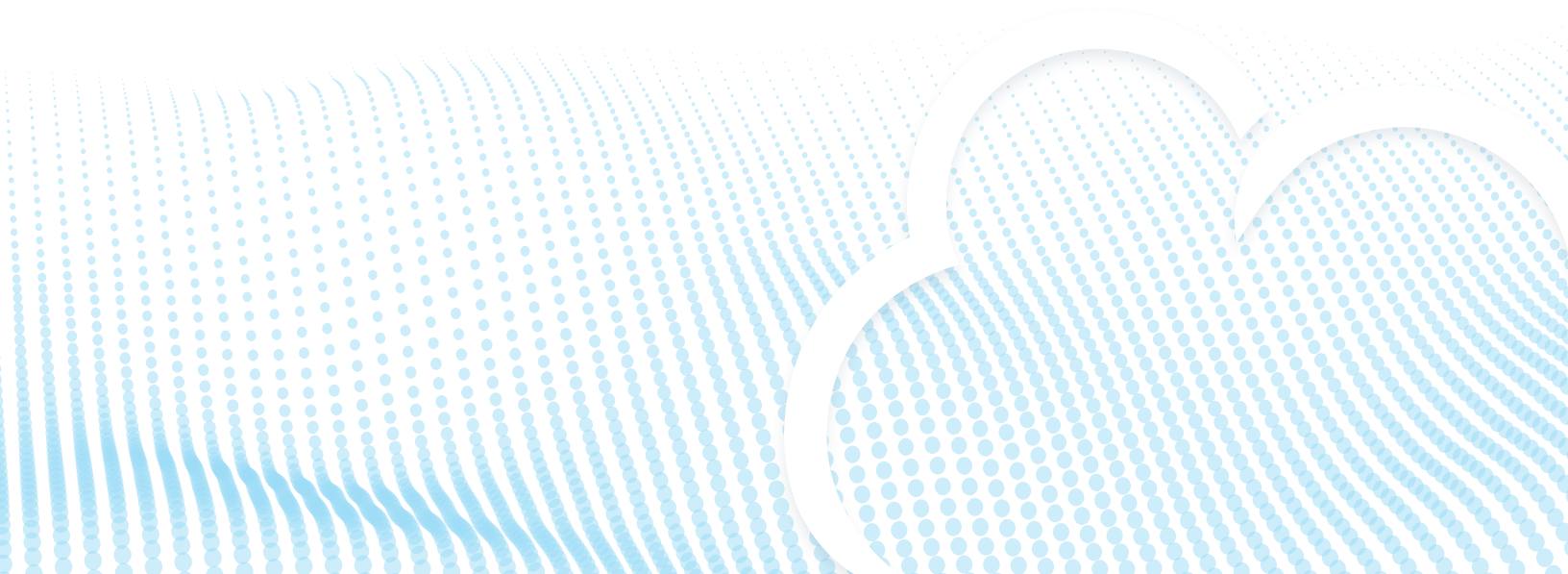




PeopleSoft

CASE STUDY

By Platform 3 Solutions
platform3solutions.com



SITUATION

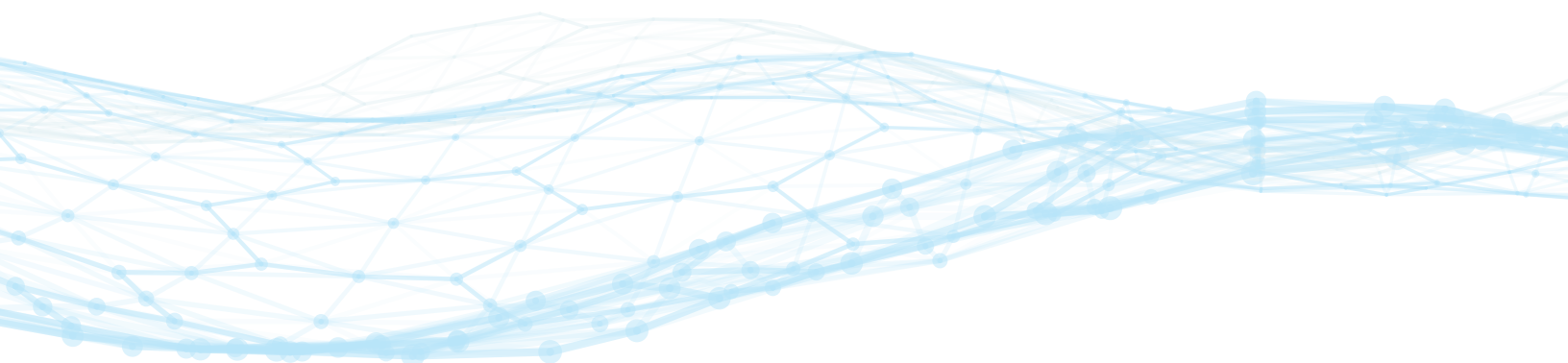
After a merger and acquisition, a large life sciences company needed to drastically cut cost and transform their business to recognize promised operational and cost synergies in the new company. Complicating this were several redundant PeopleSoft systems with these specific issues:

GOVERNANCE

- Data was duplicated in multiple systems, creating gaps and misalignment in the data. Archiving the data allowed for clean streamlined data storage in ONE system.
- Retention, legal holds and disposition could not be set. The entire PeopleSoft system and data set was kept active as a result.

COSTS

- **License fees** - Maintaining multiple instances of PeopleSoft, simply to look up old information were astronomical.
- **Hardware Assets** - The services of multiple datacenters hosting multiple servers were no longer needed once the information was archived into a central repository.
- **Knowledge costs** - Using PeopleSoft takes a great deal of training and understanding to retrieve simple datasets. Specialized SQL knowledge precluded the average user from being fully self-service, and instead became reliant on PeopleSoft experts.



SOLUTION

Platform 3 Solutions' product, Archon, allowed the business to fast track the data analysis, data extraction, and data normalization to quickly and efficiently archive those PeopleSoft systems. The automated workflow ensures referential integrity of the data, chain of custody audits, retention policies and legal holds are applied to the data.

Archon has a pre-built solution for PeopleSoft (including over 80 canned reports) that allows end users to securely access the archive PeopleSoft data. In addition, Archon has a user-friendly and efficient way to build self-service reports with Archon's Query screen builder, a tool that is like the PeopleSoft Query Manager.



RESULTS

The results were millions of dollars in operational cost taken out of their business retention policy enforcement, along with an effortless way to retrieve the needed reports. In the end, a role based, secure and central repository for users to securely access their data resulted in happy users, happy compliance teams and happier auditors.

BEFORE

Voucher Search and
Voucher Results

Voucher Search

Voucher Information

*Business Unit US001
Voucher ID
Invoice Number
Related Voucher

Incomplete
Entry Status
Voucher Style Regular Voucher
Voucher Source

Supplier Detail

Supplier ID
Short Supplier Name
Supplier Name

☒ New window
Search

Search Results Personalize | Find | View 100 | First 1-100 of 210 | Last

Business Unit	Voucher ID	Invoice Number	Invoice Date	Voucher Style	Voucher Source	Entry Status	Incomplete	Gross Invoice Amount	Transaction Currency
US001	00000001	BAE000045	06/06/2000	Regular	Online	Postable	<input type="checkbox"/>	1,042.50 USD	
US001	00000002	1234	07/12/2000	Regular	Online	Postable	<input type="checkbox"/>	1,789.75 USD	
US001	00000005	US1-1	05/15/2000	Regular	Online	Postable	<input type="checkbox"/>	1,414.66 USD	
US001	00000007	US1-2	07/30/2000	Regular	Online	Postable	<input type="checkbox"/>	2,049.88 USD	
US001	00000008	US1-3	07/25/2000	Regular	Online	Postable	<input type="checkbox"/>	2,685.09 USD	
US001	00000009	US1-4	08/09/2000	Regular	Online	Postable	<input type="checkbox"/>	3,320.31 USD	
US001	00000060	US1-5	08/01/2000	Regular	Online	Postable	<input type="checkbox"/>	3,955.53 USD	
US001	00000061	US1-6	06/07/2000	Regular	Online	Postable	<input type="checkbox"/>	4,590.74 USD	
US001	00000062	US1-7	06/12/2000	Regular	Online	Postable	<input type="checkbox"/>	5,225.96 USD	

END RESULT

Voucher Search

opentext | InfoArchive

Search Forms | Retention Sets | Hold Sets | Purge Lists | Application Info | Tables | Databases

Applications | PeopleSoft | Voucher Search

Voucher Search

BUSINESS UNIT
Voucher ID
Supplier ID
Entry Status

INVOICE NUMBER
Supplier Name
Voucher Style
Voucher Source

SHORT SUPPLIER NAME
RELATED VOUCHER
INCOMPLETE VOUCHER

SEARCH RESET

Voucher Search Results

opentext | InfoArchive

Search Forms | Retention Sets | Hold Sets | Purge Lists | Application Info | Tables | Databases

Applications | PeopleSoft | Voucher Search | Results

No criteria provided. 635 records

Select All 635 records

Business Unit	Voucher ID	Invoice No	Gross Invoice Amt	Payment Amt	Invoice Date	Invoices Informa...	Payment	Supplier
BU701	00000001	V0424801A	21,500.00	21,500.00	03/20/2002	Invoices Informa...	Payment	Supplier
BU702	00000001	V0424802AF	21,500.00	21,500.00	03/20/2002	Invoices Informa...	Payment	Supplier
BU703	00000001	V0424801	295.00	295.00	03/29/2001	Invoices Informa...	Payment	Supplier
BU704	00000001	V804VYTRA	65,780.00	65,780.00	06/12/2002	Invoices Informa...	Payment	Supplier
BU706	00000001	1020010-019	920.92	920.92	01/07/2002	Invoices Informa...	Payment	Supplier
BU707	00000001	2020000-001	-700.00	-700.00	01/21/2002	Invoices Informa...	Payment	Supplier
BU708	00000001	2020000-001	-2,300.00	-2,300.00	01/21/2002	Invoices Informa...	Payment	Supplier

Details Compliance

Business Unit BU701
Voucher ID 00000001
Invoice No V0424801A
Gross Invoice Amt 21,500.00
Payment Amt 21,500.00
Invoice Date 03/20/2002
Short Supplier Name SINGLEEFPY1
Supplier ID SINGLEEFPY1
Supplier Name SinglePay
Voucher Style SinglePay
Related Voucher (Blank)
Entry Status Postable

W2 AND PAY SLIP REPORTS

The following documents are requested through HR and to be legally compliant, the data must be presented in an immutable format and in its originally presented format to the employee for compliance. Archon will allow you to archive all of the PeopleSoft documents and files within the various modules. Some common ones are shown below.

W2 Forms

PeopleSoft provided these forms from 2011. The format changes every year.

W2 Details		a. Employee's social security number		OMB NO. 1545-0008	
c. Employer's name, address and Zip Code		1. Wages, tips, other compensation		2. Federal income tax withheld	
MANSFIELD MA 02048		104636.00		18684.08	
		3. Social security wages		4. Social security tax withheld	
		106800.00		6621.60	
		5. Medicare wages and tips		6. Medicare tax withheld	
		111877.35		1622.22	
		7. Social security tips		8. Allocated Tips	
				1800.00	
d. Control Number		9		10. Dependent care benefits	
				1800.00	
e. Employee's Last name Suff. first name and Initial		11. Nonqualified plans		12a	
		13. Statutory Retirement Third-Party Plan Sick pay		C 100.88	
		Y		D 7241.35	
f. Employee's Address		13a Employee's Social Security Number		12c	
LAKEVILLE MA 02347				12d	
		13b Employee's Identification Number			
		14. Other			
15. State Employer's state ID number		16. State Wages, tips, etc		17. State income tax	
MA 020-502-162		104636.00		5439.72	
		18. Local wages, tips, etc		19. Local income tax	
				20. Locality name	

FORM **W-2 Wage and Tax Statements** 2010 Department of Treasury - Internal Revenue Service

Copy 1-For State, City or Local Tax Statement

Pay Slip

Legal mandates states that pay slips must be presented in the exact format in which it was originally prepared.

15 Hampshire Street Mansfield, MA 02048 508-261-8000		PayGroup: CPB-CORPORATE BIWEEKLY		Business Unit: COVDN	
		Pay Begin Date: 12/12/2015		Advice #: 000000094155529	
		Pay End Date: 12/25/2015		Advice Date: 12/31/2015	
		Cost Center: 02000 50 - 270 6010 -		Tax Entity:	
Lakeville, MA 02347		Employee Id: 5027000051-05		TAX DATA: Federal Married State Married	
		Department: APPLICATIONS - SHD SVC CTR		Allowances: 0 0	
		Location: Mansfield, MA (Corporate)		Adst. Pct:	
		Job Title: Sys Analyst IV		Adst. Amt: 150.00	
		Pay Rate: \$127,890.10 Annual			

HOURS EARNINGS					TAXES		
Description	Rate	Hours	Earnings	Description	Current	YTD	
Regular Pay	65.584667	75.00	4,918.85	Fed Withholding	807.26	54,349.43	
Health Incentive			57.50	Fed MED/EE	65.97	3,649.20	
Executive Bonus			0.00	Fed OASD/EE	0.00	7,347.00	
Other Bonus			0.00	Fed Addl Med	40.94	465.02	
Medtronic Retention Bonus			0.00	MA Withholding	215.12	12,465.45	
TOTAL WORKED		75.00	4,918.85	Total	1,129.29	78,276.10	
TOTAL		75.00	4,976.35				

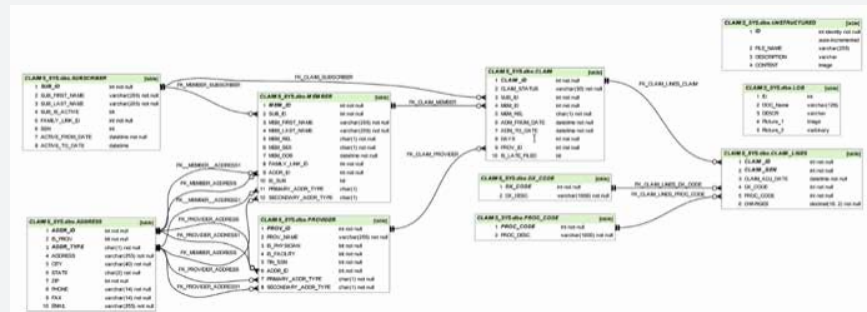
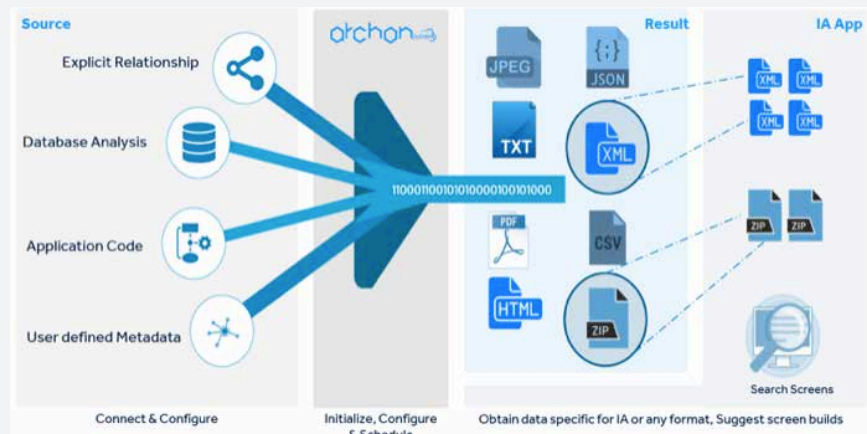
Before Tax Deductions			After Tax Deductions			Employee Paid Benefits		
Description	Current	YTD Deduction	Description	Current	YTD Deduction	Description	Current Benefit	YTD Benefit
401(k)	295.13	7,621.06	PFA	7.38	191.23	Life Insurance	8.28	212.76
FSA Dependent Care	80.76	2,100.00	LTD	23.27	600.47	Taxable Inc*		
Medical	317.76	8,261.76	Supp Life EE	40.47	1,048.06	401(k) Company	147.57	3,810.66
Vision	8.02	208.52	TOTAL	71.12	1,839.76	Core	147.57	4,139.25
Dental	28.94	752.44						
Total	730.61	18,943.78						

Overall Totals				
	Gross Earnings	Federal Taxable Amt	Tax Amount	Net Pay
Current	4,976.35	4,254.02	1,129.29	3,045.33
YTD	262,778.69	244,047.67	78,276.10	163,719.05

Payment Type		Account Type	Account Number	Deposit Amount
Start Balance	0.0	Checking	000000094155529	3,045.33
Earned	0.0			
Bought	0.0			
Taken	0.0			
Sold	0.0			
Adjustments	0.0			
End Balance	0.0			

REFERENTIAL DATA INTEGRITY AND CHAIN OF CUSTODY:

Archon analyzes the data in PeopleSoft to find the relationships between tables, tying together information that is critical to produce results for users who are *not technical* users.



AD-HOC QUERY SCREEN BUILDER:

A popular feature of PeopleSoft is the ability to create Ad-Hoc queries using the Query Manager functionality. Archon provides the ability to create Ad-Hoc query forms within the archive; this allows the business the flexibility to respond to changing business and compliance needs without calling the vendor every time a new report or alternate view of the data is needed. Having the functionality of Archon Query Builder also allows users to inquire against the data in any manner they can think of – this removed a great deal of pressure from those business representatives who were responsible for creating custom search forms during the initial archival period.

The Query Builder from Archon is very easy to use and those users who worked with the PeopleSoft Query Manager transitioned quickly, putting together search forms that pulled the same datasets from the archive as the original PeopleSoft application with very little training.



LEARN MORE

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