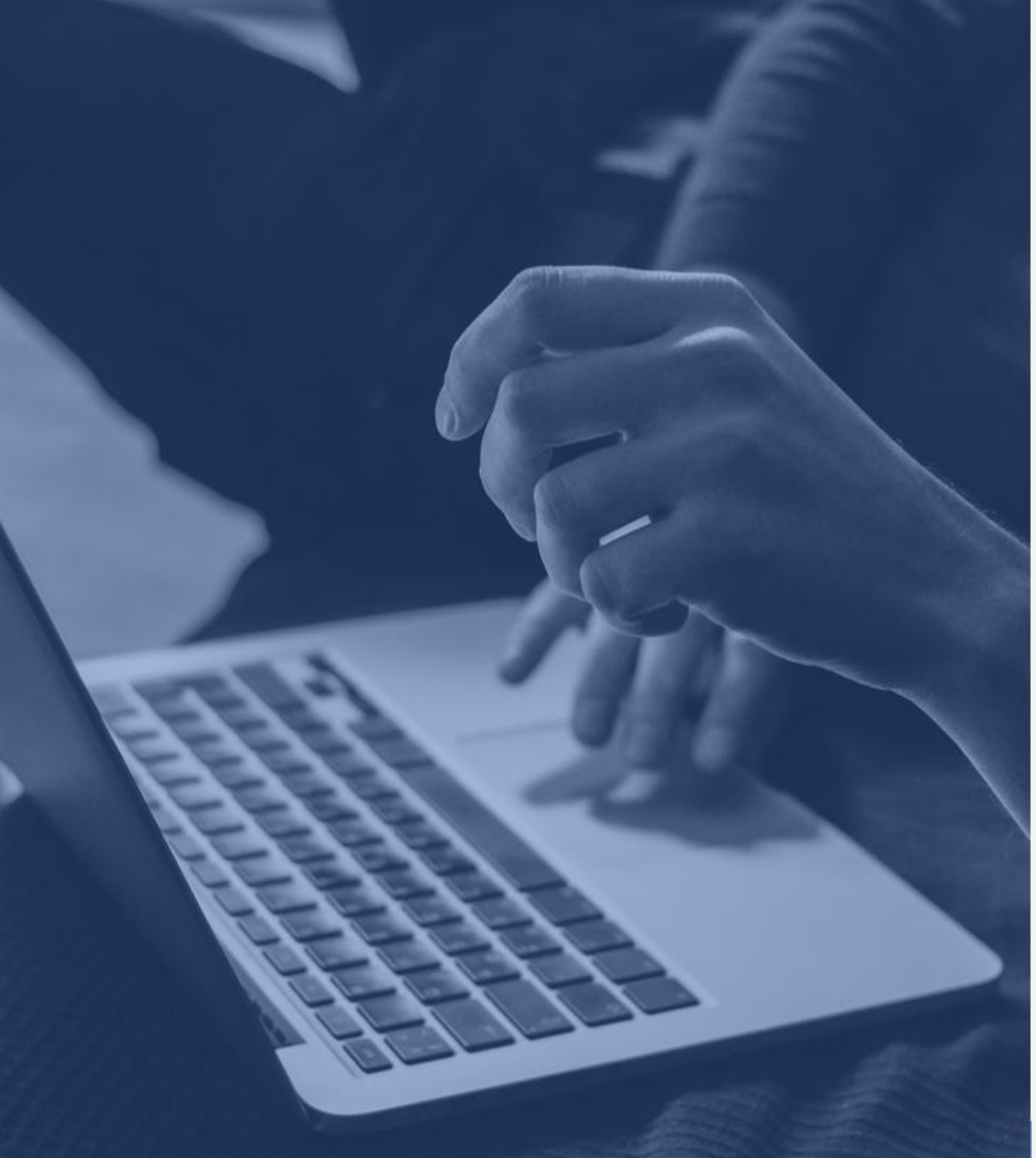
Quest
Oracle
Community

PeopleSoft Financials PUG Meeting

Image 41 and Roundtable

September 21, 2021



Join us online!

Oct 4-7th , 2021

Four jam-packed days of hands-on practical learning for PeopleSoft users.

Registration is now open!

◆ ◆ ◆

PeopleSoft

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DIVE DEEP

questoraclecommunity.org/reconnect

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Agenda

- Housekeeping
- Presentation and Open Discussion

Heads up

- Tools update 8.58.07 – watch for journals/allocation processing – rebuilding of index

Image 41

- My Oracle Support:

Image 41 link

YouTube video:

https://www.youtube.com/watch?v=75vXcKTpF3Y

Image 41- Delegation Transactions

Delegation Transactions

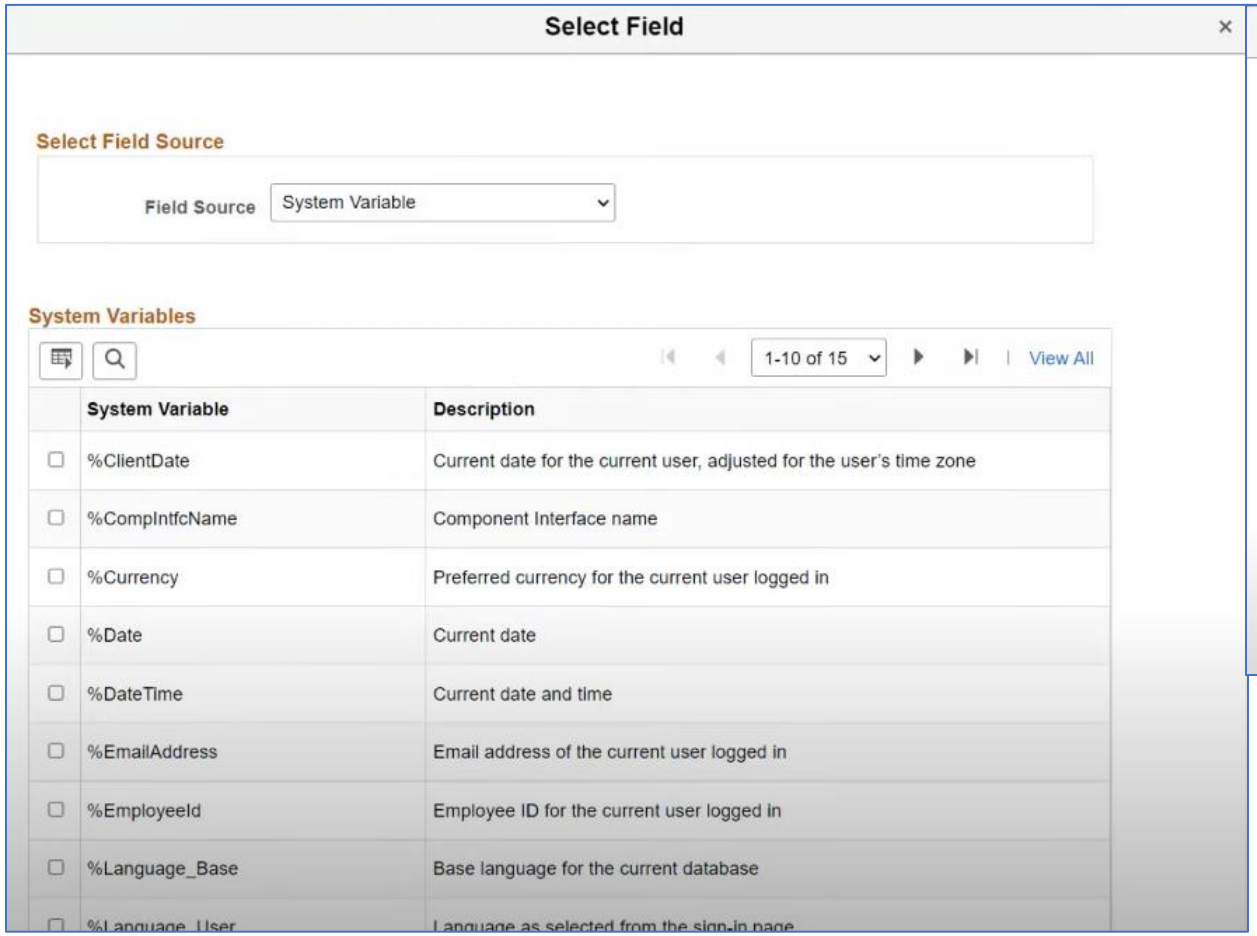
PRODUCT	TRANSACTION	IMAGE
Expenses	Expense Report, Cash Advance, Time Adjustment, Time Report, Travel Authorization	33
Payables	Payment Request	33
eProcurement	Requisitions	33
General Ledger	Financial Structure Request GL Journal Approval, GL Reconciliation, Commitment Control Journal Approval, and Journal Unpost Approval	35 41
Payables	Suppliers	35
Purchasing	Purchase Order	37
Supplier Contract Management	SCMT Document, SCMT Clause	37
Billing	Credit Invoice, Express Credit Invoice	39
Payables	Vouchers	39
eSettlements	Invoice Header, Invoice Line	39
Strategic Sourcing	Sourcing Plan approval, Sourcing Events approval	39
Source to Settle Common Information	Supplier Change Request, User Registration, Supplier Registration, and Bidder Registration	39
Receivables	AR Draft Writeoff, AR Maintenance Writeoff, AR Payment Writeoff, AR Refund	39
Services Procurement	Services Work Order, Services Timesheet, Services Expense, Services Progress Log, Services Invoice	39
Resource Management	Resource Assignment and Resource Assignment Schedule Change	40
Program Management	Program Budgeting and Project Request	40
Grants	Proposal Approval	40
Treasury	Settlement Approval, Deal Approval, Deal Confirmation	40

Asset Management	AM Cost Adjust Transfer, Asset Cost IUT, Asset Cost Transfer, Asset Reversal ADJ, Asset Reversal ADD, Asset Reversal IUT, Asset Reversal TRF, AM Self Service Retire, AM Self Service Transfer, AM Mass Transaction, AM Upload Spreadsheet, AM Disposal, AM Self Service	41
Maintenance Management	PM Schedule Approval, Work Order Approval	41
Lease Administration	Audit Expense Monitoring, Sales Amount Monitoring, Lease Clause Monitoring, Critical Date Notify, Transaction Queue, SAR Critical Date Notify, SAR Approval, Lease Transaction, Finalize Sites	41

Image 41 – PFC – Use of System Variables

- Enhanced the Page and Field Configurator to support the use of system variables. With this update, system variables such as the current date and ID of the logged-in user can be selected as default field values.
- The %Date variable can be used to add an effective date to the PFC configuration.

Image 41- PFC – Use of System Variables



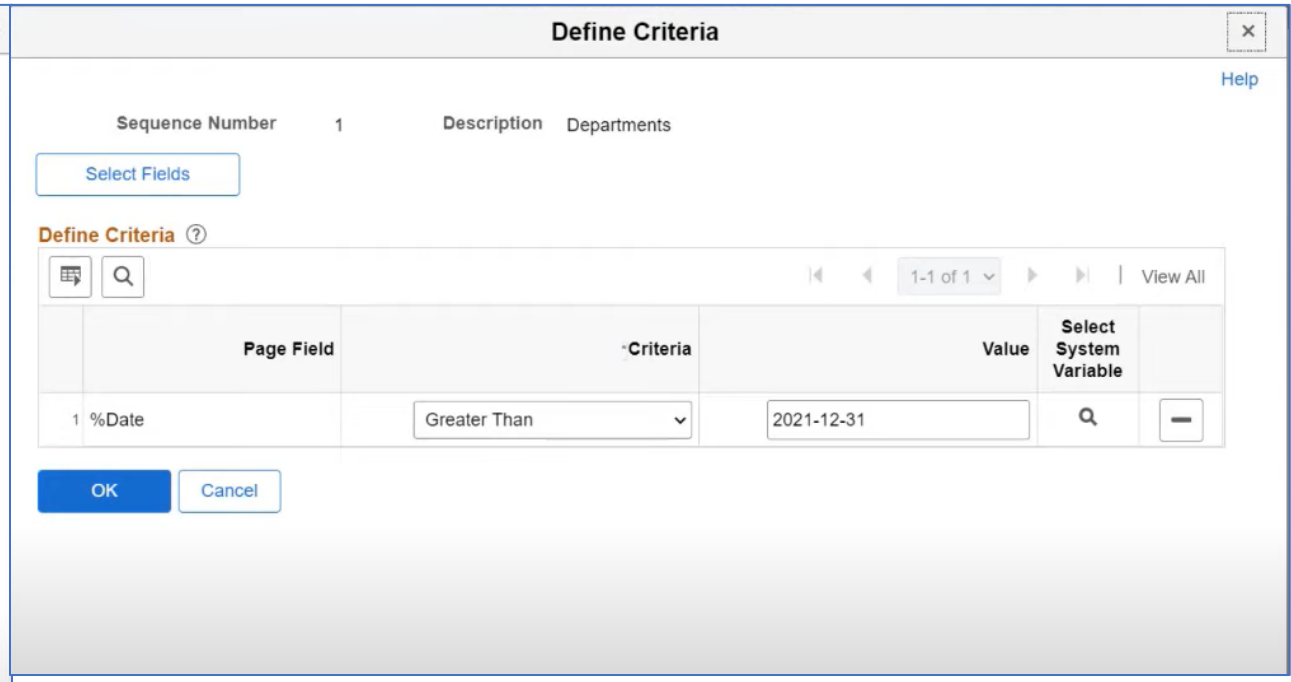


Image 41 – Simple Invoice

- Forms and Approval Builder to create a simple invoice form for users who are not familiar with the detail of creating a Billing invoice.
- A component interface is now available to access the form in Express Billing where you can access the fields defined in Forms and Approval Builder, and process the invoice.

Image 41 – Payment Plans

- Added the ability to define a payment plan for a customer and generate monthly installments. You can create a payment plan based on fixed monthly amount, number of months, or custom plan.
- You can also specify number of months to include in the plan and a processing fee.
- Payment Plans are setup under Conversations.

Image 41 – Payment Plans

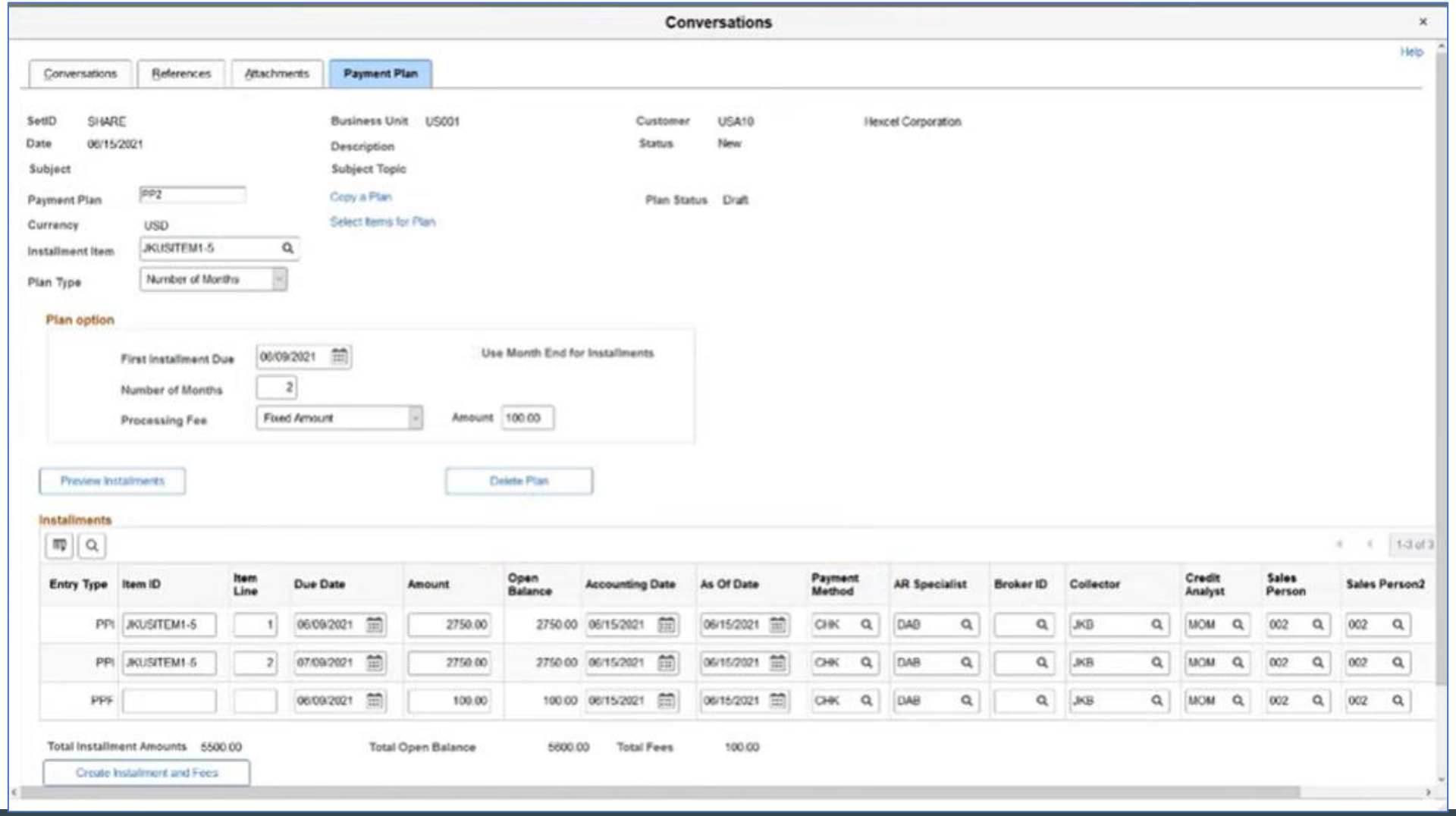
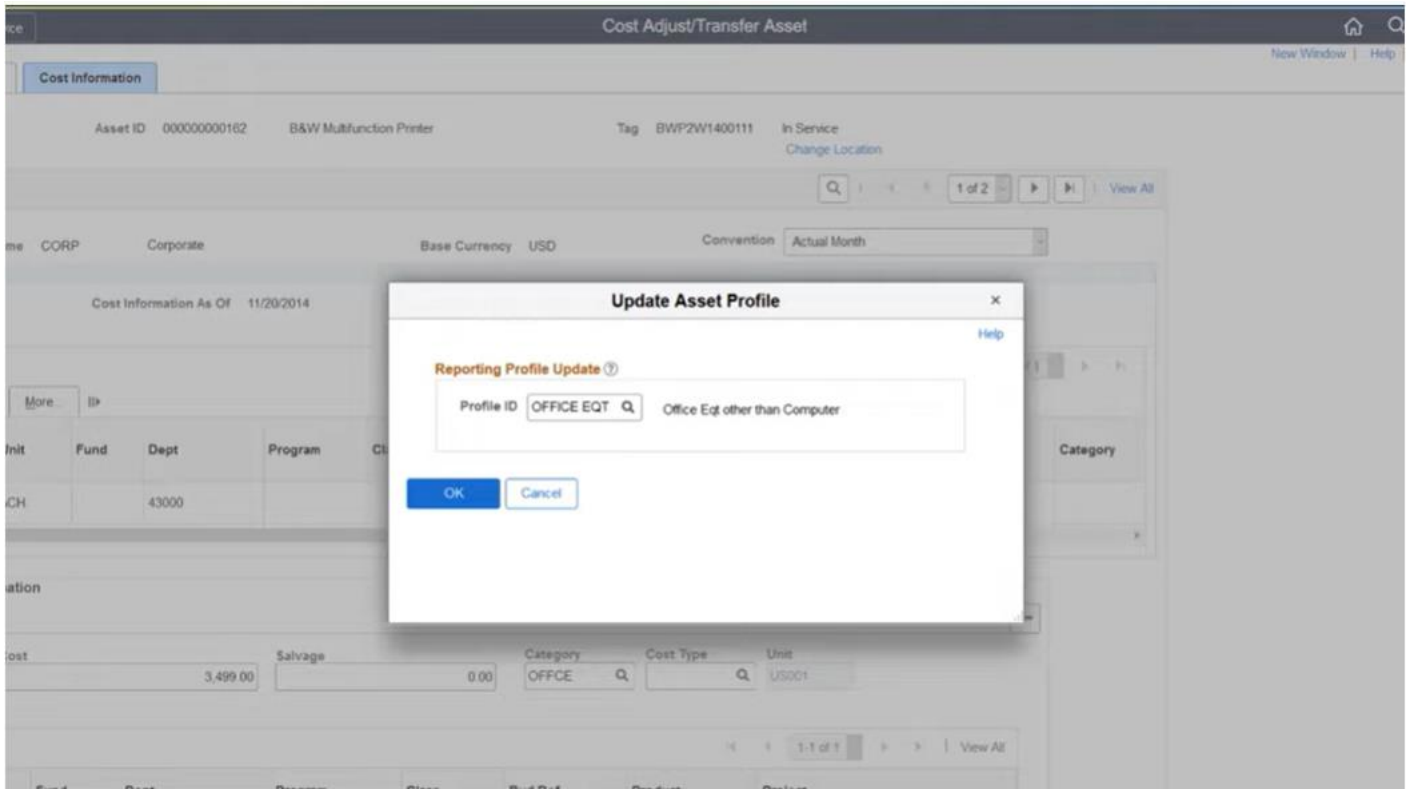


Image 41 – Asset Recategorization & Asset Profile Enhancement

- Enhanced asset recategorization to allow updates to the asset profile at the same time you recategorize the asset.
- This does not change any of the Book information, just the asset profile for reporting purposes



This is an Idea Spaces feature.

Image 41 – Expenses Duplicate tracking

- Enhanced the Expense Entry feature to check for duplicate expense lines when the transaction is saved.
- The system compares expense type, amount, and date to determine whether the line could be a duplicate with a previously submitted expense report.
- A message is displayed if a potential duplicate expense entry is found and a Review Duplicate Lines button is available to the employee

Image 41 – Expenses Skill in the Employee Digital Assistant

- Enhanced the Expenses Skill to be part of PeopleSoft Intelligent Chatbot Assistant from Oracle (PICASO), Employee Digital Assistant. In addition to making inquiries on the status of expense reports, you can quickly add as incurred expenses to My Wallet.

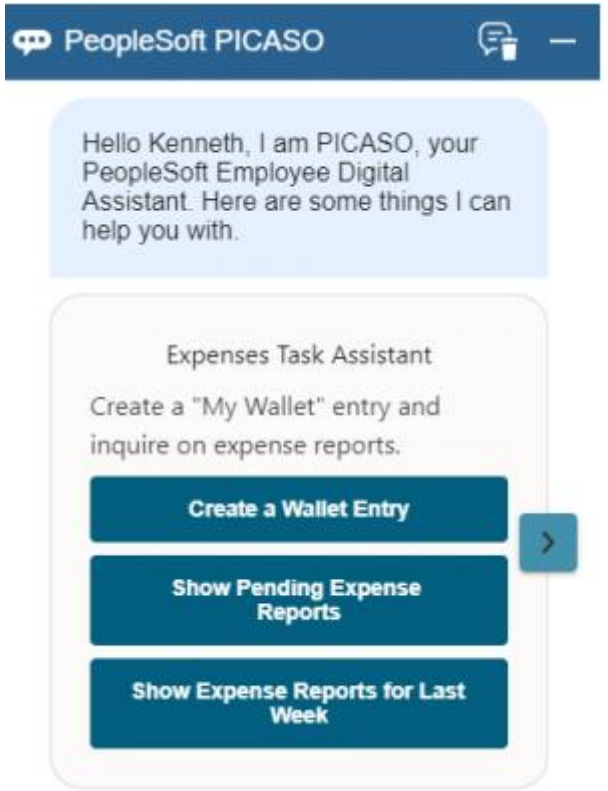
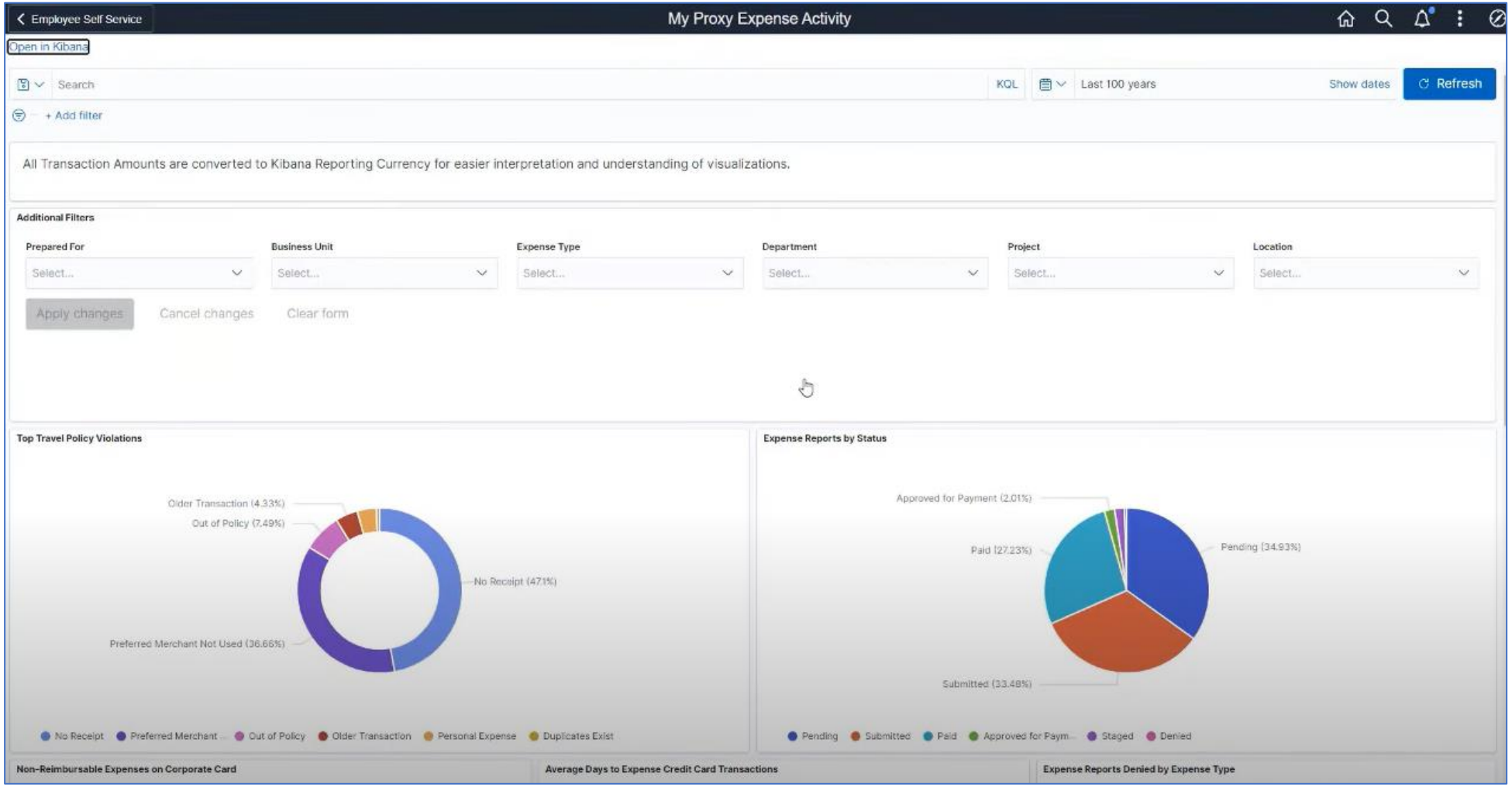


Image 41- Kibana for Expenses



Use this dashboard if you are an assistant entering transactions for others

Image 41: Kibana for GL

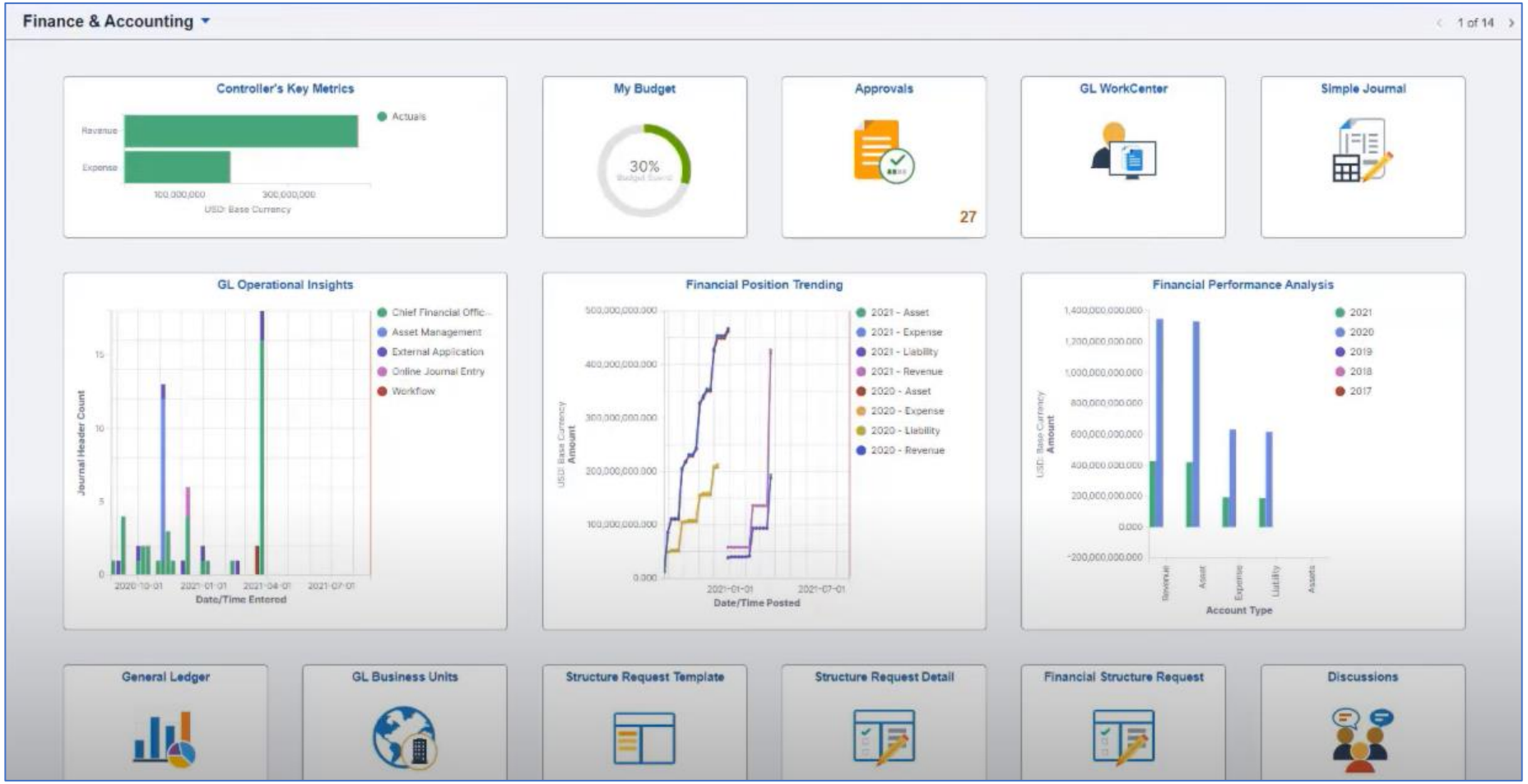


Image 41: Budget Dashboard

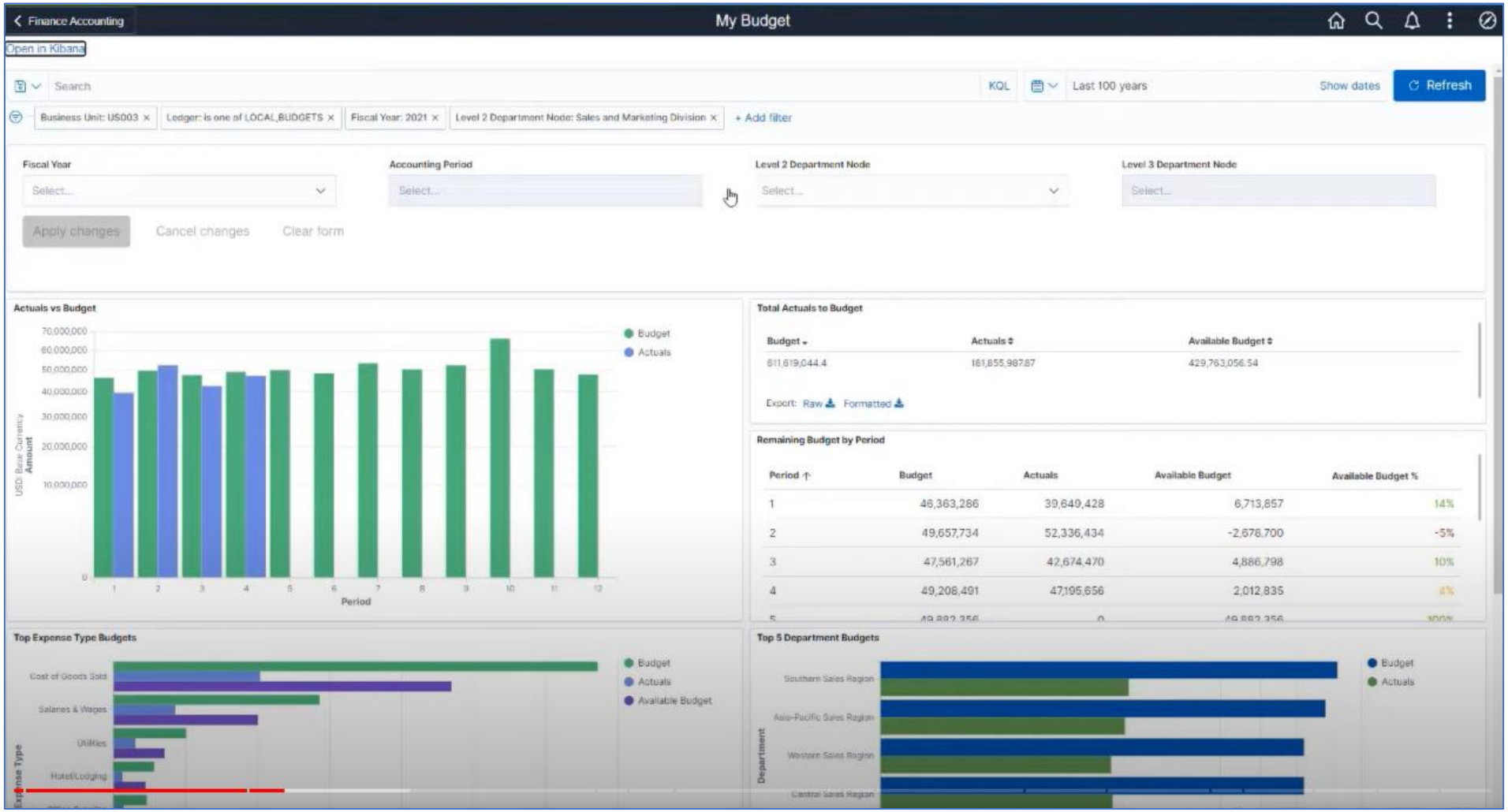


Image 41: Controllers Dashboard

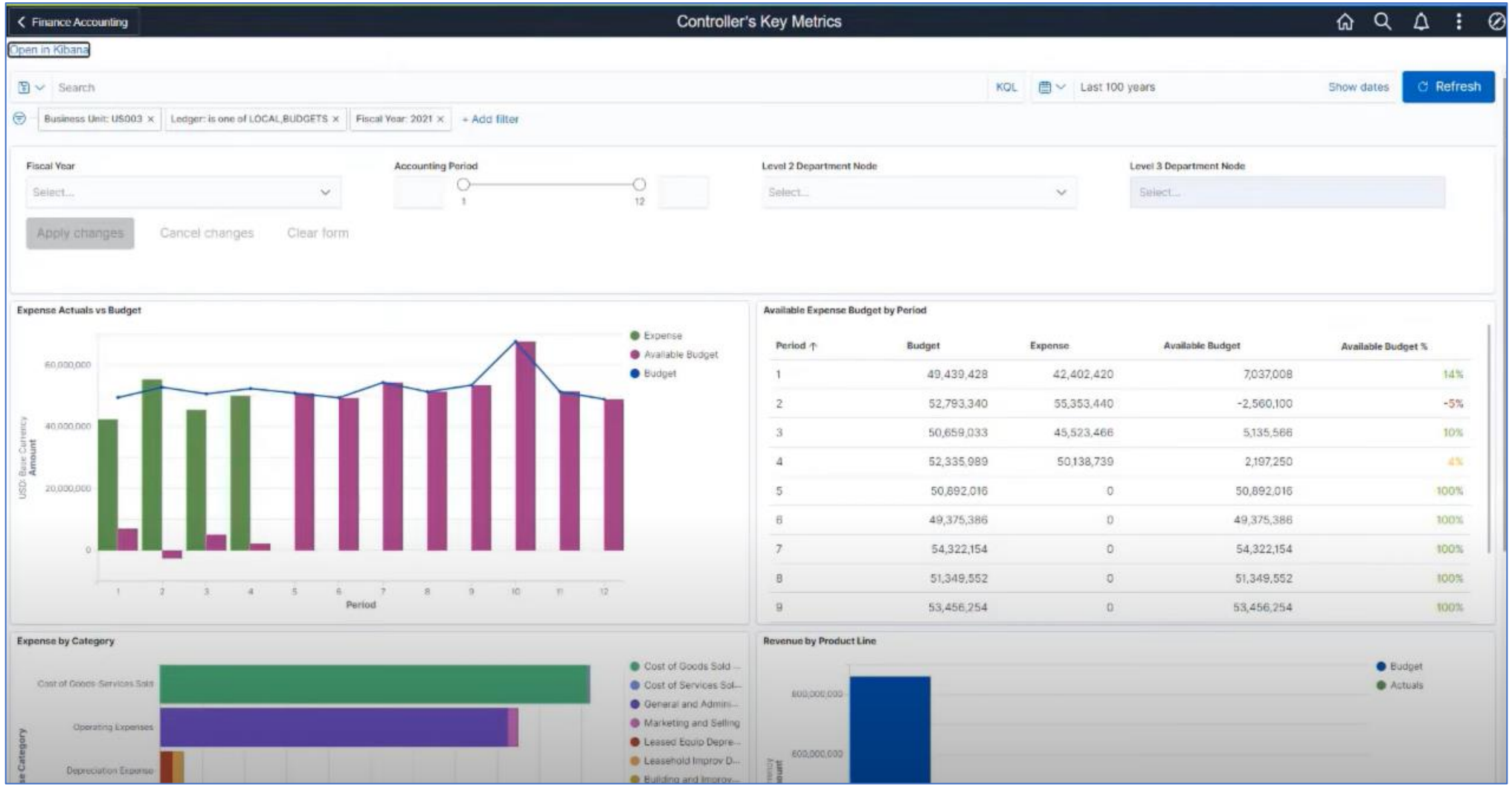
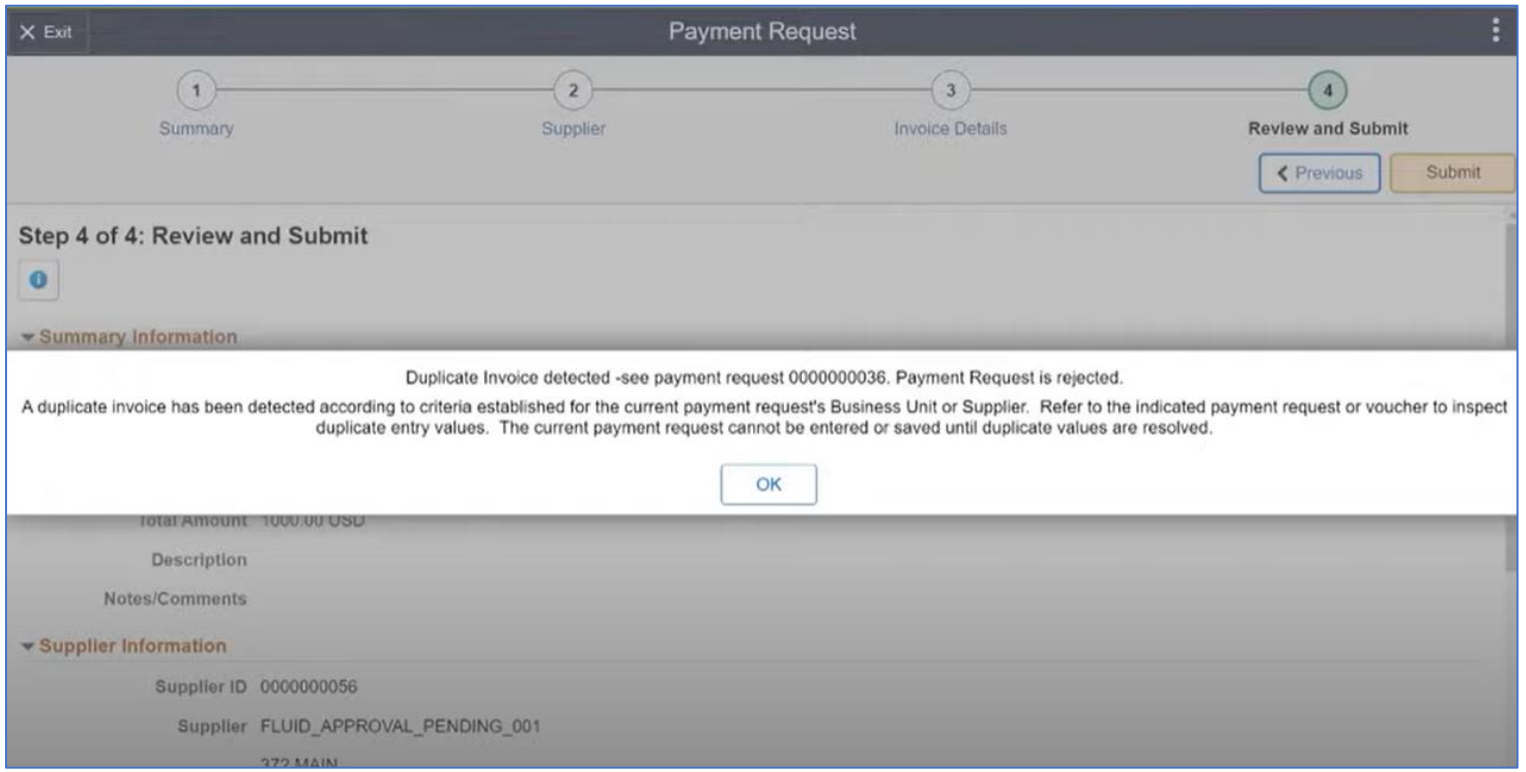


Image 41: Duplicate Invoice checking for Payment Request

- Enhanced the payment request feature to validate duplicate invoice numbers before submission, review and approval of a request.



This is an Idea Spaces feature.

Image 41: Create Req Links & Express Entry

- Added Budget Checking Status and Pre-Encumbrance links to the Create Requisition, Edit Requisition, and Save Confirmation pages.
- This ad hoc requisition entry option can be used when you need to quickly add requisition lines and know the details such as Item ID, Supplier, and UOM

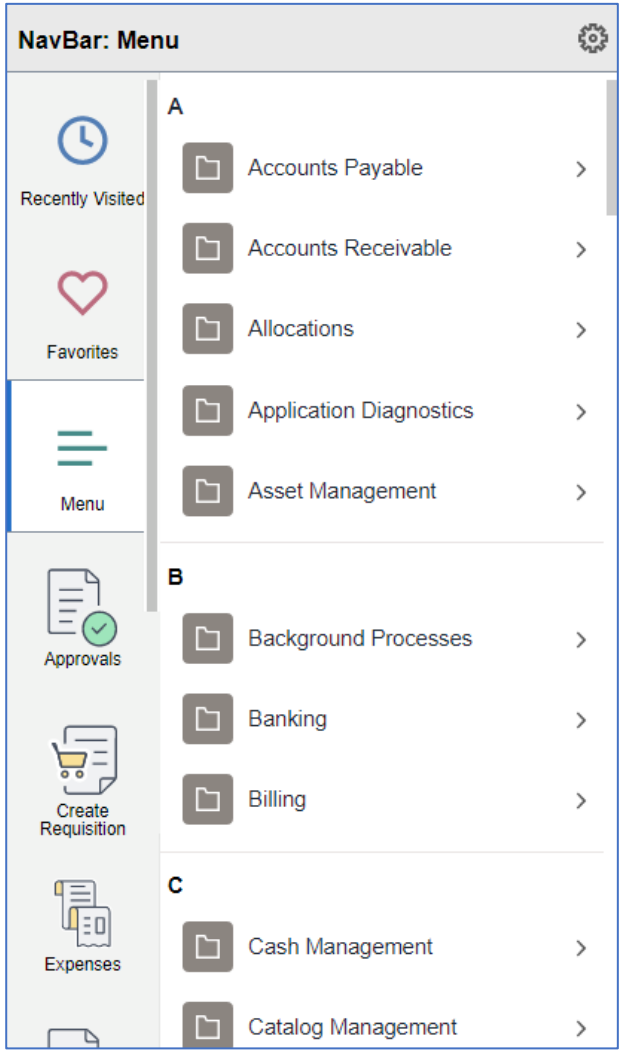
Image 41: Supplier Skill

- The skill can be accessed from the User Registration, Public Bidding Events, Events Calendar, Announcements, and FAQs and Contact Us pages as well.
- Guest users, first-time bidders, or suppliers can use the supplier Skill to inquire about business opportunities.
- The skill enables them to quickly accomplish different tasks related to user registration and bidding events through real- time communication.

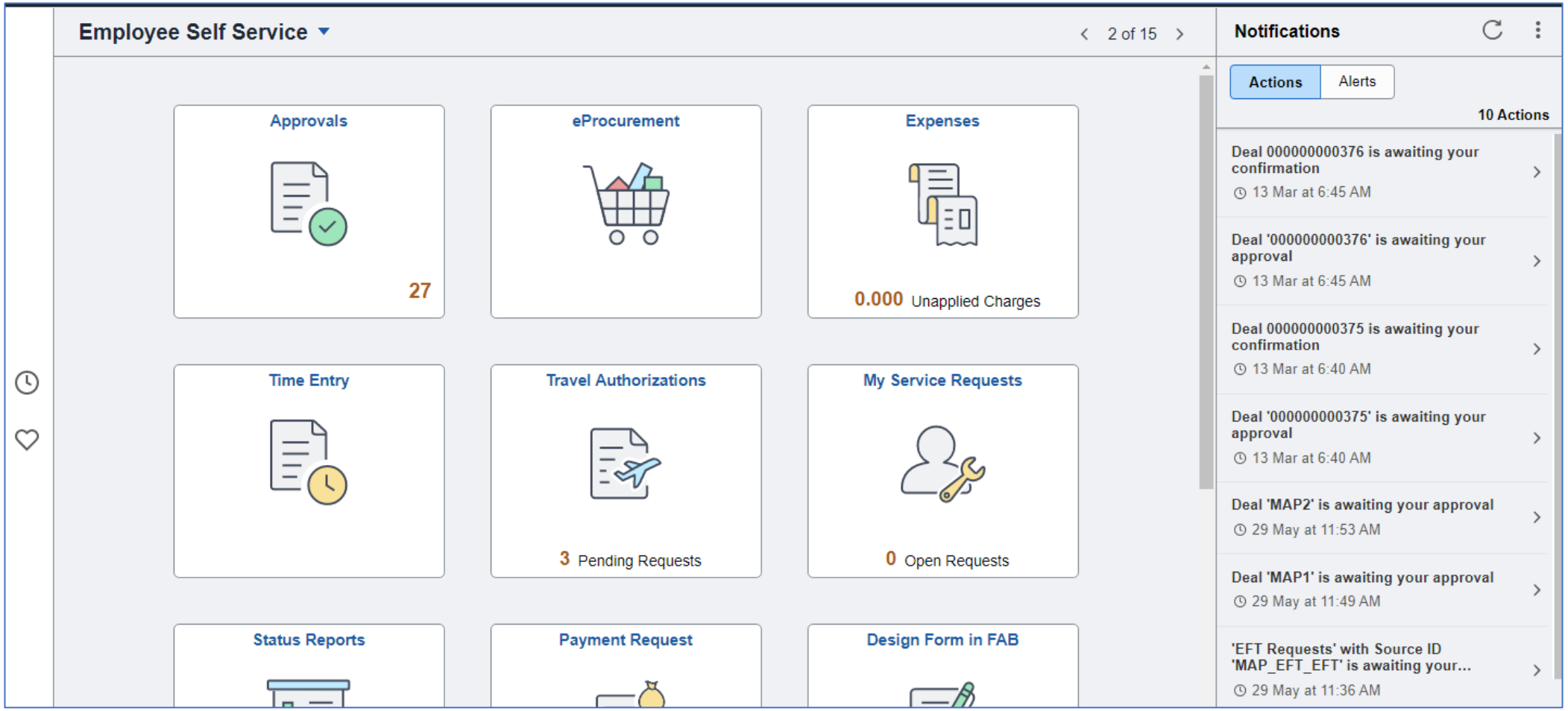
Image 41: Expand Invoice Mass Maintenance

- Enhanced the Invoice Mass Maintenance functionality by adding additional fields. Along with the existing fields, users can update the Accounting Date, Credit Analyst, Pay Terms, Bill Inquiry Phone, Letter of Credit ID, and Letter of Credit Document ID fields for multiple invoices.

PeopleTools 8.59: Navigation Change



PeopleTools 8.59: Homepage Changes



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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
- Image 38 Video
  - https://www.youtube.com/watch?v=dilMtj1hjTE&list=PL4okLhHVjSg5EY1HIVAFw6aBZWurBrqIY

Open Discussion

Questions, comments, or concerns?