Singular Focus. Limitless Passion.

# Optimizing your PeopleSoft 9.2 Deployment

# Contents

## Background

We have seen it many times before, organizations upgrade to 9.2 but only perform a technical upgrade to maintain support. While it may serve the organization in the short term to quickly or cheaply move to 9.2, it does not provide the business any value. The business continues to operate as though it was the early 2000's, not leveraging the modern toolset and latest features and functionality. There is no optimization and improvement in the business processes or overall improvement to the organization which does not result in cost savings, strategic value-add of employees or, in general, more efficient operations.

Let's explore specifically how the above-defined scenario can be detrimental to the organization but, at the same time, be easily fixable - not only easily fixable but likely resulting in far superior business value than could be envisioned. If a technical upgrade to 9.2 was performed and it has been 4 years in the same situation with no enhancements deployed, the organization likely lacks the knowledge and overall vision to fully maximize the value of PeopleSoft without outside assistance. In absence of that vision, a formal process for optimization must be deployed.

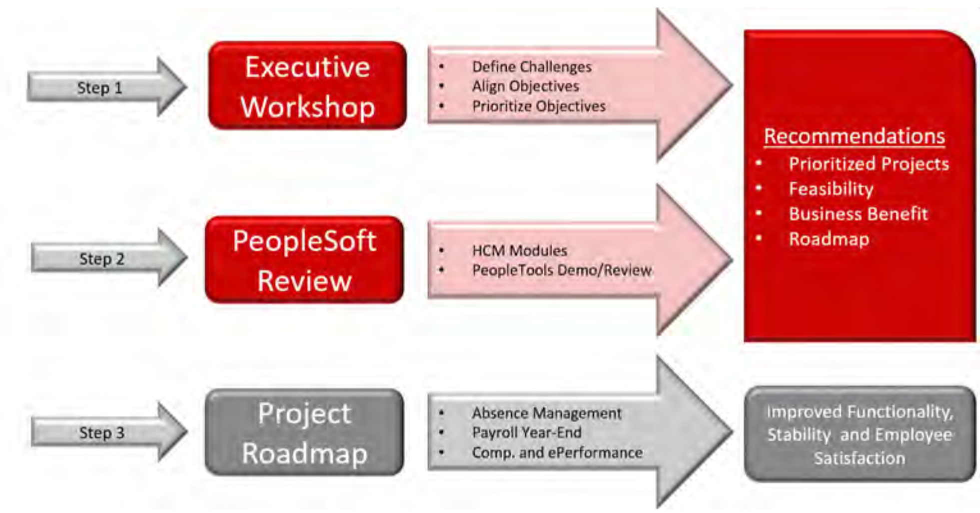
Within this white paper we will walk through the formal and structured process to PeopleSoft optimization: define key objectives for the organization and leverage those objectives as a guide to analyzing the new features and functionality to deploy, create recommendations, prioritize those recommendations, create a project and deliverables roadmap and provide an example with results tying the process all together.

## Optimization Process

The first thing to remember is that you must treat the optimization as a project and not as a discrete activity.  When you treat the optimization as a project your organization needs to:

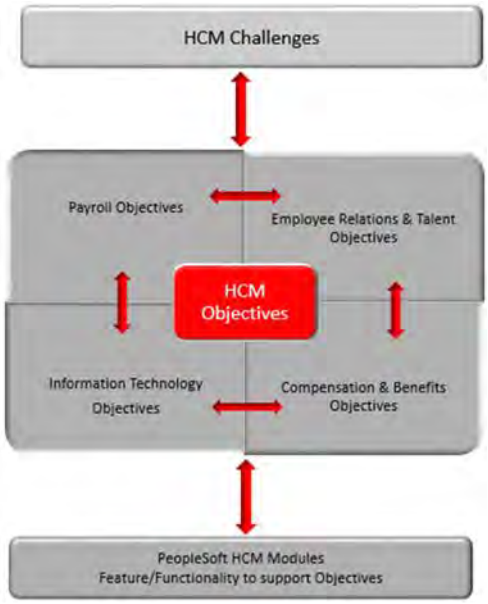
1. Define your current issues/concerns (top to bottom).
   - Be specific, generate a list.
2. Document specific objectives that must be accomplished.
3. Come to a consensus & prioritize objectives.
4. Define & document success criteria.
   - What defines a successful optimization outcome?
5. Generate an Executive Strategy Outline (ESO) consisting of the issues, objectives and success criteria.
   - Use the ESO to help prioritize projects that will be generated as a result of deep product and functionality reviews.
6. Execute product reviews within PeopleSoft.
7. Generate a roadmap to execute optimization content that provides the largest business value and is achievable within an acceptable timeframe.

In summary, the diagram below outlines the formalized steps to achieve a truly successful optimization.



Why is it important to take the time to execute in this manner?

- Executive challenges (top level) help feed downstream challenges.
- Challenges help define what needs to be addressed.
- Challenges are easily transformed into objectives.
- Objectives are used for internal alignment and priorities.
- Objectives are used to guide the PeopleSoft reviews.



## Executive Strategy Workshop

The most effective and results-oriented manner to define organizational objectives is to execute an Executive Strategy Workshop. This workshop is conducted by experienced facilitators with a history of successfully organizing and effectively managing large meetings with varying organizational executive presence. It is vital that the leader of the workshop is an experienced facilitator as it is difficult to align calendars and get many executives to commit to a full-day workshop. We must make the most effective use of the time and ensure the executives gain immediate buy-in during the workshop. The workshop is supported by an executive who is assigned as the sponsor, gaining the support of the other executive attendees. The workshop typically consists of the following agenda:

- Introductions and Kickoff: Not only do we want to walk through introductions but we want to understand what each attendee expects to get out of the workshop. Most importantly, we also want the executive sponsor to outline to the attendees their reasons for requiring the workshop and their intended results.
- Group Activity: The group activity is designed to get everyone thinking about the current state, current issues and where they want the organization to go. This sets up the remainder of the activities to help focus on objectives and goals.
- Discuss Current Issues and Concerns: This is an open discussion (facilitated and managed) letting each executive outline some of their largest issues/concerns related to their business and PeopleSoft's ability to support their business. We keep a running list of these issues.
- Objectives: We discuss and define what constitutes good objectives. We utilize the list of issues and concerns to turn them into objectives. How do we solve the issues? What is the ultimate outcome of having those issues addressed? We create specific objectives from those discussions.
- Executive Sponsor Objectives: We provide the opportunity for the executive sponsor to outline their key objectives and identify these as high priority.
- Define Objectives: We confirm and consolidate the objectives and ensure they are specific enough to be achievable. We create a timeline for completion for each objective, assign the objective an owner and define the success criteria. In other words, how do we know if we have met each objective?

| Introductions and Kick Off |
| --- |
| Project Importance |
| Activity:  Group Activity |
| Discuss Current Issues/Concerns |
| Objectives Discussion |
| Executive Objectives |
| Activity:  Define Objectives |
| Activity Continued:  Define Objectives |
| Wrap Up |

After the workshop, we document the results into an Executive Strategy Outline and provide each attendee a copy. The Executive Outline then serves to feed the next step of the optimization which is the PeopleSoft product reviews.

## PeopleSoft Product Reviews

Once you have the challenges and objectives defined, your organization is ready to execute the PeopleSoft product review. It is very important that the product reviews are executed by highly experienced and knowledgeable resources that are current on the latest and greatest PeopleSoft images and functionality, not only the functionality of the applications but the toolset and how the toolset can be leveraged in conjunction with the application to improve business processes.
The key steps to the product review are outlined below:

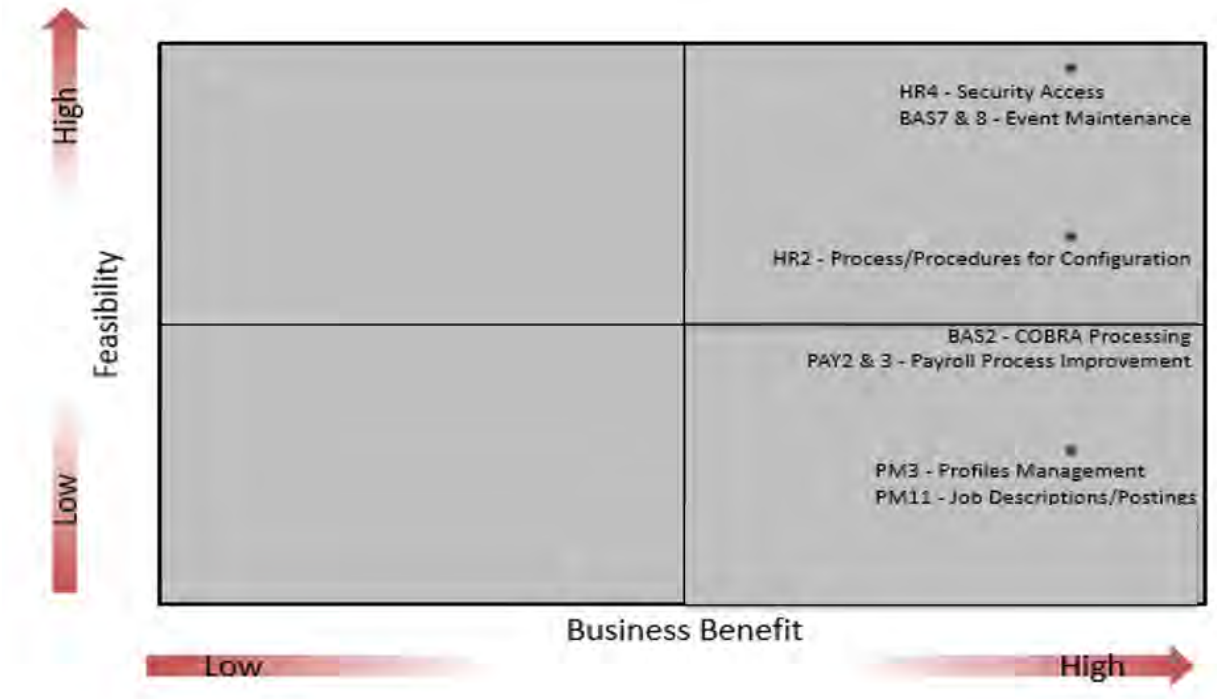
- Generate feature/functionality available between current image and latest available image.
- Leverage the ESO from the Executive Workshop to understand the objectives and use those objectives to focus on the areas in PeopleSoft to achieve those objectives.
- Review current business processes.
- Review current setup and configuration in PeopleSoft.
- Demo the new functionality for applicability.
- Seek opportunities to improve the end user experience leveraging the toolset.
- Leverage the objectives against the current setup and use PeopleSoft to generate a list of opportunities.
    - Define the business benefit of the new functionality.
    - Define the feasibility to deploy the functionality. How hard or easy will it be for the organization?
    - Map the recommendation/opportunity to the objective it helps achieve from the ESO.
    - Prioritize recommendations based on benefit, feasibility and the objectives that are achieved.
- Provide detailed documentation of the results of the product reviews and recommendations.
- Create a project plan to execute the various “mini” projects for optimization.

It is important that the document is well organized, easy to understand and structured in a manner that allows for the prioritization of various recommendations across multiple applications. This cross-application prioritization is actually prioritizing across business units and business processes, keeping in mind that various business owners may want their priorities first. This ties back to the Executive Strategy Workshop where we ensure the objectives are in alignment, supporting and not conflicting. This step helps ensure that any of the priorities addressed will just not help an individual department or executive but the organization as a whole.

While the product review report will have significant details regarding each recommendation, it is important to summarize each recommendation, the business benefit (H,M,L), the feasibility (H,M,L) and which objective the recommendation will address.  Below is a sample summary chart.

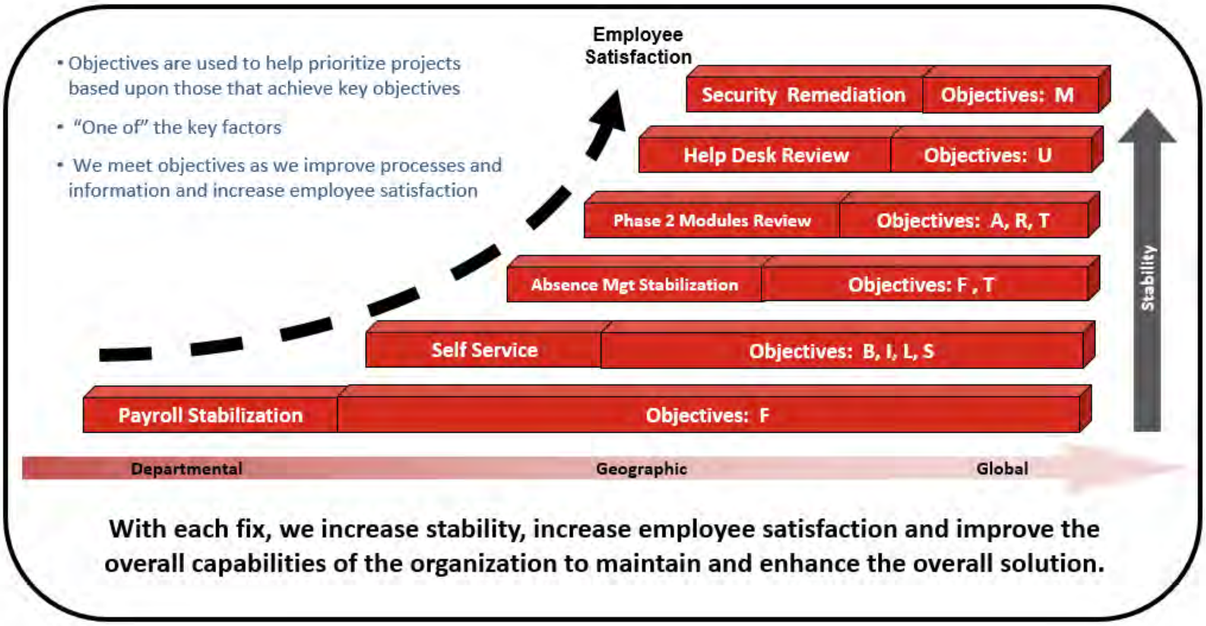
| Module | Comments | Benefit | Feasibility | ESO Objective(s) |
|---|---|---|---|---|
| Core HR | Audit the entire set of Positions and realign them with the true corporate structure.  Review Position reporting relationships and vacant Positions; establish a process for managing reporting relationships. | H | M | A, F |
| Profile Management | Complete the set-up of Non-Person Job Profiles for all Job Codes. There are 2000 plus active Job Codes. Use the format currently established with the following tabs: Summary, Population, Functions, Competencies, Scope and Level, Qualifications and Other Requirements.<br>Job Profiles are the core requirement to integrate with functionality for Recruiting, Succession Planning, Career Planning, Self Service, Manager Self Service, Learning Management and Performance Management. PeopleSoft Profile Management module can provide much of the data consolidation and standardization needed to manage and keep track of the workforce. | H | L | F, M |
| Profile Management | Leverage Profile Management data and Position Management data to create Job Postings directly from PeopleSoft HCM.  This will replace the current process: a manual cut and paste effort that is time consuming and hard to manage.  Job Requisitions can be configured directly from Job Profiles and Position Descriptions.  Integrating PeopleSoft Workflow would streamline and automate the process for creating, approving, updating and maintaining Job Requisitions | H | L | A, B |

Additionally, it is graphically appealing to be able to see all recommendations on a benefit/feasibility chart. Recommendations in the upper right quadrant are highly feasible and offer high business value whereas those in the lower left quadrant offer both low feasibility and low business value. Of course, many may end up with high business value but are more complex or time consuming to implement or have significant pre-requisites and therefore a lower feasibility. The chart makes it easy to identify those projects that can be implemented both easily and offer the greatest business value.



## Project Roadmap

With over 20 images released in FSCM and HCM since the first PeopleSoft 9.2 image, there are many new features and, inevitably the PeopleSoft review process will generate many opportunities for improvements. Each improvement/recommendation becomes a series of small projects. Because of the organized manner of the documented PeopleSoft review, each recommendation is properly prioritized and a series of projects are defined. Ultimately, each project provides value to the organization and aligns back to achieving specific objectives as defined from the Executive Strategy Workshop.




Those are the steps and that is how an optimization is performed properly to ensure the most value. After all, if your organization did perform a technical upgrade to 9.2 and has been on the same features and functionality for four years, when you want to gain that business value, you want to do it right. You may have only one opportunity and you want to make the most of it.

## Optimization Results

Now that we know the proper way to optimize PeopleSoft, let's look at a specific example. This example will be abbreviated, but we'll walk through the steps as outlined within this document and discuss results. We focused on improving the user experience for the buyers. The second phase was implementing application new features and functionality.

In this example, we have an organization that has a large centralized purchasing organization. They have very high volumes of procurement centered around a group of dedicated buyers to support internal requisitions and the purchase of goods to support operations. This organization upgraded to PeopleSoft 9.2 but performed a "technical only" upgrade. They did not deploy any new features at the time of the upgrade or since, no new 8.5X Tools features and no Fluid. Prior to the upgrade they had a very manual intensive approach to procurement that remained manual post upgrade. This manual approach was very inefficient for the buyers and those inefficiencies resulted in higher costs, poor support, unsatisfied employees and, therefore, high turnover and executives that were unable to access data in a timely manner. Additionally, the organization was becoming more and more mobile in nature. Something had to be done to improve operational efficiencies and the use of PeopleSoft.

First we worked with the customer to execute the Executive Strategy Workshop. We had our executive sponsor and performed all the pre-work necessary to prepare for the workshop. With an excellent facilitator, we defined our challenges outlined above and summarized below (abbreviated):

### Challenges

A. Extremely inefficient and manual business processes.
    a. Buyers run queries, write down pertinent information and then manually navigate PeopleSoft and investigate.
B. Inefficiencies lead to higher costs, more employees required, less value add from employees and ultimately higher turnover.
C. Training is a challenge with high turnover.
D. Buyers do not have access to timely information.
E. Navigation is clumsy.
F. Buyers are increasingly mobile but are tied to a laptop or desktop to perform their job functions.
G. Executives do not have access to timely information.

Looking at the various challenges outlined, we turned those challenges into specific objectives for the organization.

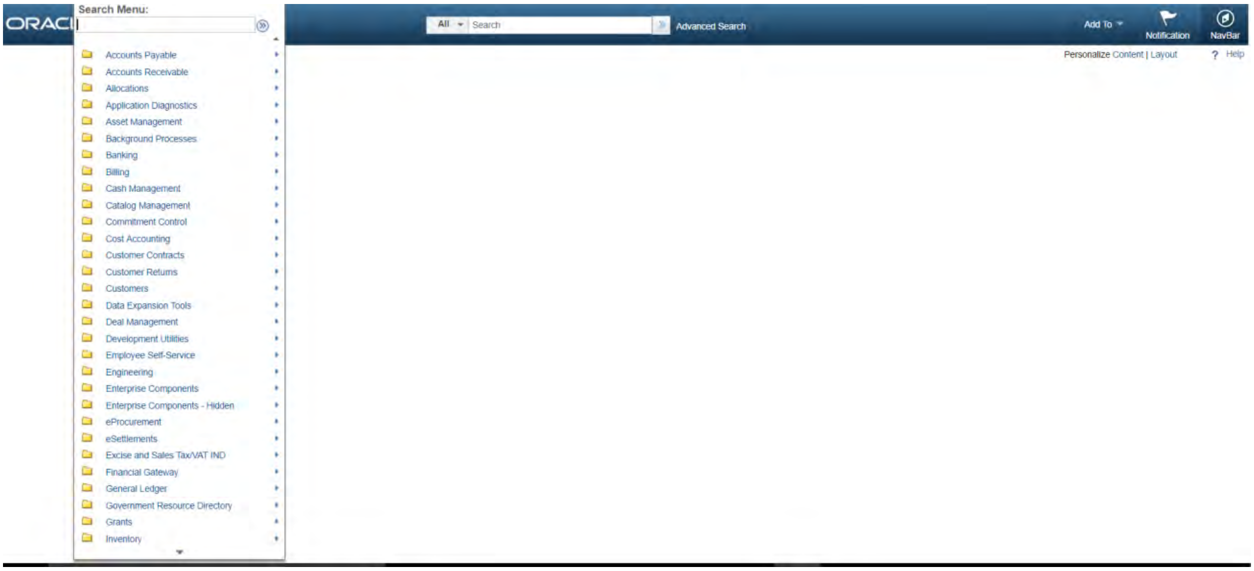
Objectives:

| Objective | Challenge | Success Criteria |
|---|---|---|
| Optimize the use of PeopleSoft through WorkCenters, Fluid Navigation Collections and other new features. | A, E | - Deploy WorkCenters<br>- Deploy Fluid approvals<br>- Deploy pivot grid tiles<br>- Deploy Homepage content personalized<br>- Deploy Fluid Navigation Collections<br>- Utilize drilling URL's within queries |
| Design PeopleSoft in a manner that improves the ability to train new resources | B, C | - Onboarding time is reduced by 25%<br>- Time for resources to be self-sufficient is reduced by 25%<br>- Deploy Fluid content |
| Provide timely access to data and key information for buyers | D | - Deploy Fluid pivot grids<br>- Deploy WorkCenters<br>- Personalize WorkCenters with embeddable Pagelets |
| Provide timely access to data and key information for executives | G | - Create Fluid Homepages for executives to access anywhere, anytime |
| Increase the ability to use mobile devices for buyers | F | - Implement Fluid approvals<br>- Implement Fluid pivot grids |

In this scenario, our PeopleSoft review was focused primarily around these objectives and we built a project around achieving the associated success criteria for these 5 key objectives. The results are staggering and we'll walk through the changes and overall improvements to this organization's business process efficiency.

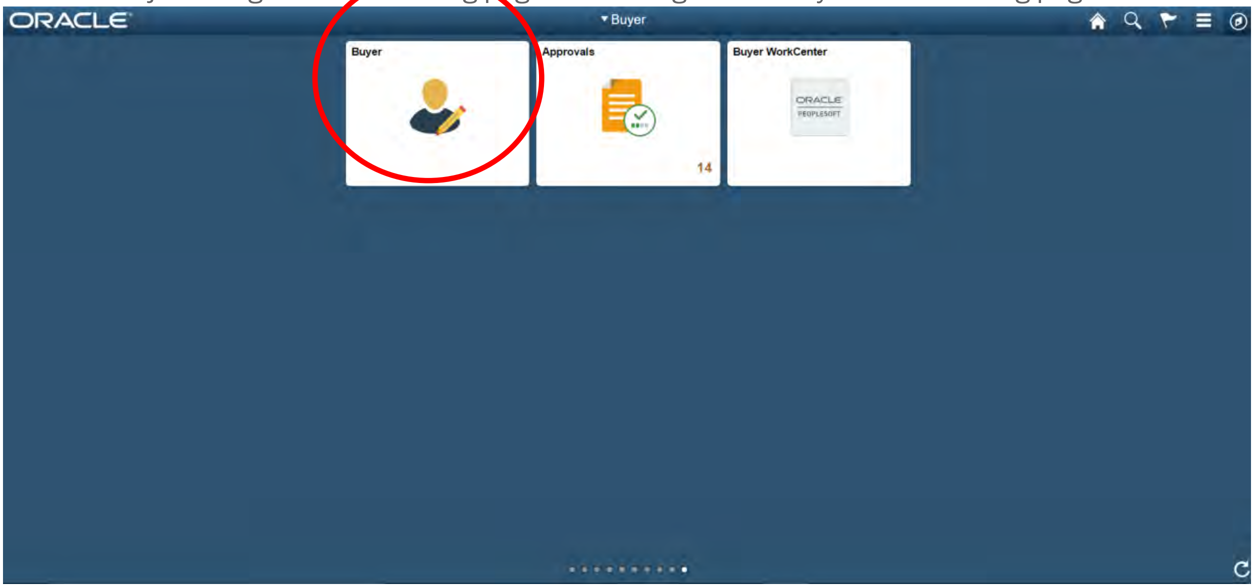
First, it is important to understand the “before” and “after” picture of this organizations procurement so let’s look at the before.

**Before:** Buyers would land on the Homepage with nothing deployed and available except the entire menu of available applications, whether applicable to their job function or not. This is how buyers would start their day and then move forward to running queries and navigating in an inefficient manner throughout PeopleSoft. None of the new features, such as the Buyer WorkCenter, were made available as a result of the technical 9.2 upgrade.




**After:** Many changes were made, from the initial landing page to deploying new features and functionality.

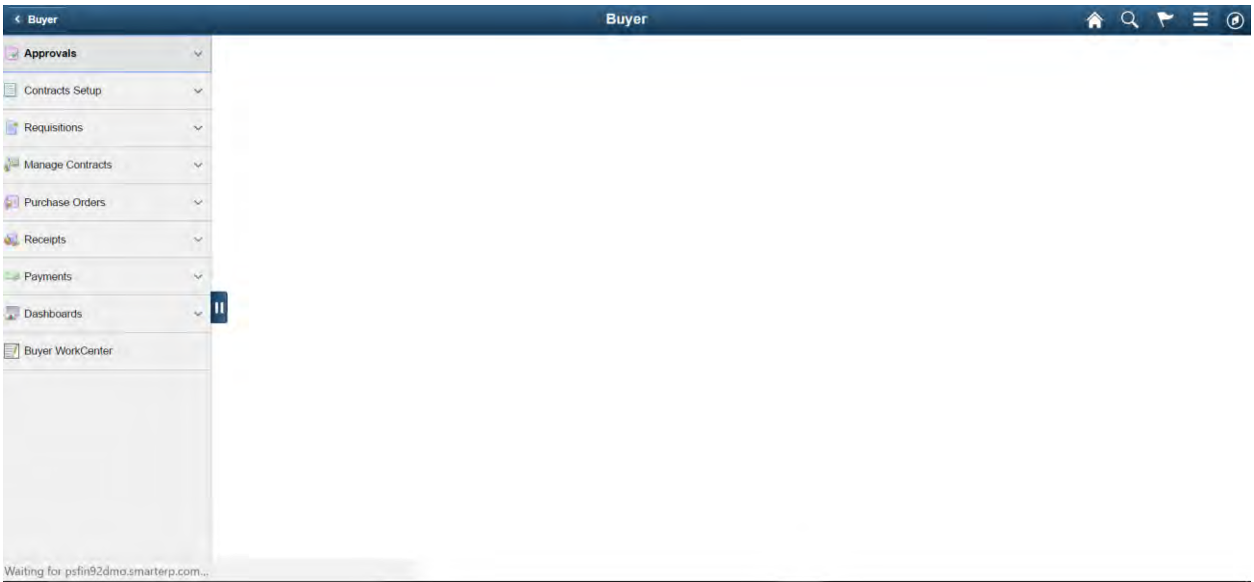
The first major change was the landing page. We configured a “Buyer” Fluid landing page.



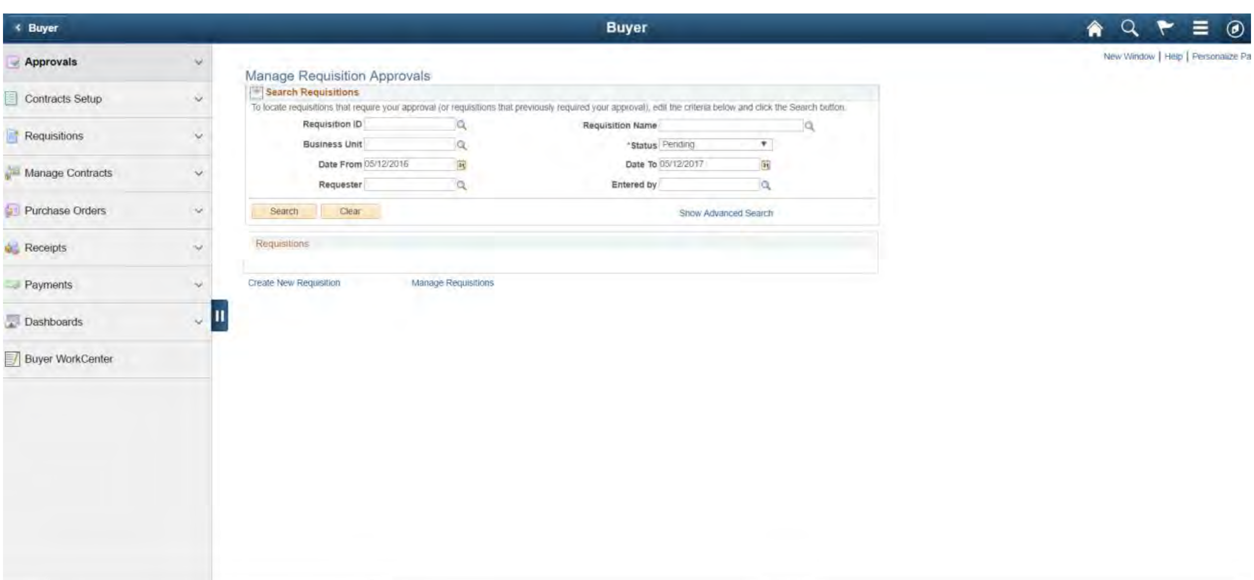
The landing page had to be designed with some clear objectives in mind:

- Keep it simple.
- Keep it job-function specific.
- Enable Fluid for mobile access.

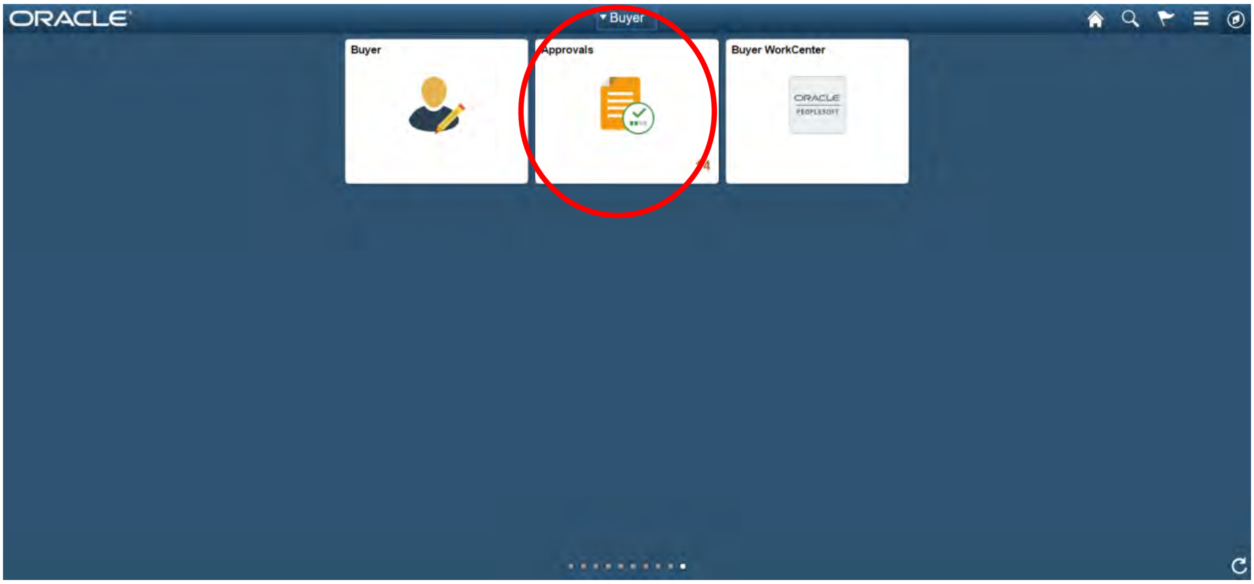
The buyers would land on a page with few options and those options were specific to their job function. First, clicking on the “Buyer” tile would take them to a configured Fluid Navigation Collection.

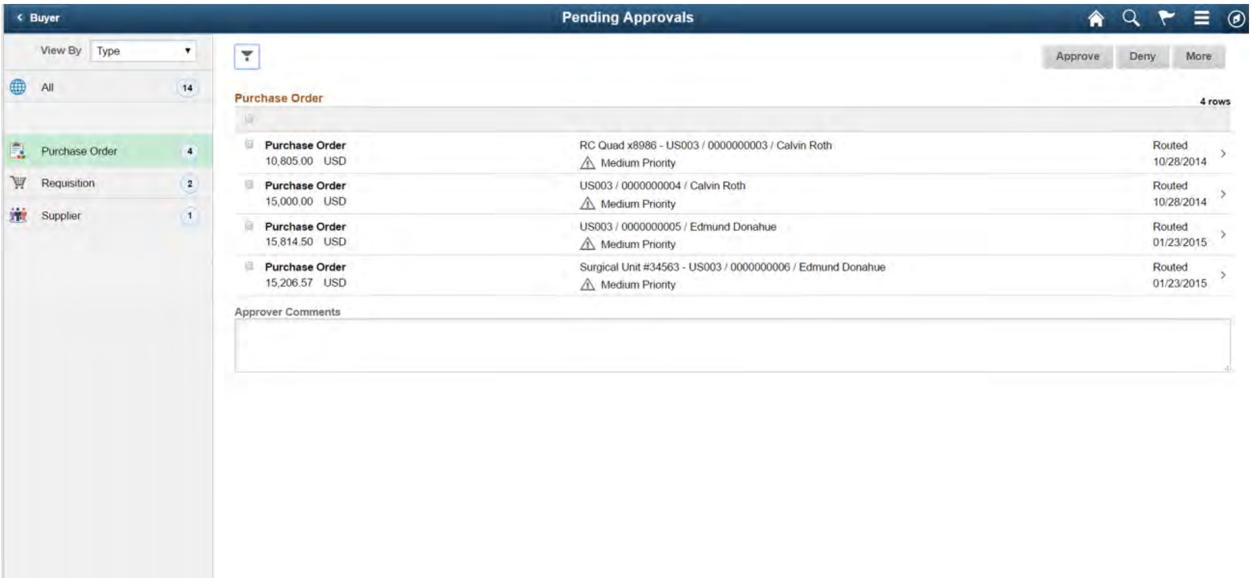



Here, we configured the navigation collection to only include those application functions specific to the buyers and we removed those that would not be used, simplifying their navigation. Since the buyers had access to everything they needed from this one collection, they would not have to use any other menu navigation. The Fluid content is always on the left and classic pages on the right, providing the ability to execute detailed work while at the same time always having access to the appropriate menu tasks.

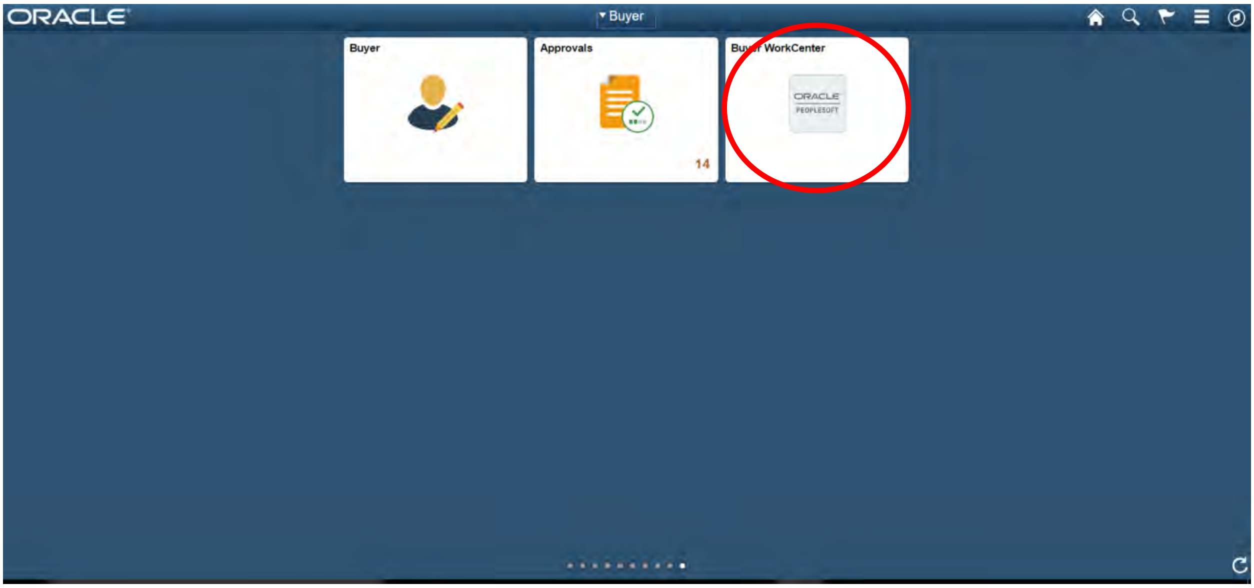


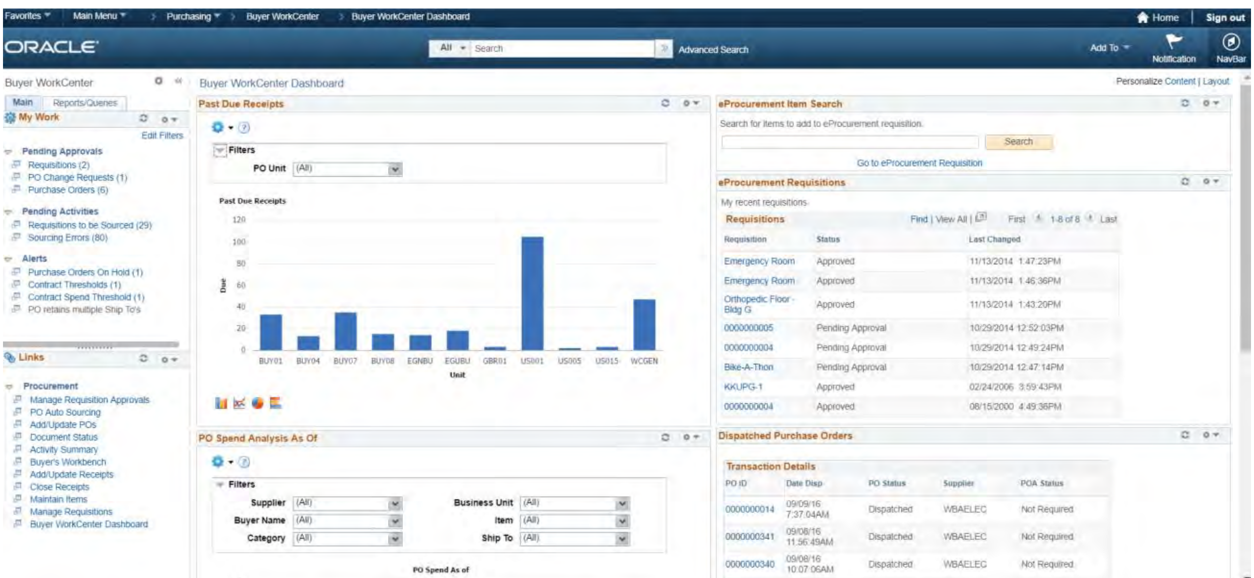
The second tile on the landing page was the "Approvals" tile; we enabled Fluid approvals for the buyers.  Each buyer would have access to the purchase orders, requisition and supplier information that they were assigned.   Approvals were a large roadblock to work progressing, enabling Fluid approvals streamlined the process and removed the roadblock.  Enabling Fluid approvals meant buyers could log-in on their mobile devices and approve, thus greatly increasing their efficiency and moving the procurement process forward.




The third tile we created provided direct access to the Buyer WorkCenter.  The information contained within the Buyer WorkCenter is a one-stop shopping area for the buyers to perform their work and get the information they need to execute their job functions.  While the Buyer WorkCenter is also part of the configured navigation collection, it was important to provide access from the Homepage.

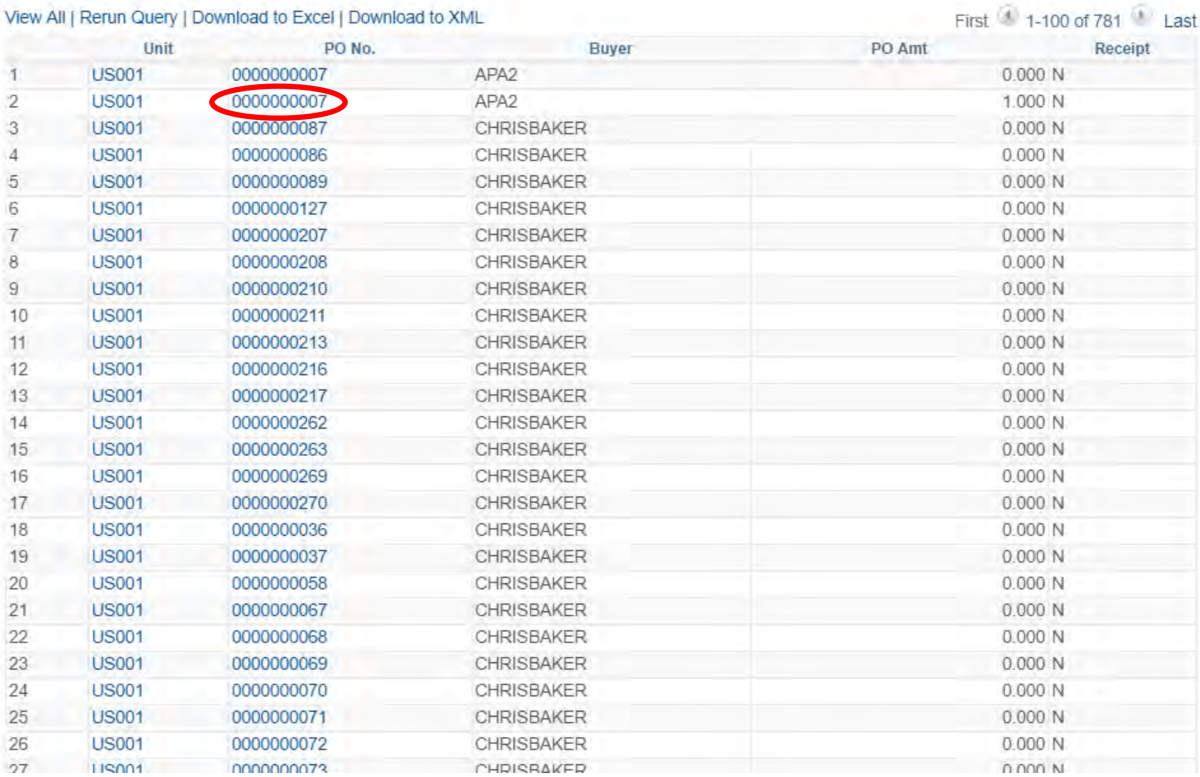


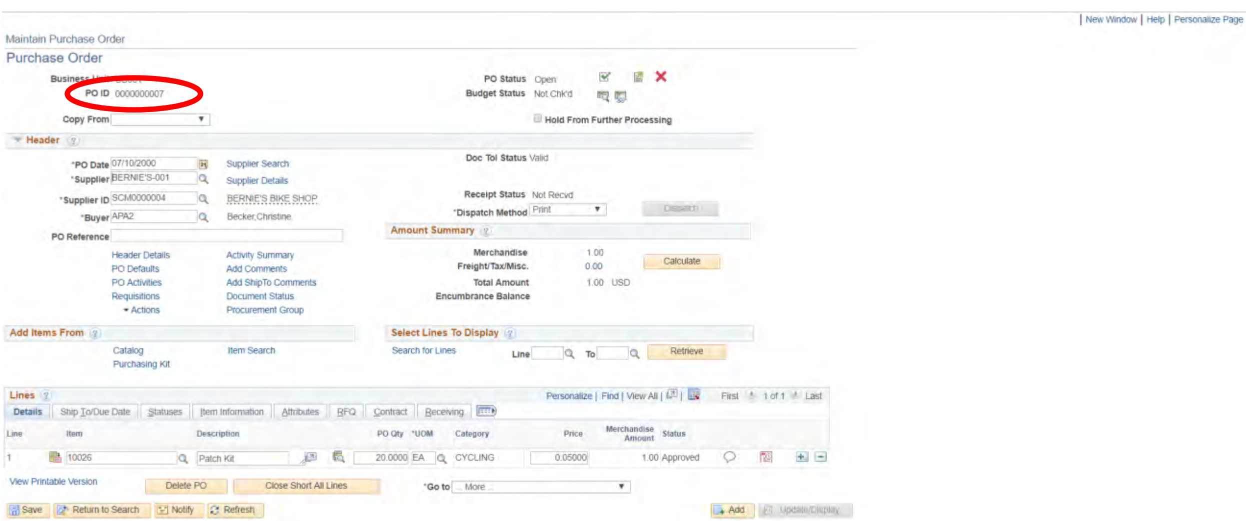

Within the Buyer WorkCenter, we personalized the content for each of the buyers. As delivered, the WorkCenter provided most of the information that the buyers required but there were some additional reports that the buyers needed. We created some additional pivot grids, made them into embeddable pagelets and provided access through the WorkCenter. Additionally, we eliminated the unnecessary work links and added additional configured work links and queries. We also setup "scope" to help define the content within the WorkCenters. Essentially the WorkCenters were deployed leveraging as much delivered functionality as possible and we personalized it to make the WorkCenter buyer-specific.

One additional significant change we made was enhancing the queries that the buyers used to investigate issues. The buyers would essentially execute the query, review the information and then write down on paper the PO number, etc. Then the buyers would navigate to the appropriate pages. This was a very inefficient process taking much longer than necessary. To solve this issue and improve the process, we utilized the queries but configured them with drilling URL's. These drilling

URL's allowed the buyers to run the query from the WorkCenter and then, directly from the query results, click on the hyperlink which would take the buyer to the appropriate PeopleSoft page. With the number of investigations each buyer would execute in a day, this resulted in tremendous time savings and efficiency gains. Buyers could get rid of their pens and paper and everything was automated through PeopleSoft.


View All | Rerun Query | Download to Excel | Download to XML — First 1-100 of 781 Last

| | Unit | PO No. | Buyer | PO Amt | Receipt |
|---|---|---|---|---|---|
| 1 | US001 | 0000000007 | APA2 | 0.000 | N |
| 2 | US001 | 0000000007 | APA2 | 1.000 | N |
| 3 | US001 | 0000000087 | CHRISBAKER | 0.000 | N |
| 4 | US001 | 0000000086 | CHRISBAKER | 0.000 | N |
| 5 | US001 | 0000000089 | CHRISBAKER | 0.000 | N |
| 6 | US001 | 0000000127 | CHRISBAKER | 0.000 | N |
| 7 | US001 | 0000000207 | CHRISBAKER | 0.000 | N |
| 8 | US001 | 0000000208 | CHRISBAKER | 0.000 | N |
| 9 | US001 | 0000000210 | CHRISBAKER | 0.000 | N |
| 10 | US001 | 0000000211 | CHRISBAKER | 0.000 | N |
| 11 | US001 | 0000000213 | CHRISBAKER | 0.000 | N |
| 12 | US001 | 0000000216 | CHRISBAKER | 0.000 | N |
| 13 | US001 | 0000000217 | CHRISBAKER | 0.000 | N |
| 14 | US001 | 0000000262 | CHRISBAKER | 0.000 | N |
| 15 | US001 | 0000000263 | CHRISBAKER | 0.000 | N |
| 16 | US001 | 0000000269 | CHRISBAKER | 0.000 | N |
| 17 | US001 | 0000000270 | CHRISBAKER | 0.000 | N |
| 18 | US001 | 0000000036 | CHRISBAKER | 0.000 | N |
| 19 | US001 | 0000000037 | CHRISBAKER | 0.000 | N |
| 20 | US001 | 0000000058 | CHRISBAKER | 0.000 | N |
| 21 | US001 | 0000000067 | CHRISBAKER | 0.000 | N |
| 22 | US001 | 0000000068 | CHRISBAKER | 0.000 | N |
| 23 | US001 | 0000000069 | CHRISBAKER | 0.000 | N |
| 24 | US001 | 0000000070 | CHRISBAKER | 0.000 | N |
| 25 | US001 | 0000000071 | CHRISBAKER | 0.000 | N |
| 26 | US001 | 0000000072 | CHRISBAKER | 0.000 | N |
| 27 | US001 | 0000000073 | CHRISBAKER | 0.000 | N |

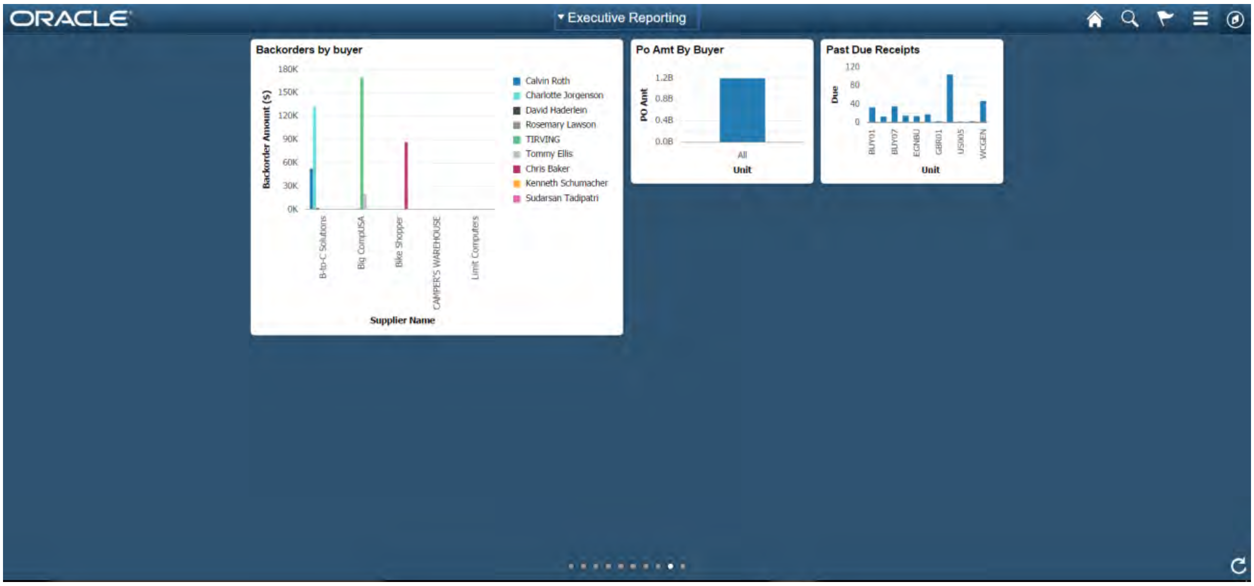


Implementing these changes, including creating a simple and focused landing page, enabling Fluid approvals, enabling and personalizing WorkCenters, and configuring a buyer-specific navigation collection, enabled us to meet the defined objectives and make significant improvements. These simple and intuitive changes also improved the ability to train resources because the simple navigation, combined with the intuitive nature of Fluid, make PeopleSoft streamlined and easy to use.

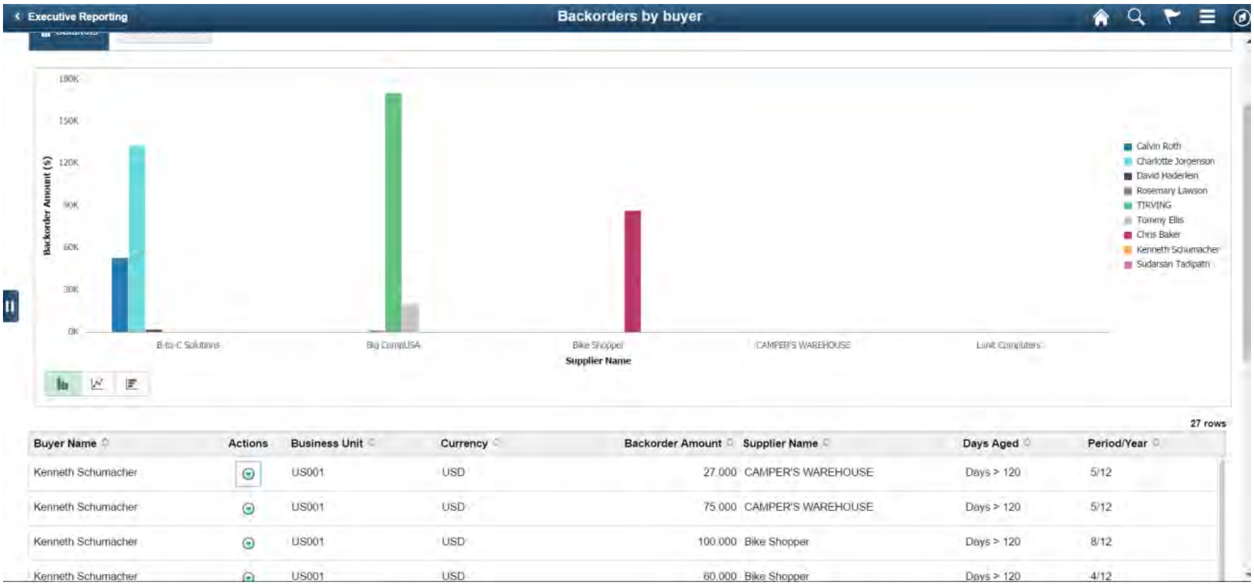
Another objective was giving the executives access to timely data. The executives are mobile and not tied to a PC so we needed to design an approach that was mobile friendly. When designing the approach, we focused on a few key questions:

- What are the key business questions that the executives need to answer?
- What data do the executives need to see first thing in the morning when they begin their day?

Using this as our guide, we created a Fluid landing page for the procurement executives. When executives logged-in through their mobile device, they land access to 4 to 5 key pivot grid tiles. This allowed the executives to have immediate access to their key reports and information. The executives could drill into each report.




While some of the pivot grid tiles were new queries that were created, turned into pivot grids and then turned into Fluid tiles, we also leveraged the simplified analytics. We generated simplified analytics regarding suppliers and the backorders associated with the suppliers each buyer manages and placed that simplified analytic on the executive reporting Homepage.




If we look back at the primary objectives, we can see how we leveraged PeopleTools and new features to achieve our objectives for buyers and executives.

| Objective | Challenge | Success Criteria |
|---|---|---|
| **Optimize the use of PeopleSoft through WorkCenters, Fluid Navigation Collections and other new features.** | A, E | ✓ Deploy WorkCenters<br>✓ Deploy Fluid approvals<br>✓ Deploy pivot grid tiles<br>✓ Deploy Homepage content personalized<br>✓ Deploy Fluid Navigation Collections<br>✓ Utilize drilling URL's within queries |
| **Design PeopleSoft in a manner that improves the ability to train new resources** | B, C | ✓ Onboarding time is reduced by 25%<br>✓ Time for resources to be self-sufficient is reduced by 25%<br>✓ Deploy Fluid content |
| **Provide timely access to data and key information for buyers** | D | ✓ Deploy Fluid pivot grids<br>✓ Deploy WorkCenters<br>✓ Personalize WorkCenters with embeddable pagelets |
| **Provide timely access to data and key information for executives** | G | ✓ Create Fluid Homepages for executives to access anywhere, anytime |
| **Increase the ability to use mobile devices for buyers** | F | ✓ Implement Fluid approvals<br>✓ Implement Fluid pivot grids |

## Supporting and Supplemental "How To" Content

These improvements are discussed in detail in our "how to" instructional blogs.

How to Create Fluid Navigation Collections: https://blog.miproconsulting.com/2016/11/fscm-navigation-collection-configurations/

How to Create Fluid Pivot Grid Tiles: https://blog.miproconsulting.com/2016/11/create-fluid-pivot-grid-tile/

How to Configure WorkCenters:
Part 1: https://blog.miproconsulting.com/2017/03/configuration-of-workcenters/
Part 2: https://blog.miproconsulting.com/2017/04/workcenter-configuration-part-2/
Part 3: https://blog.miproconsulting.com/2017/04/pagelet-personalization/

How to Create Drilling URL's: https://blog.miproconsulting.com/2012/06/peopletools-query-drilling-url/

Enhanced Fluid Approvals: https://blog.miproconsulting.com/2016/09/image-20-fluid-approvals/

Creating Simplified Analytics: https://blog.miproconsulting.com/2016/10/simplified-analytics/

PeopleSoft Fluid and Classic WorkCenter Scope:
https://blog.miproconsulting.com/2016/11/peoplesoft-workcenter-scope/

## Conclusion

Follow a formal process to create the most important objectives for your organization. Make sure those objectives are in alignment, well-defined and include success criteria. Leverage those objectives to guide your analysis of the latest and greatest features in your PeopleSoft applications and toolset. Once your analysis is complete and your organization has a list of recommendations to deploy, create a roadmap of your projects to prioritize. Following this approach is a proven method to help ensure your PeopleSoft solution is optimized, your business processes are improved and end users are happy with a modern, intuitive PeopleSoft solution.