

Introduction

Union Bank of Switzerland is a premier global financial institution. Based out of Zurich, Switzerland, UBS employs more than 50,000 employees worldwide. Their clients include international corporations; domestic businesses in Switzerland, national governments, financial institutions, market participants and individuals. UBS has the world's largest private banking business and is a leading global asset manager. In 1999, UBS had a net profit of about 3.7 billion dollars.

In 1999, UBS' domestic operations revamped their payroll application by implementing PeopleSoft's payroll solution. The size of UBS Switzerland and the intricacies of the Swiss payroll system required extensive customization to PeopleSoft, which presented UBS with numerous challenges. UBS chose CA-AutoSys and its integrated PeopleSoft adapter to provide the automated management portion of its mission critical the payroll solution.

The Challenge

UBS needed a complete job management solution to automate its payroll processing. The solution needed to provide a seamless integration between all systems, people, products and applications within the PeopleSoft environment. The following objectives had to be met to successfully complete the project:

- Setup the complete payroll system in an integrated job processing environment with intricate branch-logic
- Fulfill the internal customizations, leading towards a completely dynamic and automated integration with the PeopleSoft environment
- Empower the PeopleSoft developers by providing them an intuitive, efficient and bilingual interface to interact with the Job Scheduling Group
- Create an efficient AutoSys production and test environment, with an optimal migration path
- Reduce the turnaround time for the Operations, Scheduling and Development groups, in event of job processing exceptions
- Integrate exceptions and other events with messaging and notification applications such as SMS
- Access real-time and historical information via the Internet.

The timeframe allowed for the AutoSys portion of this implementation put the solution team on a very

aggressive project schedule. Job management expertise was essential in meeting the project deadlines.

The Approach

PGTI incorporated best practice methodologies and technologies to provide a complete solution to UBS. Interaction between the project team and the PeopleSoft Developers and Administrators was very important to meet the project goals.

Software configuration management guidelines were followed to separate the AutoSys test and production environments that were created. By identifying and defining the payroll processing requirements, highly efficient job workflows were built, tested and then migrated to production. PGTI performed an in-depth analysis of the SQR Reports and other PeopleSoft payroll processes, in order to achieve a dynamic and fully automated integration within the PeopleSoft solution. As a result, PGTI was able to further customize and add new functionality to the AutoSys/Adapter for PeopleSoft. By coordinating the requirements between the PeopleSoft developers and the UBS Job Scheduling Group, PGTI was able to develop a complete HTML/JavaScript based bilingual web interface to facilitate efficient communication between the two groups. Similar reporting and information access interfaces were created to allow users, developers and managers to retrieve all relevant information from the web. UBS deployed PGTI's graphical internet application iXp for visualization, analysis, forecasting, monitoring and control of the AutoSys workflows. iXp was particularly helpful for personnel that would need access to AutoSys through a modem connection.

Conclusion

The unique combination of AutoSys, PeopleSoft and web technology skills allowed PGTI to help UBS with a complete job management solution for their payroll processing system. In addition to the job management expertise, PGTI was able to leverage internal software development skills to customize the PeopleSoft/CA AutoSys integration that is utilized at UBS. In order to complete all of the project objectives, it was necessary to deploy PGTI's web based CA AutoSys companion tool: iXp.

