Introducing ERP Gadget to Easily Enhance PeopleSoft Applications

Doris Wong, CEO

Dan White, VP of Product Strategy

February 24th, 2009

Our webinar will begin shortly. Please note all phone lines and computer microphones will be placed on mute throughout the presentation. Please use the GoToWebinar QUESTION feature to ask questions.

ORACLE® Gold Partner

SMART ERP Solutions™

Welcome & Introductions

Doris Wong
CEO, Smart ERP Solutions, Inc.
Former Oracle Group VP and GM for PeopleSoft Enterprise
15 Years Experience with PeopleSoft

Dan White
VP, Product Strategy, Smart ERP Solutions, Inc.
Former Oracle/PeopleSoft Principal Functional Architect
12 Years Experience with PeopleSoft

Agenda

- About Smart ERP Solutions, Inc.
  - Who We Are
  - Our Philosophy and Business Value
- Introducing ERP Gadget: Easily Enhance PeopleSoft Applications—while avoiding customizations
- ERP Gadget Demo
  - LOTS of Examples Across ALL Applications
- Summary and Q & A

About Smart ERP Solutions, Inc.

Smart ERP Solutions, Inc.

- Comprised of the best former developers, architects and executives from PeopleSoft/Oracle

- Providing cost-effective, robust and repeatable "Smart Solutions" for PeopleSoft applications

- Unique best practices and expertise in PeopleSoft strategic planning, Smart implementation and upgrade services

KEY DIFFERENTIATOR−OUR SMARTADVANTAGE

Rather than assigning teams of consultants to projects we apply our pre-built, proven solutions to efficiently address those efforts common to any PeopleSoft project thus saving time, reducing costs, minimizing risks and lowering total cost of ownership by avoiding costly difficult-to-maintain customizations.

SmartERP: Our Philosophy
Solutions

- Enhance and Extend Standard PeopleSoft Functionality to Meet Business Needs
  - 3Cs : **C**ommon, **C**ritical, **C**omplementary
- Repeatable, Pre-Packaged, Highly-Configurable and Innovative Solutions
- Release Independence
- Customer-Driven Requirements
- Architected and Designed as Add-On Solutions
- Lower Total Cost of Ownership
  - Minimal to No Customizations
  - Minimal Upgrade Impact
- Affordable and Cost-Effective

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SmartERP: Our Solutions

Business Requirements	Smart Solutions
Row level security on any data that requires limited or authorized access	Smart Security
Robust workflow approval capabilities across any documents across your Enterprise	Smart Workflow
Quick ChartField data entry to increase user productivity and data accuracy	Smart Keys
Streamlined and easy-to-use data entry pages configured to meet your specific business process requirements, incl. industry reqmts	Smart Docs
Enhanced user interface for self-service transactions	Smart Flex UI
One-stop vis... transaction	Smart Lifecycle Viewer
Easily add features anywhere such as Save as Draft, Copy from Templates, Attachments, Configurable Print, Collaborative Comments, Workflow, User Help, Business Process View	ERP Gadget--NEW
Addressing additional compliance requirements not in standard PeopleSoft	Smart Compliance
Manageable solutions for complex integration needs	Smart Integration Pack
Other Common, Critical and Complementary business requirements	Tell us, we'll build it!

Configurable User Interface Smart Solutions

SmartERP: Our Business Value

- SmartERP Solutions Offer Lower Costs Compared to Traditional Solutions
- Designed and Developed with Customer Requirements and Feedback
- Configurable and Streamlined to Meet Your Specific Business Requirements
- Quick and Short Implementation Times
- Solves Business Needs on Your Current PeopleSoft Release
- Applicable to All Applications: Financials, HCM, Campus Solutions, SCM, CRM, EPM
- Proven and High-Quality Solutions and Services

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SmartERP Business Value
Where Do Smart Solutions Fit in?

- Are you implementing and considering customization to address specific requirements?
- Have you already built your own customizations and found it's too costly to continue to support for maintenance and upgrades?
- Are you in production and discovered you have a need for additional requirements?

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Introducing
ERP Gadget™

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What is ERP Gadget™?

- A configurable collection of high productivity end-user functions that can be easily and consistently deployed anywhere on any PeopleSoft page

ERP Gadget

Save ▼ Copy ▼ Print ▼ Attach Collaborate Lifecycle Viewer Extend Data Workflow ▼ Settings Help

- Easily add convenient features to PeopleSoft—any application, module or version (8.x and beyond)
- Extend application capabilities while avoiding customizations
- Streamline data entry and increase productivity
- Enhance accountability and collaboration
- Configurable Printing for reporting, and user help features
- Add business process insight and automated workflow options

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ERP Gadget – Feature Set

Save ▼   Copy ▼   Print ▼   Attach   Collaborate   Lifecycle Viewer   Extend Data   Workflow ▼   Settings   Help

- Actions are configurable for each Step <u>and</u> each Task or pages.

- A default may be assigned to the button for those with multiple available actions.

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ERP Gadget Demo

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ERP Gadget – Actions

	•Save	PeopleSoft Save - Saves the transaction as new or an update if a unique number (Transaction ID) has already been assigned.
	•Save as Draft	-Saves any data in a working state even if required fields are not populated. - Allows the user to pickup where they left off without receiving a Transaction ID.
	•Save as Template	-Saves any data in a working state that can be used for creation of any new transaction. - Template may be saved as Public or Private.

	•Copy from Draft	-Loads data from any previously saved draft. -Allows the user to continue where they last saved as a draft.
	•Copy from Template	-Copies populated fields and selections from any saved template into the working document. -Template data remains untouched for recurring use.

ERP Gadget – Actions

Save ▼ Copy ▼ Print ▼ Attach Collaborate Lifecycle Viewer Extend Data Workflow ▼ Settings Help

Settings	•Options	-Manage options of user's saved templates.
		-Manage options of user's saved drafts.
		-Allows the user to specify a default template to be used when creating a new transaction of a specified type (e.g. Vendor, Voucher, Journal, Award).

Demo

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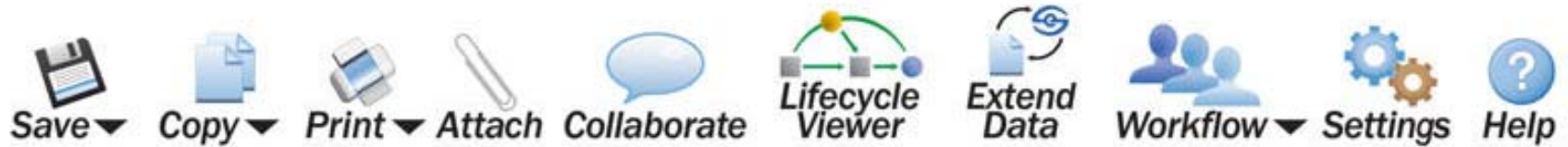
ERP Gadget – Actions

	•Print	•Configurable HTML Print
		•Standard PeopleSoft Reports (XML, Crystal, SQR, nVision)

Demo

ERP Gadget – Actions

Save ▾ Copy ▾ Print ▾ Attach Collaborate Lifecycle Viewer Extend Data Workflow ▾ Settings Help

	•Attach	-Attaches files at the Header level, Line level or both for the given transaction.
Attach		-Enhances productivity and accountability by persisting all related documentation with the transaction.

Demo

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ERP Gadget – Actions

Save ▼ Copy ▼ Print ▼ Attach Collaborate Lifecycle Viewer Extend Data Workflow ▼ Settings Help

|		
Collaborate	•Collaborate	-Provides capability for threaded collaborative discussions retained throughout a specific transaction. -Comments are individually date-time stamped with user identification for accountability.

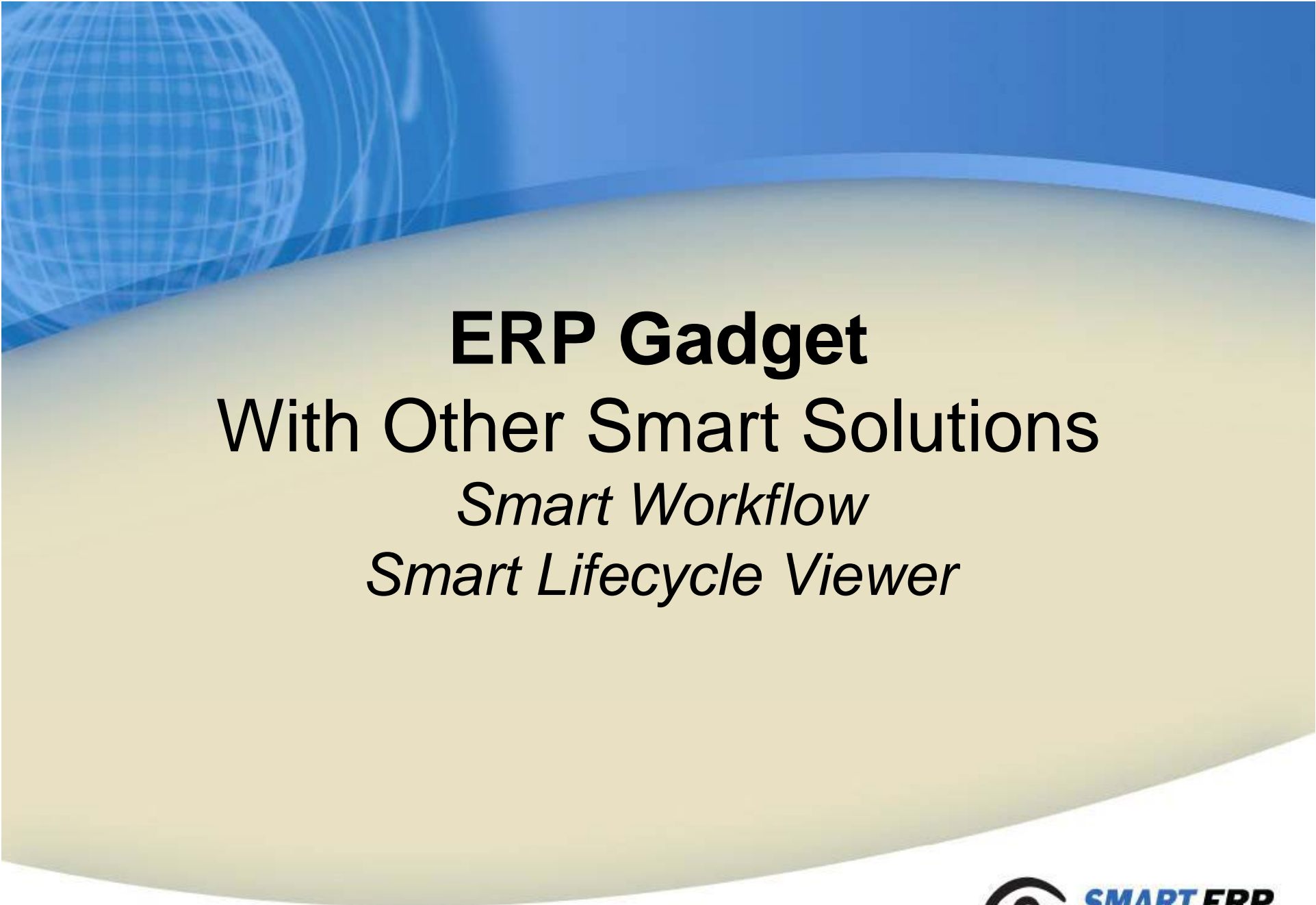|		
Help	•Help	-Opens a help window containing rich configurable context sensitive information targeted at the specific task being performed. -This is intended to be unique organization specific HTML-based help information, graphics, links and text.

Demo

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ERP Gadget – Actions
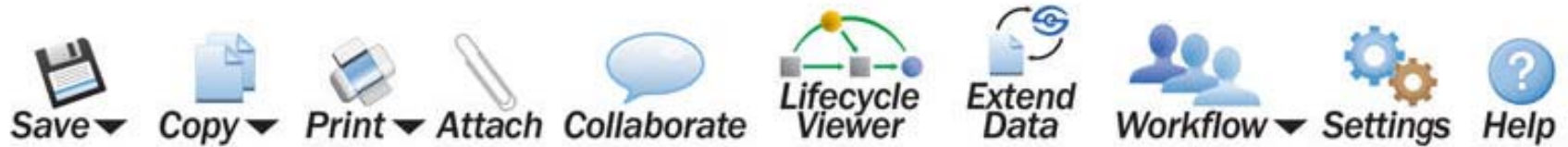
	•Extend Data	-Used to capture and relate additional data elements not found on the transaction page. -Configurable per transaction, with options for the storage of additional data (outside or within the standard PeopleSoft data model).

Demo

ERP Gadget
With Other Smart Solutions
Smart Workflow
Smart Lifecycle Viewer

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ERP Gadget – Actions

Save ▼ Copy ▼ Print ▼ Attach Collaborate Lifecycle Viewer Extend Data Workflow ▼ Settings Help

Workflow ▼	•Preview	Displays the expected flow of approvals for the given document.
	•Submit	Submits a validated transaction into workflow.
	•View Approval Map	Views the process of the document in workflow once it has been submitted (e.g. Who has it been routed to or who has provided approval).
	•Approval Options	Approve, Deny, Pushback and Hold workflow actions are accessed from this menu.

Demo

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ERP Gadget – Actions

Save ▼ Copy ▼ Print ▼ Attach Collaborate Lifecycle Viewer Extend Data Workflow ▼ Settings Help

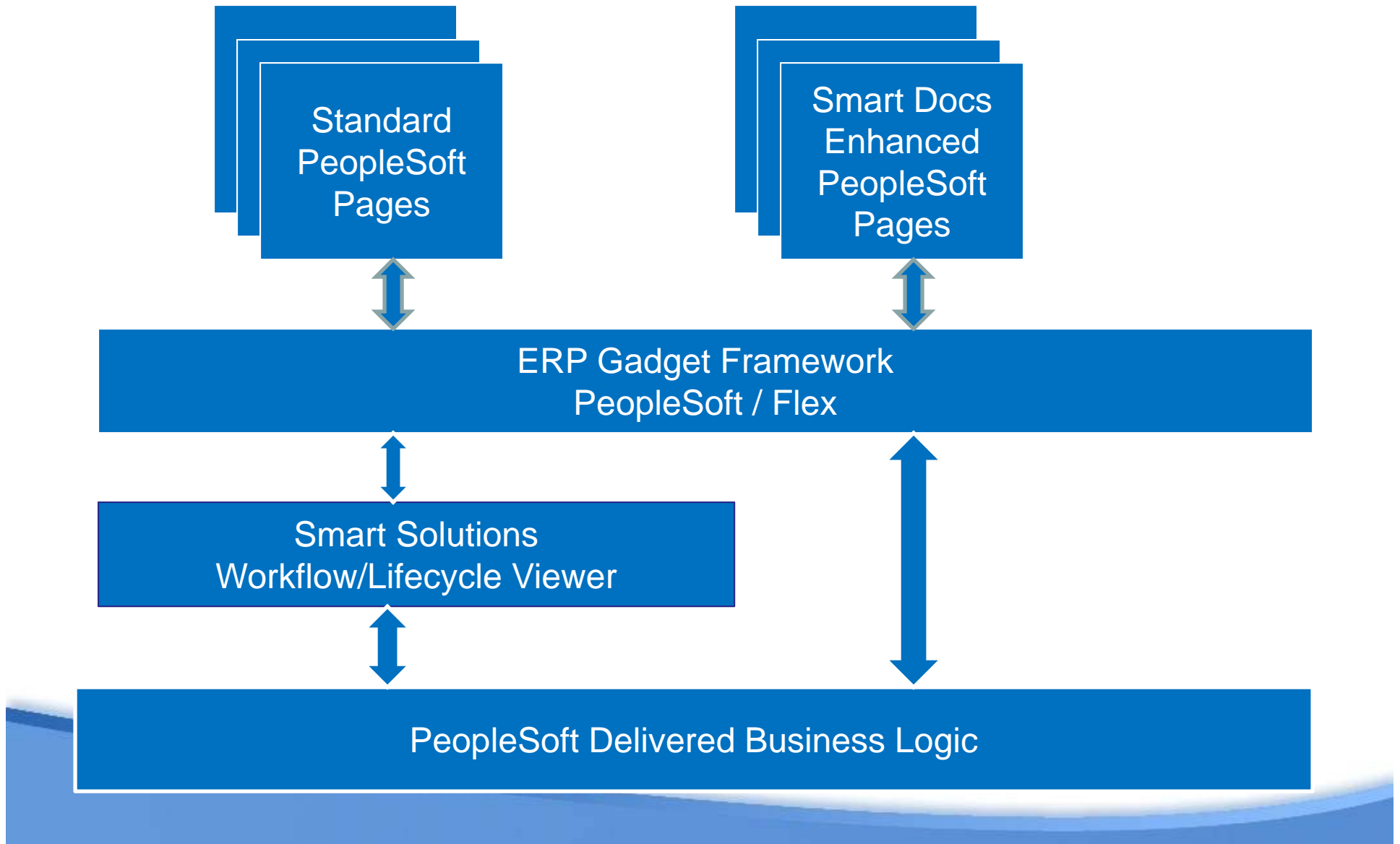|	•Lifecycle Viewer	-Displays Smart Lifecycle Viewer for the specific transaction.
Life Cycle Viewer		-Shows related transaction IDs and information from the start to end of the flow of data to identify the status of the current document within the business process.
		-Financials Procure-to-Pay Example: Voucher and related upstream Requisition, Purchase Order and Receiving information as well as related downstream Payment and Journal information.
		-Campus Solutions Enrollment Example: Student and related Enrolled Courses, and Required Books.

Demo

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ERP Gadget Architectural Overview

| Standard PSFT Pages Enhanced with ERP Gadget | | Tailored PSFT Pages Enhanced with ERP Gadget |

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Smart Docs Framework (ERP Gadget)
PeopleSoft / Adobe Flex

$\updownarrow$

Smart Solutions
Security/Workflow/Smart Keys

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PeopleSoft Delivered Business Logic
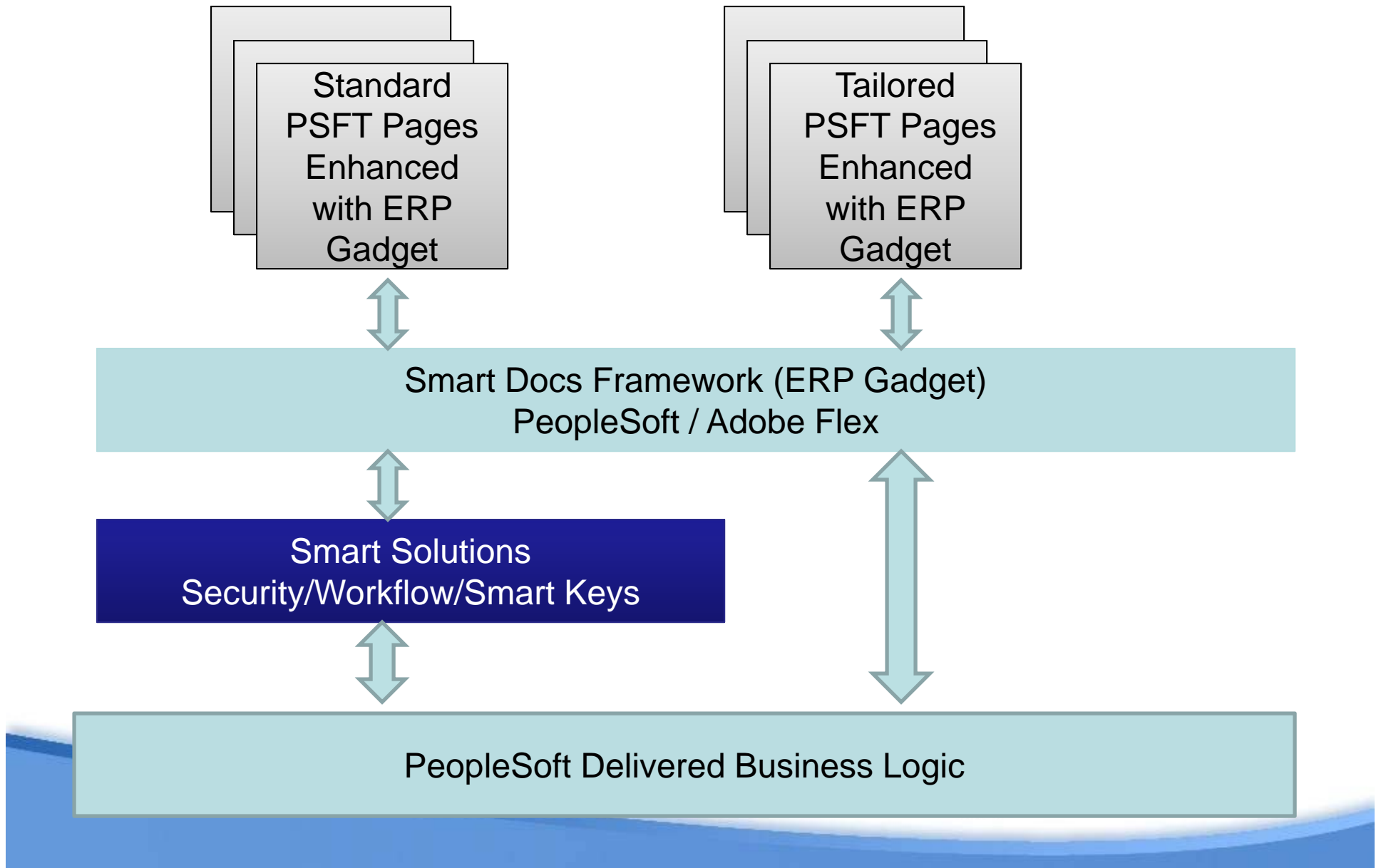
ERP Gadget Overview

Configuring ERP Gadget

1) Select desired Actions (all Actions are optional*)
2) Select desired PeopleSoft target components
3) Run automated ERP Gadget deployment process
4) Configure ERP Gadget features

* (Lifecycle Viewer and Workflow are additional efforts)

Low Total Cost of Ownership

- During maintenance (patches/updates/upgrades) ERP Gadget "hooks" can be readily removed and re-deployed after maintenance activities are complete

ERP Gadget Summary
High Value Capabilities, Low Costs

- Add High-Value, End-User Productivity Capabilities to Any PeopleSoft Applications

- Implement Configurable, Common and Consistent Capabilities Anywhere on Any Release
  - Save As, Copy, Workflow, Attachments, Collaboration, Printing, Extend Data, User-Help, etc.

- Easily Configure Any PeopleSoft Page Within Minutes!

- Lower Total Cost of Ownership
  - Utilize Best Practices, Add-on, No Customizations
  - Maintenance and Upgrades

- Complete Projects Better, Faster and Cheaper !

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Upcoming Events

- ## Alliance 2010 (Official ERP Gadget Launch)
  - San Antonio, TX, February 28 - March 3

- ## Collaborate 10
  - Las Vegas, NV, April 18 - 22

- ## OHUG 2010 Global Conference
  - Las Vegas, NV, June 13-17

- ## HIUG Interact 10
  - Orlando, FL, June 27-30

- ## SmartERP Webinar Series

- ## Personal Demo with Your Organization
  - Any Time you Want!

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Q & A

To ask a question please use the GoToMeeting QUESTION feature (please note all phone lines and computer microphones have been placed on mute).

If we can't get to your question live we will respond to you directly via email after the webinar.

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View Solution Previews: **smarterp.com/previews**

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Thank You

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