RELEASE VALUE PROPOSITION /Executive Overview ............... 5
PeopleSoft Enterprise Human Capital Management 8.9 ................ 6
  Total Ownership Experience ............................................................ 6
  Implementation ................................................................................. 7
  Usability ............................................................................................ 8
  Supportability .................................................................................. 8
  Total Ownership Experience Summary ........................................ 9
Plan, Attract, Onboard ..................................................................... 11
What’s New in PeopleSoft Enterprise Recruiting Solutions 8.9? ...... 12
  New Architecture and Packaging .................................................. 12
  Enhanced Candidate Experience .................................................... 13
  Enhanced Usability ........................................................................ 14
  Enhanced Integration ....................................................................... 15
  Additional Core Features ................................................................. 16
Assess, Design, Develop ................................................................. 19
What’s New in PeopleSoft Enterprise ePerformance 8.9? .......... 20
  Multisource Functionality (360-Degree and Multirater Capabilities) 20
  Employee-Initiated Performance Process ..................................... 22
  User Interface Enhancements .......................................................... 22
  Enhanced Writing Tools ................................................................ 23
  Ability to Delete Documents ............................................................ 24
  Improved Administrative Capabilities .......................................... 24
  Integration .......................................................................................... 26
Optimize, Track, Monitor ................................................................. 28
What’s New in PeopleSoft Enterprise Human Resources 8.9? ....... 29
  The Person Model .......................................................................... 30
  Contingent Workforce Management ............................................ 30
  Persons of Interest Management ..................................................... 32
  Configurable Search/Match .............................................................. 33
  Configurable Actions/Action Reasons ........................................... 33
  New Flexible Row-Level Security .................................................. 35
  Even Faster Fast Views .................................................................. 36
  Management by Labor Agreement ............................................... 36
  PeopleSoft Enterprise eProfile Manager Desktop Enhancements 42
  France ............................................................................................... 42
What’s New in PeopleSoft Enterprise Payroll for North America 8.9? 44
  Ease of Use ........................................................................................................ 44
  Integration ........................................................................................................... 44
What’s New in PeopleSoft Enterprise Time and Labor 8.9? 46
  Scheduling ........................................................................................................... 47
  Time Reporting .................................................................................................... 47
  Business Process Controls ................................................................................. 50
  Financials Integration .......................................................................................... 52
  Performance ........................................................................................................ 55
What’s New in PeopleSoft Enterprise ePay 8.9? ............................................. 55
  Ease of Use ........................................................................................................... 56
What’s New in PeopleSoft Enterprise Absence Management 8.9? ......... 56
  PeopleSoft Enterprise Absence Management Features .................... 57
What’s New in PeopleSoft Enterprise Workforce Analytics 8.9? ...... 62
  PeopleSoft Enterprise HRMS Warehouse ......................................................... 63
  PeopleSoft Enterprise Workforce Scorecard ............................................. 65
  Improved Total Cost of Ownership ................................................................. 66
  Scorecards on the Multidimensional Warehouse (MDW) .................... 66
What’s New in PeopleSoft Enterprise Process Integration Pack for SAP 8.9? ................................................................................................................................. 67
  Ease of Use ........................................................................................................... 67
  Speedier Implementation .................................................................................. 68
  Maintainability ................................................................................................... 68
What’s New in PeopleSoft Enterprise 8.9 to PeopleSoft EnterpriseOne Integrations? ....................................................................................................................... 68
  PeopleSoft EnterpriseOne Address Book .................................................... 69
  PeopleSoft EnterpriseOne General Ledger ..................................................... 69
PeopleSoft Workforce Service Delivery: PeopleSoft Enterprise HelpDesk for Human Resources ................................................................. 70
  Knowledge Management .................................................................................. 71
  Service Level Agreement Management and Reporting ........................ 72
  Employee Self Service ...................................................................................... 72
  Service Analytics ............................................................................................... 73
  System Configurability ..................................................................................... 73
  Multichannel Communications ....................................................................... 74
  Email Response Management System ........................................................ 74
  Computer Telephony Integration (CTI) .......................................................... 75
What’s New in PeopleSoft Enterprise Global Payroll 8.9? 76
  Ease of Use ........................................................................................................... 76
  Extended Functionality ...................................................................................... 79
  Integration ........................................................................................................... 84
  Performance ....................................................................................................... 84
What’s New in PeopleSoft Enterprise Global Payroll for the U.K. 8.9? 85
  Ease of Use ........................................................................................................... 85
  Additional Delivered Rules for Speedier Implementation ........................ 87
  Standard Data Extract ...................................................................................... 89
What’s New in PeopleSoft Enterprise Global Payroll for Germany 8.9? ................................................................................................................ 89
  eGovernment ........................................................................................................ 90
  Old-Age, Part-Time Tax Enhancement .................................................................. 91
What’s New in PeopleSoft Enterprise Global Payroll for Switzerland 8.9? ................................................................................................................ 91
  Pension Interface (BVG) ......................................................................................... 92
  Banking Enhancements ......................................................................................... 92
  Legislative Reporting ........................................................................................... 93
What’s New in PeopleSoft Enterprise Global Payroll for France 8.9? 93
  Retroactivity ........................................................................................................ 93
  Enhancements to DADS ....................................................................................... 94
  Enhancements to Banking ..................................................................................... 95
What’s New in PeopleSoft Enterprise Global Payroll for Japan 8.9? 95
  Support for Multiple Jobs ..................................................................................... 96
  Social Benefit Features ......................................................................................... 96
  Deeper Localization Support ............................................................................... 96
Plan, Incent, Reward ............................................................................................. 97
  Dependent/Beneficiary Enhancements ................................................................ 97
  Multiple Annual Benefits Base Rates ................................................................... 98
  ERISA Enhancements .......................................................................................... 99
What’s New in PeopleSoft Enterprise Sales Incentive Management 8.9? ................................................................................................................ 99
  Enhanced User Interface ....................................................................................... 101
  New Administrative Tools .................................................................................... 101
  Infrastructure Enhancements ............................................................................... 102
  New Industry Template for Banking and Capital Markets ......................... 102
RELEASE VALUE PROPOSITION /EXECUTIVE OVERVIEW

This document provides an overview of the new features and enhancements planned for Oracle’s PeopleSoft Enterprise Human Capital Management (HCM) 8.9. It is a roadmap intended to help you assess the business benefits of PeopleSoft Enterprise HCM 8.9 and plan your IT projects and investments. HCM is used throughout this document as a means of grouping our extensive family of products from Oracle’s PeopleSoft Enterprise Human Resources 8.9 and Oracle’s PeopleSoft Enterprise Performance Management 8.9 to Oracle’s PeopleSoft Enterprise Global Payroll 8.9 and Oracle’s PeopleSoft Enterprise Learning Management 8.9.

This document is only a preliminary version and is not subject to your license agreement or any other agreement with the company. It contains intended developments and functionalities and is not meant to be binding to any particular course of business, product strategy, or development. Please note that this document is subject to change at any time without notice.

Throughout this document, you will find examples of our ingenuity at work. In each section of this document, you will find detailed descriptions of the new features, functions, and products planned for PeopleSoft Enterprise HCM 8.9, along with business benefits that our customers can achieve. We’ve organized this document according to the four main HCM business processes with a special introduction to PeopleSoft Enterprise HCM 8.9 overall, including our special focus on the Total Ownership Experience.

Review the table of contents to find the topics that interest you most. There, you will see that the document is divided into clearly delineated, product-related sections under each of the four business processes:

- Plan, Attract, Onboard
- Assess, Design, Develop
- Optimize, Track, Monitor
- Plan, Incent, Reward
PEOPLESOFTE NTERPRISE HUMAN CAPITAL MANAGEMENT 8.9

If you want an edge in a fast-changing business environment, look to your workforce. Find better ways to develop and deploy talent. Manage your people as mission-critical assets that can help you achieve higher levels of operating performance. When our customers asked for new strategies that could add value to traditional human resources management processes, we listened. Today, we continue to deliver on the promise of human capital management as a new way of doing business in which every employee—from the boardroom to the storeroom—contributes to business performance.

Human capital management, a business discipline powered by 17 years of HR leadership, is the only enterprise-wide strategy for unlocking the full value of your workforce. Your people determine the success of everything your organization does—from serving customers to running an efficient supply chain. PeopleSoft Enterprise HCM enables you to put the right people in the right jobs, develop and reward top performers, retain key talent for the long term, and increase efficiency and operating performance throughout your organization. With HCM, you can turn every employee into a competitive asset.

PeopleSoft Enterprise HCM 8.9 is our newest solution suite, providing the foundation for effective human capital management around the world. HCM applications promote a rapid return on investment—through reduced operational costs and increased efficiency—by connecting people to delivered business processes, automating common administrative tasks, and leveraging industry best practices. We offer the most technically advanced, comprehensive, and cost-effective human resources management product suite on the market today. This suite is built on a uniform, internet-based technology platform and delivers innovative functionality and embedded analytics. Seventy-three of the top 100 companies on the Fortune 500 list use our human resources management solutions.

Total Ownership Experience

No one has used technology to address the people-intensive processes of owning enterprise software—until now. In 2003, our management team made a commitment to address our customers’ total cost of owning PeopleSoft Enterprise applications. We are making installations and implementations faster, simplifying upgrades, offering real-time support and performance diagnostics, and delivering robust integration with other eBusiness software. This initiative, which quantifiably addresses reduction in implementation cost, usability, and supportability improvements, is called the Total Ownership Experience. It transforms the way you implement, maintain, and use enterprise software. Your results? Faster implementation. Greater end user productivity. Increased IT effectiveness. And a greater return from your software investment. In PeopleSoft Enterprise HCM 8.9, you will find new functionality and enhancements that deliver on the promise of the Total Ownership Experience.
Even before we started on this initiative, we were improving the enterprise application lifecycle. As a result, much of the groundwork for the Total Ownership Experience has already been laid, and it is yielding positive results.

We continue to raise the bar with the goal of improving implementations, operations, upgrades, and usability of enterprise applications by applying technology to improve all aspects of the customer experience. This initiative addresses all aspects of the enterprise application lifecycle.

We are investing in installation, configuration, and integration to dramatically reduce implementation time and costs. Like all of our applications, PeopleSoft Enterprise HCM 8.9 and PeopleTools 8.45 have a strong development focus on delivering the best Total Ownership Experience in the industry. New technology further automates support, increases quality, and streamlines upgrades to increase availability and decrease operational costs. Our continued investment in application usability will further increase user productivity and effectiveness.

Implementation

According to analysts, labor makes up 65 percent of the total project cost for an average ERP implementation. Total Ownership Experience automates the people-intensive process of installing, configuring, and integrating software. Continual improvements on installation, configuration, and integration, dramatically reduce implementation time and costs. With PeopleSoft Enterprise HCM 8.9 and PeopleTools 8.45, we are accomplishing this goal by making significant enhancements.

Process Improvements

- Improved installation documentation and training and delivery of new utilities designed to make the installation process easier and faster.
- New implementation wizards and templates designed to lead you through software setup and configuration management.
- Out-of-the-box multivendor business process integration.
- More than 200 component interfaces delivered to load high-volume reference tables.

Results

- PC-like installation with Oracle’s PeopleSoft Enterprise Express Install. Reduction in upgrade installation time.
- Faster to configure. Step-by-step implementation wizard (Setup Manager).
- Connector technology for SAP to reduce integration time.
- Reduction in complexity and time to load data into critical application tables.
Usability

PeopleSoft Enterprise HCM 8.9 with PeopleTools 8.45 technology delivers on the Total Ownership Experience by enhancing usability across the product suite. It reduces the time and number of clicks needed for key processes, establishes industry leadership in task completion rates, and makes marked improvements in the usability of key functions throughout the HCM suite. We achieved these milestones by doubling our investment in our usability team and increasing customer participation in validating the usability of the application.

- We are conducting usability tests for all top transactions in Oracle’s PeopleSoft Enterprise Benefits Administration, Oracle’s PeopleSoft Enterprise eCompensation, Oracle’s PeopleSoft Enterprise ePay, Oracle’s PeopleSoft Enterprise eRecruit, Oracle’s PeopleSoft Enterprise Time and Labor, Oracle’s PeopleSoft Enterprise Learning Management, Oracle’s PeopleSoft Enterprise Sales Incentive Management, and Oracle’s PeopleSoft Enterprise Payroll for North America.
- The key metrics we are monitoring include task completion rates and click counts.
- Specific usability enhancements across the applications include better titles, section headings, color separations, and a new portal-style interface for recruiters called the Recruiter Console.
- We now conduct performance and functional testing by using real customer data.

Results

Higher productivity and decreased training costs.

Less time and fewer clicks required for key processes.

Recruiter Console and Applicant Console.

Functional area navigation pages.

Better performance and scalable applications.

Supportability

PeopleSoft Enterprise HCM 8.9 and PeopleTools 8.45 incorporate extensive improvements in the areas of supportability, performance, and upgrades. We now offer three new system-aware diagnostic and support tools as part of the PeopleTools 8.44 Total Ownership Experience release, including Change Assistant, Performance Monitor, and Diagnostic Framework. These tools are designed to automate your software update process and to streamline your application performance and issue diagnostics. Together, these tools enable you to decrease the amount of time your IT staff spends maintaining your PeopleSoft Enterprise applications. In turn, this helps you to reduce your overall total cost of ownership.
**Process Improvements**

- Diagnostic and troubleshooting improvements that reduce customer time spent on calls and enable faster case resolution.
- Embedded diagnostic scripts as well as single-click maintenance loads.
- Automated diagnostics for continuous performance optimization.
- Reduced number of service packs and improved utilities to reduce upgrade time.
- Quarterly Fix Packs now available to facilitate easier application of patches and updates.
- Upgrade paths that are volume tested with real customer data.
- New performance quality benchmarks that ensure that no software is shipped with outstanding performance incidents.

**Results**

- Automatic detection and delivery of software updates and patches (Change Assistant).
- Performance monitoring tools packaged with PeopleTools to allow instrument-level tuning.
- Major reduction in upgrade downtime.
- Reduction in performance incidents, as well as application performance benchmarks available at general availability.

**Total Ownership Experience Summary**

More than 2,700 employees are focused on Total Ownership Experience initiatives. Success measurements and management by objectives are directly tied to 25 planned releases, 684 separate projects, and 115 identified line items. In all, we will spend more than $800 million to ensure that these directives remain our primary focus and that we can consistently deliver on the promise of Total Ownership Experience for our customers. In fact, our customers are already showing measurable results from using Oracle’s PeopleSoft Enterprise 8.8 applications with Total Ownership Experience enhancements. They can now implement, use, and maintain their PeopleSoft Enterprise applications more quickly and easily, increasing user value and lowering their overall total cost of ownership.

**PricewaterhouseCoopers**

This global professional services firm has completed the smoothest software upgrade in its history. PricewaterhouseCoopers (PwC), a global professional services firm, upgraded to Oracle’s PeopleSoft Enterprise HCM 8.8 (Service Pack 1) from PeopleSoft 7.5, extending its HR system and delivering employee self service to 25,000 staff and retirees in the United States. PwC initially implemented
an upgrade to Oracle’s PeopleSoft Enterprise Human Resources, successfully adding an upgrade to Oracle’s PeopleSoft Enterprise Payroll just three and a half months before the system went live. The company is moving toward a single instance of HCM across its worldwide operations.

- Implementation was faster and less expensive than expected, with the upgrade to PeopleSoft Enterprise 8.8 taking half the time it took for 7.5 and costing just one-sixth as much.
- Design, code, and testing for the upgrade to PeopleSoft Enterprise 8.8 took one-tenth the hours and one-tenth the staff it took for 7.5, allowing PwC to reduce configuration staff from 20 people to eight working part-time on the project.
- Streamlined HR and payroll processing is saving the company about $7 million.
- The company accelerated overnight payroll processing from 17 hours to four—an 80 percent reduction.
- The company decreased full-time employees working on maintenance from seven to three and reduced overall IT support by seven percent.
- The implementation was not disruptive to end users.

**Remy Corporation**

This rapidly growing staffing company has achieved a 50 percent increase in user productivity for front-office staffing professionals. Remy Corporation, a leader in integrated staffing, recruiting, and consulting solutions, has experienced rapid success and growth over the past three years, presenting a major challenge to its business and technical infrastructure. The crucial need was to find software that would allow Remy to easily support, use, and manage an ever-growing amount of information.

- The ease of upgrade to PeopleSoft Enterprise 8.8 reduced Remy’s upgrade budget from $250,000 to $184,000, a 26 percent savings.
- The quality of the testing process, the upgrade scripts, and Oracle’s PeopleSoft Enterprise Upgrade Assistant contributed to a hassle-free implementation.
- Remy required only two testing steps before putting the software into production.
- The total upgrade effort took about three weeks, and the upgrade had minimal impact on end users.

**Regional Municipality of Durham**

This regional government municipality in Ontario, Canada, has reduced training by 40 percent. The Regional Municipality of Durham sought to improve cross-agency
financial management and collaboration while containing IT costs. The municipality is upgrading from PeopleSoft 7.5 to Oracle’s PeopleSoft Enterprise Financial Management 8.8 and PeopleSoft Enterprise HCM 8.8.

- The upgrade was implemented on schedule and within budget. The municipality reduced person-hours spent on the upgrade process by 15 percent, compared to the previous upgrade.
- The municipality configured its HCM application in 72 hours, with little manual configuration and minimal disruption to end users.
- The municipality implemented a demo and system environment in three days, compared with two weeks for other software.

**Plan, Attract, Onboard**

The first business process in the employee lifecycle is Plan, Attract, Onboard. This process is as critical to the workforce as raw materials are to a manufacturing assembly line. Our definition of this business process includes planning the workforce you need, attracting the best candidates, onboarding them efficiently, and providing the tools new hires need to work effectively from day one. This process includes the procurement of service or contract labor.

What makes us unique in this arena? We provide a single global platform across this entire business process that integrates with sophisticated HR functionality. We also provide robust functionality in the areas of sourcing, role based usability, and metrics. Our users have streamlined their recruitment processes and gained immediate returns. Some examples include:

- **University of California Berkeley**, which moved from a decentralized recruiting system to an enterprise approach. The university reported 40 percent fewer lost resumes and a reduction in average per hire fill time from 70 to 44 days.

- **Vail Resorts**, which implemented a kiosk-based recruiting front end so that applicants could come in and apply for jobs right on the mountain. Unlike the old system, in which applicants had to come back and interview, applicants can now interview on the spot— and HR reps can hire immediately. This new way of doing business helped streamline the hiring process from up to six days to two hours. And the six HR administrators who used to perform back-end HR processing are now on the front line, interviewing candidates.

- **Borgata**, the first new casino in Atlantic City in 13 years. Before Borgata had finished its new building, it had screened 60,000 people and hired 5,000 through Borgatajobs.com. The casino cut costs and eliminated paper by recruiting exclusively through the online system.

We introduced our core recruiting functionality in 2000 and have made major enhancements each year (8.0, 8.3, 8.8, 8.8 SP1). The market has responded with
enthusiasm. Five of the Fortune 10 companies and 155 of the Fortune 500 have selected Oracle’s PeopleSoft Enterprise Recruiting Solutions to meet their staffing needs.

What’s New in PeopleSoft Enterprise Recruiting Solutions 8.9?

PeopleSoft Enterprise 8.9 is a major release for Recruiting Solutions and will be the fourth generation of the product since its initial release in 2000. We have invested heavily in technical and functional product enhancements. These changes are primarily motivated by customer requests, with additional feedback coming from domain experts.

PeopleSoft Enterprise Recruiting Solutions 8.9 has five key themes:

- New architecture and packaging.
- Enhanced candidate experience.
- Enhanced usability.
- Enhanced integration.
- Additional core features.

New Architecture and Packaging

As part of PeopleSoft Enterprise Recruiting Solutions 8.9, we will be making major changes to the data model and componentizing products as well as merging and enhancing functionality. These changes will lead to a cleaner design and allow a much more efficient development and upgrade process as we continue to enhance the product suite. This functionality change will be accompanied by a product name change as well. Oracle’s PeopleSoft Enterprise eRecruit Manager Desktop product will be called Oracle’s PeopleSoft Enterprise Talent Acquisition Manager.

This new architecture will allow us to have a much cleaner interface structure with core PeopleSoft Enterprise HR. It will make it easier to test and implement bundles and service packs by looking at specific components instead of recruiting as a whole. It will also simplify support processes, as all users will be working off the same components, with variations being driven by security rather than license.

Note: PeopleSoft Enterprise eRecruit Manager Desktop is changing to Candidate Gateway to more clearly communicate that this module is the access point for candidates to interact with the system. Additional functionality will also be included (see the section “Enhanced Candidate Experience”).

Merging Federal Components

We are eliminating the need for federal customers to have a separate implementation of Recruiting Solutions by merging the two code lines. We will still maintain the actions that are required for federal functionality (such as transmutation and augmentation), and in some cases, the federal functionality will be available to commercial customers to allow them to be on the same code as
commercial customers. It will also allow them to use the self-service transactions that they couldn’t use in previous releases.

Enhanced Candidate Experience

Seeking candidates online is becoming standard practice for most companies. PeopleSoft Enterprise eRecruit Manager Desktop was designed for the candidate experience. In Oracle’s PeopleSoft Enterprise Recruiting Solutions 8.9, we will be enhancing the entire process and general usability for candidates.

Simplified Application Process

We will remove the wizard-driven approach in Oracle’s PeopleSoft Enterprise Recruiting Solutions 8.9. Instead, we are allowing customers to define the information they want to collect and how many steps they want to have applicants go through to present that information. Customers have the flexibility to choose a single-page application or multiple pages, depending on their business requirements.

Added Privacy Notice

A key compliance need for customers is the ability to conform to data privacy requirements. Chief among these requirements is a notice to candidates that explains how their data will be stored and used.

In PeopleSoft Enterprise Recruiting Solutions 8.9, we will introduce this notice. Customers can configure the text on this page to meet their compliance requirements. They can also require candidates to agree to the notice’s terms in order to apply. This feature is most applicable for global implementations.

New Recruiting Locations Table

In the new release, we will introduce a new table for locations within Recruiting Solutions. This table will be tied to the PeopleSoft Enterprise Human Resources table but will allow customers to configure different locations. With this change, customers will also be able to post positions with multiple locations and let candidates retrieve them.

Better Search

In this release, we are enhancing our search capabilities, changing the layout, and adding fields. Candidates will have the option to conduct a simple key word search or to move to an advanced search that will enable them to search on many more fields. Search will be enhanced to take advantage of the latest version of Verity, which will provide better performance and functionality. Results will be displayed more effectively, showing candidates their search criteria for context as well as the positions found. These features will provide candidates with more and better information as they search for positions.
**Enhanced Candidate Functionality**

In addition to the features listed previously, there are many enhancements for job seekers. These include:

- **Multiple applications per day.** Currently, if a candidate applies more than once in a day, the software only saves the most current application. In PeopleSoft Enterprise Recruiting Solutions 8.9, we will track each application separately, allowing candidates to send in multiple applications if they choose to do so.

- **Save applications on site.** When candidates have applied, they will have the option to save application details on the website. This capability will allow them to reuse the same application when they return or use it as a starting point to create a new application.

- **Save the job basket.** In the current release, if a candidate has jobs saved to the job basket and then ends the session, the jobs are removed from the basket. This is an obstacle for candidates who may have found a dream job but don’t have time to apply right away. In PeopleSoft Enterprise Recruiting Solutions 8.9, we will maintain the jobs in the job basket so that a candidate can access them on future visits to the website.

A company’s website is an important branding tool and often shapes a candidate’s first impression. With these changes, companies will be able to provide a better experience for target candidates.

**Enhanced Usability**

For PeopleSoft Enterprise Recruiting Solutions 8.9, we are moving from a transaction orientation to presenting screens that allow users to find information, context, and analysis before taking action. A good comparison is Amazon.com, which provides access to reviews and ratings to help users decide which book to purchase. We want to enable users to access the decision support information they need to select a candidate or apply for a job.

**New 360-Degree Views**

In PeopleSoft Enterprise Recruiting Solutions 8.9, we will be creating 360-degree views for applicants and requisitions. These pages will bring together the similar pages (history, activity, and detail) and present the information in one view. By providing these pages together, users will be one click away from most of the transactions they want without having to use the left navigation menu to get there. They will easily be able to see other activities or actions, which will help them decide to act on a candidate or change a requisition. This enhancement will allow better decision making for recruiters and managers.
**Easier-to-Use Layout and Design**

For PeopleSoft Enterprise Recruiting Solutions 8.9, we’ve assigned a user interaction designer to look at the entire product and bring it up to best practices in usability design. This process involves building prototypes, testing them with users in the design lab, and updating product designs to reflect the feedback.

As a result of this process, this release will include many changes to the interaction and layout of pages. One of the most visible changes will be the information architecture. The left navigation menu will be simplified, and the labels will be clarified to make it easier to choose the right actions. The new design will also present more simplified screens, with labels and text that will be easier for the casual user to manage.

**More Configuration Options**

One common issue for customers is word choice. Customers frequently request changes to a button label or instruction text. Many customers also want to be able to vary their recruiting processes and text for various audiences (for internal or external candidates or for different business units).

In PeopleSoft Enterprise Recruiting Solutions 8.9, we will make two tools available for customers to use in configuring their application: message catalog and text catalog. By using these tools, customers will be able to change instructional text, button labels, and hyperlinks to match their business needs. They also will be able to segment the application actions by internal and external candidates or by SetID.

By presenting information in a context, updating the product layout, and increasing the configuration options, we ensure that users will be able to make better decisions for applicant and requisition management.

**Enhanced Integration**

The ability to integrate with specialized vendors is a key need for Recruiting Solutions. Every customer has its own preferred vendors that it would like to integrate into the application. In PeopleSoft Enterprise Recruiting Solutions 8.9, we will be introducing a standard integration framework to help customers integrate easily with these vendors.

**More Options Resume Management**

In PeopleSoft Enterprise Recruiting Solutions 8.9, we are opening more options for resume management. Our open integration framework will allow customers to choose from many extraction tools, including Oracle’s PeopleSoft Enterprise Resume Processing or third-party vendors. By using XML, vendors will be able to feed resumes into the database for customers. This integration will enable customers to choose the extraction tool that best meets their needs. We have also enhanced the process to enable applicants to validate their information as it is entered into the system.
Finally, we have enhanced our source tracking to allow customers to track not only the referral source (such as online job board, employee referral, or agency) but also the channel the candidate used to apply (such as online or email attachment). These changes are designed to facilitate easier acquisition of candidates while increasing the quality of the data and the information presented on applications.

**Better Integration with Services Procurement**

We will be creating a standard integration for contingent worker management. This integration will support integration to Oracle’s PeopleSoft Enterprise Services Procurement or to another contingent management product. With this integration, customers will be able to create requisitions in PeopleSoft Enterprise Recruiting Solutions, pass them to PeopleSoft Enterprise Services Procurement for fulfillment, and hire candidates back into the system. The integration for contingent management will support customers who want to manage their complete workforce acquisition process, including employees and contingent workers.

**More Options for Background Checks**

We will be moving our delivered background check integration to the new open integration framework. This change will support customers who want to use their preferred background check provider. They will be able to integrate vendors into the business process flow by using this framework.

The new open integration framework is a key deliverable for this release. It allows our customers to integrate with third-party vendors without significant customization. It also provides us with a strong framework to expand into additional integrations in the future (for example, with assessment providers or interview scheduling tools).

**Additional Core Features**

In addition to the changes mentioned previously, we will provide several key features in PeopleSoft Enterprise Recruiting Solutions 8.9. These features will be available for recruiters and managers. The guiding design is to provide tools to support core recruiting needs.

**Robust Approval Processes**

For many customers, approvals are required before they can work on a requisition or extend an offer. But each company requires a different number of approvals and involves different approvers. In many companies, the approval chain also differs between business units.

In this release, we will introduce a new approvals engine. This tool was designed to provide a more robust approval process for requisitions and offers. With this new engine, companies will be able to have different approval chains by business unit. They will be able to manage separate approval cycles for requisitions and offers. Users will be able to add approvers to the requisition while it is in the approval
process. The new tool will also support adding “reviewers”—people who need to be notified but don’t have approval authority—into the workflow.

**Better Support for Recruiting Processes**

The current recruiting process has been primarily requisition based. Although this model is applicable for many customers, it is not the only model our customers use to fill positions. To better support all our customers, we are removing some of the constraints currently placed on the process.

- **Job postings.** Some positions are always open; they may be high turnover positions or just difficult positions to fill. Sometimes a recruiter needs to start sourcing for a position before a requisition is approved. In both cases, a requisition doesn’t meet the need. In PeopleSoft Enterprise Recruiting Solutions 8.9, we are introducing the concept of a job posting, which contains position information and can be posted to various websites. It does not function like a requisition, however—no approvals are required, and it does not count for time-to-fill metrics. The goal of this posting is to attract candidates and then forward them to requisitions as the need arises.

- **Screening.** As part of our PeopleSoft Enterprise Recruiting Solutions 8.9 design, we are making requisition screening available to self-service users. Customers had commented that the process seemed disjointed with this feature restricted to power users. In the new design, screening becomes a more integrated part of the process. Also, screening tools will be updated. Customers will be able to define multiple levels of screening to meet their business process.

- **Status effects.** We are introducing a new status—review—for recruiters. This new status will allow recruiters to have a different status for candidates whom they have linked to the requisition, as opposed to those who applied for the position. This status will help recruiters move candidates through the process and be clearer about what action might come next.

- **Additional actions.** In PeopleSoft Enterprise Recruiting Solutions 8.9, we are expanding the actions that can be taken on a candidate, regardless of whether that candidate has been associated with a requisition. It will be possible to interview a candidate or even create an offer without a requisition, if that is what meets the business need.

**New Candidate Lists**

Many recruiters like to maintain informal lists of candidates. These may be people they have talked to about a position that isn’t yet open, hot candidates for certain types of jobs, or candidates in a specific region. In any case, these lists are not associated to a requisition.

In PeopleSoft Enterprise Recruiting Solutions 8.9, we will support creating lists. Users will be able to create a list from search results or ad hoc and modify the
contents over time. Lists can be made public to facilitate candidate management among recruiters or kept private. From a list, users will be able to route candidates to requisitions, forward them to other users for review, and send them messages. This feature enhances the product for college recruiting and other sourcing activities.

**Better Contact Management**

Managing a candidate is at least 50 percent of a recruiter’s job. Today, all the informal tracking (email, notes on which to follow-up, and so on) has to be done outside the system.

In PeopleSoft Enterprise Recruiting Solutions 8.9, we will provide the option to track notes and correspondence with applicants. Users will be able to add notes on the candidate record and make them public or private. Attachments can also be added to the notes, if the user wants to cut and paste a message or add a document to the message. Users will also have a new correspondence module, which enables them to create email and send them to individuals or groups of applicants. When email is generated, a copy will be automatically appended to the applicant’s file.

With these key features, we will increase the support we offer to recruiters, who are the system’s power users. These tools will make it easier for companies to use multiple methods of recruiting, whether requisition or candidate based, and track their activities in the system.

**Better Hiring Processes**

In PeopleSoft Enterprise Recruiting Solutions 8.9, we are leveraging the Person Model to enhance the pools of candidates who can be managed by Recruiting Solutions. This enhancement includes developing a process to support internal transfers and enabling users to find candidates who are rehires and leverage their previous employee IDs. Companies that want to track contingent or on-demand workers in their HR database will be able to identify the type of worker when executing the hire. These changes will facilitate the final part of the recruiting process by eliminating workarounds needed today and replacing them with a streamlined hiring process that can be used for all worker types.

**A Final Word**

We are making a major investment in Recruiting Solutions for this release. The features selected were primarily a result of customer feedback and have been validated by months of customer interaction.

This release is significant in terms of features and technical design. By making this investment, we are confident that our customers will continue to see significant value from PeopleSoft Enterprise Recruiting Solutions.
Assess, Design, Develop

The second business process in the employee lifecycle is Assess, Design, Develop. This business process encompasses workforce development. To get the most out of their employees, companies must identify top talent for future planning and development and ensure that their employees are executing organizational strategies. The functionality in this business process enables our customers to assess the skills of their workforce, design learning and performance programs, and develop their people in alignment with career paths and corporate objectives.

Every industry around the world is facing intense competition and more stringent governance and compliance demands. To answer these challenges, business leaders want to encourage superior levels of efficiency and performance from their workforce and tie those increases directly to key company objectives to improve operating results. To do so, organizations need to assess the competencies and knowledge of their global workforce, design effective performance and learning programs that directly support business initiatives, and develop individuals in alignment with departmental goals and organizational objectives.

What makes us unique in this arena? We provide a single, global, integrated, and highly scalable talent management solution. We offer unmatched breadth of functionality that includes the ability to plan organizational skill and competency needs, assess the current capabilities of the workforce, identify competency gaps, create learning and performance plans, plan workforce careers and successions, set performance goals based on organizational objectives, and develop employees based on defined business goals.

- **United States Navy.** As one part of an overhaul of its human capital management processes, the United States Navy wanted to take a fresh look at the system it used for performance measurement, career development, and promotions. The old, paper-based system involved expensive manual intervention and enormous labor resources. The Navy is implementing Oracle’s PeopleSoft Enterprise ePerformance and other modules in what it envisions as a single, integrated enterprise system. This system will support the growth and development of the entire workforce across the five “vectors” (professional development, personal development, certifications and qualifications, leadership, and performance) for every individual in the Navy, while saving the Navy millions of dollars.

- **Horizon Blue Cross Blue Shield of New Jersey.** As it considered going public, Horizon BCBSNJ wanted to become an employer of choice. Recognizing the importance of developing and retaining human capital, the company needed to give its managers the tools to offer valuable coaching to employees. With PeopleSoft Enterprise ePerformance, Horizon BCBSNJ can now enable employees to create results-based goals, job responsibilities, and developmental goals; increase accountability among employees and managers; and reduce the administrative workload for managers, enabling them to spend more time providing meaningful feedback to employees.
What's New in PeopleSoft Enterprise ePerformance 8.9?

Workforce performance management is one of the fastest growing segments of the human capital management software market. Research continues to provide conclusive proof that leading organizations have strong performance management practices. PeopleSoft Enterprise ePerformance is designed to enable these best practices and help you align corporate goals with workforce or individual goals. It facilitates pay-for-performance initiatives that can improve overall business performance. Most enterprises want to increase the productivity of their workforce. PeopleSoft Enterprise ePerformance helps ensure that employees have the right competencies to do their work and are achieving the most important business goals.

Oracle’s PeopleSoft Enterprise ePerformance 8.9 will deliver an expanded feature set to further assist organizations in all their performance management activities and processes. It will offer unparalleled flexibility by providing the framework and processes to enable organizations to successfully manage development and assessment evaluations for their entire workforce. For the first time, organizations will be able to design, deliver, and modify performance processes for development activities on their own, as part of a formal assessment appraisal or evaluation process, or to reinforce a pay-for-performance program or initiative.

This new functionality will enable organizations to implement and administer employee-initiated and employee-managed assessment or development performance processes. The new multisource feedback capability will enable you to include feedback from people other than the employee and manager directly into the performance process.

For PeopleSoft Enterprise ePerformance 8.9, we have made significant enhancements in the following areas:

- Multisource functionality (360-degree and multirater capabilities).
- Employee-initiated and employee-driven performance process.
- Collaborative criteria setting.
- User interface enhancements.
- Enhanced writing tools.
- Ability to delete documents.
- Improved administrative capabilities (multiselect functionality for express actions: Cancel, Transfer, Change Status, Enter Preliminary Ratings).
- Integration.

Multisource Functionality (360-Degree and Multirater Capabilities)

With PeopleSoft Enterprise ePerformance 8.9, individuals other than the manager and employee will be able to provide direct feedback into an employee’s
performance or developmental evaluation or document. Additional roles include peers, mentors, and multiple managers.

The proposed new functionality for establishing the criteria and enabling multisource evaluations will consist of several new or expanded business process steps that will be introduced with PeopleSoft Enterprise ePerformance 8.9. These steps are:

- **Establish Criteria** enables the manager and employee to define performance criteria on documents.
- **Nominate Participant** enables the manager and employee to nominate participants to provide feedback on employee performance.
- **Review Participant Evaluations** enables the manager and employee to track and view the feedback from the nominated participants. This step is not applicable unless step two is enabled.
- **Complete/Review Employee Self Evaluation** enables the manager to review an employee’s self evaluation after he or she completes it.
- **Complete/Review Manager/Mentor Evaluation** enables the manager to complete an evaluation for the employee, which the employee can then review.

For these steps, the manager and employee will be able to view the applicable steps of the business process at any time. Each individual (or role) in the process will be able to view the actions they can take and results for the steps displayed.

**Nominations**

To fully enable the new multisource functionality, we’re adding additional features to the template definition to support the various roles and rules that will be available.

One of the most significant new features is the nomination process. For the first time, roles other than the employee and manager can be directly included within the performance process.

The Nominate Participants step will enable the manager and employee to nominate a list of individuals they want to have included in the employee’s performance or developmental process. Based on the template setup, the manager and the employee will be able to add these individuals as nominees. The template will also determine which role (manager or employee) will be able to submit the nominations to the nominees and which roles (manager or employee) can track the status of the nominations after they have been submitted to the nominees.

Once the nominations have been submitted to the nominee, the nominee will be able to accept or decline the nomination.

Several new optional features will be added to support the nomination process:
• Ability for the manager or employee to track the nominated reviewers’ progress.
• Ability to establish a minimum and maximum number of nominations.
• Anonymous or named feedback can also be selected as a feedback rule.
• Rollover rules to hold documents until the minimum number of completed documents for all roles has been met.

Employee-Initiated Performance Process

Some organizations derive optimal performance feedback and results by deploying employee-initiated and employee-managed performance processes. In Oracle’s PeopleSoft Enterprise ePerformance 8.8, only the manager or HR administrator role could initiate and complete the performance process. Based on customer feedback, PeopleSoft Enterprise ePerformance 8.9 will offer options to enable employees to launch the performance process and define the criteria within the performance document.

Organizations will be able to configure the method that best fits their needs. The manager or employee will be able to initiate the creation of a performance document. From there, the initiating party will establish the performance criteria. This functionality will enable the employee or manager to update the performance criteria, where applicable, before starting the performance evaluation process. This new functionality will reduce the time needed to update criteria because only a single document is used to determine the content to be evaluated.

These features will prove invaluable to matrix organizations or organizations in which the work environment is characterized by multiple projects or reporting relationships within defined performance cycles.

User Interface Enhancements

In some organizations, managers access performance documents infrequently and employees make updates as infrequently as once or twice a year. It is therefore critical that the user interface be as intuitive as possible, particularly if a multisource feedback process is in place. The very success of the performance process can be measured by its perceived ease of use.

In PeopleSoft Enterprise ePerformance 8.9, when users access an active document, they will see all the steps (and their status) relevant to that document. This new user interface provides instant insight into the performance document and pinpoints the steps required, as well as the status for each. The employee and manager can quickly and easily track the stage of completion against this easy-to-use grid.

The page shot in Figure 1 displays some of the features of the new user interface. We’re adding similar usability changes throughout the application, and users will find that PeopleSoft Enterprise ePerformance 8.9 requires fewer clicks to reach where they need to be or to complete an action.
Figure 1: This page shows the value of adding the steps for the 360 review process directly into the Document Progress display. Users know immediately what the required actions are, their status, and their due dates. They have the necessary hyperlinks to complete the task or to initiate workflow to notify others on what is required to keep the process moving. This page is entirely configurable and easy to implement with the PeopleSoft Enterprise ePerformance template design.

Enhanced Writing Tools

Organizations do not always have the time to adequately train managers or administrators in the optimal approaches or content requirements for the performance processes that they must complete. This is especially true for text and comments meant to encourage employee success and improve performance. Without guidance, these activities can detract from, rather than improve, the performance process.

PeopleSoft Enterprise ePerformance 8.9 will provide solutions to these business challenges. Writing tool enhancements will be delivered to expand on the success of the Oracle’s PeopleSoft Enterprise Advisor Tools (Results Writer, Development Tips, Language Sensitivity Checker, and Spell Checker) provided within PeopleSoft Enterprise ePerformance 8.8. Enhancements will enable roles other than the manager to access and incorporate feedback from these integrated performance self-help tools. This enhancement will deliver more professional performance processes, greater consistency across the organization, and greater opportunities to leverage best practice features to all participants in the performance process.

PeopleSoft Enterprise ePerformance 8.9 delivers the following enhancements:

- Managers and employees will have access to any performance notes they captured during the performance period and will be able to quickly bring in comments from other participant evaluations.
• Oracle’s PeopleSoft Enterprise Writing Tools (Results Writer, Development Tips, Performance Notes, and Other Evaluator Comments) will be accessible from each Comments field on the performance evaluation.

• A new interface will allow the user to quickly select from one page the suggested text for any Writing Tool enabled on the template. This page will display all suggestions that meet the criteria for the section or item the user is currently working on.

• If necessary, the user can also expand a search within a specific writing tool from the Suggested Text page.

**Ability to Delete Documents**

It is important to protect information in the performance process. Privacy and confidentiality must be incorporated into the process to ensure fairness and to meet organizational and certain legislative requirements. Safeguards must be established to prevent accidental loss or intentional destruction of data or information.

The need to delete performance documents that were incorrectly created is also a valid business requirement, however. The template design in PeopleSoft Enterprise ePerformance makes it possible to create performance documents that may never be used. These documents should be purged from the system if for no other reason than to minimize data storage requirements.

To ensure that these requirements are addressed, PeopleSoft Enterprise ePerformance 8.9 will expand the security and data management actions for administrators so that they can easily access, review, and delete documents.

**Improved Administrative Capabilities**

The easier the system is to use, the greater the opportunities for success. A series of changes in PeopleSoft Enterprise ePerformance 8.9 will significantly improve the overall administration and operation of the application for all users.

**Logically Grouping Subdocuments**

The PeopleSoft Enterprise ePerformance 8.8 page design displays all subdocuments (manager and employee documents) in one grid and does not group sets of subdocuments together under one overall document header. With multisource functionality in ePerformance 8.9, peer documents will be introduced, adding more complexity to the display of subdocuments in one grid. To improve usability, the current documents page has been redesigned into a two-step document selection process. The first page will display a list of all logical documents for the role of the user. Once the logical document is selected, the user will be presented with only the related subdocuments for his or her view. Figure 2 shows a prototype page.
Current Performance Documents

Listed below are the current performance documents for which you are the Manager.

<table>
<thead>
<tr>
<th>Performance Documents</th>
<th>Document Type</th>
<th>Begin Date</th>
<th>End Date</th>
<th>Job Title</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>Adland Chu</td>
<td>Annual Review</td>
<td>01/01/2009</td>
<td>12/31/2009</td>
<td>Clerk-Payroll Sr</td>
<td>In Progress</td>
</tr>
<tr>
<td>Adland Chu</td>
<td>Annual Review</td>
<td>01/01/2009</td>
<td>12/31/2009</td>
<td>Clerk-Payroll Sr</td>
<td>In Progress</td>
</tr>
<tr>
<td>Angela McKay</td>
<td>Annual Review</td>
<td>01/01/2002</td>
<td>12/31/2002</td>
<td>Auditor-General</td>
<td>In Progress</td>
</tr>
<tr>
<td>Annie Minnison</td>
<td>Annual Review</td>
<td>01/01/2003</td>
<td>12/31/2003</td>
<td>Analyst-Business</td>
<td>In Progress</td>
</tr>
<tr>
<td>Antonio Santos</td>
<td>Annual Review</td>
<td>01/01/2004</td>
<td>12/31/2004</td>
<td>Assistant-Administrative</td>
<td>In Progress</td>
</tr>
<tr>
<td>Antonio Santos</td>
<td>Project Review</td>
<td>06/15/2002</td>
<td>12/31/2002</td>
<td>Assistant-Administrative</td>
<td>In Progress</td>
</tr>
<tr>
<td>Bailey Macdonald</td>
<td>Annual Review</td>
<td>01/01/2002</td>
<td>12/31/2002</td>
<td>Analyst-Financial Sr</td>
<td>In Progress</td>
</tr>
<tr>
<td>Carmichael Espinosa</td>
<td>Project Review</td>
<td>08/15/2002</td>
<td>12/31/2002</td>
<td>Consultant-Senior</td>
<td>Available for Review</td>
</tr>
<tr>
<td>Christoff Stevenson</td>
<td>Annual Review</td>
<td>01/01/2002</td>
<td>12/31/2002</td>
<td>Clerk-Payroll Sr</td>
<td>In Progress</td>
</tr>
<tr>
<td>Connie Chang</td>
<td>Annual Review</td>
<td>01/01/2002</td>
<td>12/31/2002</td>
<td>Auditor-General</td>
<td>Available for Review</td>
</tr>
<tr>
<td>Cynthia Adams</td>
<td>Annual Review</td>
<td>01/01/2003</td>
<td>12/31/2003</td>
<td>Officer-Loan</td>
<td>In Progress</td>
</tr>
<tr>
<td>Wendy Rolen</td>
<td>Annual Review</td>
<td>01/01/2002</td>
<td>12/31/2002</td>
<td>Analyst-Financial Sr</td>
<td>In Progress</td>
</tr>
</tbody>
</table>

Figure 2: This prototype page shows the first step in the document selection process for a single manager. All the performance documents are listed alphabetically by employee. The at-a-glance view provides the performance document type, begin and end dates, and the document status. The next step would then provide the details on the specific document the manager selects.

Improved Search Capabilities

PeopleSoft Enterprise ePerformance 8.9 allows the administrator to search on the employee’s first or last name, manager’s first or last name, document type, document status, and period dates.

Integrating All Rating Calculation Methods to Salary Planning

All rating calculation methods (Average Calculation Method, Summation, and Review Band) on performance documents will be integrated into the salary planning application in PeopleSoft Enterprise HCM 8.9. This integration is configurable and includes single signon capability. The user can directly view the calculation from PeopleSoft Enterprise ePerformance within the correct field in the Salary Planning pages of PeopleSoft Enterprise Human Resources.

Multiselect for Express Actions: Cancel, Transfer, Change Status, Enter Preliminary Ratings

This feature will enable the user to select multiple documents to process at once. This capability will be available for canceling documents, transferring documents, changing the status of documents, and entering the preliminary ratings. For example, the manager could select all documents that need to be transferred to a new manager. In PeopleSoft Enterprise ePerformance 8.8, the manager would need to select each document and then enter the new manager for each document. By using the new selection page in PeopleSoft Enterprise ePerformance 8.9, the manager will be able to select multiple documents and then transfer them all with a single action to the new manager.
You can cancel a series of documents at once in the same manner, as Figure 3 demonstrates.

### Cancel Document

To cancel a performance document, select the Evaluators checkbox and click the Continue push button. Only "In Progress" performance documents can be cancelled.

<table>
<thead>
<tr>
<th>Evaluators</th>
<th>Document Type</th>
<th>Begin Date</th>
<th>End Date</th>
<th>Job Title</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>Adlardi Chu</td>
<td>Annual Review</td>
<td>01/01/2004</td>
<td>02/01/2004</td>
<td>Clerk-Payroll Sr</td>
<td>In Progress</td>
</tr>
<tr>
<td>Adlardi Chu</td>
<td>Annual Review</td>
<td>01/01/2002</td>
<td>02/01/2003</td>
<td>Clerk-Payroll Sr</td>
<td>In Progress</td>
</tr>
<tr>
<td>Angela Miller</td>
<td>Annual Review</td>
<td>01/01/2002</td>
<td>02/01/2002</td>
<td>Auditor-General</td>
<td>In Progress</td>
</tr>
<tr>
<td>Antoina Santos</td>
<td>Annual Review</td>
<td>01/01/2003</td>
<td>02/01/2003</td>
<td>Assistant-Administrative</td>
<td>In Progress</td>
</tr>
<tr>
<td>Antoina Santos</td>
<td>Annual Review</td>
<td>01/01/2004</td>
<td>02/01/2004</td>
<td>Assistant-Administrative</td>
<td>In Progress</td>
</tr>
<tr>
<td>Antoina Santos</td>
<td>Project Review</td>
<td>01/01/2002</td>
<td>02/01/2002</td>
<td>Assistant-Administrative</td>
<td>In Progress</td>
</tr>
<tr>
<td>Bailey MacDonald</td>
<td>Annual Review</td>
<td>01/01/2002</td>
<td>02/01/2002</td>
<td>Analyst-Financial Sr</td>
<td>In Progress</td>
</tr>
<tr>
<td>Christella Stevenson</td>
<td>Annual Review</td>
<td>01/01/2002</td>
<td>02/01/2002</td>
<td>Clerk-Payroll Sr</td>
<td>In Progress</td>
</tr>
<tr>
<td>Cynthia Ambrosi</td>
<td>Annual Review</td>
<td>01/01/2003</td>
<td>02/01/2003</td>
<td>Office-Loan</td>
<td>In Progress</td>
</tr>
<tr>
<td>Wendy Rossin</td>
<td>Annual Review</td>
<td>01/01/2002</td>
<td>02/01/2002</td>
<td>Analyst-Financial Sr</td>
<td>In Progress</td>
</tr>
</tbody>
</table>

Select All  Deselect All  Continue

Figure 3: The Cancel Document page.

### Notifications

PeopleSoft Enterprise ePerformance 8.9 will include many new notifications to directly support the new multisource functionality. These notifications will save time, improve efficiency, and streamline the performance cycle within any organization. Examples include those in the following table.

#### Notification Purpose

- **Employee Initiates Performance Process**: Notify manager if he or she is a participant in the process.
- **Employee Completes Performance Criteria**: Notify manager if he or she is a participant in the process.
- **Manager Completes Performance Criteria**: Notify employee if he or she is a participant in the process.
- **Manager Submits Nominations to Nominees**: Notify nominees.
- **Participants Complete Their Evaluations**: Notify trackers
- **Return Document to Participants for Rework**: Notify participants.

### Integration

One key advantage to an integrated solution is that your organization is no longer responsible for building and supporting enterprise integration points, including integration between PeopleSoft Enterprise ePerformance and other PeopleSoft Enterprise business solutions, as well as third-party integration. For example, additional third-party certified integration plans for PeopleSoft Enterprise ePerformance include partner Development Dimensions International (DDI). PeopleSoft Enterprise ePerformance will deliver both standard and generic...
integration points to support organizations that plan to leverage data from multiple sources.

Through integration with a broad suite of workforce performance and development applications, organizations can link performance evaluations and assessments to workforce plans, individual career plans, development, rewards, and reporting. Organizations no longer have to choose between the rich functionality of a niche vendor and the integration of a large vendor. Our integrated suite of products, designed to increase workforce performance, delivers out-of-the-box business process integration, superior technology, and the ability to store and share all employee data in a single system.

We will continue to deliver on this important feature set, helping organizations control costs and create value. In PeopleSoft Enterprise ePerformance 8.9 and beyond, we are planning to deliver increased integration points to other applications such as Oracle’s PeopleSoft Enterprise Workforce Compensation Solutions and Oracle’s PeopleSoft Enterprise Learning Management (targeted for the 2005 releases of these products) and to an increased number of third-party content providers.

What’s New in PeopleSoft Enterprise Learning Management 8.9?

Today, successful organizations want to increase business performance by adapting their workforce, customers, partners, and suppliers to support an ever-changing business environment. By embedding learning into business processes across the extended enterprise, our learning solutions enable organizations to proactively manage change and transfer key knowledge. By linking learning to organizational goals, our learning solutions enable targeted, on-demand knowledge transfer to increase workforce, customer, and channel partner productivity while increasing an organization’s competitive advantage.

PeopleSoft Enterprise Learning Management is built as a standalone product to be easily integrated into any business process and to enable us to keep pace with the rapid evolution of learning technologies. As such, PeopleSoft Enterprise Learning Management is on its own release cycle, independent of the rest of PeopleSoft Enterprise HCM. PeopleSoft Enterprise Learning Management 8.9 is scheduled for release in the first half of 2005.

Planned enhancements for Learning Management 8.9 include:

- Training for profit. Expand the capabilities that are already in PeopleSoft Enterprise Learning Management to provide self-service registration for external (nonemployee) learners, integration with Oracle’s PeopleSoft Enterprise CRM and Oracle’s PeopleSoft Enterprise Accounts Receivable, subscription-based learning, and distributed registrar capabilities.

- Learning portfolio management. Forecast the demand for learning, plan and track resource use, and track learning revenue, costs, and budget.
• Learning marketing. Market learning programs to targeted audiences through a variety of methods and gather critical information about the success of your learning through rating, instructor scorecard, and simple survey functionality.

• Automation and support. Deepen the integration with content management systems and calendars (Lotus and Exchange), and enhance administrative automation.

Optimize, Track, Monitor

The ongoing challenge of doing more with less is forcing companies to streamline their workforce processes. Successful organizations optimize, track, and monitor their workforce to gain unprecedented efficiency in real time. They optimize their global workforce by placing the right people in the right jobs at the right time. They track every aspect of workforce deployment through accurate and relevant management and compliance reporting, and they monitor organizational performance so they can adjust and adapt. Our solutions help customers plan, measure, and control costs by defining consistent processes and best practices across global boundaries.

What makes us unique in this arena? Our range and depth of solutions help to improve productivity and reduce operational costs. Whether your workforce management processes are centralized at global headquarters or managed by regional offices, our flexibility offers rich functionality and configurable workflow to streamline business processes in one global system. From workforce management to time collection, payroll management, and self service, we deliver functionality integrated with human capital management applications, rich reporting, and analytical decision-making tools—all within a flexible, role-based workforce portal. The result is lower operational costs and an empowered staff that can perform routine business activities more efficiently.

With Oracle’s PeopleSoft Enterprise software, National Geographic has:

• Consolidated infrastructure platform from 15 to three servers.

• Reduced its business systems budget by $1.2 million.

• Achieved $700,000 in savings from PeopleSoft Enterprise Time and Labor over five years.

Merck has:

• Decreased global headcount report cycle time from four to six weeks to 24 hours.

• Provided access to accurate, comprehensive information on headcount, turnover, employee activity, diversity, compensation, and staffing.

• Enabled managers with quick-view scorecards that measure progress against strategically aligned human capital metrics.

Staples has:
• Reduced cost per paycheck significantly compared to outsourced payroll.
• Reduced headcount in corporate HR.
• Eliminated duplicate data entry.
• Deployed software in stores without large expenses for new hardware or additional bandwidth.

What’s New in PeopleSoft Enterprise Human Resources 8.9?
PeopleSoft Enterprise Human Resources has a functional range and depth covering the entire employee lifecycle. It includes feature-rich, global modules; comprehensive reporting; and extensive employee and manager self service.

PeopleSoft Enterprise Human Resources increases productivity by connecting people to delivered business processes that represent HR industry best practices. It automates common administrative tasks and enables HR departments to focus on managing the most important assets of their organization—their people.

For many companies, managing critical workforce information has become an increasingly complex challenge. Internal pressures, such as the demand for global reporting or the need to cut system maintenance costs, are leading companies to consolidate their core business applications and eliminate secondary or redundant systems. External pressures for corporate accountability and transparency also add to the complexity of data management. Companies are consolidating systems to reduce the risks associated with conflicting or uncontrolled data.

Companies that manage their whole population by using one centralized solution reap rewards such as holistic reporting, global analytics, and higher levels of data consistency and integrity. They may also reduce costs by eliminating secondary systems, maintenance, hardware, and interfaces.

PeopleSoft Enterprise Human Resources 8.9 is being designed with these consolidation needs in mind. Ultimately, it will enable companies to manage their entire workforce population holistically by using one system of record, regardless of worker classification or geography.

In PeopleSoft Enterprise Human Resources 8.9, we made significant enhancements in the following areas:

• The Person Model.
• Contingent workforce management.
• Person of interest management.
• Configurable search/match.
• Configurable actions and action reasons.
• Management by labor agreement.
• Oracle’s PeopleSoft Enterprise eProfile manager enhancements.
• Flexible row-level security.

The Person Model

Today’s workforce demographics and employment trends are redefining the requirements for HRMS systems. The significant increase in contingent workers (that is, consultants and contractors) demands more sophisticated functionality for centrally tracking a diverse workforce. Workforce management trends that have contributed to information complexity include the growth of contingent worker populations, the need to support the unique needs of salaried and hourly populations in one centralized system, and the increased demand for centralizing global employee information. External pressures, such as corporate accountability requirements, have also convinced many corporate policy makers to maintain only one source of employee information.

In response, we have redesigned the HRMS architecture to support storing and tracking all person types, including contingent workers and persons of interest, within one centralized repository. This next-generation architecture is an innovative new framework for the consistent tracking of people in the HRMS database. It increases operational excellence by efficiently accommodating rapidly fluctuating workforce dynamics and providing internal visibility and control to critical elements of workforce management. The Person Model is dynamic, delivers highly accurate reporting to support real-time decisions, and ensures that changing business conditions trigger appropriate rapid responses from HR management.

In contrast to previous designs, which focused primarily on storing and tracking employees, the new architecture provides a framework for storing and tracking all person types, including contingent workers and persons of interest— instructors, students, consultants, interns, and board members—within one centralized repository. This new architecture will enable personal data to be stored once, with one ID that is retained for the duration of a person’s tenure with the organization, regardless of changes to that person’s working status.

This architecture evolution provides foundational support for the introduction of several new and improved business processes, including contingent worker management and nonworker management. To further support the new Person Model, we’ve made enhancements throughout the HCM product family so that all person types can be managed throughout the applications.

Contingent Workforce Management

The Advisory Council of the United States Department of Labor recently issued a detailed report that documented the extent to which corporate America is replacing full-time workers with part-time workers, temporary employees, and independent contractors. These workers now make up more than 30 percent of the United States workforce, and their number is growing quickly. Since 1990, the number of workers employed as temporary employees alone has tripled from one million to three million and is expected to quadruple to 12 million over the next 10 years.
In PeopleSoft Enterprise Human Resources 8.9, employees and contingent workers co-reside in all core business processes. A company’s contingent workforce can be managed and accounted for alongside its employee population while still maintaining key differentiation.

The following features are included within contingent workforce management.

**PeopleSoft Enterprise eRecruit Manager Desktop/Services Procurement for Contingent Workers**

Managing a contingent workforce begins with identifying and hiring contingent workers. To support the business process of hiring contingent workers, we’ve enhanced contingent workforce support within PeopleSoft Enterprise eRecruit Manager Desktop and PeopleSoft Enterprise Services Procurement.

For example, if a job (or position) within PeopleSoft Enterprise eRecruit Manager Desktop is designated as contingent, the information for the selected candidate will be transferred into Oracle’s PeopleSoft Enterprise Workforce Administration as a contingent worker, reducing processing time, manual data entry, and error rates for customers.

**Human Resources for Contingent Workers**

Today’s workers may have several relationships with a company, either sequentially or concurrently. Someone may begin working for a company as a contractor and then later become an employee. Someone may leave a company as an employee but be rehired later as a contingent worker. Additionally, someone may be an employee who is also working on a project as a contractor.

With PeopleSoft Enterprise Human Resources 8.9, people will seamlessly transition between employee and contingent worker status while keeping the same employee ID. They’ll be able to be an employee and a contingent worker simultaneously. Complete job history for all instances will be kept and easily reviewed in one central location. An enhanced UI and functionality will be delivered to accommodate tracking requirements for contingent workers.

This feature will be useful for organizations that frequently transition people between contingent worker status and employment status or for companies in which people frequently hold multiple concurrent statuses.

**Payroll Solutions for Contingent Workers**

Some companies directly pay contingent workers. Others do not. In PeopleSoft Enterprise Human Resources 8.9, companies will choose their process. Each payroll product (Oracle’s PeopleSoft Enterprise Global Payroll, Payroll Interface, and Payroll for North America) will support contingent workers, employees, or people who are concurrently contingent workers and employees. This enhancement is particularly useful for global companies in which directly paying contingent workers is a common practice.
**Self Service and Contingent Workers**

In today’s flexible workforces, it is not uncommon for a contingent worker to manage direct reports or for contingent workers to provide or maintain information via self service. Because contingent workers will be identified with a static employee ID and the same security views as employees, it becomes much simpler to include contingent workers as approvers or self-service users. This feature will be useful for organizations that want to extend self service to their contingent workforce or that commonly have contingent workers functioning as managers.

**Reporting and Analytics**

The rising proportion of contingent workers creates the need to quantify and manage a new and growing population within companies. To effectively support business processes such as space allocation and planning, network security, building security, and true headcount analysis, companies need visibility into their total workforce.

In PeopleSoft Enterprise Human Resources 8.9, contingent workers reside alongside employees, simplifying combined reporting. Customers can specify whether to run a report for contingent workers, employees, or both. This feature will be useful for companies for which contingent workers constitute a considerable percentage of the workforce.

**Search Record Enhancements**

For companies to benefit from greater control of their contingent workforce, they need to be able to easily identify and manage the records of contingent workers throughout all their core business processes.

To facilitate easier access to contingent worker records, the common employee search records used throughout PeopleSoft Enterprise Human Resources 8.9 modules are being enhanced to enable searching by employee or contingent worker status. This feature is useful for any company that manages contingent workers.

**Persons of Interest Management**

Organizations frequently need to store basic information on people who are not workers. They may want to track board members, volunteers, or nonworkers who have security access to buildings or networks. A university may want to monitor who has library access or parking passes. The possibilities are limitless and often unique to an industry or organization. We already store persons of interest in numerous places within the application. There are instructors, emergency contacts, and many more.

Because the new Person Model architecture will allow personal data to be stored once, without job information, and then used for multiple purposes, users will be able to track people within core tables for any reason, without needing a job record.

Features for managing persons of interest include the following.
**Human Resources 8.9-Defined Relationships**

The previous architecture necessitated duplicate entry of personal information when an employee was also an instructor within Administer Training or when someone was an employee and a witness within Health and Safety. Duplicate entry threatens data integrity and necessitates redundant maintenance.

The new architecture, which supports persons of interest, sets the stage for personal information to be entered once and then used for multiple purposes in different modules. PeopleSoft Enterprise Human Resources 8.9 will exploit this new technology to eliminate duplicate entry of instructors within Training Administration and witnesses within Health and Safety. Look for more applications of this architecture in the future. Once the person is used within a new process, the system recognizes the new association and builds a view of the person’s active relationships to the organization.

**Customer-Defined Relationships**

Customers may want to track persons of interest who exist for reasons outside of the company. For example, a hospital may want to track basic information about volunteers. A university may want to keep information about visiting professors.

PeopleSoft Enterprise Human Resources 8.9 allows customers to define and maintain their own classifications for persons of interest. This feature is useful for customers who have a large number of nonworkers associated with their organizations that they want to track and monitor.

**Configurable Search/Match**

With the ability to manage multiple relationships between a person and a company, there is a need to prevent a person from being entered into the system more than once.

PeopleSoft Enterprise Human Resources 8.9 will deliver a company-configurable search/match wherever people can be added into the application. The search results page will also be configurable. The search and results configuration is being delivered to allow customers to determine, and protect, data that they determine to be sensitive.

This feature will be valuable for any organization in which people commonly hold multiple jobs or relationships with the company. This feature will also be useful for companies that frequently rehire former workers.

**Configurable Actions/Action Reasons**

Not all job actions are appropriate for all types of workers. Not all companies, geographies, or industries share the same business rules. Organizations work differently according to their own needs and priorities and may want to configure their job actions to align more closely with their own business processes and employee data tracking requirements.
In recognition of these diverse data-management needs, PeopleSoft Enterprise Human Resources 8.9 will deliver configurable actions and action reasons. Actions are being moved from the translate table and relocated to their own table. New setup pages, which will be similar to the page illustrated in Figure 4, complement this new table.

The configurable actions and action reasons provide the following features for customers.

**Status Definition**

When customers create a new action, they can now decide whether the action is for informational purposes or if it will actually determine new statuses for HR or payroll. Customers can also set the prerequisite status for a job action. For example, a customer could create a rule that prohibits the use of the action leave of absence if the person’s status is currently terminated.

Additionally, a new high-level status has been introduced to assist with report definition consistency. The existing employee statuses that are typically used to define active employees for reporting purposes are Active, Leave, Suspension, and Probation. If users don’t select a consistent combination of these statuses, employee counts will not reconcile.

In PeopleSoft Enterprise Human Resources 8.9, these statuses will still be available for granular report definition. A new higher-level field, however, called HR Status, will identify all employees in any of the four active employee statuses. Similar logic within the new HR Status field enables you to identify employees in all terminated statuses, and so on. This new feature will be useful for companies that want to simplify end user reporting and reduce report inconsistencies.
**Actions by Organizational Relationship**

Companies will be able to limit the use of actions to specific segments of their populations based on the people’s relationship to the organization. Use of specific actions can be restricted to employees, contingent workers, persons of interest with job records, or all three organizational relationship designations.

**New Flexible Row-Level Security**

As any decentralized or complex company knows, determining and controlling who has access to what data can be a challenging task. In light of the emerging legal requirements for data transparency and accountability, controlling who is accessing your data and for what purpose becomes even more critical.

PeopleSoft Enterprise 8.9 will deliver an innovative and completely flexible way to define your organization’s row-level security. You decide how granular you want your control to be by basing row-level security on any field or combination of fields that you choose.

By working in conjunction with the new Person Model, you can also define security according to worker population. For example, you can give an operator access to contingent labor only or persons of interest only.

In Oracle’s PeopleSoft Enterprise HRMS 8.9, we’re making significant enhancements to our row-level security in the following areas:

- Configurable row-level security.
- Even faster fast views.

**Flexible Security Definition**

Row-level security for PeopleSoft Enterprise HRMS 8.9 will include features that enable organizations to align their security strategy with their business model and their corporate culture.

Some HR organizations may be centralized in one country; others may be spread across many countries. Some companies may allow anyone in HR to view data on anyone in the organization. Other companies may want to restrict data access by location or worker population so that very few people can access information about the executive staff in corporate headquarters. Perhaps a large corporation has one HR team that manages the union workforce while another HR team manages salaried employees.

You’ll be able to configure security to support any of these business models, and many more. The possibilities are practically limitless. The existing department security process will be carried forward into PeopleSoft Enterprise Human Resources 8.9 for organizations that do not want to change their security setup.
Even Faster Fast Views

To support the new flexible security structure, we’re enhancing the security fast view process. Fast views will be updated in real time. There will also be more flexible batch updating capabilities. The only time a process must be run is if there is a change to the security trees— but even that process will be more flexible and will perform partial updates. There will no longer be a need to update the entire table.

Management by Labor Agreement

Performing critical business processes such as hires, terminations, and pay rate changes is a complex endeavor when HR professionals must adhere to multiple, detailed labor agreement specifications. We have confirmed that approximately 60 percent of PeopleSoft Enterprise customers are in unionized industries. To better understand industry requirements, we conducted extensive focus groups and joint design sessions with customers and gathered industry specialist feedback. As a result of this analysis, PeopleSoft Enterprise Human Resources 8.9 delivers new labor agreement management functionality that will help unionized customers by automating and streamlining many of their current manual processes.

---

**Figure 5:** Configurable security model can be defined at the field level.
The labor agreement definition includes the following features.

**Job Codes and Wage Plans**

Within a collective labor environment, a person’s job code dictates many of his or her job attributes, including his or her job path hierarchy, bumping rights, and wage progression plan.

In PeopleSoft Enterprise Human Resources 8.9, job codes are associated to a labor agreement in a hierarchical order. A wage plan is then associated with each job code. When a labor agreement or job code is updated on an employee’s job record, the employee inherits the associated wage plan. The combination of job code and labor agreement is verified to ensure validity as the record is saved.
Configurable Seniority Dates, Tiebreakers, and Expiration Rules

Seniority dates drive numerous processes within unionized companies, primarily in the United States but also in some EMEA countries. Seniority dates determine critical employee rights such as bidding for shifts, receiving wage increases, or determining a person’s place on a layoff roster. Furthermore, seniority dates can be determined by different criteria. For example, the date used to determine an employee’s seniority for shift bidding could be the date that he started working at a new facility, but his vacation accrual may be determined based on his seniority within the company or union. Frequently, more than one employee has the same seniority rank, and a tiebreaker is applied to determine a final order. Expiration of rights is also determined.

In PeopleSoft Enterprise Human Resources 8.9, customers can define up to 12 seniority dates per labor agreement. These dates can default from dates that already exist elsewhere in the system and can then be renamed. For example, customers may want to include the pre-existing job code Entry Date field in their labor agreement, but they re-label the field as Wage Progression Seniority Date. Customers may also create their own dates. When an employee is placed into a labor agreement on their job record, she inherits the dates from the agreement.

Customers can also select from an extensive list of fields to use as tiebreakers and determine the period of time for which recall rights are valid.
Facilities

For unionized companies, a facility is defined as the physical workspace covered by a labor agreement. It could be a store, plant, campus, or medical center. There could be more than one location within a facility, or there could be more than one facility within a location. For these reasons, unionized organizations need a flexible way of designating facilities.

In PeopleSoft Enterprise Human Resources 8.9, we're adding a new table to allow customers to define their facilities. The facilities are then associated to the labor agreements. The new facility field will also appear, and will be able to be maintained, on the job record and the position record.

Wage Progression

Wage progression is a core process for unionized companies, particularly in the United States. Monitoring eligibility and maintaining correct compensation is challenging. The challenge grows with the size and complexity of a company's unionized workforce.

PeopleSoft Enterprise Human Resources 8.9 automates wage progression by providing features such as formula-based progression rules and a process that evaluates rules against eligibility criteria and inserts new compensation rates. Common progression eligibility criteria that can be supported with PeopleSoft Enterprise Human Resources 8.9 include time worked, calendar based, or time since last increase. An early version of rule configuration is illustrated in Figure 9.
These progression plans are then associated to wage scales. Step increases within scales can be based on formulas such as percentage of maximum rate, flat amount, percentage of current rate, or custom configured.

Because wage progression is primarily a business practice for unionized, United States organizations, this feature is being delivered with integration for receiving time worked from PeopleSoft Enterprise Payroll for North America. It can also be configured to receive time from any other time source. Because pay increases are triggered by the insertion of job records, any integrated payroll solution, such as PeopleSoft Enterprise Global Payroll or a third-party system, can be used for payment.

**Layoff and Reinstatement Management**

Companies that have large union workforces occasionally need to temporarily or permanently lay off large numbers of employees. A production plant may permanently close when a product is discontinued, or a workforce may be downsized for a temporary reduction in production demand. When these union workforce actions occur, seniority lists must be assembled, individual employee seniority rights must be considered, and a large number of transactions must be processed. Furthermore, accurate records must be kept to justify decisions to union authorities. In the case of temporary reductions, the process must then be reverse-engineered to return people to work. This is a time-consuming project that frequently occurs with little advance notice.

PeopleSoft Enterprise Human Resources 8.9 provides companies with tools that manage the layoff and recall process. The targeted population is defined and an initial list is generated according to selected criteria as illustrated in Figure 10. The
data used for defining criteria and sorting the list is typically contained within the relevant labor agreement.

A new roster management tool (Figure 11) is then used to refine the list and to track the status of targeted employees. The list can be refreshed to account for changes to employee data. It can also be exported at any time to preserve list history. Transactions can be processed all at once or on different dates to support layoffs that are processed in waves.

The reinstatement process returns employees to the job or position that they previously held.

Figure 10: Generate an initial list according to configurable criteria.

Figure 11: Dynamic roster management tool refines list and tracks the status of targeted employees.
PeopleSoft Enterprise eProfile Manager Desktop Enhancements

Oracle’s PeopleSoft Enterprise eProfile Manager Desktop has reduced HR administrative costs and increased data accuracy by equipping managers with the tools to manage their own workers. Conducting and capturing workflow online increases visibility and accountability for approvals.

In PeopleSoft Enterprise Human Resources 8.9, we’ve enhanced hierarchy navigation and text configuration.

Enhanced Hierarchy Navigation

With PeopleSoft Enterprise Human Resources 8.9, senior-level managers will be able to drill down through their entire organization and view or perform transactions on employees or contingent workers anywhere within their reporting chain. The new architecture also allows higher-level managers to access and transact on the direct reports of terminated managers or open positions. Managers will be able to see open positions represented alongside their employee rosters. Managers who hold multiple jobs will be able to access direct reports for each job quickly and easily.

Configurable Text

In PeopleSoft Enterprise Human Resources 8.9, customers will be able to represent their own policies, instructions, and business rules within the pages of PeopleSoft Enterprise eProfile Manager Desktop. They’ll be able to update text within the pages through the text catalog.

Flexible Row-Level Security

As companies grow in headcount or expand geographically, their requirements for user security also grow and become more complex. Companies may want to define row-level access in new ways that support the way their organization is structured and managed.

With PeopleSoft Enterprise Human Resources 8.9, organizations can maintain security by using Department and Department Security Trees. They will also be able to define row-level security by location, regulatory region, country, or business unit. They may choose an additional field, such as Salary Grade, or a combination of fields on which to base security. For example, they may create an operator class that can access employees only of a certain salary grade within a particular country.

This new and very flexible security is based on Fast Views that will work in real time in PeopleSoft Enterprise Human Resources 8.9 for improved performance. The security extends to query, SQR, and batch processing.

France

In PeopleSoft Enterprise Human Resources 8.9, we are making significant enhancements to improve local functionality for France.
PeopleSoft Enterprise Human Resources 8.9 includes features that will enhance the HR administrator’s ability to easily comply with legislative requirements in France. Specifically, we are improving the 2483 report and the employee survey.

**2483 Report**

The 2483 training report is a mandatory yearly report that lists all company costs related to training. Organizations must provide this report before 30 April to the Tax Office. This report is used to calculate the fees that companies must pay if the amount they invested on training did not reach the legal training expenses. This requirement is complex and cumbersome. In particular, users need to assess their training plans, record sessions completed, and track which costs are chargeable and which are not. After the end of the year, only the chargeable costs can be reported. Many training departments spend a significant amount of time tracking and reporting the costs and producing the 2483 report.

As part of PeopleSoft Enterprise Human Resources 8.9, we’ll enhance the training module and the processing of 2483:

- We’ll allow a more seamless setup of costs in the training module, including the ability to record training costs not related to a session, such as full time instructors and training staff, as well as the ability to manually enter the indicators that are not automatically computed.
- We’ll enhance the integration with PeopleSoft Enterprise Global Payroll by supporting multiple employee record numbers and using writable arrays.
- We’ll review all existing indicators to ensure that their calculation matched the legal requirements.

This feature will be useful for any company implementing or using training administration in France.

**Employee Survey**

Employee Survey, commonly called Bilan Social in French, is an annual regulatory report. The Employee Survey reports an organization’s last three years of activity by the means of nearly 200 indicators. These indicators are listed in seven groups defined by French regulations: job, compensation, health/safety, working environment, training, social relationships, and other. This report is presented and discussed before the Work Council. Because this report is quite complex, many companies are trying to produce it automatically.

As part of PeopleSoft Enterprise Human Resources 8.9, we will enhance the capabilities to support our customer's Employee Survey requirements by:

- Adding indicators related to Global Payroll.
- Adding indicators related to profit sharing.
• Rewriting absence indicators so that they report information out of the absence functionality in Global Payroll or Human Resources.

• Allowing users to choose the source of information and easily modify the computation.

**What’s New in PeopleSoft Enterprise Payroll for North America 8.9?**

Without an effective payroll system, a company can’t keep its employees productive and happy. It’s important for preparation, management, and reporting to be accurate and complete.

PeopleSoft Enterprise Payroll for North America is a mature, proven, feature-rich payroll solution. It accurately, efficiently manages payroll functions while ensuring compliance with federal, state, and local regulatory requirements.

In PeopleSoft Enterprise Human Resources 8.9, we made significant enhancements to Payroll for North America in ease of use and integration.

**Ease of Use**

Oracle’s PeopleSoft Enterprise Payroll for North America 8.9 includes features that will make it easier for the payroll manager to manage and process payroll.

**Alternative Overtime**

Recently enacted California legislation requires an employer to pay overtime at the rate of one and one-half times an employee’s regular rate of pay for hours worked over eight in a workday and twice an employee’s regular rate of pay for hours worked over 12. Though we have supported FLSA calculations for many releases, California’s requirements go beyond this requirement.

Alternative overtime will enable payroll managers to correctly calculate the rate of pay for employees affected by this legislation, without limiting the population to a specific state or locality. Additional flexibility will allow any group of employees to be subject to the alternative method of overtime calculation.

This feature will be useful for any organization that pays employees in California or requires the alternate calculation due to union or company agreements.

**Integration**

Payroll systems are never standalone. There is always a need for systems to feed the payroll process or receive payroll results. In PeopleSoft Enterprise Payroll for North America 8.9, we are delivering features that will improve integration with the payroll system.

**Sales Incentive Management Integration**

Companies want an automated process that enables them to distribute incentive payouts to their employees by transmitting PeopleSoft Enterprise Sales Incentive Management data to Payroll for North America for the next scheduled pay run.
Today, users must either create a custom interface or manually enter the data. These two processes are costly and time consuming and may result in delayed payouts.

To facilitate incentive payments in PeopleSoft Enterprise Payroll for North America 8.9, we will introduce a bidirectional data interface between PeopleSoft Enterprise Sales Incentive Management and PeopleSoft Enterprise Payroll for North America. This interface will include functionality to configure the data integration and then manage the ongoing exchange, payment, and confirmation of the gross payment data. This capability will decrease the time needed to compensate the sales force and ensure greater data reliability and accuracy.

**Standard ChartField Configuration**

Payroll expenses represent one of the largest operating costs within an organization. Companies are constantly seeking ways to more accurately and efficiently post payroll information to the general ledger.

New with PeopleSoft Enterprise 8.9, the standard ChartField configuration will enable consistent use of ChartFields between Oracle’s PeopleSoft Enterprise General Ledger and PeopleSoft Enterprise Payroll for North America. It allows for the synchronization of ChartField configuration between the two applications, thereby providing the information necessary for more detailed reporting of labor costs.

**PeopleSoft EnterpriseOne General Ledger Integration**

Posting payroll data to PeopleSoft Enterprise General Ledger is one of the final steps in the payroll cycle. When a combination of products exists within an enterprise, it can be time consuming and costly to implement and maintain integration solutions.

Delivered as an off-cycle project for Oracle’s PeopleSoft Enterprise 8.8 SP1, PeopleSoft Enterprise Payroll with Oracle’s PeopleSoft EnterpriseOne General Ledger Integration enables synchronization between PeopleSoft Enterprise Payroll for North America or PeopleSoft Enterprise Global Payroll and PeopleSoft EnterpriseOne General Ledger. Business objects are defined and maintained in a single system and synchronized, thereby reducing data entry errors and redundancy. Payroll transactions from PeopleSoft Enterprise payroll applications are posted to PeopleSoft EnterpriseOne General Ledger.
What’s New in PeopleSoft Enterprise Time and Labor 8.9?

Companies today require a time and attendance application that addresses industry-specific and global time and attendance needs. To enable greater efficiency, it must act as a single repository of time that processes all rule requirements while integrating to HRMS, financial, manufacturing, and distribution systems.

PeopleSoft Enterprise Time and Labor is a flexible, integrated solution that gives organizations the intelligence and power in a single repository to determine key performance indicators that are impacted by time-related data. It is designed to support the time-related needs of a wide range of business functions—including payroll, financial and cost accounting, project management, employee benefits, and organizational administration—across industries.

Time and Labor enables organizations to:

- Reduce their gross payroll costs by automating time capture and complex pay rate calculations.
- Improve employee productivity by streamlining time-consuming processes.
- Reduce infrastructure costs by consolidating disparate legacy and homegrown systems.
- Support better decision making with enterprise analysis of labor data.
• Make sure that the right worker is in the right job at the right time.

• Increase customer satisfaction as cost effectively as possible.

In Oracle’s PeopleSoft Enterprise Time and Labor 8.9, we will make significant enhancements in the following areas:

• Scheduling.

• Time reporting.

• Business process controls.

• Financials integration.

• Performance.

Scheduling

There are three scheduling environments that an organization is likely to encounter. In a fixed schedule environment, employees are assigned a work pattern on hire or on a change in role or situation. The planned work pattern is static and is changed only in special situations. In a rotating schedule environment, schedule rosters are established in advance and assigned to groups of employees on hire or when a new project or period begins. In a dynamic environment, an employee does not have a set schedule; a new schedule is established every period, and updates are made frequently based on a variety of factors.

In each environment, it is critical for schedules to be created and maintained systematically to communicate work expectations, track adherence, reconcile with actual work, and anticipate shifts in labor supply. PeopleSoft Enterprise Time and Labor 8.9 will provide improved capabilities to support each schedule environment.

Fixed Schedule Environments

In PeopleSoft Enterprise Time and Labor 8.9, a company may support centralized standard schedule definitions and ad hoc manager-specified work patterns. All schedule building blocks, including shifts, workdays, and schedule definitions, will be optional. For example, an organization may want to establish only standard shifts and allow these to be assigned directly to employees.
Rotating Schedule Environments

In PeopleSoft Enterprise Time and Labor 8.9, a set of rotations, with relative start days, may be defined on a schedule. For example, Crew A may start its rotation on day one of the pattern and Crew B may start on day seven. Schedule patterns will not be associated with specific dates until an employee is assigned to the pattern, allowing for maximum flexibility and reusability. The scheduler may choose a sample date, however, and view the resulting rotation pattern.

PeopleSoft Enterprise Time and Labor 8.9 will also accommodate split shifts on one day, off shifts that are greater or less than 24 hours, and day breaker rounding for shifts that cross midnight. These features will be particularly useful for organizations that operate on a 24-hour schedule and must rotate individuals between day shifts and night shifts.
Dynamic Schedule Environments

Dynamic scheduling environments require frequent schedule changes and intelligent scheduling arrangements. Today, the schedule override capabilities are intended for infrequent ad hoc use.

In PeopleSoft Enterprise Time and Labor 8.9, a generic interface to the open scheduling architecture will be available for loading optimized work schedules or data from other systems, including training data from PeopleSoft Enterprise Learning Management.

Managers will have a graphical interface to view schedules for their employees. In addition to viewing coverage, assigned shifts, and total work hours, managers will be able to identify individuals with planned absences or training. If updates need to be made to the schedule, managers will be able to find replacements, swap shifts, copy schedules, and make short- and long-term schedule changes.
General Scheduling Enhancements: Employee Access

In addition to these enhancements, PeopleSoft Enterprise Time and Labor 8.9 will allow employees to view their monthly schedule, including work/shift information, planned absences, holidays, and training.

Time Reporting

Time reporting requirements differ from industry to industry and organization to organization, but one thing remains the same: time reporting must be fast and easy. Companies need self-service timesheets to be flexible enough to support all different types of employee populations but easy enough to ensure that employees can perform this administrative task quickly and accurately.

PeopleSoft Enterprise Time and Labor 8.9 will include a new and improved self-service timesheet that features prepopulation and configurability, visibility to useful information, and task completion usability improvements.

Prepopulation and Configurability

Each employee population may have different needs for cost reporting, data prepopulation, and time recording. Much configuration is available today, but additional flexibility will be added in PeopleSoft Enterprise Time and Labor 8.9.

For punch-time reporting, a predefined punch pattern (such as meal in/meal out) will prepopulate the timesheet horizontally. The time reporter or adjuster will not
need to enter a punch type. He or she can simply enter the punch time and any supporting attributes to complete time entry.

All task-related data will appear on the grid either on the main time reporting tab or a secondary tab. Fields used frequently can be placed on the main tab, and overrides can be placed on the secondary tab.

According to the configuration, timesheets can be prepopulated from schedules, previous period time, or personal task values.

In addition to viewing and reporting time by week, predefined time periods may be established; the days of those periods will be prepopulated on the timesheet regardless of whether a time pre-population method is used.

**Visibility to Useful Information**

Information such as total hours reported and available leave balances will help employees and managers to ensure accurate time reporting and corrections.

Employees and managers will have easy access to leave balance and schedule information from within the timesheet. Users will be able to view daily and period running totals by time categories (customer-configured groupings of time reporting codes). For example, an organization may want to group time as productive and nonproductive, providing decision support information with data elements that are truly useful to each organization.

![Enhanced user interface for employee time entry with supporting data elements.](image)

Figure 18: Enhanced user interface for employee time entry with supporting data elements.
**Task Completion Improvements**

In PeopleSoft Enterprise Time and Labor 8.9, we’ll make enhancements to speed time reporting:

- Punch-time reporters and adjusters will have a single page to report punch and elapsed time.
- Users will be automatically brought into the timesheet based on today’s date. The timesheet will display the entire reporting period surrounding the date, beginning with the period start day as configured. For example, time periods always begin on Monday.
- Time reporting codes will be filtered so that only the codes that should be entered online are available.
- Managers will be able to scroll through employees by using next in list/previous in list, thereby reducing the number of clicks required to complete the job.

**Business Process Controls**

It is critical to report hours and costs accurately, control costs, and track reviews and adjustments carefully.

![Timesheet with punch pattern. (Page prototype; subject to change.)](image)

**Timesheet Approvals and Controls**

In many organizations, a manager must approve time immediately after submittal. It is essential that the manager sign off on the hours recorded by the employee, as well as task elements that were charged (such as labor distribution and project costing).

In PeopleSoft Enterprise Time and Labor 8.9, organizations will be able to use delivered time approval workflow. They will be able to submit, approve, deny, or adjust time at the timesheet or detail level. Employees and managers will be notified on submittal, approval, denial, and adjustment of time. Managers will have visibility into the timesheet statuses of all their employees, including those who have not yet submitted time and those who have exceptions associated with their time, in one central location.
For organizations that need additional controls and audit capabilities, comments may be recorded at the detail time level to capture such information as overtime explanations or adjustment reasons. Such comments will be visible in both reported and payable time. The last user to update time, along with the timing of the update, will be displayed. In addition to prior period adjustments, future period entry may be controlled at the role level.

These features will be useful to many customers but may be particularly useful to those who are concerned about DCAA compliance.

**Payable Time Approval Enhancements**

Many organizations need to review processed time before it is paid to ensure accurate payment. You can complete this task quickly and precisely if you have access to summary information and visibility to potential trouble spots.

In PeopleSoft Enterprise Time and Labor 8.9, the Approve Payable Time user interface will be enhanced with high-level summary information, such as total hours, total overtime hours, and absence hours, that can be configured to appear on the employee summary page. Exceptions will be flagged. As a result, the approver will be able to quickly identify individuals who may require further scrutiny. All others may be approved as a group. If an individual does require further scrutiny and, ultimately, hours adjustments, the approver may drill directly into the timesheet to make the changes.

Notifications will be added to alert managers to time that is awaiting approval and exceptions that need to be cleared. A manager will receive only one notification per time administration process.

```
Figure 20: Manager Self Service Approve Payable Time page. (Page prototype, subject to change.)
```

**Manager Self Service**

Managers need quick access to information and transactions. PeopleSoft Enterprise Time and Labor 8.9 provides a consistent interface in which managers and administrators can easily identify and navigate through the pool of employees they are interested in. Users will be able to establish preferred employee criteria and default values. They'll be able to prepopulate lists with a subset of their overall
employee pool, override criteria, and refresh the data. Once the employee pool is identified, the list persists throughout the application for easy navigation. A manager may navigate through the list by using next in list/previous in list capabilities, reducing the time it takes to complete tasks for multiple employees.

Figure 21: Manager Self Service selection criteria and options.

Financials Integration

ChartField Integration

To operate and integrate consistently with Oracle’s PeopleSoft EnterpriseOne Financial Management applications, PeopleSoft Enterprise Time and Labor 8.9 will support standard ChartField integration and individual ChartField entry. Organizations will be able to analyze labor costs at the detailed ChartField level in PeopleSoft Enterprise General Ledger and Oracle’s PeopleSoft Enterprise Project Costing and will be able to reconcile costs between the two applications.

Companies will be to associate time with any combination of ChartFields, regardless of whether they are using commitment control. ChartField combinations may be entered through a single code or may be entered or overridden at an individual level. ChartFields will be mapped to PeopleSoft Enterprise Project Costing, North American Payroll, and Global Payroll and mapped from Expenses. PeopleSoft Enterprise Time and Labor 8.9 will also support standard ChartField configuration, in which companies can re-order, re-label, or inactivate chart fields. The resulting configuration will consistently be displayed on PeopleSoft Enterprise Time and Labor pages.
Projects Integration

Labor costs associated with projects and activities can be sent from PeopleSoft Enterprise Time and Labor to PeopleSoft Enterprise Project Costing for inclusion in project-based cost analysis and reporting.

PeopleSoft Enterprise Time and Labor 8.9 will provide additional controls over the flow of data to PeopleSoft Enterprise Project Costing, allowing for tighter integration and improved performance. For example, only time transactions that have valid combinations of business unit, project, and activity will be published to PeopleSoft Enterprise Project Costing. Companies will be able to control what time reporting codes are sent to PeopleSoft Enterprise Project Costing.

Performance

Time Administration

It is critical to convert reported time into payable time as quickly as possible. In PeopleSoft Enterprise Time and Labor 8.9, we’ll optimize the central process of time administration. We’ll reduce the number of temporary tables, eliminate redundant batches, and remove processing loops. Some processing logic will be moved forward to timesheet entry, such as punch duration calculations. The process should be 15 to 20 percent faster than in Oracle’s PeopleSoft Enterprise Time and Labor 8.8 SP1.

Dynamic Group Refresh

In today’s dynamic work environments, employees are frequently coming, going, and moving around. To ensure that these employees do not slip through the cracks, employee groups must be refreshed quickly and efficiently. In PeopleSoft Enterprise Time and Labor 8.9, the performance of the dynamic group refresh process will be improved by consolidating the process and reducing the number of deletes and truncates. The process should be 15 to 20 percent faster than in PeopleSoft Enterprise Time and Labor 8.8 SP1.

What’s New in PeopleSoft Enterprise ePay 8.9?

When an organization has a large population of employees, multiple locations, or multiple business groups around the world, managing the payroll function can be a challenging, complicated, and time-sensitive task. PeopleSoft Enterprise ePay provides real-time, on-demand payroll information for employees. They can view their basic payroll information or print a copy of their latest earnings statement online. Most employees find it much easier to get the personal and payroll information they need through their organization’s intranet than through traditional methods.

PeopleSoft Enterprise ePay features an extremely flexible and functional design. It is fully integrated with PeopleSoft Enterprise Payroll for North America and Global Payroll and provides a quick return on investment for employers.
Ease of Use

PeopleSoft Enterprise ePay 8.9 includes features that will make it easier for payroll managers to manage and process payroll as a result of employees being able to view their payslips online.

Online Payslip

Viewing an electronic payslip is the number one employee self-service transaction in the world today. Each country extension currently requires a separate payslip transaction, which is only delivered with a small number of country extensions. This transaction may not show the same information that employees receive in their paper payslips, which is confusing for employees. For users, there is need to reduce the maintenance required to duplicate new enhancements across all the country extensions.

In Oracle’s PeopleSoft Enterprise ePay 8.9, we will provide an online payslip that can be used by all country extensions, supported by PeopleSoft Enterprise Global Payroll. Employees will be able to view online an exact copy of the paper payslip that they received. With a single transaction, you can provide the information that is specific to the employee’s country, thereby lowering your total cost of ownership.

Note: For some countries, we also provide the ability to indicate whether you want to provide only online payslips, with no paper payslips. Doing so can lower your organization’s expenses even more by eliminating printing and delivery costs.

What’s New in PeopleSoft Enterprise Absence Management 8.9?

Employee absences are the largest remaining unmanaged employer benefit. Absence is a particular issue for small to medium-sized businesses in which an absent employee can make a huge difference to the smooth function of the organization. For larger organizations, managing multiple absence systems can be costly and inefficient.

Oracle’s PeopleSoft Enterprise Absence Management is an innovative absence management system that gives you control over absence planning and compensation operations—even in a multinational environment. It combines employee and manager capabilities and tracks all absences in a single, powerful, web-deployed application. It’s easy to use, configurable, and flexible enough to meet the most complex needs in absence management. Whether your operations are solely in the United States or in a multinational environment, you can tailor this solution to meet your operational needs. It is scalable enough to grow with your organization.

Organizations have been searching for a flexible, robust absence solution that employees and managers can easily use on a daily basis. Through diligent research and customer focus groups, PeopleSoft Enterprise Absence Management was designed to meet today’s leading requirements in the United States, Canada, and around the world. Although PeopleSoft Enterprise Absence Management is built
on the proven functionality of PeopleSoft Enterprise Global Payroll and is included with Global Payroll, it is now a standalone module, which enables customers who use PeopleSoft Enterprise Payroll for North America or a third-party payroll solution to use PeopleSoft Enterprise Absence Management.

The rules-based engine and scalable platform enable you to operate and administer employee absences that fully comply with local requirements around the world. You can process absences for payment in a centralized or decentralized environment. This flexibility in deployment and administration enables you to leverage a single application across your organization without customization or interfaces. Absence Management enables you to define and implement best practices across your organization even as you adhere to regional differences.

PeopleSoft Enterprise Absence Management 8.9 was built with special emphasis on:

- User-friendly employee and manager self service.
- Delivered integration.

**PeopleSoft Enterprise Absence Management Features**

Oracle’s PeopleSoft Enterprise Absence Management 8.9 delivers a robust feature set to assist organizations in all their time-off management activities and processes. In a single installation, PeopleSoft Enterprise Absence Management 8.9 will enable organizations to automate the processes around planning for, and later compensating, paid time off for their entire worldwide workforce.

New or expanded features by role are detailed in the following table.

<table>
<thead>
<tr>
<th>Feature</th>
<th>Roles</th>
</tr>
</thead>
<tbody>
<tr>
<td>Simple and efficient employee self service to submit absence requests and view status.</td>
<td>Employee</td>
</tr>
<tr>
<td>Simple and efficient employee self service to view current and projected absence balances.</td>
<td>Employee</td>
</tr>
<tr>
<td>Simple and efficient manager self service to submit absence requests on behalf of employees.</td>
<td>Manager</td>
</tr>
<tr>
<td>Simple and efficient manager self service to view current and projected absence balances for employees.</td>
<td>Manager</td>
</tr>
<tr>
<td>Simple and efficient manager self service to act on (approve/deny) absence requests.</td>
<td>Manager</td>
</tr>
<tr>
<td>Highly configurable request approval functionality, including multilevel approvals and alternate approvers.</td>
<td>Absence Management Administrator</td>
</tr>
<tr>
<td>Highly configurable absence accrual functionality, including a rules engine to compute the most complex accrual logic.</td>
<td>Absence Management Administrator</td>
</tr>
</tbody>
</table>
Highly configurable absence consumption (absence take) functionality, including a rules engine to compute the most complex consumption logic.

Absence Management Administrator

Highly configurable absence terminology.

Absence Management Administrator

Ability to export computed absence accruals and consumption (by employee, by pay period) to Payroll for North America for actual payment.

Absence Management Administrator

Ability to export computed absence accruals and consumption (by employee, by pay period) to PeopleSoft Enterprise Payroll Interface for actual payment.

Absence Management Administrator

Ability to export computed absence accruals and consumption (by employee, by pay period) to Time and Labor for payable time generation.

Absence Management Administrator

The sections that follow describe a more detailed overview for each of the major new enhancements in PeopleSoft Enterprise Absence Management 8.9.

The Request Absence screen is shown.

Figure 22: Employee Self-Service Absence Request view.

**Employee Self Service: Submit Absence Request**

PeopleSoft Enterprise Absence Management 8.9 will enable employees to submit a time-off request with a minimum of clicks. The user interface displays only the required amount of information needed to submit the request and is tailored to each kind of absence (sick, vacation, and so on). This capability allows for a fast, user-friendly process that will minimize—if not eliminate—calls to your help desk, paper-based processes, and manual data entry.
**Employee Self Service: View Balances**

PeopleSoft Enterprise Absence Management 8.9 will enable employees to easily view their current or projected absence entitlement balances. By default, current balances are displayed, but employees can choose the Forecast Balance option, which allows the balance of a future date to be projected. This feature enables employees to analyze and plan their leave ahead of time and helps prevent situations in which employees would have to take leave without pay. Now, employees can access their absence information, reducing inquiries to the HR department.

**View Absence Balances**

<table>
<thead>
<tr>
<th>Entitlement Name</th>
<th>View All</th>
<th>First 1-5 of 9</th>
<th>Last</th>
</tr>
</thead>
<tbody>
<tr>
<td>Current Balance</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Sickness</td>
<td>28 Hours</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Paid Time Off</td>
<td>10 Days</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Jury Duty</td>
<td>21 Days</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Figure 23: Employee Self-Service Absence Balances view.

**Manager Self Service: Submit Absence Request**

PeopleSoft Enterprise Absence Management 8.9 will enable managers to easily submit a request to take time off on behalf of one of their employees. The user interface display is simple and easy, showing all pertinent information needed to submit the request, and is tailored to each kind of absence (sick, vacation, and so on). Through this easy-to-use self-service interface, managers and employees can spend less time managing time off and more time on productive work that impacts the bottom line.

**Manager Self Service: View Balances**

PeopleSoft Enterprise Absence Management 8.9 will enable managers to easily view their employees' current or projected absence entitlement balances. By default, current balances are displayed. The Forecast Balance option allows the balance of a future date to be projected. Employees and managers no longer have to spend time searching paper trails or manually calculating what entitlements and balances should be. Now, managers can understand available time off and manage employee time off efficiently, eliminating paper-based reports and inquiries to the HR department.
Manager Self Service: Process Requests

PeopleSoft Enterprise Absence Management 8.9 will enable managers to easily call up a list of all absence requests that are awaiting approval. The list can be sorted and filtered a variety of ways for easy visualization and management. Now, managers have a single access point to all absence requests while workflow enables paperless business processes and more efficient task completion.

Rules-Based Engine Computes Complex Accrual Logic

PeopleSoft Enterprise Absence Management 8.9 provides highly configurable absence accrual functionality. This functionality is identical to core functionality in PeopleSoft Enterprise Global Payroll, which has already proven its ability to model absence accrual needs in more than two dozen countries. For example, with each user-defined absence entitlement (vacation, sick, FMLA, and so on), you can indicate whether it accrues per period (such as biweekly) or per absence (such as 180 days per maternity leave). You can also define eligibility rules that govern when each accrual should occur (based on hours worked, longevity, and so on). The configurable rules engine gives you powerful flexibility. When you need to make changes to the logic used to determine accruals, no programming is required. The rule formula merely needs to be edited by your administrator. This flexibility enables organizations to leverage one integrated system throughout the enterprise and translates into decreased administrative costs and reduced IT resources required to maintain and manage the system.

Rules-Based Engine Computes Complex Absence Consumption Logic

PeopleSoft Enterprise Absence Management 8.9 provides highly configurable absence consumption functionality, or “absence take.” This functionality is identical to core functionality in PeopleSoft Enterprise Global Payroll, which has already
proven its ability to model needs in more than two dozen countries. For example, with each user-defined absence use, or take, you can indicate how it draws down one or more accruals and with what priority (perhaps the first 10 days of sick time are paid as sick time while the next six weeks are paid against a short-term disability benefit). When you need to make changes to the logic used to determine decrementing balances, no programming is required. The rule formula merely needs to be edited by your administrator. This flexibility enables organizations to leverage one integrated system throughout the enterprise, resulting in elimination of manual intervention, reduction in errors, and decreased administrative costs.

**Highly Configurable Absence Terminology**

PeopleSoft Enterprise Absence Management 8.9 will enable you to change the terms viewed in self-service (and other) pages so they can better match local needs. For example, “absence request” can be displayed as “leave request” (Australia) or “time off request” (United States). This flexibility enables you to use one single system that requires no customization to accommodate regional and organizational differences.

**Integration to PeopleSoft Enterprise Payroll for North America**

Within the PeopleSoft Enterprise Human Resource module today, the Base Benefits Leave component is integrated with PeopleSoft Enterprise Payroll for North America. Historically, this was the only leave functionality available to our North American customers. As absence management has become a key focus among United States companies, the requirements have become more complex and demanded a more robust and flexible solution.

PeopleSoft Enterprise Global Payroll has provided our global customers with Absence Management to manage leave accruals, takes, and balances. This solution is far more flexible and robust than the Base Benefits solution because it uses a rules-based engine. It allows customers to create any type of take or entitlement rule they need. For PeopleSoft Enterprise Absence Management 8.9, we will deliver PeopleSoft Enterprise Absence Management independently from PeopleSoft Enterprise Global Payroll so that it can be used by customers who use a third-party payroll or PeopleSoft Enterprise Payroll for North America. They will be able to address more complex absence requirements with a rules-based solution.

To enable the integration between PeopleSoft Enterprise Absence Management and PeopleSoft Enterprise Payroll for North America, PeopleSoft Enterprise Absence Management 8.9 will deliver the ability to export computed absence accruals and consumption (by employee, by pay period) for actual payment. Only a minimum amount of setup is required to map absence payment accounting concepts to an existing PeopleSoft Enterprise Payroll for North America system. Customers who use PeopleSoft Enterprise Payroll for North America will be able to use an integrated, robust absence management solution without spending time, effort, and money on customizations to meet their absence management needs.
Integration to PeopleSoft Enterprise Payroll Interface

To enable the integration between PeopleSoft Enterprise Absence Management and third-party payrolls, PeopleSoft Enterprise Absence Management 8.9 will enable you to export computed absence accruals and consumption (by employee, by pay period) for actual payment. Only a minimum amount of setup is required to map absence payment accounting concepts to an existing payroll interface process. Now, customers who use third-party payrolls can use an integrated, robust absence management solution without spending time, effort, and money on customizations to meet their absence management needs.

Integration to PeopleSoft Enterprise Time and Labor

The functionality proposed for PeopleSoft Enterprise Absence Management 8.9 will include the ability to export computed absence accruals and consumption (by employee, by pay period) to PeopleSoft Enterprise Time and Labor for payable time generation. This capability allows you to retrieve absence data from PeopleSoft Enterprise Absence Management for use as criteria within the rules processed against time in PeopleSoft Enterprise Time and Labor. For example, you may have an overtime rule that states that payees are not eligible for overtime if they are absent within two days of the overtime period. To correctly apply this rule, PeopleSoft Enterprise Time and Labor must be aware of all absences reported in PeopleSoft Enterprise Absence Management. This integration eliminates double entry and custom interfaces while enabling paperless business processes for our customers who use PeopleSoft Enterprise Time and Labor.

In Summary

To be competitive in the worldwide marketplace, employers must adopt a worldwide view of their human resource issues, including absence management. To better manage absence, employers will need to make significant progress in measuring the impact of absence on their organizations. Many employers do not consistently track unscheduled absences. In the United States, for example, almost two-thirds of employers do not know what their absence rate is or how their experience compares with that of their competitors. PeopleSoft Enterprise Absence Management will help you manage, track, and analyze all your organization’s absence-related needs, directly improving your bottom line.

What’s New in PeopleSoft Enterprise Workforce Analytics 8.9?

In this release, we have made tremendous strides to improve the Total Ownership Experience for Oracle’s PeopleSoft Enterprise Workforce Analytics customers. We’ve made significant improvements to PeopleSoft Enterprise HRMS Warehouse—the foundation of all our PeopleSoft Enterprise Workforce Analytics products—as well as PeopleSoft Enterprise Workforce Scorecard. We’ve also made numerous improvements in usability and maintainability across all our PeopleSoft Enterprise Workforce Analytics applications. These improvements reflect the key
needs in the marketplace for analytic applications and feedback that we have been receiving from our customers:

- **Need for simplicity.** Reducing the time and cost to implement and own PeopleSoft Enterprise Workforce Analytics has been the key priority for this release. Because we will also be supporting mid-market customers who use PeopleSoft EnterpriseOne HCM, the need for simplification, without affecting functionality and scalability, has been even greater.

- **Packaged content plus extensibility.** Although PeopleSoft provides a tremendous amount of pre-delivered and packaged content, we know that each organization has data and business intelligence requirements that make it unique. That’s why one of the most important priorities for this release was to make it easier for customers to extend the capabilities of Workforce Analytics by adding their own content.

- **Modular deployment.** PeopleSoft Enterprise Workforce Analytics provides a robust set of content and functionality. Normally, customers have taken a phased approach to rolling out Workforce Analytics applications and content in the HRMS Warehouse. For this reason, we have made many improvements in our toolset and structures to make it easier to roll out content and applications in a modular way.

**PeopleSoft Enterprise HRMS Warehouse**

Significant enhancements have been made to Oracle’s PeopleSoft Enterprise HRMS Warehouse to improve the Total Ownership Experience. These improvements will make it easier and faster for our customers to achieve the benefits and ROI of all our PeopleSoft Enterprise Workforce Analytics applications. These changes will greatly reduce the cost and time required for maintaining and supporting all Workforce Analytics products. We’ve also made great strides in providing globalization capabilities and are adding features to support many data warehouse best practices.

PeopleSoft Enterprise HRMS Warehouse will become the PeopleSoft Enterprise HRMS Warehouse solution for Oracle’s PeopleSoft EnterpriseOne HCM customers. These customers will gain new capabilities in metrics and analysis. For companies that own both PeopleSoft Enterprise HRMS and PeopleSoft EnterpriseOne HCM, it means having a single warehouse that will consolidate information about the workforce from both these sources.

The key themes for the improvements discussed here are:

- Simplification of tools.
- Improved flexibility for modular deployment and extending content.
- Full globalization capabilities.
- Data warehouse best practices.
**Simplification of Tools**

In January 2004, we announced that we were using a new extract-transform-load (ETL) provider for Oracle’s PeopleSoft Enterprise Performance Management (EPM) applications: Ascential. For the PeopleSoft Enterprise EPM 8.9 release, we will be expanding the use of this tool for all of the transformations within PeopleSoft Enterprise Warehouse and PeopleSoft Enterprise HRMS Warehouse. We will replace Data Loader and Data Mart Builder with this technology.

With this change, customers will be able to leverage a single, industry-leading ETL technology for all data movement from source all the way through analysis, thus reducing maintenance and implementation costs.

**Improved Flexibility for Modular Deployment and Extending Content**

Customers have often taken the approach of rolling out parts of PeopleSoft Enterprise HRMS Warehouse in a phased approach. Through improved metadata support and simplified data structures, we’ve made it easier than ever for customers to roll out parts of PeopleSoft Enterprise HRMS Warehouse in a more modular way.

We also know that our customers often extend PeopleSoft Enterprise HRMS Warehouse content by adding, deleting, and modifying data attributes to fit their own business intelligence needs. We’re adding many capabilities, including improved metadata support, easier-to-use data transformation tools, and deeper, more detailed content within dimensional structures, to make it easier than ever to extend content.

- **Metadata improvements.** The improved metadata support capabilities will give customers a unified view of how data flows all the way from transactions through analysis. Through this “data lineage” capability, customers will be able to understand exactly which transformations and source data elements are needed to implement specific analytics.

- **Simplified structure.** We’ve also simplified the structure of PeopleSoft Enterprise HRMS Warehouse to reduce the number of transformations required to deploy our data marts.

- **Deeper content.** In previous releases, content within the data mart section of PeopleSoft Enterprise HRMS Warehouse were designed with the purpose of providing specific, predefined analyses and metrics. With PeopleSoft Enterprise 8.9, the data mart section of PeopleSoft Enterprise HRMS Warehouse will be called Multidimensional Warehouse. It will contain much more detailed-level data from the source system, which will allow our customers to much more easily modify or create their own data mart content by aggregating and organizing information directly from this detail via another transformation or by using a business intelligence tool.
**Full Globalization Capabilities**

For customers who use our HCM solutions in more than one country, we have expanded the capabilities of our PeopleSoft Enterprise HRMS Warehouse to support multiple languages, currencies, time zones, and units of measure across all areas of PeopleSoft Enterprise HRMS Warehouse.

**Data Warehouse Best Practices**

Surrogate Keys: PeopleSoft Enterprise 8.9 architecture for data warehousing incorporates the use of a technology best practice called “surrogate keys.” Surrogate keys provide the fastest possible performance for reporting and analytics. They also support an advanced data loading technique called “slowly changing dimensions” to better support reporting historical information over a period of time.

Conformed Dimensions PeopleSoft Enterprise 8.9 architecture also incorporates the use of another industry best practice called “conformed dimensions.” Conformed dimensions are warehouse tables that are shared (conformed) across multiple subject areas. They enable customers to integrate content across functional warehouses and across data marts to enable enterprise level analysis. They also enable customers to develop a suite of related reports with drill-across capabilities from one report to another.

**PeopleSoft Enterprise Workforce Scorecard**

Oracle’s PeopleSoft Enterprise Workforce Scorecard provides a dashboard for executives, managers, and HR analysts to measure and communicate goals and metrics. PeopleSoft Enterprise Workforce Scorecard includes predefined key measures used to determine the health and pulse of the workforce and align the workforce with business objectives. Thirty-three delivered key measures, determined in conjunction with HR thought leaders, help HR executives quickly understand and communicate workforce information to the enterprise. With consistent metrics presented in a real-time, easy-to-understand dashboard, managers can see trends early and manage their organizations better.

With Oracle’s PeopleSoft Enterprise Workforce Analytics 8.9, we are expanding the capabilities of the PeopleSoft Enterprise Scorecard and PeopleSoft Enterprise Workforce Scorecard with new features to allow creation of Personal Scorecards. Users will be able to use Personal Scorecards to increase accountability deeper into the organization by providing scorecards potentially to all employees. We are also improving usability and the maintainability of scorecards.

**Personal Scorecards**

Scorecards are growing in popularity. Many customers are now asking for scorecards that can be used by many of an organization’s levels, not just senior-level management. Personal Scorecards will be a simple mechanism to create and distribute personalized scorecards throughout the enterprise. Each user in the organization will be able to see what their individual contribution is to the success
of the overall corporate strategy through a template-based scorecard definition. Scorecards will then be automatically personalized for a role or an individual user and will be personally assessed for each user.

**Ease of Use**

Besides general improvements to usability, many new features are being created to give users more personalization and flexibility in how they would like to see information presented by Workforce Scorecard.

- **KPI viewer.** The new key performance indicator (KPI) viewer will allow end users to customize KPI views to suit their needs. The new “dashlet” (an analytic portlet) metaphor will allow nontechnical users to browse and choose which KPIs they want to see, pick how they want to visualize them (10 chart types or table view), and organize them in a simple dashboard view.

- **KPI families.** KPI families will provide intelligent linking between KPIs. Anytime a KPI is viewed, users will be able to switch views to other related KPIs that are part of the same family without leaving the context of their analysis.

- **User-configurable charting.** In this release, we are introducing customizable charts. Users will be able to render KPIs in a table or a number of chart types, including 2D Bar, 2D Histogram, 2D Horizontal Bar, 2D Horizontal Percentage Bar, 2D Horizontal Stacked Bar, 2D Line, 2D Percentage Bar, 2D Stacked Bar, 3D Bar, 3D Percentage Bar, 3D Pie, or 3D Stacked Bar.

**Improved Total Cost of Ownership**

**Hierarchical KPIs**

We will provide the ability to attach a PeopleSoft Enterprise tree to a KPI definition. This capability will automatically compute and assess the KPI values at all node levels within the hierarchy, eliminating the need to create KPIs for each level of a hierarchy.

**Simplified Scorecard and KPI Setup**

Based on feedback from our customers, we will reduce, reorganize, and simplify the number of steps required to create scorecards and KPIs alike.

**Scorecards on the Multidimensional Warehouse (MDW)**

Starting in PeopleSoft Enterprise Workforce Analytics 8.9, customers will be able to define scorecards that leverage the data contained in the MDW. Customers will be able to create business process-centric scorecards that require conformed data from every PeopleSoft transactional system.
What’s New in PeopleSoft Enterprise Process Integration Pack for SAP 8.9?

In today’s environment, it is rare for an organization to use a single vendor for all its application requirements. Integration with non-PeopleSoft Enterprise systems can require a significant investment by customers, decreasing their ROI and increasing the time to break even for an implementation. Even after the initial implementation expense, ongoing maintenance and migration when systems need to be upgraded and accountability when things go wrong can cause an integration project to end up costing an organization more than one-third of its IT budget. To address the need for prepackaged integration solutions between PeopleSoft Enterprise and other ERP applications, we have developed packaged Process Integration Packs.

Process Integration Pack for SAP provides a bidirectional integration from PeopleSoft Enterprise Payroll to SAP Financials. The PIP delivers all the required levels of integration, including data transformation, routing, cross-reference maps, and connectors and adapters needed for a complete, end-to-end process.

In PeopleSoft Enterprise Human Resources 8.9, we’re adding the Process Integration Pack for SAP to the PeopleSoft Enterprise HCM product line. This out-of-the-box prepackaged solution provides:

- Ease of use.
- Speedier implementation.
- Maintainability.

Ease of Use

Posting payroll data to PeopleSoft Enterprise General Ledger is one of the final steps in the payroll cycle. When a combination of products exists within an enterprise, integration solutions can be costly and time consuming to implement and maintain.

Process Integration Pack for SAP is an out-of-the-box, prepackaged solution that provides synchronization between PeopleSoft Enterprise Human Resources and SAP Financials. Business objects are defined and maintained in a single system and synchronized, thereby reducing data entry errors and redundancy. Payroll transactions from PeopleSoft Enterprise Payroll for North America and PeopleSoft Enterprise Global Payroll are posted to SAP General Ledger.
Speedier Implementation

With traditional payroll-to-general-ledger integration, typical projects take four to six months, and complex projects take longer. With Process Integration Packs, you can reduce the integration timeline to four to six weeks. Process Integration Packs handle the business process mapping, integration point identification, technical architectural design, and detailed functional design.

Maintainability

Integration costs often end up being larger than they initially seem. After the initial expense, you must pay for ongoing maintenance and migration when systems need to be upgraded. Process Integration Packs are designed to provide customers with a low-cost and low-risk answer to enterprise integration questions.

Process Integration Packs reduce risk and preserve your integration investment through future upgrade cycles because we maintain the integration. As newer versions are released, we upgrade and certify the Process Integration Pack.

What’s New in PeopleSoft Enterprise 8.9 to PeopleSoft EnterpriseOne Integrations?

Seamless business process integration is a need for all enterprise application vendors. That’s why we’re providing and maintaining integration between PeopleSoft Enterprise Human Resources and Oracle’s PeopleSoft EnterpriseOne Financial Management and Manufacturing Management systems. This delivered integration eliminates the costs and resources associated with custom interfaces and decreases the total cost of ownership for our customers.
In PeopleSoft Enterprise Human Resources 8.9, we're adding business process integration points with:

- Oracle’s PeopleSoft EnterpriseOne Address Book.
- Oracle’s PeopleSoft EnterpriseOne General Ledger.

**PeopleSoft EnterpriseOne Address Book**

Oracle’s PeopleSoft Enterprise and Oracle’s PeopleSoft EnterpriseOne applications use employee information such as name, address, and phone number. This data must be maintained in both systems. By using our integration, you can copy your existing employee records from Oracle’s PeopleSoft Enterprise Employee Master to PeopleSoft EnterpriseOne Address Book. This integration also automatically updates PeopleSoft EnterpriseOne each time you add or change an employee record in PeopleSoft Enterprise.

![Figure 26: PeopleSoft Enterprise HCM to PeopleSoft EnterpriseOne Address Book process flow.](image)

The synchronization of employee and department data between PeopleSoft Enterprise Human Resources and PeopleSoft EnterpriseOne eliminates the need to manually maintain both systems, thereby reducing data maintenance and errors.

**PeopleSoft EnterpriseOne General Ledger**

Posting payroll data to the general ledger is one of the final steps in the payroll cycle. When a combination of products exists within an enterprise, integration solutions can be costly and time consuming to implement and maintain.

PeopleSoft Enterprise Payroll with PeopleSoft EnterpriseOne General Ledger Integration provides synchronization between PeopleSoft Enterprise Payroll for North America or Global Payroll and PeopleSoft EnterpriseOne General Ledger. Business objects can be defined and maintained in a single system and synchronized, thereby reducing data entry errors and redundancy. Now, payroll
transactions from PeopleSoft Enterprise Payroll applications can be posted easily to
PeopleSoft EnterpriseOne General Ledger.

PeopleSoft Workforce Service Delivery: PeopleSoft Enterprise HelpDesk for Human Resources

We provide an integrated service management solution that enables companies to
automate the entire process of managing internal HR support and service requests.
In the past, organizations have been unable to provide a complete service delivery
mechanism for their entire workforce, which has meant costly overlapping services
at best or lengthy delays and inefficiency at worst. Self service has significantly
enhanced the overall ability of organizations to improve efficiency, reduce costs,
and increase workforce satisfaction.

By augmenting self service, Oracle’s PeopleSoft Enterprise HelpDesk for Human
Resources is a complete integrated business solution for human capital
management workforce service delivery. It quickly enables streamlined, integrated
support processes within a single global framework. It enables you to leverage best
practices throughout the organization—anywhere, anytime. Workforce efficiency is
further enhanced by providing HR help desk agents and specialists with appropriate
tools and information to resolve questions from the workforce as quickly as
possible. By using real-time, 360-degree views, it aligns your workforce with key
organizational goals by tying together an enterprise view of people, skills, performance, cost efficiencies, and HR services.

With PeopleSoft Enterprise 8.9, we’re extending your ability to support HR service operations through key enhancements in the following areas:

- Knowledge management.
- Service level agreement management.
- Employee self service.
- Service analytics.
- System configurability.
- Multichannel communications.

By mid-2005, another release of PeopleSoft Enterprise HelpDesk for Human Resources will be made available to provide integration to the PeopleSoft Enterprise Human Resources 8.9 database. In addition to these features highlighted in this section, the PeopleSoft Enterprise HelpDesk for Human Resources 2005 release will include expanded integration points to the support the new Person Model, expanded integration points into additional HRMS functional areas, and new navigational features. Further information on these features will be provided later in 2004.

**Knowledge Management**

In PeopleSoft Enterprise 8.9, PeopleSoft Enterprise HelpDesk for Human Resources will provide expanded knowledge management capabilities, which will enable users to locate information quickly and conveniently. In addition to increasing the productivity of help desk agents, this solution will greatly enhance the usability of the system for self-service users. We’re extending the search capability in Oracle’s PeopleSoft EnterpriseOne Solution Advisor to include:

- **Thesaurus.** Users will be able to search and select documents based on synonyms for a specified word.
- **Alternate spelling.** The search engine will perform approximate pattern matching and identify similar words to help eliminate the impact of common misspellings or typing errors.
- **Stop word.** Commonly used or repetitive words can be excluded from the search to narrow the search and reduce search times.
- **Spider index.** The system will be able to search indexed documents on a web server or in a file system to greatly expand the knowledgebase available to users.
- **Expanded advanced search.** Additional operators and modifiers will be provided to enable users to perform more specific searches.
Service Level Agreement Management and Reporting

Service level agreements (SLAs) are vehicles for setting and managing expectations, improving service quality, and lowering the cost of providing HR support. Oracle’s PeopleSoft Enterprise HelpDesk for Human Resources 8.9 will support the management and reporting processes related to internal SLAs, which will enable help desk organizations to better prioritize HR support requests and measure their ability to uphold internal service commitments. The SLA management and reporting capability includes:

- The ability to define SLAs for use by HelpDesk for Human Resources.
- The ability to define different service levels (response-and-restore times) for different roles, departments, locations, contact channels (for example, web, phone, or in person), and incident priority.
- The ability to determine the appropriate response-and-restore time for an incident based on predetermined weighting of the applicable criteria mentioned earlier. The service level selection options can be presented to the agent or selected automatically.
- An SLA SmartView that will provide users and management with real-time insight into performance against targeted service levels and related agreements. SmartViews enable more proactive management by allowing users to conduct interactive what-if analysis. The SLA SmartView will enable multidimensional analysis of items such as on time and late response and restore times across provider groups, individual agents, and priority.

Employee Self Service

Employee self service enables organizations to provide their workforces with more convenient support at a lower cost. We’ve extended the self-service capability to include:

- Out-of-the-box access to troubleshooting guides and frequently asked questions (FAQs).
- Access to live-agent chat from any self-service page.
- The system’s ability to automatically provide employees with a list of suggested solutions, based on the content of their request, while a chat request is in the queue.

These capabilities mean that PeopleSoft Enterprise HelpDesk for Human Resources 8.9 delivers support and issue resolution beyond the agent, right into the hands of the workforce. Employees will be able to resolve most questions on their own with smart solutions, frequently asked question prompts, and the ability to access live-agent chat. Building on the most successful support desk toolsets, employees will be prompted with solutions or focused search prompts to streamline solution delivery. Your entire workforce will be able to get the right answer at the right time.
For more information on email management system (ERMS), chat capability, and the enhancements delivered in the current release, see the Multichannel Communications section of Oracle’s PeopleSoft Enterprise CRM Statement of Direction and Release Value Proposition.

**Service Analytics**

PeopleSoft Enterprise HelpDesk for Human Resources will leverage the PeopleSoft Active Analytics Framework to introduce the concept of closed-loop analytic functions in internal HR support. This framework will be used behind the scenes to guide HR specialist actions, enhance the value of customer interactions, and help enforce the adoption of best practices.

Embedded service analytics provide HR help desk agents with guidance on suggested next actions and related dialogs, with one-click access to the applicable application page or branch script. For example, if an employee contacts the help desk to correct information in his profile or W2, the help desk agent is automatically provided with links to the HR transactions required to resolve the case. PeopleSoft Enterprise HelpDesk for Human Resources ships with more than 45 of these most frequently used HR transactions.

![Figure 28: Based on the case information and description, embedded service analytics provide suggested actions and one-click access to the related application page required to resolve the case.](image)

**System Configurability**

In PeopleSoft Enterprise HelpDesk for Human Resources 8.9, we provide system administrators with more case page configurability options. These options will
increase flexibility while reducing total cost of ownership by eliminating the need to customize. Users will be able to better configure HelpDesk for Human Resources to support internal business processes across lines of business, departments, or locations.

Options for case configuration include:

- Items such as hiding or displaying individual fields, sections, or tabs.
- Choices for field labels, toolbars, and search configuration.
- Choice of the associated toolbar and configurable case search definition.

Multichannel Communications

Providing an end-to-end business process solution for HR service delivery is key to the success of any organization. Delivering this support across a variety of the most frequently used communications channels means greater flexibility, responsiveness, and faster point-in-time solutions. Callers can be on the road, log a problem, and specify the best way to contact them with the resolution. There’s no need to lock the communication of the solution to the communication channel in which it was received.

We help organizations manage an integrated, multichannel HR contact center cost effectively. We also help them to deliver consistent yet highly personalized service—no matter the communication channel. In PeopleSoft Enterprise 8.9, we have further expanded the email management (ERMS) solution in the following areas:

- Incorporation of natural language processing for smart business processes.
- Embedded intelligence for enhanced HR agent effectiveness.
- Redesigned email workspace for enhanced usability.

Email Response Management System

Our email response management system (ERMS) will include natural language processing support, which enables further intelligent automation of email management. In this release, users will be able to route, suggest, and respond automatically to an incoming email. They will be able to tailor the process and level of automation based on the categorization of an email. For example, suggested responses to high-priority emails can be routed to a particular HR specialist for review and response within a required time frame.

Given the volume of calls for assistance that are initiated through email in many organizations, these tools provide instant value. Call routing via email means better matching of the caller to the most effective resource, shorter queues and wait times, and clear explanations of the time frames within which a solution can be delivered. This additional integration is incorporated on top of existing email installations to further leverage existing IT investments.
In addition to focusing on system usability, we’re further enhancing productivity by embedding additional intelligence into the email workspace. Specific enhancements include:

- Automatic creation of a case from an email, including prepopulation of all relevant information.
- Recommended next actions and suggested solutions provided based on the content of an email.
- Real-time visibility into recent employee interactions and activities, with the ability to drill into any interaction with one click.
- Enhanced automatic selection of email templates from expanded template indexing that includes email categorization, product group, individual product, or keywords.
- Association of internal notes to an email and inclusion in the employee’s interaction history.

![Figure 29](image.png)

Figure 29: Based on the intelligent classification of an email and its content, the system will automatically suggest templates for the HR specialist to use in crafting an accurate and consistent yet personalized response to an email inquiry.

**Computer Telephony Integration (CTI)**

Through our partnerships with leading CTI vendors, we will deliver a unified desktop for HR specialists that will streamline system navigation and increase HR agent productivity. We will expose a server-side API that enables our partners to integrate directly through the PeopleSoft Enterprise desktop. Agents will have a seamless desktop interface across all employee communication methods and business applications, reducing clicks and providing a single desktop look and feel. The server-side integration will enable customers to continue to leverage their investments with our partners’ technology. They will be able to monitor agent state...
and control the call queue without introducing another desktop tool for the HR agent. In addition, we will defer support for specific ACDs or PBXs to our partners, which will allow customers to use any of the numerous switches supported by our partners.

What’s New in PeopleSoft Enterprise Global Payroll 8.9?

Managing payroll in one country or multiple payroll systems around the globe can be costly and ineffective. PeopleSoft Enterprise Global Payroll is an innovative payroll system that gives you control over all aspects of your payroll operations in a multinational environment.

The single rules-based engine and scaleable platform enable you to install and operate payrolls that fully comply with local requirements on a worldwide basis. You can process payrolls in both a centralized and decentralized environment.

In PeopleSoft Enterprise Human Resources 8.9, we made significant enhancements to the PeopleSoft Enterprise Global Payroll core in the following areas:

- Ease of use.
- Extended functionality.
- Integration.
- Performance.

Ease of Use

PeopleSoft Enterprise Global Payroll 8.9 will include features that will make it easier for the payroll manager to manage and process payroll.

Off-Cycle Payroll Processing

Many possible business reasons can require organizations to pay their employees right away, outside the regular on-cycle payroll calendar. Examples include terminations and related termination payments, corrections of pay errors, and processing one-off bonus payments. The PeopleSoft Enterprise Global Payroll solution today supports off-cycle payroll processing. In this new version, we are making enhancements to make the process even more intuitive and user friendly.

In PeopleSoft Enterprise Global Payroll 8.9, off-cycle payroll processing will provide payroll processing outside the “normal” on-cycle payroll processing window, including scenarios such as paying a new hire who was not included in the regular run, corrections for timesheet omissions, and pay errors. The user will be able to launch an off-cycle process without creating additional calendars, and the on-cycle run will be automatically suspended.

This feature will be useful for any organization but especially for organizations that have higher attrition rates (such as hospitality, retail, and other services industries).
Payment Reversals

The ability to reverse system-generated payments is a significant business need for the global market. Reversals are usually the result of lost, destroyed, or stolen negotiable instruments (checks). The error is sometimes discovered prior to leaving the payroll office, however, creating an imminent need to reverse the check. The reversal process will reverse all earnings, deductions, banking entries, accumulator balances, and manual or auto-generated positive input entries. In previous versions of PeopleSoft Enterprise Global Payroll, the way to perform this task was to use retrospective processing.

PeopleSoft Enterprise Global Payroll 8.9 uses off-cycle processing and offers enhanced functionality to manage reversals that will minimize manual intervention in this business process.

Recording of Manual Payments

In PeopleSoft Enterprise Global Payroll 8.9, we will introduce the ability to record manual payments to payees from an external source. This feature provides functionality to allow manually calculated and prepared checks to be entered and accumulators and balances to be updated in the payroll system database. In this manual process, the system does not calculate the earnings, deductions, or tax elements. Instead, it accepts the amounts used in the gross-to-net calculation of the manual check issued to the employee and updates the accumulators and balances accordingly, permitting subsequent payments to consider the manual balances in future calculations.

Examples of this feature include on-demand payments for terminating payees, incentive payments, and corrective adjustments paid from satellite offices.

![Image of Manual Payment Detail Information](image-url)
Administrator View of Payroll Results

In previous releases of PeopleSoft Enterprise Global Payroll, the ability to view the payslip online was only available to payees. The administrator payroll results inquiry was detailed and technical. In PeopleSoft Enterprise Global Payroll 8.9, we will deliver the ability to view all the details of the payslips online via ePay for the administrator and the payee. The end user can use the configurable Administrator Results Inquiry pages for functional auditing and reporting.

These configurable views will enhance the efficiency of payroll users because they will access the payroll results data in ways that meet their business needs. They will have access to all the key payroll data (such as earnings and deductions, accumulators, absences, and supporting elements) in a single location.

<table>
<thead>
<tr>
<th>Summary</th>
<th>Supporting Elements</th>
<th>Earnings and Deductions</th>
<th>Accumulators</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>Employee</td>
<td>004P01</td>
<td>004P01</td>
<td>RLT_AOM</td>
<td></td>
</tr>
</tbody>
</table>

![Figure 31: Administrator View Payroll results summary page.](image)

Earnings/Deductions Assignment Page

We've greatly enhanced the Earnings/Deductions Assignment page to allow users to configure which overrides can be entered for each element, resulting in a more user-friendly format. This page enables the user to inquire on a particular payee or to inquire or filter on all payees assigned to a specific earning/deduction. This feature includes the descriptive labels and online validation of the Supporting Element Overrides (SOVRs), which will provide easier data entry and online validation.
**Positive Input Page/Component**

This feature will replace the current Override page on PeopleSoft Enterprise Global Payroll Core Manual Positive Input and Positive Input by Calendar features and components, resulting in a more user-friendly version. The main advantage of this new feature is to make the entry available for every customer. To do so, the page details are configurable on a setup page. Users also benefit from descriptive labels, online edits, and prompt tables.

**Delivered Report for Messages**

Delivered Payroll Message reports have previously been developed for specific country extensions. In PeopleSoft Enterprise Global Payroll 8.9, we are consolidating what was in the country extensions and delivering a standard global report that will allow payroll administrators to print out a list of messages created during the payroll process (currently they can view this data only online). This report will provide the ability to identify payees who may need further editing to make it through finalization of the payroll. It provides the same selection logic as is available online.

**Extended Functionality**

**Multiple Resolutions for Earnings, Deductions**

In some cases, when you create rules, you may need to calculate a given earning or deduction multiple times by using particular criteria. For example, you might want to resolve a garnishment or loan element multiple times based on the number of garnishments or loans an employee has. With PeopleSoft Enterprise Global Payroll 8.9, you can do so by duplicating the earning or deduction multiple times.

In PeopleSoft Enterprise Global Payroll 8.9, we will introduce the multiple resolution feature that will allow you to use a driver (for instance, multiple instances of an accumulator) for resolving an earning or a deduction multiple times. It will
allow multiple entries directly on the Earnings/Deductions Assignments page, which will facilitate the rules setup, maintenance, processing, and calculation of complex earnings and deductions that require multiple calculation steps.

**Process Versus Priority Order**

What’s the difference between process and priority order? Processing order is defined as the order in which pretax deductions must be calculated before taxes, thus resulting in the tax liability, after which the calculation can continue with post-tax deductions. Priority order is defined for each deduction, and the net pay validation occurs after the initial deduction calculations in the order of each deduction’s priority.

Before PeopleSoft Enterprise Global Payroll 8.9, this feature was not available, nor was the ability to perform net pay validation at a different time than when you calculated the deduction. A new feature will allow the system to identify a calculation error or limit during processing. This capability will be important in cases in which the payment to payee cannot be less than a specified amount or less than zero.

**Post-Process Formula**

The PeopleSoft Enterprise Global Payroll core engine currently enables you to override the resolved value of an earning/deduction by using a post-process formula, which is often done to apply limits or add additional amounts.
The current functionality enables you only to override the resolved amount. It does not enable you to override the individual component values (rate, unit, base, percentage). As a result, the calculation results are often misleading, and you end up with situations in which the component value results are not in sync with the final resolved amount value.

This new functionality will allow a functional user to be able to override each individual component (rate, unit, base, percentage) in a post-process formula, which will provide a full solution to limit and additional amount requirements.

**Mass Retroactivity**

PeopleSoft Enterprise Global Payroll core currently provides a functionality to set up, log, and process payee-level triggers for payroll. The different types of triggers generated and processed are retro, iterative, and segmentation. PeopleSoft Enterprise Global Payroll 8.9 core provides the ability to automatically create mass retro and segmentation triggers for the impacted population based on events such as changes to set up (non-payee) tables.

This feature:

- Automatically tracks and stores changes made to nonpayee tables as defined by a user.
- Finds the population impacted by these changes.
- Writes retro and iterative triggers for every employee in the result set.
- Provides an interface where created and unprocessed triggers can be reviewed or deleted if needed.

**Banking Enhancements**

The PeopleSoft Enterprise Global Payroll core banking process incorporates setup tables and batch processing, which creates generic payment information. Country extensions build processes that facilitate the transmitting of these records to banking institutions. PeopleSoft Enterprise Global Payroll 8.9 provides additional features that will:

- Limit the payment method of check and cash to one for net pay distribution.
- Provide the ability to override all employees’ net distribution for a specific run type or calendar group ID or by payee.
- Provide the ability to put a net or recipient payment on hold and pay it at a later date.

**Payment Reconciliation Process**

New with PeopleSoft Enterprise Global Payroll 8.9 is the bank reconciliation process, which will match transactions found in the bank file with those found in the system. An exception report helps you identify entries that do not match and
enables you to manually resolve the exceptions. You can also manually reconcile the entire bank statement if the financial institution doesn’t provide an electronic file.

Figure 34: Criteria-based reconciliation report can identify entries that do not match that need resolution.

<table>
<thead>
<tr>
<th>Reference</th>
<th>Description</th>
<th>TransBank Amt</th>
<th>TransBank Date</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>TRN9000000097</td>
<td>Amounts Not Equal</td>
<td>-693,918.5800</td>
<td>08/08/2000</td>
<td>Wire - Disbursement</td>
</tr>
<tr>
<td>FRO264</td>
<td>Treasury</td>
<td>-6,593,918.2000</td>
<td>08/08/2000</td>
<td>None Appl</td>
</tr>
<tr>
<td>FRO264</td>
<td>Deposits</td>
<td>7,590.00</td>
<td>08/08/2000</td>
<td>Deposits</td>
</tr>
<tr>
<td>FRO265</td>
<td>Receivables</td>
<td>4,910.50</td>
<td>08/08/2000</td>
<td>None Appl</td>
</tr>
<tr>
<td>FRO265</td>
<td>Deposits</td>
<td>4,910.50</td>
<td>08/08/2000</td>
<td>Deposits</td>
</tr>
<tr>
<td>000001</td>
<td>Amounts Not Equal</td>
<td>1,042.60</td>
<td>07/02/2000</td>
<td>Paid</td>
</tr>
<tr>
<td>Manual</td>
<td>Passiblo</td>
<td>1,142.60</td>
<td>07/02/2000</td>
<td>Check</td>
</tr>
<tr>
<td>000001</td>
<td>Amounts Not Equal</td>
<td>1,042.60</td>
<td>07/02/2000</td>
<td>Paid</td>
</tr>
<tr>
<td>Manual</td>
<td>Passiblo</td>
<td>1,142.60</td>
<td>07/02/2000</td>
<td>Check</td>
</tr>
<tr>
<td>Check</td>
<td>2,185.20</td>
<td>07/02/2000</td>
<td>Paid</td>
<td></td>
</tr>
</tbody>
</table>

Figure 35: The Bank Transaction Entry page.

**IBAN Support**

International Bank Account Number (IBAN) is a bank account number, assigned according to international ISO standards, that uniquely identifies a bank account in...
cross-border financial transactions between European countries. The IBAN code contains information on the country, bank or branch ID, and account number.

On paper, the IBAN is broken into groups of four characters to make it easier to read. Countries that support IBAN are shown in Figure 36.

The IBAN has the following format (shown in Figure 37):

- ISO country code (such as CH): two characters.
- IBAN check digits: two characters.
- Domestic bank account code (BBAN): 30 characters.

<table>
<thead>
<tr>
<th>Country</th>
<th>Length</th>
<th>Example of an IBAN</th>
</tr>
</thead>
<tbody>
<tr>
<td>Austria</td>
<td>20</td>
<td>AT61 1004 3002 3457 3201</td>
</tr>
<tr>
<td>Belgium</td>
<td>16</td>
<td>BE67 5100 0756 7061</td>
</tr>
<tr>
<td>Denmark</td>
<td>18</td>
<td>DK10 0380 0440 1162 43</td>
</tr>
<tr>
<td>Finland</td>
<td>18</td>
<td>FI21 1234 5670 0007 85</td>
</tr>
<tr>
<td>France</td>
<td>27</td>
<td>FR14 2004 1010 0505 0001 3002 606</td>
</tr>
<tr>
<td>Germany</td>
<td>22</td>
<td>DE89 3704 0044 0532 0130 00</td>
</tr>
<tr>
<td>Gibraltar</td>
<td>23</td>
<td>GI75 WB0000 0000 7090 453</td>
</tr>
<tr>
<td>Greece</td>
<td>27</td>
<td>GR16 0110 1250 0000 0001 2300 695</td>
</tr>
<tr>
<td>Hungary</td>
<td>28</td>
<td>HU42 1177 3016 1111 1018 0000 0000</td>
</tr>
<tr>
<td>Ireland</td>
<td>26</td>
<td>IE11 0159 2600 7654 5110 7033 39</td>
</tr>
<tr>
<td>Ireland</td>
<td>22</td>
<td>IE29 ABBK 9111 5212 3456 28</td>
</tr>
<tr>
<td>Italy</td>
<td>27</td>
<td>IT40 3554 2811 1910 0000 0123 456</td>
</tr>
<tr>
<td>Luxembourg</td>
<td>20</td>
<td>LU78 0019 4006 4475 0000</td>
</tr>
<tr>
<td>Netherlands</td>
<td>18</td>
<td>NL91 ABNA 0417 1663 00</td>
</tr>
<tr>
<td>Norway</td>
<td>15</td>
<td>NO93 8001 1117 947</td>
</tr>
<tr>
<td>Poland</td>
<td>28</td>
<td>PL27 1140 2004 0000 3002 0135 5367</td>
</tr>
<tr>
<td>Portugal</td>
<td>25</td>
<td>PT00 0002 0122 1234 5670 9015 4</td>
</tr>
<tr>
<td>Slovenia</td>
<td>19</td>
<td>SI86 1910 0000 0123 418</td>
</tr>
<tr>
<td>Spain</td>
<td>24</td>
<td>ES91 2110 0418 4502 0005 1332</td>
</tr>
<tr>
<td>Sweden</td>
<td>24</td>
<td>SE55 5000 0000 0549 1000 0003</td>
</tr>
<tr>
<td>Switzerland</td>
<td>21</td>
<td>CH15 0023 0230 5062 2118 1</td>
</tr>
<tr>
<td>United Kingdom</td>
<td>22</td>
<td>GB19 NMBK 6016 1331 9688 19</td>
</tr>
</tbody>
</table>

Figure 36: IBAN countries and numbers.

In PeopleSoft Enterprise HCM 8.9, the IBAN information will be added to the employer and payee bank account information and the electronic file transfer (EFT) files will use this code where needed:

- The BIC code (also known as SWIFT code) will be added into the Bank and Branch definitions.
- The IBAN field will be added into the Bank Accounts definitions.
• The PeopleSoft Enterprise Global Payroll country extensions for Spain and Switzerland will update their EFT processes to support IBAN.

Integration

PeopleSoft Enterprise Sales Incentive Management Integration

Companies want an automated process to distribute incentive payouts to their employees by transmitting data calculated in PeopleSoft Enterprise Sales Incentive Management to Payroll for the next scheduled pay run.

To facilitate incentive payments in PeopleSoft Enterprise 8.9, we will introduce an interface between PeopleSoft Enterprise Sales Incentive Management and PeopleSoft Enterprise Global Payroll. This interface will include functionality to initially configure the data integration and then manage the ongoing exchange and payment of the gross payment data. This feature will decrease the time needed to compensate the sales force and help ensure data reliability and accuracy.

Standard ChartFields Configuration

New with PeopleSoft Enterprise Global Payroll 8.9, the standard ChartField configuration will provide consistent use of ChartFields between PeopleSoft Enterprise General Ledger and PeopleSoft Enterprise Global Payroll. PeopleSoft Enterprise Financial Management allows PeopleSoft Enterprise General Ledger users to define how their ChartFields are displayed and used in combinations. PeopleSoft Enterprise HCM 8.9 will display chart fields exactly the way they appear in PeopleSoft Enterprise Financial Management.

PeopleSoft Enterprise Global Payroll 8.9 will validate the list of values for each of the individual ChartFields but will still only allow eight ChartFields for PeopleSoft Enterprise General Ledger processing. When PeopleSoft Enterprise Global Payroll is distributing information to PeopleSoft Enterprise General Ledger, the complete set of ChartFields as defined in PeopleSoft Enterprise General Ledger for activity-based costing can be used, which will allow more detailed costing from PeopleSoft Enterprise Payroll to PeopleSoft Enterprise General Ledger to take place.

Performance

Payroll performance is critical to all organizations. In PeopleSoft Enterprise Global Payroll 8.9, we are delivering features that will enhance the performance of your payroll system.

Optimized Payroll Results Data Structure

PeopleSoft Enterprise Payroll data holds a wealth of information about employees’ pay. Although we would like to store every detail for analysis and reporting, it is not always practical. We have further optimized the data structures for storing PeopleSoft Enterprise Global Payroll results, reducing the volume of payroll data stored without requiring you to invest in additional hardware.
PeopleSoft Enterprise Global Payroll 8.9 will enable you to identify a balance as an absence accumulator or a payroll accumulator. You can configure the system to store this balance only in the result tables when the parent segment has a calculation type of absence or payroll, respectively. In the rare cases where an accumulator needs to be stored and updated in calendars of both calculation types, there will be an option to define the accumulator as both types. This feature will significantly reduce the volume of the accumulator table. Custom period accumulators will also be enhanced to support an end date, which is not possible in the current version.

**What's New in PeopleSoft Enterprise Global Payroll for the U.K. 8.9?**

PeopleSoft Enterprise Global Payroll for the U.K. uses the rules engine to deliver a payroll that provides superior flexibility. The United Kingdom country extension provides all the statutory rules you need to comply with Inland Revenue requirements, including the latest electronic filing formats. You can use the same engine to tailor the application to include your specific pay rules. With no need to clear data at tax yearend, you can report on pay information over any length of time, whether to coincide with your accounting year or an accumulation over several years.

In PeopleSoft Enterprise Human Resources 8.9, we are making significant enhancements to Oracle's PeopleSoft Enterprise Global Payroll for the U.K. in the following areas:

- Ease of use.
- Additional delivered rules for speedier implementation.
- Standard data extract.

**Ease of Use**

PeopleSoft Enterprise Global Payroll for the U.K. 8.9 includes features that will make it easier for payroll administrators to manage and process payroll. Input errors will be reduced with the increased validation on the Statutory Details pages. Improved preprocessing reporting will highlight errors before the pay process is run.

**Redesign of the Statutory Details Pages**

The Statutory Details pages are used regularly for all employees. Correct data input is critical to making correct pay calculations. In PeopleSoft Enterprise 8.9, we have designed a better way for entering correct tax and national insurance details, and we have redesigned the effective date coverage of Tax and National Insurance (NI) information by creating separate effective dates for each.

Creating two distinct effective dates for Tax and NI required us to change the Statutory Details pages, so we have used this opportunity to enhance the usability of these pages. A new subpage will be added to display revised header details,
including Employee Job details and National Insurance Number. The new subpage will provide all the basic employee information, as well as pay details, on one page for the payroll administrator. This subpage is used across the Tax and NI pages and also the Tax Credits and Student Loans pages for consistency.

Data input validation has been enhanced to reduce errors. For example, the Reduced Liability check boxes are disabled until the NI category is selected, at which point they are enabled as appropriate. If the NI category code selected is B, E, or G, then the RL Certificate Seen check box becomes available.

In PeopleSoft Enterprise 8.9, more messages are displayed to help the user. For example, if the NI category code is not selected and the user attempts to save the record, the following reject message appears: “NI Category Code Missing. The employee must have a valid NI Category Code.”

![Figure 38: The Statutory Details pages are better designed for correct tax and national insurance details, and the effective date coverage of Tax and National Insurance Information was redesigned.](image)

**Preprocessing Reports**

Payroll managers need to check for errors in payroll data and correct these errors before the pay calculation process is run. The more accurate the pay data is at process run time, the fewer adjustments payroll managers must make and the sooner the pay calculation can be finalized. Mistakes or omissions in pay data must be highlighted throughout the tax year so that there is ample opportunity to make corrections before the critical year-end period, when time is short. Customers can
currently do so by defining their own reports or by using searches to find exceptions.

In PeopleSoft Enterprise Global Payroll for the U.K. 8.9, we are delivering preprocessing reports that will make data checking much easier for payroll managers. These checks include:

- Temporary NI numbers.
- Invalid NI category for employees who have reached retirement age.
- Net Pay=zero.

Redesign of P45 Functionality

Many of our customers are large global corporations that have employees who transfer frequently between different locations—not only across the U.K. but also abroad. These transferring employees must be terminated from the U.K. pay system once they leave the U.K. The company is required to issue a P45 (statement of earnings) to the employee and the Inland Revenue. In most payrolls, companies can terminate the employee record, but global organizations that have single instances of their HR and payroll databases need to have just one record for an employee that covers that employee’s total employment with the company. It is therefore essential to be able to terminate the employee from the U.K. payroll without ending that employee’s company HR record.

Employers may also want to delay the production of a P45, for example, when late notification of leaving has occurred and they must recover an overpayment to the employee. A more flexible approach to producing a P45 would increase efficiency and make the process easier for the payroll administrator.

With PeopleSoft Enterprise Global Payroll for the U.K. 8.9, it will be possible to produce a P45 for an employee even if she has not terminated her employment but have simply left U.K. jurisdiction. You'll be able to choose which action reasons on the job record are used to trigger the production of a P45 to ensure that an employee has one employee record (and ID reference) throughout her employment.

We are also adding a feature to let users see a list of employees due to be issued a P45 and to allow them to suspend production for individual employees.

Additional Delivered Rules for Speedier Implementation

The PeopleSoft Enterprise Global Payroll rules engine allows customers to define any number of rules they require to calculate their payroll for their unique requirements. Some rules, although not part of statutory requirements for all organizations, are commonly used by the majority of customers. If it is possible to deliver some of these commonly used rules in a flexible format, customers will not have to write them during the implementation, and the time and the cost to implement will be reduced.
Enhancements to Loans Administration

Although there is loans functionality in the previous release of the PeopleSoft Enterprise Global Payroll for the U.K. extension, it is of limited scope. Only three loan entries are allowed per employee, and there is no facility for more than one loan of a similar type to run concurrently. It is used as a template for customers to build their loan rules.

The new Loans Administration functionality in PeopleSoft Enterprise Global Payroll for the U.K. 8.9 provides flexible rules for the repayment of loans. The type of loan and repayment method and time frame is user definable and enables users to allow for “repayment holidays” by loan type. The Employee Loan Deduction page includes defaults where applicable and is easy to use.

The Review Loans page will show total loan amounts, total deducted to date, and outstanding balances for each of the loans along with the Loan Stop Date once loan recovery is complete. Loans can be flagged for inclusion in the P11D extract report. These enhancements will provide an easy-to-use input page for payroll administrators and the information they need to quickly answer employee queries on their loan repayments.

SAYE Administration

Many organizations in the U.K. operate Save as You Earn (SAYE) schemes. The rules associated with SAYE are complex; they vary according to the type of scheme and how long the employee is part of the scheme. Defining the rules for SAYE can take a long time during implementation and can require detailed knowledge of the workings of the tax and NI calculation rules. To calculate the tax and NI implications of SAYE schemes correctly can be a headache for payroll administrators. Delivering the SAYE rules with PeopleSoft Enterprise Global Payroll for the U.K. 8.9 will reduce the rules build process as part of implementation and also reduce the time to upgrade to new versions of PeopleSoft Enterprise Global Payroll for most of our customers.
With PeopleSoft Enterprise Global Payroll for the U.K. 8.9, we are delivering comprehensive SAYE administration that will cover Share Save and Buy SAYE schemes. This flexible rules build will allow customers to define their own values for length of the scheme, amount of deduction, rules for terminations, contribution holidays, maternity leave rules, insufficient earnings rules, and so on.

When you enter details of new schemes, information on existing schemes will be available for reference, providing valuable information for the payroll administrator, who will also be able to search for employees by scheme ID.

**Standard Data Extract**

**P11D Data Extract**

All U.K. customers are required to report on taxable benefits to the Inland Revenue (P11D/P9 reports) and to provide this information to employees each year. These reports are complex to administer, and the requirements change frequently. Data required for the report comes from multiple sources, including HR, benefits, payroll, expenses, and finance. Any help with the production of this report will reduce the workload for payroll administrators.

Customers currently must define their own P11D report or the extract file for export to a third-party software provider. Some of the data is held in HR and payroll, but there is no easy way of extracting this data.

In PeopleSoft Enterprise Global Payroll for the U.K. 8.9, we are delivering a data extract tool that will streamline this process and enable you to take the data held in HR and PeopleSoft Enterprise Global Payroll to any third-party P11D calculation software application.

We have identified fields and records across the entire product line that are reportable for P11D calculations; these are company car details within Human Resources and beneficial loans within Global Payroll. We recognize, however, that customers may have added fields in Human Resources or payroll elements in PeopleSoft Enterprise Global Payroll that must be included in the P11D report. We are therefore delivering a generic means of extracting data from PeopleSoft Enterprise Human Resources and PeopleSoft Enterprise Global Payroll that will allow our customers to add customized fields, records, or payroll elements to the extract file. Payee details will be extracted for all directors and employees who have data held in PeopleSoft Enterprise Human Resources or PeopleSoft Enterprise Global Payroll for any P11D section of the report.

**What’s New in PeopleSoft Enterprise Global Payroll for Germany 8.9?**

Making timely payments to your workforce while lowering your total cost of ownership is a business goal your organization can achieve with Oracle’s PeopleSoft Enterprise Global Payroll for Germany. PeopleSoft Enterprise Global Payroll for Germany has attained a certification for excellence in social insurance
reporting (DEUEV) and has met all German requirements for statutory calculations and reporting.

PeopleSoft Enterprise Global Payroll for Germany 8.9 delivers two new categories of features that will help you comply with recent legislation and stay current with new payroll trends:

- eGovernment.
- Old-age, part-time tax enhancement.

**eGovernment**

Governments are under increasing pressure to cut costs and serve online constituencies. eGovernment—or online government—involves the transformation of internal and external relationships within the public sector through internet-enabled processes to optimize service delivery, constituency participation, and governance.

PeopleSoft Enterprise Global Payroll for Germany 8.9 delivers several important new eGovernment enhancements to help organizations adapt to the growing demands and opportunities of eGovernment.

**Data Transmission of Tax Statement (ELSTER)**

In compliance with recent German tax legislation, tax statements may be transmitted electronically to the tax office over the internet in XML. The German tax administration initiated Project ELSTER (Elektronische Steuererklärung, or electronic tax return) with the goal of simplifying tax declarations via an electronic interface.

Global Payroll for Germany 8.9 will deliver a standard process to transfer tax statements electronically to the German tax administration. In addition to the cost savings realized by purely online reporting, payroll administrators also benefit from no longer having to attach tax statements manually to the tax card.

**DEUEV Data Transmission**

DEUEV (Datenerfassungs und Übermittlungsverordnung) refers to a set of standards defined for tracking and reporting on social insurance information. In accordance with recent German legislation, social insurance data and contribution lists should be transmitted to social insurance providers as a data file by encrypted email rather than in paper form.

PeopleSoft Enterprise Global Payroll for Germany currently provides a data file with social insurance data and contribution lists. In 8.9, we will also deliver the integration to an electronic data transfer process, thus helping our customers reduce the number of manual steps involved with social insurance reporting.

---

1The following features will also be delivered with PeopleSoft Enterprise Global Payroll for Germany 8.8 as part of a service pack.
DEUEV Recertification

In 2002, PeopleSoft Enterprise Global Payroll for Germany received the DEUEV certification from a coalition of German social insurance providers (ITSG), demonstrating our ongoing commitment to deliver secure, accurate, user-friendly social insurance reporting. The DEUEV certification for PeopleSoft Enterprise Global Payroll for Germany will be renewed in June 2004.

Disabled Employee Reporting (REHADAT)

German employers must pay a fine if they fail to employ the required number of heavily disabled persons. A third-party provider, REHADAT, produces the necessary reports for the unemployment office.

PeopleSoft Enterprise Global Payroll for Germany 8.9 will deliver a standard data file for disability reporting to the REHADAT program, REHADAT-Elan 03, which will generate the necessary handicapped reports for the Unemployment Office.

Old-Age, Part-Time Tax Enhancement

German old-age, part-time legislation was enacted to allow workers to acclimate gradually to leaving the workforce. The legislation allows companies to phase people into retirement by allowing them to work on a part-time basis several years before retiring. Old-age, part-time workers receive a supplemented part-time salary to make the plan more attractive, and their regular social insurance contributions continue to be paid by the company. They receive their full benefits on retirement, but take-home pay is capped to limit the benefits of dropping into a lower tax bracket.

To offset the rising costs of the old-age, part-time program, the calculation rules for old-age, part-time workers will be changed as of July 1, 2004. Anyone entering the old-age, part-time program as of July 1, 2004, will be affected by the new rules, while workers already in the program will continue to be paid according to the old rules. PeopleSoft Enterprise Global Payroll for Germany 8.9 will support both sets of calculation rules.

What’s New in PeopleSoft Enterprise Global Payroll for Switzerland 8.9?

Making timely payments to your workforce while lowering your total cost of ownership is a business goal your organization can achieve with Oracle’s PeopleSoft Enterprise Global Payroll for Switzerland. You have complete control over all aspects of your payroll operation, including statutory payroll and absence requirements.

PeopleSoft Enterprise Global Payroll for Switzerland 8.9 will offer several new features to simplify payroll processing for your organization:

- Pension interface (BVG).
- Banking enhancements.
- Legislative reporting.

**Pension Interface (BVG)**

BVG, or Berufliche Vorsorge, is the mandatory Swiss occupational pension (old-age, death, and invalid) insurance. The objective of BVG is to complement the benefits of national social security to ensure the continuation of the accustomed standard of living. Employers that have employees who are subject to obligatory pension insurance must either establish a registered occupational benefits institution or affiliate with one. Customers currently must either implement their own pension functionality or integrate with a third-party provider.

Oracle’s PeopleSoft Enterprise Global Payroll for Switzerland 8.9 will deliver a standard integration to the BYro 70 product PEKA to make it easier for payroll managers to manage pensions. PEKA supports pension calculations such as employer/employee contributions, payments, and adjustments. We will report gross salaries to PEKA, which will calculate the contributions and report them back so that they can be deducted in payroll.

*Note: This feature is pending the establishment of a partnership with BYro 70.*

**Banking Enhancements**

Banking is a critical function of payroll processing. In PeopleSoft Enterprise Global Payroll for Switzerland 8.9, we are delivering enhanced banking features.

**Lastschriftverfahren (LSV)**

LSV (Lastschriftverfahren, or direct debit facility) is an electronic payment transfer system in Switzerland. PeopleSoft Enterprise Global Payroll for Switzerland 8.9 will support direct debit bank transfers by generating an LSV file for negative payment amounts.

**SIC Integration**

Changes of bank codes happen quite frequently in Switzerland (about 50 to 100 changes per quarter). To facilitate the entry of these changes, PeopleSoft Enterprise Global Payroll for Switzerland 8.9 will enable the direct download of bank information from the Swiss Interbank Clearing (SIC) website, which regularly publishes a text/Excel file with the most current bank information. In PeopleSoft Enterprise Global Payroll for Switzerland 8.9, we will deliver a standard process to read the information from the SIC file and update the system bank records.

**IBAN Banking**

PeopleSoft Enterprise Global Payroll for Switzerland 8.9 will support the IBAN banking format for international bank transfers. IBAN is the standard format for intercountry payment transfers within the EU.
Legislative Reporting

We are committed to helping customers meet their statutory reporting requirements in the different Swiss cantons. PeopleSoft Enterprise Global Payroll for Switzerland 8.9 will deliver the Source Tax report for Canton Tessin.

What's New in PeopleSoft Enterprise Global Payroll for France 8.9?

Making timely payments to your workforce while lowering your total cost of ownership is a business goal your organization can achieve with Oracle's PeopleSoft Enterprise Global Payroll for France. You have complete control over all aspects of your payroll operation, including statutory payroll and absence requirements.

PeopleSoft Enterprise Global Payroll for France offers several enhancements to simplify payroll processing for your organization:

- Retroactivity.
- Enhancements to DADS.
- Enhancements to banking.

Retroactivity

Every customer must record retroactive updates that affect payroll. These retroactive updates can affect the gross payroll and sometimes even the deductions. The law stipulates that any changes to the gross payroll should be taxed using rates of the payment dates. In real life, however, there are cases in which we need to correct an error that affects the deductions, not the gross. In PeopleSoft Enterprise 8.9, we will provide the following retroactivity functionality:

- Retroactivity standard setup
- Support for retroactivity in reporting
- Calculation of inactive segments

Retroactivity Standard Setup

PeopleSoft Enterprise Global Payroll's core functionality provides a flexible engine to address these requirements, but to date, there have been no delivered rules in Global Payroll specifically for France.

In PeopleSoft Enterprise Global Payroll for France 8.9, we will provide a standard setup for retroactivity cases that affect the current year by using the corrective method. This setup will address most common cases (gross, deductions funding base, correction of errors, and so on) and will be designed to work with the various reports. In the case of a gross change, the calculation will happen on the current period by using accumulators. For changes that affect the past year, the method of choice will remain forwarding. In the case of an upgrade, customers will be able to choose between the standard setup and their own custom rules by using the forwarding method.
Support for Retroactivity in Reporting

The current DUCS norm does not allow declaration of retroactive changes in contribution. When payroll is calculating rates that are not accepted by DUCS, the declaration can be rejected. As part of the new DUCS 4.2 norm, the DUCS committee will introduce the support for corrective declaration. This support will vary for the various official bodies (URSSAF, AssÅždic, and Retirement funds). The DUCS 4.2 norm is planned to be in effect starting July 2004.

We'll take advantage of this norm to declare additive declaration or rectified declaration. We'll also provide the user with a tool to handle the correction of rates done by the official bodies and to detect invalid rates before sending the declaration.

Note: PeopleSoft Enterprise Global Payroll for France 8.9 will have to be certified by the DUCS committee to be fully compliant with DUCS 4.2. Any modifications related to this certification will be delivered in a bundle following the general availability of 8.9.

Calculation of Inactive Segments

When a retroactive calculation is triggered after a change of company or when positive input is assigned to a terminated employee, inactive segments are produced. The delivered rules do not take inactive segments into account.

We'll provide standard calculation of inactive segments by:

- Calculating hours worked and days worked in this special case.
- Controlling which pay elements need to be triggered and which shouldn't be triggered.
- Managing contribution ceilings in this special case.
- Handling the declaration of these segments in the DADS.

These enhancements will lower the cost of ownership for any company that manages retroactivity in payroll.

Enhancements to DADS

DADS, the most important report in French payroll, provides extensive information for the entire year. We chose to deliver the new DADS-U norm from the first release of PeopleSoft Enterprise Global Payroll for France more than three years ago. Now DADS-U will be mandatory and will replace the old TDS norm starting in 2005. We used customer feedback to enhance the DADS-U report in 2003 for all supported releases and is making the following enhancements:

- Additional reporting capabilities.
- Enhancement of error handling.
- Other minor enhancements.
Additional Reporting Capabilities

Every customer must validate the DADS report before submitting the file. We'll provide tools to reformat DADS data in a way that makes it easier to produce reports.

Enhancement of Error Handling

Customers report that correcting DADS is very time consuming. Issues can come from various sources, and the review process could be made easier. We'll provide ways to assess errors and include those errors in a printed report. We've also enhanced the error handling process and provided a way to quickly review and fix the errors online.

Other Minor Enhancements

To enhance user productivity, we’ve analyzed the DADS process and provided several minor enhancements:

- Ability to populate all establishments, active establishments, or inactive establishments when creating the Sending Reference.
- Edits on situation override.
- Ability to feed DADS tables—we’ll provide a component interface to facilitate these common interfaces.

These enhancements will benefit any company that uses PeopleSoft Enterprise Global Payroll for France.

Enhancements to Banking

The banking process allows you to process the amount calculated in payroll to pay net pay to the employee, as well as alimony pensions and other garnishments to third parties. The banking process is made up of two parts—one provided by PeopleSoft Enterprise Global Payroll core functionality and one provided by PeopleSoft Enterprise Global Payroll for France. A source bank is a bank that is used to pay the employee or the third party. It is an employer bank from which the money is deducted. In the past, PeopleSoft Enterprise Global Payroll for France allowed only the processing of net pay and limited customers to one source bank per pay entity.

In PeopleSoft Enterprise Global Payroll for France 8.9, we will support multiple source banks. We’ll generate a different payment file for each source bank and adapt the existing payment report. We’ll also allow payments for additional recipients and integrate the recipients in the garnishment page.

What's New in PeopleSoft Enterprise Global Payroll for Japan 8.9?

With deeper Japanese compensation practices and statutory requirements support, Oracle’s PeopleSoft Enterprise Global Payroll for Japan 8.9 aims to simplify your payroll setup and reduce the operating costs of your payroll operation.
In PeopleSoft Enterprise Global Payroll for Japan 8.9, we offer some new functions to simplify payroll administrative work:

- Support for multiple jobs.
- Benefit features.
- More flexible functions.

Support for Multiple Jobs

In Japan, it is very common for employees to work for multiple business units at the same time. In PeopleSoft Enterprise Global Payroll for Japan 8.9, we will streamline the process of managing the payroll for employees who receive compensation from multiple business units. We’ll reduce the need to make manual adjustments and consolidations for payments.

Social Benefit Features

Simplifying Social Insurance Administration

On a regular basis, companies in Japan must submit various social insurance reports to the authorities. PeopleSoft Enterprise Global Payroll for Japan 8.9 delivers various social and employment insurance statutory reports out of the box to streamline the data collection and filing process. For example:

- The social insurance authorities accept enrollment and change data such as Enrollment/Termination, Geppen/Santei, and Address Change by electronic formats. PeopleSoft Enterprise Global Payroll for Japan 8.9 delivers these electronic formats to greatly simplify the filing process.
- Every month, the payroll department has to reconcile the monthly social insurance amounts from the payroll system to the premium contribution reports provided by the social insurance authorities. We provide the managerial reports to streamline the reconciliation process.

Deeper Localization Support

In Japan, other activities are managed by the payroll department on a less frequent basis. These include:

- Year-end adjustments.
- Retirement calculations.
- Commuter allowances.

We have studied the most common business practices and incorporated them into PeopleSoft Enterprise Global Payroll for Japan 8.9 to help our customers manage these processes efficiently. The result is less manual work and greater accuracy for your payroll and compensation data.
Plan, Incent, Reward

What motivates your workforce to deliver its best? Rewards. But not everyone is motivated by the same types of compensation. That’s why we offer a truly comprehensive and integrated compensation solution suite that maximizes efficiency, reduces costs, and increases workforce performance. From salary to pension and benefits to incentives, organizations can not only plan their total reward strategies but also monitor and measure those strategies to determine their effectiveness in aligning the workforce with business objectives.

What makes us unique in this arena? We provide a single, integrated platform across all elements of compensation. Our compensation solution suite allows you to easily add modules as your compensation strategy expands or shifts. Solutions include benefits, stock, pension, base and variable pay, incentives, flexible spending accounts, and paid time off. And we offer comprehensive compensation, performance management, and learning management solutions on the same proven, integrated platform.

What’s New in Benefits for PeopleSoft Enterprise 8.9?

Skyrocketing benefits costs are affecting employers on many levels. Companies are being forced to reduce costs or risk hits to their bottom line. Meanwhile, to recruit and retain top talent, companies realize that they must offer comprehensive benefit plans. But how can they do this and still meet revenue expectations?

Oracle’s PeopleSoft Enterprise eBenefits and PeopleSoft Enterprise Benefits Administration help organizations reduce the administrative time and costs associated with today’s complex benefit plans.

To help our customers more effectively administer and deliver benefits to their workforce, we have made many significant enhancements to capabilities within the PeopleSoft Enterprise Base Benefits module of PeopleSoft Enterprise Human Resources. These changes were made as a result of feedback from benefits customers and user groups about features and functions that would most significantly help them reduce costs and streamline processes.

These enhancements will help organizations to:

- More efficiently manage dependents and beneficiaries.
- More flexibly administer plans by using a variety of annual base benefit rates.
- Better comply with ERISA regulations.

Dependent/Beneficiary Enhancements

Accurate information on dependents and beneficiaries is critical for the effectiveness of processing benefits by the plan sponsor as well as the health plan and plan provider. Changes to dependent and beneficiary information often trigger a change in eligibility, and the dates of those changes are used to determine when coverage changes should begin and end. Requirements such as a Qualified Medical
Child Support Order (QMCSO) and Qualified Domestic Relations Order (QDRO) mandate that employees provide benefits to dependents and beneficiaries, and accurate history must be maintained.

In PeopleSoft Enterprise 8.9, we will be effective-dating the Dependent/Beneficiary record so that customers can have more comprehensive reporting and tracking capabilities in this area. This capability will allow our customers to track exactly what dependent and beneficiary information changed and when. Because changes to dependent and beneficiary information often affect eligibility and coverage for benefit plans, having such accurate history is often critical for compliance, as well as accurate historical record keeping on dependents and beneficiaries. This new functionality will serve as an internal control to help corporations remain compliant with QMCSO, QDRO, and other mandated regulations.

We will be adding effective-dated information for the following information:

- Name
- Address
- Phone numbers
- Occupation
- Sex
- Disabled flag
- Marital status
- Student status
- Smoker status
- Relationship

Multiple Annual Benefits Base Rates

In many benefit plans, the benefit levels are determined based on a certain definition of employee’s salary. Most commonly, these are life insurance, accidental death and dismemberment, and disability plans (long term and short term). In these types of plans, the coverage amount can be a multiple of salary defined at a particular time.

As plans become increasingly complex to try to deal more effectively with the rising cost of healthcare, it is becoming increasingly common for different definitions of salary to be used for different benefit plans.

In PeopleSoft Enterprise 8.9, we will be providing the capability to define and use an unlimited number of annual benefit base rates to meet your needs. We will provide new capabilities to support Multiple Annual Benefits Base rates (ABBRs)
and, at the same time, minimize the impact on your current processes. To do this, we will be providing the capabilities to:

- Provide for the entry and maintenance of multiple ABBRs.
- Allow the user to specify which ABBR to use for a given benefit plan by using the Calculation Rules table.
- Modify the common deduction calculation routines to recognize multiple ABBRs and select the proper ABBR for use for any given benefit plan.
- Retain the current single ABBR on the job record as a default “primary” ABBR.

**ERISA Enhancements**

United States cafeteria benefit programs (Section 125) permit only certain mid-year changes to occur to an employee’s elections. Generally, employees can change their elections only when their life circumstances change. Examples include moving to a new area, birth of a child, adoption, and the death of a spouse or dependent.

The concept of consistency and the Consistency Rule have been a part of the regulations, subject to the interpretation of the IRS. At a general level, this means that the changes allowed must be in conformity with the event. Recently, the IRS clarified some of the rules, bringing the issue to the forefront again.

In this release, we will be providing the capability to permit an employee to make changes in levels of coverage consistent with the gain or loss of coverage eligibility. With this new security, companies can control employee access but still reap the cost savings by offering employee self-service benefits registration and maintenance year-round.

This new security means that changes in elections have to be consistent with what actually happened. For example:

- To increase coverage, the event must be an increase in the number of eligible dependents, such as marriage, birth, adoption, or placement for adoption.
- Coverage decrease would only be allowed if there were a divorce, annulment, legal separation, death of spouse or dependent, or loss of dependent eligibility.
- Flexible spending account election changes must also be consistent with family member eligibility gains or losses.

**What’s New in PeopleSoft Enterprise Sales Incentive Management 8.9?**

Economic uncertainty, increased competition, and the age of corporate accountability are requiring organizations to cut costs, do more with fewer resources, and still meet sales expectations or be passed by. The call to action for sales and human capital executives is to align the sales force with organizational objectives through incentives to drive overall corporate success. Successful
organizations focus on driving pay for performance and manage their business through effectively incenting their sales force. By making the data they need more visible, as well as providing their own personal financial results derived from that data, the sales force can become “information driven,” leading to greater productivity and efficiency and maximizing their own earning potential.

Oracle’s PeopleSoft Enterprise Sales Incentive Management 8.9 was designed to do exactly that. This new release was developed based on customer feedback, focus groups, analysts’ research, and our own analysis.

PeopleSoft Enterprise Sales Incentive Management 8.9 gives you the real-time visibility and flexibility required to impact sales behaviors and meet your goals:

- Improve administrative efficiencies and lower costs by integrating your sales business processes across the enterprise.
- Use templates to configure instead of customize your compensation plans.
- Have the flexibility to meet the ever-changing needs of the market and your business.
- Reduce commission overpayments through back-end system integration and automated error-checking.
- Increase sales productivity with real-time access to commission credits and status.
- Get timely problem resolution through automated routing and workflow.
- Reduce administrative time and costs through configurable and intuitive user interfaces.
- Provide configurable, interactive reports to end users for access to actionable data.

PeopleSoft Enterprise Sales Incentive Management is a part of our total rewards suite, PeopleSoft Enterprise Workforce Compensation Solutions. As part of this suite, PeopleSoft Enterprise Sales Incentive Management allows organizations to offer sales incentives as part of a larger compensation package. We offer a truly complete compensation solution from base pay and bonuses, stock and flexible spending accounts to benefits, pension, and incentive management. In addition, PeopleSoft Enterprise Sales Incentive Management also plays a pivotal role in the PeopleSoft Enterprise Customer Relationship Management product suite.

PeopleSoft Enterprise Sales Incentive Management completes the customer lifecycle by allowing sales organizations to tie orders and the status of those orders to an incentive or commission credit to the appropriate salesperson, people, or teams.

PeopleSoft Enterprise Sales Incentive Management is built as a standalone product to be easily integrated into any business process and to enable we keep pace with the vast array of potential compensation plan designs for different industries. As
such, PeopleSoft Enterprise Sales Incentive Management is on its own release cycle, independent of the other product suite releases. PeopleSoft Enterprise Sales Incentive Management 8.9 is scheduled for release in the fourth quarter of 2004.

There are four key themes in this latest PeopleSoft Enterprise Sales Incentive Management release:

- Enhanced user interface.
- New administration tools.
- Infrastructure enhancements.
- New industry template for banking and capital markets.

**Enhanced User Interface**

SIM delivers a new user interface object (UIO) that enables compensation managers or HRIT specialists to easily configure incentive plan content and layout pages in a template format instead of customizing or writing new code. Each plan element can be copied, modified, and saved by effective date saving significant time and administration costs when creating new plans and compensation program designs.

In addition, with PeopleSoft Enterprise Sales Incentive Management 8.9, organizations that have multiple lines of business can now manage all their incentive plans from a single view. With the understanding that each industry uses different methods for basing and calculating incentives, we have developed template management functionality that simplifies and organizes the aspects of designing, building, and deploying industry template functionality. So, for organizations that have multiple plans in multiple industries or one plan with several different versions, PeopleSoft Enterprise Sales Incentive Management 8.9 enables significant time and cost savings when you create your new plans. In addition, this new flexibility within PeopleSoft Enterprise Sales Incentive Management gives organizations the power to align incentive plans to business objectives instead of basing them simply on what their software can support.

**New Administrative Tools**

As a part of the compensation administrator’s tasks, troubleshooting questions and resolving issues received from sales representatives, sales managers, and field operations personnel are among the most frequent. To troubleshoot and resolve issues, compensation administrators must typically know the compensation plans at a deep level, understand the policies and procedures associated with the compensation plans, and have internal knowledge acquired through experience and on-the-job training. With PeopleSoft Enterprise Sales Incentive Management, the sales representatives and managers have better access to the information to resolve and understand issues directly, as well as a direct path for reporting issues and questions. Compensation specialists have enhanced screens to further research, resolve, and quickly correct information as needed.
Structured variables are an exciting new feature that allows plans to be constructed by using single variables with varying frequencies. This feature allows greater flexibility and ease of use in creating information, reporting, and generating payments for quota and attainment. For example, automatic division by the time period can be incorporated, or varying values based on seasonality formulas or any other design can be applied to represent each individuals' quota annually, quarterly, monthly, and so on. Compensation managers can create more efficient compensation plan designs and minimize effort to design new plans and programs.

**Infrastructure Enhancements**

PeopleSoft Enterprise Sales Incentive Management 8.9 now provides bidirectional integration with Payroll for North America. This publish-and-subscribe interface includes functionality to enable users to configure data integration initially and then manage the ongoing exchange and confirmation of gross payment data.

Processing times have been enhanced in PeopleSoft Enterprise Sales Incentive Management 8.9 to accommodate larger volumes of data required by many industries (such as the financial services industry). Now, larger volumes of data can be processed within shorter processing time windows.

**New Industry Template for Banking and Capital Markets**

Different industries employ different methods to incent their sales force and, due to the nature of their business, measure and drive their businesses differently. What applies to one industry does not necessarily apply to all. For this reason, we have taken an industry approach to developing PeopleSoft Enterprise Sales Incentive Management. We have created industry-specific plans and metrics to enable a faster implementation, lower total cost of ownership, and a rapid return on your investment. Industry templates fit your industry and business processes to deploy a solution that delivers prebuilt practices that are specific to your industry. Therefore, PeopleSoft Enterprise Sales Incentive Management industry templates are highly configurable to reflect your organization’s unique business processes. We created industry templates to help you meet your implementation timeline, budget, and user expectations so that you can leverage the usability and performance and investment in your business.

Specifically, the PeopleSoft Enterprise Sales Incentive Management template for banking and capital markets delivers support for three lines of business:

- Retail banking.
- Mortgages and loans.
- Investment banking and brokerage.

The ability to combine and support many different types of participants and transactions, including:

- Tellers and loan originators.
• Underwriters and portfolio managers.
• Traders, account executives, collection agents, and managers.

Management of events related to the account relationship, deposits, withdrawals, opening, closing, and associating with households that could affect the incentives designed and paid, such as:

• Account opening.
• Account referral.
• Account revenue.
• Assets under management.
• Compliance.
• Direct deposit signup.
• Investment monthly fees.
• Investment sales.
• Loan origination.
• Performance metric (MBO).