



**Quest
Oracle
Community**

PeopleSoft Financials PUG Meeting

Highlights from RECONNECT

Contact Info

Alicia Kinsey

PeopleSoft Technology Services Manager

KAR Global

alicia.kinsey@karglobal.com

Pam Ingram

Financial Manager

Hennepin County, MN

Pamela.M.Ingram@hennepin.us

Jennifer Bentley

Senior PeopleSoft Analyst

Lockton Companies

jbentley@lockton.com

Angela Osterman

Business Systems Analyst III

Frankenmuth Insurance

Angela.osterman@fmins.com

Agenda

- Housekeeping
- Quest Experience Week – PeopleSoft Day
Monday, December 7
- Presentation and Open Discussion

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?_afLoop=50996435081614&id=1966243.2&_afWindowMode=0&_adf.ctrl-state=16kfxpbalm_4

RECONNECT Highlights

Angela Osterman's favorites

- Requisitions – Image 37
 - Ability to use action roles to display the “Amount Only” on the Special Request Page and/or Checkout Page
- Expenses – Approval Privilege Template to allow approvers to update the expense lines, such as Accounting chartfields – on Roadmap
- Requisition classic end of support is December 2021

Alicia Kinsey's Favorites

- Delete Run Controls (once we upgrade to 8.58)
- Kibana Analytics (also with 8.58)
- Additional Enhancements to Page and Field Configurator
 - Data Masking (Requires 8.57.11)
 - Simplified Field Selection (Coming soon)
 - Extending to Field Events (Coming soon)

Jennifer Bentley's Favorites

- Added the journal source security feature that restricts access to users based on the permission added to the user or role, for a specific journal source. This feature also restricts posting during period end based on the defined cut-off schedule. Image 37
- All of the Kibana sessions for Financials.
- Networking during the Financials Coffee and Connect



Improve Efficiency & Control in Period Close

Control Transactions by Journal Source Security *(Image 37)*



- ✓ Speed up Period Close
- ✓ Focus on Period End Activities
- ✓ Eliminate Surprises
- Allow Enter, Edit, and Post by Journal Source
- Grant/Revoke Journal Source Privilege by User
- Allow Exceptions
- Apply to All Journal Entry Points, *Batch Processes Optional*

Journal Source Security by User

User ID: GLAZ
[Cross User](#) Do Not Validate Batch

Accessible Business Unit Select/Deselect All - Allow Access + -

Accessible Journal Source 1-10 of 40 ▶ ◀ View All

Source	Allow Access	Override Period End Cutoff	Allow Adjusting Entry
1 ACC	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
2 ADJ	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3 JIL	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4 AM	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5 ALO	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

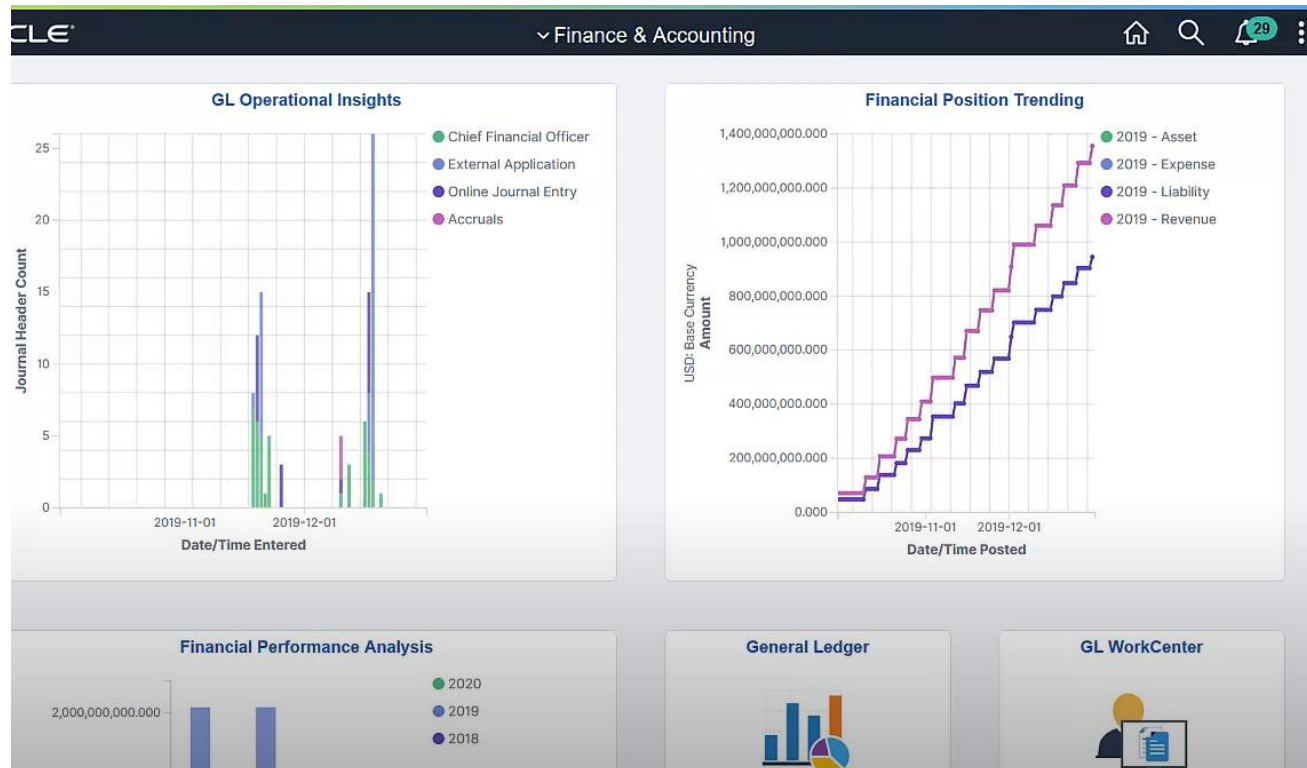
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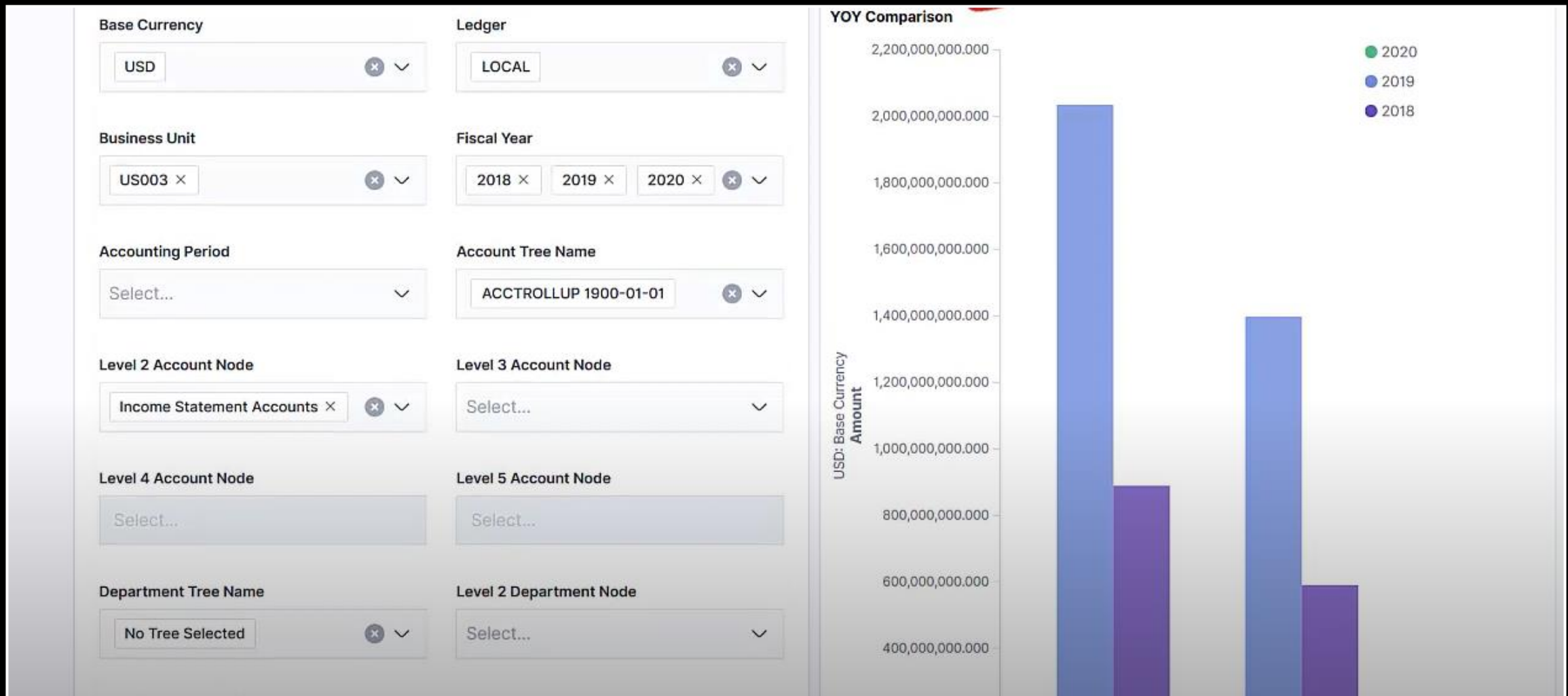


PeopleSoft ERP Update & Roadmap - Innovation Drives Costs Down

Pam Ingram's Favorites



- Visualizations through Kibana
 - Tools 8.58, Image 37
 - 3 new GL Kibana dashboards
 - <https://www.youtube.com/watch?v=L8ZISKJKW10>



Year over Year comparison with Kibana – This one is specifically Income Statement but could be Balance sheet as well.

Strategic Sourcing – Event reminder notifications and Allow Correction mode for Adobe Sign



A presentation slide for 'Strategic Sourcing'. It features a circular profile picture of a man in the top left corner. The main content area has a white background with a list of bullet points. To the right of the text is a photograph of two men in an office setting, one pointing at a laptop screen. An orange diagonal banner with the word 'Planned' is in the top right corner. At the bottom left, there is a small copyright notice.

Strategic Sourcing

- Configurable Event Reminder Notifications Leveraging Email and Text
- Response to Bid Opportunities

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A presentation slide for 'Supplier Contract Management'. It features a circular profile picture of a man in the top left corner. The main content area has a white background with a list of bullet points. To the right of the text is a photograph of two men in an office setting, one smiling. An orange diagonal banner with the word 'Planned' is in the top right corner. At the bottom left, there is a small copyright notice. Below the slide, the text 'Continuous Investment in PeopleSoft SRM/SCM' is visible.

Supplier Contract Management

- View Approval History
- Expand User Defined Fields to SCMT
- Allow Correction Mode for DocuSign and Adobe Sign

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Continuous Investment in PeopleSoft SRM/SCM



PeopleSoft ERP: Innovation Drives Costs Down

Roadmap

Simple

- Chatbots for Internal Users
- Chatbots for External Users
- Enable Payment Plans via eBill
- Approval History Across ERP
- Delegation Framework
- Accounting Tags in Expenses
- Enhanced Fluid Travel Authorization
- Time Sheet in Fluid
- Extend Fluid Payment Request
- Privilege Template for Expense Approvals
- Fluid POA for Buyers
- Quick-Buy and Req. Types
- Personalization of My Work in Fluid

Intelligent

- Maximize Collections via AI/ML
- Finance Position Insights
- Focus on Payments Analytics
- Collection Analysis & Performance
- Open Period Visualization
- Enhanced Lease Clause Capture
- Fluid Customer Hierarchy for Self Service
- Credit Card Details in Expenses
- Asset Maintenance Analytics
- Purchasing Effectiveness via Kibana
- Configurable Search

Automated

- Match Exception Collaboration
- Payment Plans in AR
- Control Transactions During Close
- Audit Trail for Customer Changes via eBill
- Financial Period Mass Update
- Improve Integration of Asset Data from Purchasing
- Guided Search
- Notification & Delegation Frameworks across FSCM
- Restart BI Publisher in Billing
- E-Mail of Activity for Fluid WorkCenters

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Non-Exhaustive!!



Other areas of interest

1099 Information

- Oracle Patch (Bug 31114646)
- Past: Advisor Webcast Nov 5th (Prior Webcast Recordings)
- Next Advisor Webcast is November 18th
 - [Doc ID 1456265.1](#)

1099 Changes

New 1099-NEC IRS reporting requirements effective tax year, 2020

In light of recent 1099 form changes from the IRS, we are releasing an Oracle patch (Bug 31114646) to assist you in preparing for the change. The Bug includes instructions, new report, new queries, new data mover script, and demo data for use in a testing environment. We recommend that you follow the instructions and make the changes as soon as possible prior to the regular 1099 Update patch in November. Due to the setup differences between customers, we are not able to provide standard data conversion scripts. Instead, we are providing you detailed setup instructions, new report, queries, and data mover script to identify changes required to assist you in making the required changes to support the new 1099-NEC form and reporting. As always, if you need additional assistance feel free to contact Oracle Support.

Please note – Logic changes to the 1099 Application Engine process to support the new 1099-NEC form and changes to the existing 1099-MISC form are in progress within PeopleSoft Development. These changes will be posted in the future.

1099 Changes (cont.)

- Changes to 1099s require the following:
 - New configuration for withholding types 1099M and 1099N to replace 1099
 - DMS scripts are provided to export from PI36 and import to your databases
 - Withholding Entity should be manually configured
 - Procurement Control definitions to be manually updated for each business unit
 - New report APX2020 will identify all of your Withholding Suppliers
 - All Withholding Suppliers will need to be updated to add the new withholding types – no conversion scripts are provided
 - All Payments will need to be updated via the Withhold Adjustments page – no conversion scripts provided
 - All unpaid vouchers will need to be updated – no conversion scripts provided

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Open Discussion

Questions, comments, or concerns?