PeopleSoft Enterprise Human Capital Management

Global Strategy
Disclaimer

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Contents
Executive Overview ........................................................................................................... 1
Introduction ...................................................................................................................... 2
PeopleSoft Enterprise HCM – Global Strategy ................................................................. 4
  Advantages of a Global Strategy ...................................................................................... 6
  Access to Global Best Practices ...................................................................................... 6
    Common Format for Common Practices and Reporting ................................................. 7
    Same Code Line Worldwide ......................................................................................... 7
    Rules-Based Architecture ............................................................................................ 8
    Architecture Enables Creation of Own Country Products ............................................ 8
  Identification of Local and Global Requirements ......................................................... 8
Features and Functions to meet Global needs ................................................................. 9
PeopleSoft Enterprise HCM Global Functions ................................................................. 10
  Availability of PeopleSoft Enterprise Global HR and PeopleSoft
  Enterprise Global Payroll Products ................................................................................. 11
  Multilanguage Support ................................................................................................ 13
    Unicode and Double-Byte Character Support ........................................................... 13
Data Privacy and Security ............................................................................................... 14
Translation of the Product ............................................................................................... 15
Global Deployment Considerations ................................................................................ 15
  Architectural Considerations ....................................................................................... 16
  Working with our Partners .......................................................................................... 17
Some Customer Success Stories ..................................................................................... 17
Conclusion ....................................................................................................................... 18
Executive Overview

A man sits down in a café in Vienna and orders a cappuccino and cake. The waiter brings him the order on a silver plate with a glass of water. An hour later the man will have to get the attention of the waiter to get his bill which will include 15% tip (Incidentally, the coffee will also have a different value-added tax rate than the cake). Once the bill arrives, he pays the waiter and tips him another 15%. If this man would sit down for the same order in New York, he typically would neither get his order on a silver plate and have tip included on the bill nor be expected to ask for his bill and have different sales tax rates. In Japan, after finishing their coffee, the patron would get up to leave and pay at the cashier at the door.

This simple example tells us volumes but specifically highlights two basic truths. First, globalization increasingly provides for standardization. On the other hand, it also accounts for the awareness of local specialization. We have all experienced similar situations abroad, which appear as a straightforward, everyday process at first. However, no matter how similar and basic, we encounter a degree of variance based on local traditions and laws all the time. Travel writers have written a plethora of travel books and TV scripts around this phenomenon. When we think about global strategy for Human Capital Management, ultimately the concept is very much the same. In this case, the baseline centers on finding, hiring, paying and terminating employees. Here again, we expect and do find uniqueness in these processes across borders and often even within countries.

In today’s business environment shaped by globalization, every organization deals with these realities not only in their core business activities, such as supply chain and customer management or regulatory reporting but also in their search for and management of talent. As a result, organizations must define unique HR process steps in light of a common process framework.

In order to remain competitive, organizations today must continue to think globally and become better at it. This includes expanding their customer, manufacturing, service fulfillment or materials supply base beyond current borders to include a presence outside of their locale as well as expanding their potential talent pool. By doing this, organizations will create projects to improve employee management and be more effective, efficient and compliant.

In the past, many organizations deployed multiple Human Capital Management solutions from varying vendors or multiple instances of a single vendor solution in order to comply with global processes or rules. This type of strategy obviously results in multiple challenges at both a corporate and local level.
They stretch from inaccurate headcount and compensation reporting to out-of-date data and inconsistent human resource process administration. In hindsight, many of the same organizations are now seeing the benefits of deploying and maintaining a single solution instance by providing extensions to meet local needs. Obvious benefits include common data definitions, global processing and reporting. Other benefits include the lowering maintenance overhead and the ability to define competencies globally in order to equitably rate and pay workers. This enables organizations to ensure the most efficient processes are being deployed consistently to ensure accurate global reporting and management of talent.

When we think about the specific global needs, we must also think about the varying practices for managing human capital globally. This includes understanding the needs of the multi-generational and mobile workforce as well as alignment with local customs and practices. We are rapidly moving from a requirement to maintain accurate job information on a worker to the ability to keep track of future career opportunities and analyze them to ensure proper planning from a worker and budgetary perspective. Such a high-impact strategy requires HR organizations today to justify their projects by quantifying their HR programs. By providing tools that track the current and proposed direction of an employee, integrated with budgetary data, HR departments become more relevant and accountable for investment decisions.

It is difficult to think about global human resource administration without thinking about data privacy and security. Data privacy is already a concern within the boundaries of a single country, but even more so when data is accessed across borders. In Europe and Asia, this is of particular interest when considering a global single solution instance due to strict requirements on data privacy. However, we are beginning to see similar needs within the United States and Canada, as data privacy becomes more regulated and uniform. The progression of adoption of data privacy laws and policies has grown exponentially in the past five years and should be a primary focus for any organization allowing employee data access and processing within a single geography as well as across borders.

Introduction

Oracle’s PeopleSoft Enterprise solutions aim to meet the needs of all organizations, whether they operate in one or many countries. PeopleSoft Enterprise provides a secure global human resources management solution—a solution that enables multinational organizations to meet specific requirements unique to a country or region.
Oracle’s PeopleSoft Enterprise Product Strategy has created this white paper to give you a better understanding of the strategy for deploying Oracle’s PeopleSoft Enterprise Human Capital Management (HCM) global applications. We’ll examine:

- PeopleSoft Enterprise HCM – Global Strategy
- Features and functions to meet global needs
- Implementation considerations
Delivering global processes to maximize the use of common data definitions to effectively interpret and analyze data is critical to timely HR actions. It is critical to recognize that there are local and cultural requirements that must be adhered to. To deal with the challenges of meeting local requirements, while at the same time recognizing the global nature of a significant part of HR processing, the concept we deliver is PeopleSoft Enterprise HCM’s global core. The global core holds functionality that is common to at least two countries but typically serves many more. Examples of this core functionality include:

- Person model
- Position management
- Compensation administration
- Talent Profile management

Because of the nature and the intended use of the global core functionality, we put significant effort into the flexibility, configurability and maintainability of these functions.

To better support specific local legislative requirements and culturally dictated business practices, PeopleSoft Enterprise solutions deliver country-specific extensions to these processes that are required for a country but are too specific to be included in the global core process. Examples of country-specific functionality include:

- Local payroll processing
- Legislative reporting
- Capturing of country-specific data
Over time, as we add to the list of supported countries, country-specific functionality may be moved into the core product, thereby making it available to all countries. Examples of this include:

- **Group Build** – the ability to build groups on user defined criteria and administer HR processes and security based on those groups
- **Rate Code Rules** – define rules to determine assignments and removal of compensation rates
- **Approvals and Workflow Engine** – Tool to define rules for approvals and workflow administration
- **Delegation** – Tool to administer delegation rights for self service processes

PeopleSoft Enterprise solutions include a variety of global products including:

- Human Resources
- eCompensation
- ePerformance
- Recruiting Solutions
- Enterprise Learning Management
- Global Payroll
- Payroll Interface
- Absence Management
- Time and Labor

Other Oracle global products that integrate to our PeopleSoft Enterprise HCM solution include:

- Workforce Scheduling
- Oracle Incentive Compensation
- Workforce Communications
- Help Desk for Human Resources
- Services Procurement
- Travel and Expense
- General Ledger/Budgeting

For additional information on any products, please review our datasheets located in PeopleSoft Enterprise Resource Library.

When we think about deploying a global solution there are other considerations including global data standards such as character set, time zones, currency, address and name formats. In addition, we need to evaluate technical considerations including architecture, support as well as security and data privacy.

With the support of a flexible, configurable HCM solution, HR professionals are enabled to manage the needs of the evolving requirements of their organization. PeopleSoft Enterprise HCM provides the
tools to ensure that organizations are able to make those timely adjustments to ensure a competitive advantage.

Advantages of a Global Strategy

The global strategy for PeopleSoft Enterprise HCM offers customers many advantages, ranging from access to global best practices for human resources management to a lower total cost of ownership (TCO). In the following sections, we’ll highlight some of the leading advantages as well as the solutions to support deploying these advantages. Our customers have deployed in over 98 countries and this list continues to grow. PeopleSoft Enterprise HCM is role and rules driven which enables organizations to simply roll out additional countries and regions.

Access to Global Best Practices

In the process of creating a global human resources management solution, we researched the requirements of many organizations in many countries. We continue to work closely with customers, thought leaders, industry leaders, and consulting firms to ensure our product includes recognized best practices that are easy to use. Examples of delivered best practices are:

- Australia – Salary Packaging
- France - Masse Salariale
- France – Compensation Forecasting
- France – Learning Compliance
- Germany - Works Council management
- Japan – Seniority Pay Administration
- Malaysia – Benefits in Kind
- Thailand – Ethnic Group and Religion tracking
- UK – Track Parental and Maternal Leave
- United States - Union Administration
- United States – EEO Reporting
For more information regarding country coverage, please see oracle.com

Common Format for Common Practices and Reporting

Organizations often discover there are many similarities between the human resources practices and reporting needs in their various locations. They appreciate the cost savings they can realize by standardizing these common processes. A single global product enables users to leverage a common format for common practices and reporting. All subsidiaries of an organization that use the same business practices and have the same reporting needs can instantly get access to these common elements of the global PeopleSoft Enterprise HCM product family. Multinational organizations can standardize their HR processes and create a two-way flow of information between employees and HR departments globally. This enables accurate reporting and the ability to act quickly on the results since significant analysis is not required to interpret and translate the data into a common definition.

Same Code Line Worldwide

The architecture of the global product enables organizations to use the same code line worldwide. Whether organizations use PeopleSoft Enterprise HCM in two countries or many countries, there is no need to install separate versions of the product. A shared code line not only makes maintenance of the product easier to manage—there are no incompatible derivatives of the product to be maintained and updated, so you need only one skill set—but also leads to a lower total cost of ownership (TCO). Organizations can install and maintain extensions and upgrades without the burden of dealing with a multi-product environment.

Other advantages of using the same code line—also contributing to a lower TCO—are the consistency in user interface, the usage of the same set of tools, and the availability of global training courses. The Web-based user interface has an intuitive look and feel, which reduces the learning curve and minimizes the need for training.
Rules-Based Architecture

We continue to develop PeopleSoft Enterprise HCM products leveraging a rules-based architecture. After examining the requirements for many business processes, it was obvious that a common denominator exists in the ability to define rules as the basis for these processes. This has led to our rules-based Global Payroll, Absence Management and Time and Labor products.

For these rules-based products, the rules are not hard-coded; they’re stored in the database, making it easy for users to create and update their own business and processing rules. Business analysts have the skill set required for this process so there is no need for programmers to be involved in the coding of rules. This highly reduces the TCO because the functional team no longer has to rely on IT resources to perform complex and time-consuming code changes. All changes are made online and are ready to be executed without the need of a code compiler step.

Rules created for one country can be used in other countries if there is a common requirement. A rule is not a customization but rather data stored in the PeopleSoft Enterprise tables. Customer-created rules are portable between the various versions of the product, leading to a lower TCO when upgrading to a new release. This is the strategy of all the recently delivered features including our talent management applications and features:

- Profile Manager
- Compensation
- Performance Management

Architecture Enables Creation of Own Country Products

The architecture and flexibility of the global product allows organizations to develop their own country-specific products and integrate them into the global product. Custom country products can co-exist in the same database without the need to develop derivatives of the global product. The architecture also provides for off-cycle releases. This means that you do not have to wait for a new release of the product before you can integrate your own country product. Examples of country specific products could include Global Payroll, Absence Management as well as the Core HR products.

Many of our partners assisted organizations with the development of country specific products. To see a list of those partners and the countries they support, please see the Oracle Partner Network.

Identification of Local and Global Requirements

We undertake extensive research and validation before we develop new functionality for PeopleSoft Enterprise HCM to ensure we are meeting the requirements of customers and prospects and satisfying legislative requirements. PeopleSoft Enterprise HCM global strategy managers and locally deployed domain experts perform this important task.

Developing software is not an activity performed in isolation. We actively facilitate and engage in a variety of forums to fully understand the needs of our customers and the industry. Examples include:

- **Customer Advisory Board.** We have Customer Advisory Boards made up of a rotating schedule of current customers. These customers focus on the strategic direction of the PeopleSoft Enterprise
HCM product line and are regularly called upon to evaluate our investment strategy and subsequent product requirements as we move through our development lifecycle. This group’s input is essential in the validation process of our detailed development efforts. We currently have two customer advisory boards: Global HCM specific for customers with operations primarily outside of the United States and Canada and HCM for customers within the US and Canada but may also have operations in one or more country.

- **Focus groups.** When developing a new product or new functionality, we invite interested customers to discuss their requirements with our products. Typically, these focus groups extend across the globe and focus on refinement of the requirements definition and design for inclusion in future releases.

- **Users groups.** Most users participate in the (independent) users group, either on a worldwide or regional level. We are generally invited to most meetings to discuss product functionality and future directions. This is another important platform from which to gain customer feedback.

- **Special interest groups (SIGs).** Customers with a special area of interest in the product often need counterparts with whom to share ideas and best practices. One of the SIGs is the Global HRMS SIG, consisting of international organizations with best practices in global human resources management. We also participate in meetings and the annual conference of this group.

Working with customers, industry thought leaders, industry analysts, and consulting firms helps us to better understand the needs of the marketplace and the future trends in the industry. Working together with these groups has resulted in state-of-the-art technology and deep functionality that meet the current and future human resources management needs of organizations worldwide. Much of this knowledge is shared with users and prospects through PeopleSoft Enterprise solutions as well as articles and white papers.

**Features and Functions to meet Global needs**

Many functions and features included in the core PeopleSoft Enterprise HCM products are essential for worldwide deployment. To see the latest list of countries supported, please see [www.oracle.com/HCM](http://www.oracle.com/HCM) and for our current customers, please see [www.support.oracle.com](http://www.support.oracle.com).
PeopleSoft HCM Global Strategy

Installation options for selection for legislative and regulatory requirements.

PeopleSoft Enterprise HCM Global Functions

PeopleSoft Enterprise was developed as a global product enabling the support of global core processes with local extensions. Some of those key global processes include foundational processing critical to a secure HR environment.

In order to appropriately track and administer all types of individuals in the organization, PeopleSoft Enterprise delivers the Person Model. This feature enables organizations to define who the person is and their relationship to the organization. With this, they are able to determine the type of transactions this individual will have access to as well as the allowed processing type.

The ability to develop, maintain and administer positions is critical in a multi-site and multi-national organization. In order to understand position allocation and budgetary impact, it is critical to track by positions. It is also important to note tracking by position adds overhead to the administration for an HCM application. However, if an organization insists on budgetary reporting and accountability, position management simplifies the process. It does so by enabling you to create, track and process employee appointments by position and ultimately budget for positions and departments.

PeopleSoft Enterprise HCM provides tools to simplify administration and enable rule sharing with the use of Set ID. Set IDs enable organizations to share business rules associated with Job Codes, Salary Plans, Departments and Location to minimize administration thereby minimizing risk associated with data entry related errors.

An organization's corporate and regional office processes are often unique. For this reason, PeopleSoft Enterprise HR enables configurable actions and configurable reasons for the actions. In
addition, you are able to define by region which job transactions are permitted. When you think about legislative requirements in Japan such as the ability to terminate employment due to a marriage, or in Switzerland the ability to give an increase due to a birth of a child, unique actions and reasons are required.

Many organizations now want to expose their hierarchical structure globally for communication and collaboration purposes. We have introduced a new feature, Company Directory, that enables organizations display their hierarchical structure and perform self service transactions, providing an alternate to the traditional navigation options.

PeopleSoft Enterprise Global HR enables you to determine the rules required to administer your organization globally based the foundation of your HR processes. However, we do recognize the need to provide localized extensions since there are always further unique processing needs when you consider the regulatory, legislative or cultural requirements by country. These unique requirements span all of our HCM processes from core HR to Talent Management to Workforce Management. To see a current list of support countries, please visit www.oracle.com/hcm.

For more information on specific product, please review our datasheets located in PeopleSoft Enterprise Resource Library.

Availability of PeopleSoft Enterprise Global HR and PeopleSoft Enterprise Global Payroll Products

Organizations in over 100 countries in all parts of the globe use PeopleSoft Enterprise HCM. PeopleSoft Enterprise HCM products have the global architecture and flexibility to support the business requirements of global organizations.

To meet specific local legislative requirements and common business practices, additional country-specific functionality has been developed as part of the global PeopleSoft Enterprise HCM product family. The table below shows the availability of the global solutions for some of the major countries in the world. A “Yes” in the “Global HR” column indicates that country-specific functionality is supported for the Human Resources product. The same is true for the “Global Payroll” column. Because of an ongoing commitment to invest in the international marketplace and to provide global solutions, this list is updated on a continuous basis.

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<th>COUNTRY</th>
<th>CUSTOMERS IN PRODUCTION</th>
<th>LANGUAGE SUPPORT *</th>
<th>GLOBAL HR</th>
<th>GLOBAL PAYROLL</th>
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Multilanguage Support

Multinational as well as single country environments require the support of multiple languages. A US based manager wants to use the system in her preferred language, English, but another US based manager may want to use the system in Spanish. Enabling this multilingual support within one country or across borders not only ensures understanding of the processes being administered but also ensures local application adoption. PeopleSoft Enterprise solutions support customers’ various multi-language needs. This support comes in many forms outlined below.

Unicode and Double-Byte Character Support

Computers store letters and other characters by assigning a number to them. Over the years, developers have established hundreds of different encoding systems to assign these numbers. Unfortunately, these systems are not always compatible with each other, resulting in problems when passing data between different coding systems. For example, two encoding systems can use the same number for different characters or use different numbers for the same character. The Unicode standard solves this problem. It provides a unique number for every character, regardless of platform, program, or language.

In a global environment, the support of Unicode is essential. Applications like PeopleSoft Enterprise HCM must handle a wide variety of languages at the same time. Mixing the character sets of the vastly different languages supported—for example, Japanese and German—is nearly impossible to do reliably without Unicode. Since Unicode has a single and unique definition for each character, it avoids the data corruption problems that plague mixed character-set programs. It provides a single code line to support the characters of all the world markets.

Due to the complex nature of some character sets, more computer memory is needed to store Unicode characters. Whereas most Western character sets are stored in eight bits of memory (equivalent to one byte), Unicode characters are stored in two bytes, hence the need for double-byte character support.

PeopleSoft Enterprise solutions support Unicode in all core components of the architecture. It enables organizations to centrally maintain and manage implementations of PeopleSoft Enterprise applications in virtually every modern language in a single database, eliminating the need for multiple databases and
servers around the world to support different languages. Users can access PeopleSoft Enterprise HCM in the language of their choice—including languages with a complex character set like Chinese and Japanese—from anywhere in the world through a standard Web browser.

For more information on Unicode: [http://www.unicode.org](http://www.unicode.org).

Data Privacy and Security

Data Privacy is a critical issue impacting all organizations around the globe. Countries, states, provinces, cantons, counties as well as individuals are dictating their requirements to organizations to ensure the privacy of their personal data so it is becoming critical that every organization establishes, understands and effectively communicate their data privacy rules and practices (below image). Understanding one’s privacy needs is critical to develop and execute on a security strategy to meet that need. Defining a security strategy and solution for personal data cannot be accomplished without a comprehensive view of the organization’s privacy requirements. Therefore, it is not just about creating user profiles, it is about understanding where data resides; how, when, by whom data is accessed and when it is retired. Privacy and security are no longer issues just for organizations that have cross border data storage considerations; we are finding that organizations, in one location or many, as well as workers are dictating stricter rules to ensure that personal data is secure. PeopleSoft Enterprise HCM security is roles and rules driven providing you the tools to enable data privacy. For more information on Data Privacy and Oracle’s security solutions, please see Oracle’s White Paper on Data Privacy – Challenges and Solutions published April 2010 at [www.oracle.com/hcm](http://www.oracle.com/hcm).

![National Freedom of Information Laws, Regulations and Bills 2009](http://www.privacyinternational.org/)
Translation of the Product

PeopleSoft Enterprise HCM is translated into a variety of languages so users can interact with the system in their preferred language. It includes the language that is used on the pages, reports, online help, data such as alternate character support and documentation. For the most current information on supported languages, please see My Oracle Support.

Global Deployment Considerations

When organizations consider the opportunity of either consolidating to a single instance or deploying multiple instances of their HCM application globally, many requirements and practices must be considered. Planning and global involvement is imperative to the success of any global deployment. Moreover, it is critical that communication is clear and requirements of all locations are considered and provided with a solution. This communication plan must be executed upon early and consistently to ensure acceptance and rapid adoption of the global HCM instance. There are obvious benefits which include:

- Deliver HR content consistently
- Create a global data model
- Store past, present and future data in one place
- Report business metrics from one source
- Quickly get a consolidated view of the organization
- Train users on one application
- Simplify maintenance by supporting one application
- Manage data privacy for effectively and securely

In order to accomplish this, the following is also required:

- Ability to deliver multiple languages
- Support multiple currencies and the conversions
- Support multiple character sets
Ultimately, in order to ensure the success of a global deployment, the organization needs to ensure they have the proper executive sponsorship to secure commitment and governance is adhered to. The failures of many projects are as a result of the lack of executive support which resulted in lack of country management support and poor communication to the local offices.

Managing a Global HCM environment is challenging without all of your plans and considerations in place. PeopleSoft Enterprise HCM provides the experience and tools to place you on the right path.

Architectural Considerations

Organizations have tried different architectural models when implementing global human resources solutions. At an early stage of the implementation, the organization has to decide on a strategy for centralized data storage or decentralization (fragmented). Selecting the right strategy depends on the need to centralize data, maintenance, and support; data privacy issues; and establishment of the expected technical performance of the system.

An organization can generally opt for one or a combination of the following implementation models:

- A global, standard system that is centralized and runs on a single server.
- A local, decentralized system with multiple implementations running on several servers.
- A data repository that collects data into a common database, repository, or data warehouse.

In the aforementioned survey, Gartner found that 36 percent of respondents chose the global/standard implementation model, 14 percent chose the local/decentralized approach, and 48 percent chose a combination of global and local systems. The survey also revealed that 60 percent of the respondents planned multi-region rollouts.

There are many reasons why organizations select one model over the other. Below are some advantages and disadvantages of the three models.

Most multinational companies will find that if they are implementing a global human resources system, it is cost effective to define a core set of processes that they can implement around the world. The ability to manage and report on employees worldwide, recruit on a global basis, and adapt best practices worldwide can best be accommodated when information is consistently recorded in one common system. A global system should look and feel local to its users. Maintenance and implementation of global systems also has cost-saving attributes. This architectural model is especially relevant to organizations that pursue the “economies of scale and consistency of practice” strategy that Gartner has identified.

Though many companies prefer to implement one system around the world, the global PeopleSoft Enterprise HCM products may not yet support the countries in which the companies operate. Furthermore, local users may not be willing, or able, to make compromises, or may already be using a local product. In these cases, it may be necessary to have separate systems and databases located around the world. The advantage to this decentralized implementation structure is that it is easier to obtain local buy-in, the cultural comfort factor may be higher, and data is typically collected and stored
in the same location. On the other hand, it is often a more expensive structure because the organization must undertake multiple upgrades of software systems, hardware, and networks.

The final model is a series of local/regional systems that are consolidated into a data repository—using PeopleSoft Enterprise solutions as a replicated repository, or using a data mart or data warehouse. This structure also provides local autonomy and cultural buy-in. But it can be an expensive proposition because of the need to develop complex interfaces and maintain several individual systems. In many cases, this data repository model may not provide enough detail or history for effective reporting and analysis.

Working with our Partners

PeopleSoft Enterprise HCM has an extensive partner network to compliment and extend the features and functions of the HR professional. Examples of additional countries deployed by partners include Czech Republic, South Africa, Taiwan, Indonesia, Pakistan, Philippines and Vietnam. For details on our certified partners, please see the Oracle Partner Network.

Some Customer Success Stories

Our PeopleSoft Enterprise HCM customers are leveraging the extended features and usability enhancements in our latest application and PeopleTools release. Please see the above referenced success stories as well as other stories to read the details of their success available on oracle.com.

1. Only The Brave Group Standardizes and Streamlines Human Resources Management Worldwide

2. Westfield Group Increases Staff Productivity and Dramatically Improves Payroll Controls


4. Alibaba Group Promotes Value-Based Corporate Culture with Unified HR Management System

5. Sanjel Corporation Streamlines Human Resources with Integrated System Deployed in Less than Six Months

6. Hilton Hotels Corporation Effectively Manages Millions of Resumes Annually and Streamlines Hiring Process
Conclusion

PeopleSoft Enterprise HCM delivers a truly global human resources management solution that meets the needs of all organizations, whether they operate in one country or in many countries. PeopleSoft Enterprise HCM enables all organizations—even multinationals—to meet specific national or regional requirements. Comprehensive multi-language, Unicode, and multicurrency capabilities accommodate workers around the world. The PeopleSoft HCM solution provides customized name, address, and national ID number formatting for each country, based on local requirements. The system lets organizations create a workforce profile that spans the globe and gives clear access to a collective view of worldwide operations.

The unique global architecture of PeopleSoft Enterprise HCM gives all users access to global best practices and allows organizations to share common practices and reporting. Because the system uses the same code line throughout the world, maintenance and updates will be less complex and less time-consuming—resulting in a lower total cost of ownership.

Oracle’s PeopleSoft Enterprise HCM is built for the internet, providing tools to redefine every aspect of doing business. Working in the current environment requires tools to accommodate many types of workers including employees and contingent workers but also supporting the multi generational workforce and the differences in tool expectations. Global organizations can use the tools PeopleSoft provides to become more agile and efficient and meet their processing demands. For the first time, employees can use a single application to track and manage HR information—from headcount to total compensation reports, turnover and recruiting to employee reimbursements. Oracle's PeopleSoft Enterprise Portal maximizes employee productivity by providing a single portal to socialize, collaborate, visualize and execute on HCM.