Quest
Oracle
Community

Financials PUG Meeting

May 21st, 2019

Agenda

- Collaborate 2019 Recap
- Hot Topics
- Session Highlights
- Future Topics Survey
- Q&A

C19 Recap

- 1375 Total Quest Registrants

- 1,000+ Education and Networking Opportunities
  - 140+ PSoft Opportunities

- Quest For Good: We made 1,500 Hygiene Kits for a local organization called Haven for Hope. This organization specializes in decreasing homelessness in San Antonio.

Hot Topics

Drop Zones

- Configurable drop zones allow you to extend the fields that are displayed and processed on **delivered fluid pages** without customizing the component or fluid page definition. It is a related content group box where dynamically injected subpages could be configured for embedded related content.

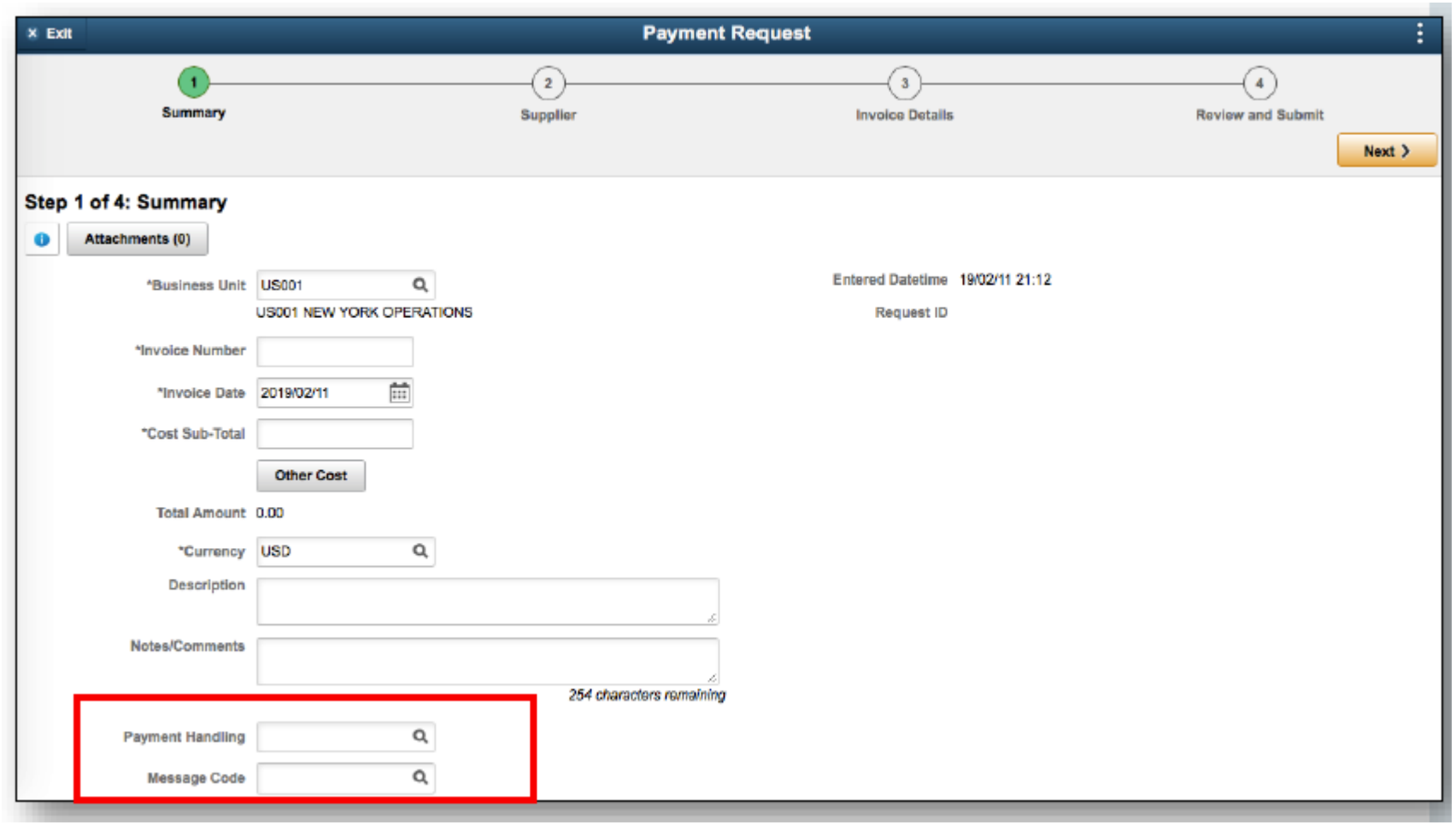
- Located at the top and bottom of certain fluid pages. Development is underway on Classic Plus pages.

- **Gotcha:** Don't add your own drop zone! That becomes a customization.

- **Requirements:** Must be on Tools 8.57, the page must be delivered with a drop zone, and you must use a subpage for the drop zone.

https://docs.oracle.com/cd/E99483_01/pt857pbr1/eng/pt/tflu/task_CreatingAndConfiguringDropZones.html?pli=ul_d41e41_tflu

Example of the Payment Request Form with Drop Zone added:



Oracle Cloud Infrastructure

- Aka OCI
- What is it?
  - Server farm owned and managed by Oracle. Basically your PeopleSoft instance sits on their servers.
- Advantages
  - PeopleSoft users can focus on the application features instead of the management of the server, patching, etc
  - PeopleTools is released on OCI first before available for on prem users
  - Improve Operational Efficiency
  - Leveraging Automation and Elastic Infrastructure
  - Optimize shared responsibility options

https://www.oracle.com/cloud/infrastructure.html

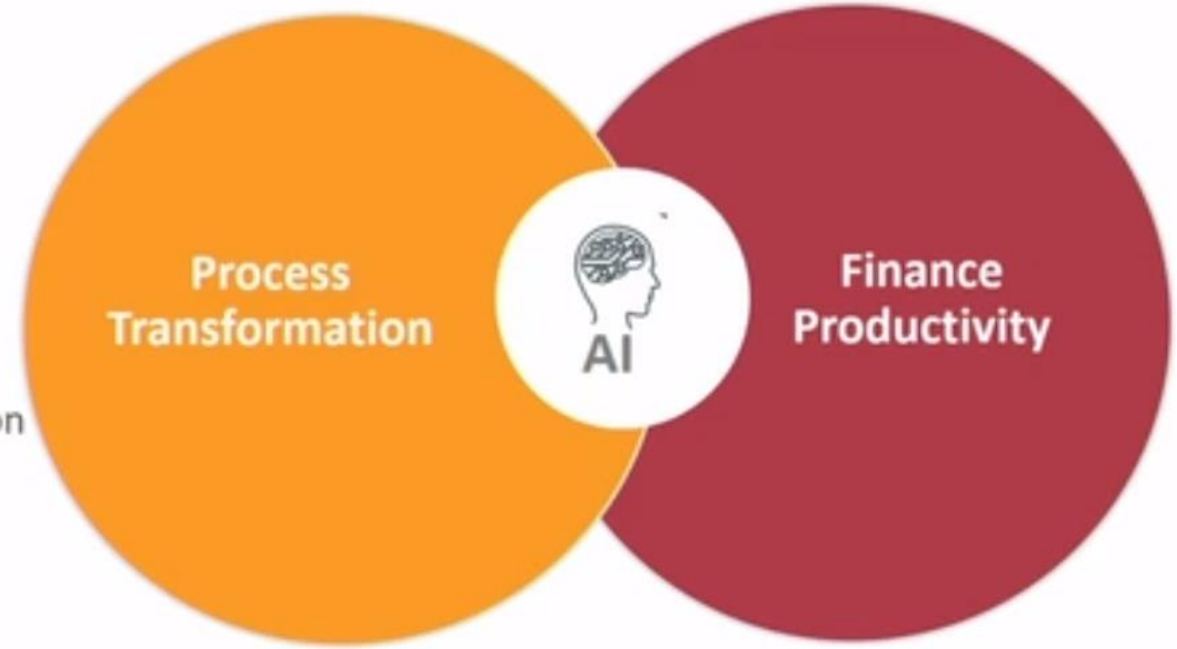
Chatbots and Artificial Intelligence

- Chatbot, short for '**Chat** Ro**bots**', interacts through instant messaging artificially replicating the patterns of human interactions. Chatbot is simply a computer program that simulates the human conversations. It allows a form of interaction between a human and a machine.

Emerging Technology in PeopleSoft

Use Cases Under Consideration

- Optimize AR Collections
- Invoice Matching
- Procure to Pay Bottlenecks
- Supplier Risk
- Supplier Bid Initiation
- Project Risk



- Customer Bot
- PeopleSoft 'Help'
- eProcurement Bot
- Supplier Self Service
- Financials Bot
- Expenses Bot
- Absence Bot
- Benefits Bot

Oracle Cloud Services and PeopleTools Infrastructure

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Session Highlights

109970 – Application Strategy and Roadmap for PeopleSoft

Oracle's 4 areas of focus

- Configuration and Customization: Avoid customizations by using delivered functionality of things like Page and Field Configurator, Branding, Forms and Approval Builder, and many more
- Deployment and Cloud Infrastructure:
- Emerging Technology: Chatbots, AI, and machine learning.
- Regulatory

- https://questoraclecommunity.org/learn/videos/overall-applications-strategy-and-roadmap-for-peoplesoft-2/

110150 – PeopleSoft Technology Roadmap

- Tools 8.57:
  - Personalized Analytic Notifications: Changes the way users interact with the PeopleSoft. The system alerts you to conditions that need attention. Users can now set thresholds.
  - Elastic Search: Elastic search now has multi-facet selections, as well as delivery of Kibana.
  - Isolating Customizations: Event mapping, Page & Field Configurator, Page Composer/Form Builder, and now Drop Zones.
- https://questoraclecommunity.org/learn/videos/peoplesoft-technology-roadmap-5/

110100 – PeopleSoft Financials Update and Roadmap

- Emerging Technology
  - Simplify interactions
  - Submit transactions
  - Anticipate questions
  - Offer suggestions
  - Provide guidance – Bots under consideration for Roadmap: Customer Bot, Financials Bot, Expenses Bot, and eProcurement Bot
- Financial Analytics
- Insight & Productivity
  - Operational Metrics for AP
  - Simplified Analytics in BI WorkCenter with Thresholds and Mass Update
- Simplicity for External Users
  - PeopleSoft eSettlements
  - PeopleSoft eBill Payment
- Link to Financial Roadmap session
  - https://questoraclecommunity.org/learn/videos/peoplesoft-financials-update-and-roadmap-innovation-drives-the-bottom-line/

Amaze Your Organization with the Power and Insight of PeopleSoft Financials

- Scope in workcenters
- Simplified Analytics

- https://questoraclecommunity.org/learn/whitepapers/amaze-your-organization-with-the-power-and-insight-of-peoplesoft-financials/

Simplified Journal Entry

Improve Financial Period Close Efficiency

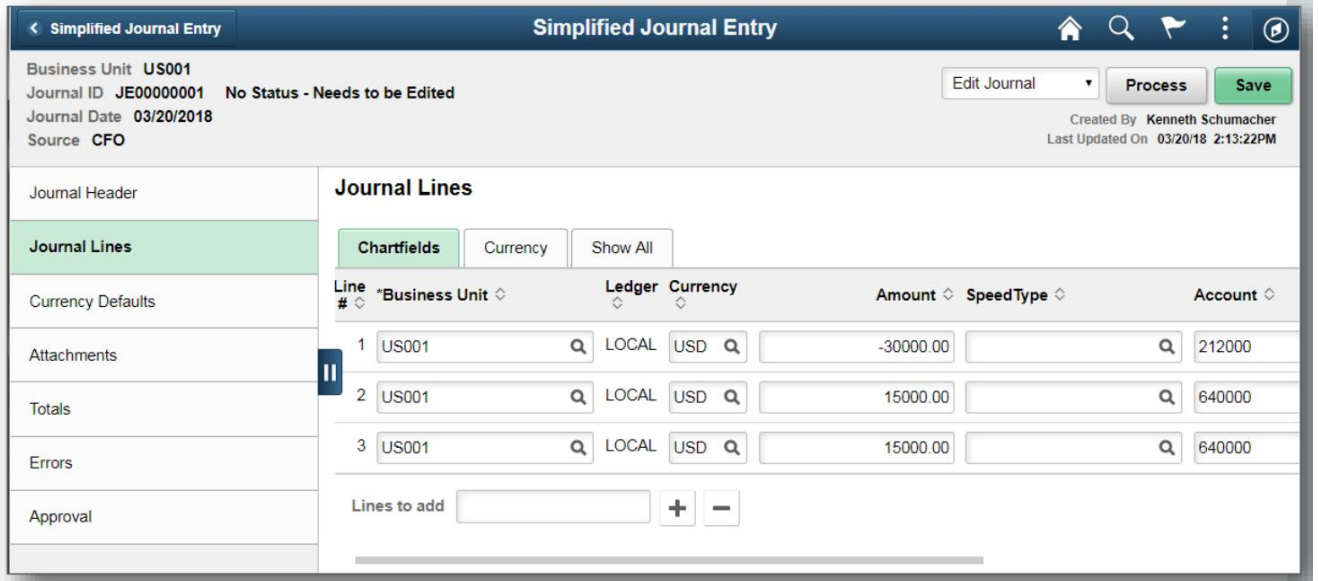
Simplified Journal Entry *(Image 29)*

✓Improve Operational Efficiency

✓Reduce Complexity for Business Users

***KEY* FEATURES**

- Configurable Template
- Render by User or Role
- Upload Attachments



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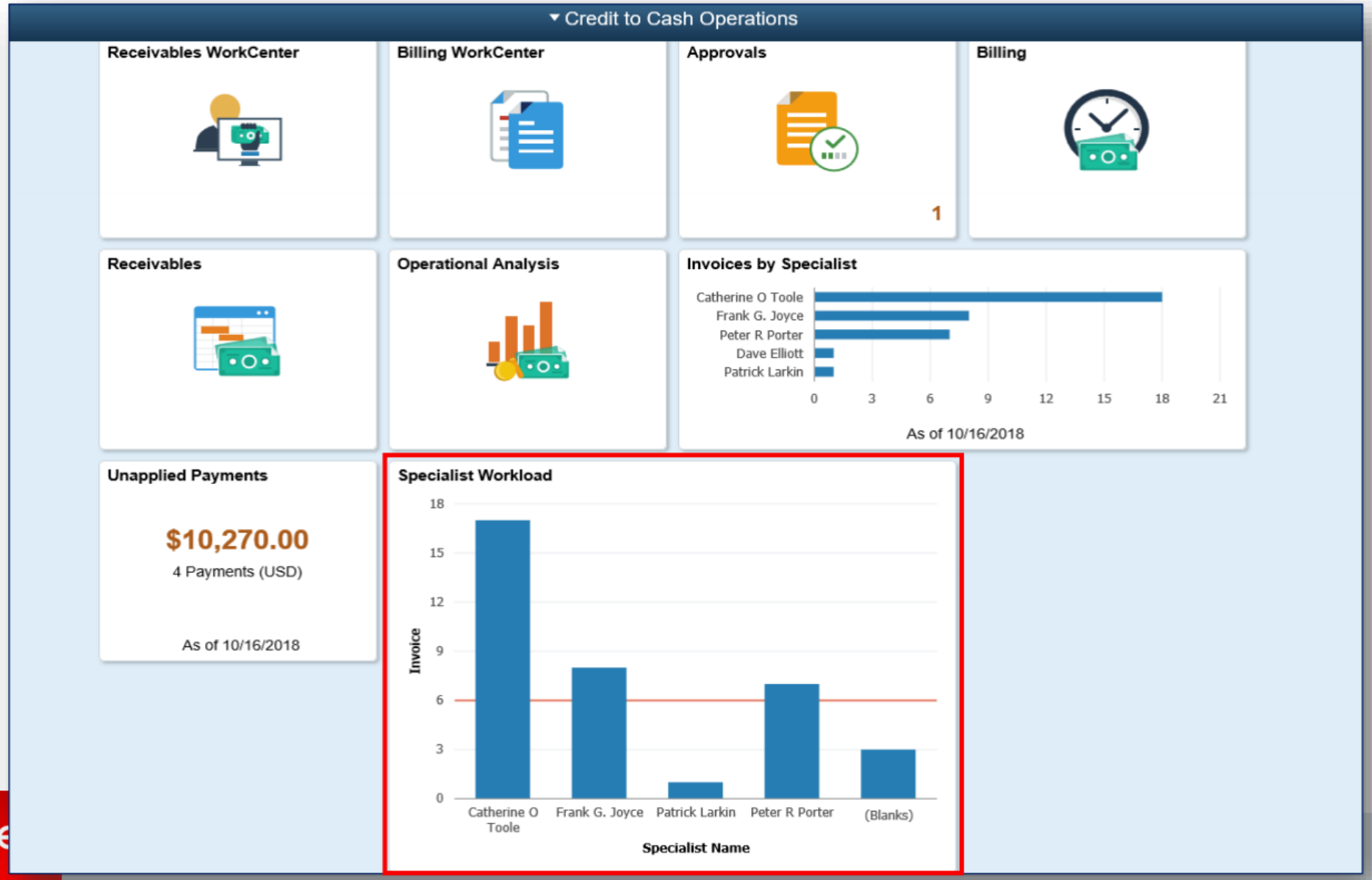
Improve Productivity Through Simplicity & Visibility

Operational Home Pages – *with User Driven Thresholds & Notification*

PeopleTools 8.56/8.57



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Comprehensive Customer View

Financial Visibility into Customer Relationship

Comprehensive Customer View *(Image 30)*

Employee Self Service | Customer Analysis

Analysis View: 1000-Alliance Group | View | Change Customer | Choose Metrics | Comparison View

Customer Contact Information

Primary Contact	Bob Johnson
Contact Method	Call
Contact Phone / Extension	925/555-1212/
Contact FAX	888/967-2253
Contact Email	bob_johnson@email.com

Customer Sales View Details

$4,575,214.38

Total Balance Amount (USD)

Customer Top Contracts View Details

5 rows

SetID	Contract ID	Business Unit	Contract Signed	Display Net Amount	Display Currency
SHARE	INDUSTRY_CONTRACT5	US001	09/03/2012	20000000000000000.00	USD
SHARE	RESEARCH_CONTRACT1	US001	08/15/2012	200000000.00	USD
SHARE	RESEARCH_CONTRACT3	US001	08/15/2012	75000000.00	USD
SHARE	RESEARCH_CONTRACT2	US001	08/15/2012	23435677.17	USD

Transaction Wheel

Financial Visibility into Customer Relationship

Comparative Customer View *(Image 30)*

Comparison View View

	1001-Apex Systems	1002-Easy Solutions
Customer Recent Payments	View Details **$2,580,842.04** Total Payment Amount (USD) **30** Payments	View Details **$5,008,500.00** Total Payment Amount (USD) **3** Payments
Customer Credit Information	Credit Class: Class A Credit Risk: Medium Credit Limit: $75,000.00 USD Risk Score: 0	Credit Class: Class A Credit Risk: Medium Credit Limit: $150,000.00 USD Risk Score: 18
Customer Recent Invoices	View Details **$5,248,896.51** Total Balance Amount (USD) **56** Invoices	View Details **$4,830,879.88** Total Balance Amount (USD) **14** Invoices

Items Planned for Roadmap

- Mass Update Invoices – Capability to Mass Update Billing Specialist, Billing Authority, and Collector

- Copy Sub-Ledger Business Unit – This is an extension of the Business Unit Management Activity Guide. They are looking at AP and AR.

- Business Entity Lifecycle – (Sale or Disposition)
  - Configure Shutdown by Process
  - Allow Completion of In-Progress Transactions
  - Support Reporting and Inquiry

- Procurement Card Maintenance, Processing and Reporting
  - Mass Update Expiration Dates
  - Attach Receipts to lines
  - Manage 'Like' Merchants for reporting purposes

Items Planned for Roadmap - Continued

- Improve Efficiency in Financial Close – Will help to control activity during period close.

- Run Control Management Framework
  - Administer End Unser Run Controls
  - Allow Multiple Run Control Deletion
  - End User Manages Own Run Controls

- New Delegations Framework – Allow managers to delegate authority to Proxies for initiating, approving, denying, or pushing back a transaction on the manger's behalf.

Innovative Business Solutions

Planned for Roadmap

Procurement Card Maintenance, Processing and Reporting

KEY BENEFITS

- ✓ Easier Setup and Maintenance
- ✓ Improved User Experience
- ✓ Improved Reconciliation and Processing
- ✓ Enhanced Reporting Capabilities

KEY FEATURES

- Mass Update Expiration Dates
- Attach Receipts to lines
- Manage 'Like' Merchants for reporting purposes

Helpful Links

- Idea Space on My Oracle Support
  - https://docs.oracle.com/cd/E52319_01/infoportal/mosc.html
- PeopleSoft Information Portal
  - https://docs.oracle.com/cd/E52319_01/infoportal/index.html
- YouTube
  - https://www.youtube.com/user/PSFTOracle
- Planned Features
  - https://support.oracle.com/epmos/faces/DocumentDisplay?_afrLoop=509964350816 14&id=1966243.2&_afrWindowMode=0&_adf.ctrl-state=16kfxpbalm_4

Survey Question

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