improve your workplace based upon new knowledge of the workforce
• Deploy rich text, targeted, personalized, newsletter communications to the workforce
PeopleSoft Integration to OIC

- Manage all your compensation programs - including Sales Commissions

- PeopleSoft HCM Integration with Oracle Incentive Compensation

- Integration with Job data
  - Certified with 8.9 and 9.0
  - Utilizes the Person model
  - Eligibility to Incentive Plans
  - Formula assignments

- More information will be forthcoming...stay tuned
**PeopleSoft HR HelpDesk Integration with EBS HCM**

**Enabling Centralized Workforce Service Delivery**

A collaborative framework for streamlining operations in an employee-centric help desk

- Optimize HR practices across the workforce
- Maximize productivity, lower costs
- Increase worker satisfaction
- Provide support through the full HR lifecycle (hire-to-retire)
- HelpDesk and HR integration for seamless issue resolution

**HelpDesk for Human Resources**

- Assess Inquiry
- Create Case
- Resolve Case
- Analyze

- 360 Degree View of Employee
- Quick Codes SLAs
- Specialist Assignment
- Knowledge Management
- HR Access & Updates
- Closure Email
- Analytics Reporting
- Satisfaction Surveys

**Core HR, Payroll, Benefits, etc. (need EBS core modules listed here)**
Oracle Business Applications for the iPhone

- A new class of task focused applications
  - Allows secure access to business information on the go
    - Performance Indicators
    - Contact Information
    - Sales data
  - Allows execs to respond quickly and easily to common tasks
    - Approvals for Finance, Purchasing, HR and Sales
Oracle Business Approvals for Apple iPhone

- A mobile application to enhance productivity via immediate notification of key tasks needing review or action, with relevant analytics provided to support decision-making.

- Key Features:
  - Optimized for superior usability on iPhone
  - Oracle EBS & Siebel Approvals:
    - Expense
    - HR Job Offer & Vacancies
    - Purchase Requisition
    - Sales Quotes
  - Oracle BI Apps pre-built Analytics
  - Oracle SOA / BPEL technology

- Target Users: Managers and Executives