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# PeopleSoft Expenses: New Tools and Frameworks to Support the Needs of Globally Diverse Organizations

Session ID: 102060



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Restricted to event use only.



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# Program Agenda

- 1 ➤ PeopleSoft Overall Investment Strategy
- 2 ➤ Automate
- 3 ➤ Control
- 4 ➤ Optimize
- 5 ➤ Expenses Roadmap

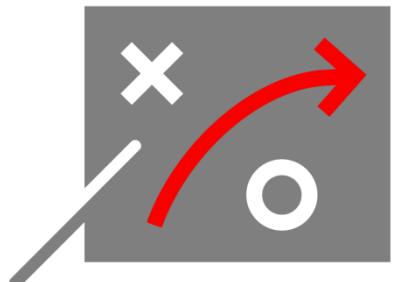
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# PeopleSoft Overall Investment Strategy

# PeopleSoft Overall Investment Strategy

## Provides the Capabilities to Turn Org

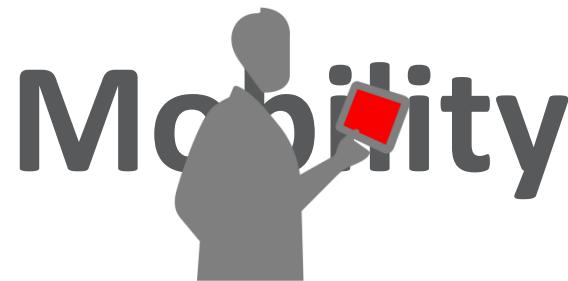


Effectively Execute  
Face of Complexity



Minimize Disruption  
Your Organization

## Needed Capabilities



### Mobile

Analytics

Robust Functionality

### Self-Service



Process Tools

Modern User  
Experience

### Low Cost Adoption

# PeopleSoft Overall Investment Strategy

***Transform the User Experience***

**Challenge: Expanded Connectivity: Any Time, Any Where**



- Simplify Transactions
- Use Familiar Device Paradigms
- Empower Employees

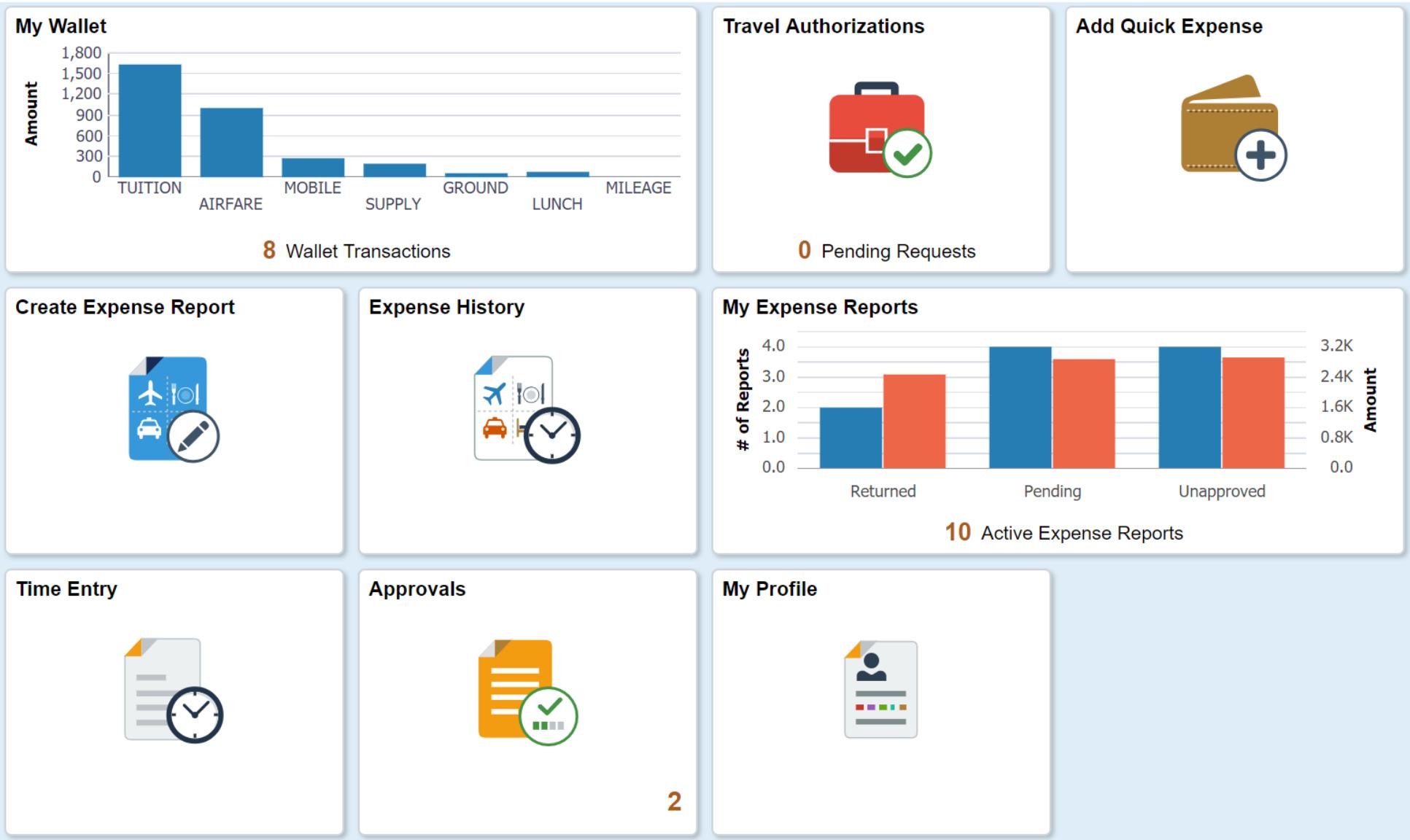
# What If I Told You

***We Could Take The Various Expenses Menu Items.....***

Travel and Expense Center		
 <b>Travel and Expense Center</b> Centralized Travel and Expense Center	 <b>Time Report</b> Create, modify, print, view or delete a Time Report <a href="#">Create/Modify</a> <a href="#">Print</a> <a href="#">View</a> <a href="#">Delete</a>	 <b>Travel Authorization</b> Create, modify, print, view or delete a Travel Authorization <a href="#">Create/Modify</a> <a href="#">View</a> <a href="#">Delete</a> <a href="#">Cancel</a>
 <b>Expense Report</b> Create, modify, print, view or delete an Expense Report <a href="#">Create/Modify</a> <a href="#">Create Express</a> <a href="#">Print</a> <a href="#">2 More...</a>	 <b>Forecast Time</b> Create, modify or view forecast data <a href="#">Create/Modify Forecast Time</a> <a href="#">View Forecasted Time</a>	 <b>Print Reports</b> Print any one of your expense transactions. <a href="#">Expense Report</a> <a href="#">Bar Code Receipt Form</a> <a href="#">Time Report</a> <a href="#">2 More...</a>
 <b>Review Payments</b> Review history of expense payments <a href="#">Review Expense History</a> <a href="#">Review Payments</a> <a href="#">Review Payroll Payments</a>	 <b>Verify Receipts</b> Confirm that receipts have been received and verify receipts match expense report values. <a href="#">Receipts Received</a> <a href="#">Validate Against Expenses</a>	 <b>Other Expense Functions</b> You can view contents in My Wallet, create your own template, or modify an existing template. <a href="#">View My Wallet</a> <a href="#">Create/Update User Template</a>

# What If I Told You

***And Convert It Into a “One-Stop” Dashboard For Expense Users***



# What If I Told You

**Need More Capabilities? A “One-Stop” WorkCenter For Expense Department**

Travel and Expense

Expenses WorkCenter

Personalize Content | Lay

My Work

Exceptions

- Incorrectly Reimbursed Expenses
- Overdue Cash Advances \*\*
- Non-Reimbursable Charges to Prepaid CC

Links

Approval

- Approve Transactions
- Modify Approved Transactions
- Reassign Approval Work

Time Report

- Create/Modify Time Report
- View Time Report

Cash Advances

- Create/Modify Cash Advances
- Mark Cash Advance for Close
- Reconcile Cash Advance
- Cash Advance History

Expense Report

- Create/Modify Expense Report
- Verify Receipts Received
- Validate Receipts Against

Expenses WorkCenter Dashboard

Expenses Top Spenders

Filters

- Department (All)
- Business Purp... (All)
- Expense Type (All)
- Currency USD

Top 20 Employees Spenders

Preferred Vs Non-Preferred Mer

Filters

- Business Unit US001
- Expense Type (All)
- Currency USD

Preferred Vs Non-Preferred Mer

Expenses by ChartField

Filters

- Business Unit US001
- Department (All)
- Product (All)
- PC Bus Unit (All)
- Activity (All)
- Currency USD
- Account (All)
- Operating Unit (All)
- Fund Code (All)
- Project (All)
- Source Type (All)

Expenses by ChartField

Expenses Billable Analysis

Filters

- Business Unit US001
- Department (All)
- Report Status (All)
- Expense Type (All)

Expenses Billable Analysis

# We Can!

***The PeopleSoft of Today –Expenses Responsive, Refreshed and Renewed!***



&



**Simpler and More Intuitive**

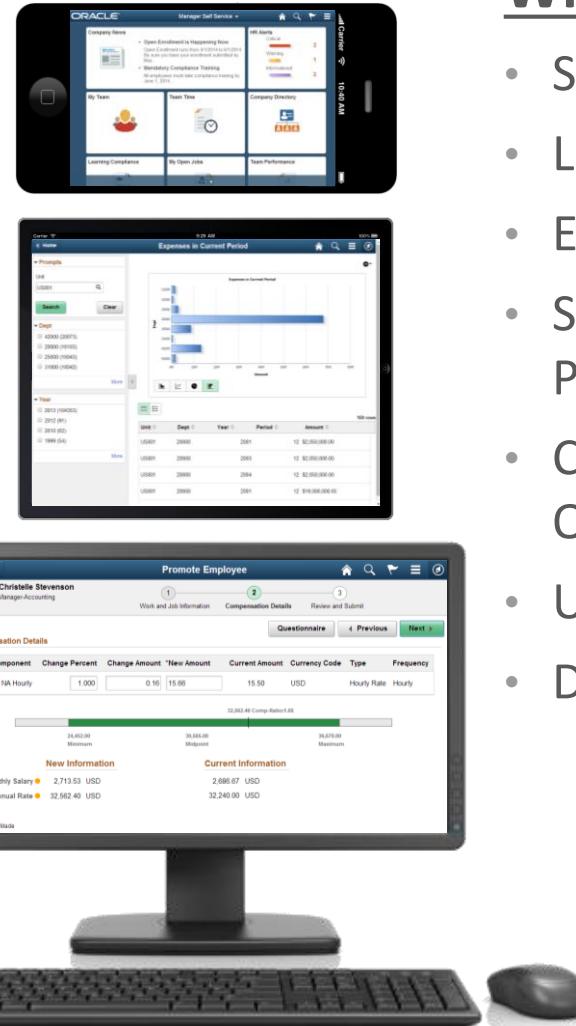
**Optimized Mobile Solutions**

# Solving Both Challenges with One Solution

## *PeopleSoft Fluid User Interface*

### What Is It

- PeopleSoft Mobility on Any Device
- New Online Desktop Experience
- Native Tablet/Phone Experience
- Optimized Across Multiple Form Factors
- HTML5/CSS3 PeopleSoft Pages
- End User Personalization
- Single, Merged Solution Across PeopleSoft



### Why You Care

- Simple and Intuitive to Use
- Lower Training Costs
- Easy to Provision and Deploy
- Seamless User Experience Across Platforms
- Consistency Across PeopleSoft and Oracle
- Uses Existing PeopleSoft Tool Set
- Delight Your PeopleSoft Users

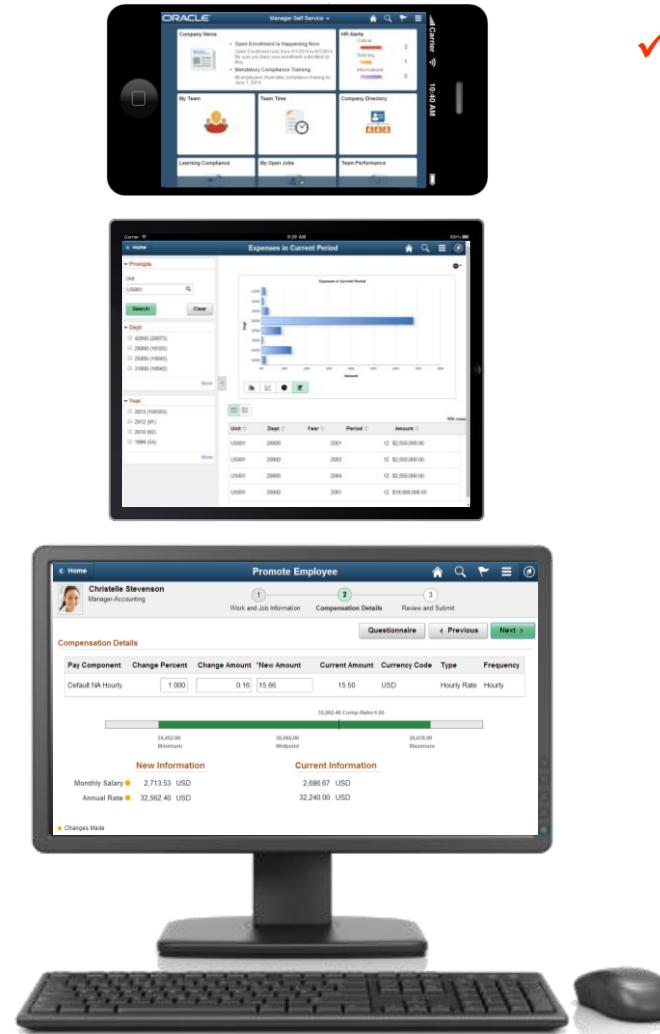
# Solving Both Challenges with One Solution

# **PeopleSoft Fluid User Interface – Customer Successes!**

- ✓ First “live” customer on Fluid Expenses was a US-based Insurance Co – approximately 250+ Expense Reports per month.



- ✓ Largest implementation so far is a world-wide non-for-profit organization with 110,000 Fluid Expenses Users in 140 countries



# PeopleSoft Expenses Update

## ***We've Been Busy!***

- Enhanced Credit Card Load for Multiple CC's (PI-28)
- Enhanced Fluid Approvals (PI-29 & PI-30)
- Enhanced Risk Visibility During Approval Process (PI-29)
- Data Privacy Framework
- Pivot Grid Thresholds (PI-30, PeopleTools 8.57)
- Change Expense Type on Expense Report for “My Wallet” Transactions (PI-32)
- Audit Report of Expense Type Changes (PI-32)
- Drop Zones on Key Expenses Transactions (PI-32)
- GPS Mileage Calculation Integration (PI-32)



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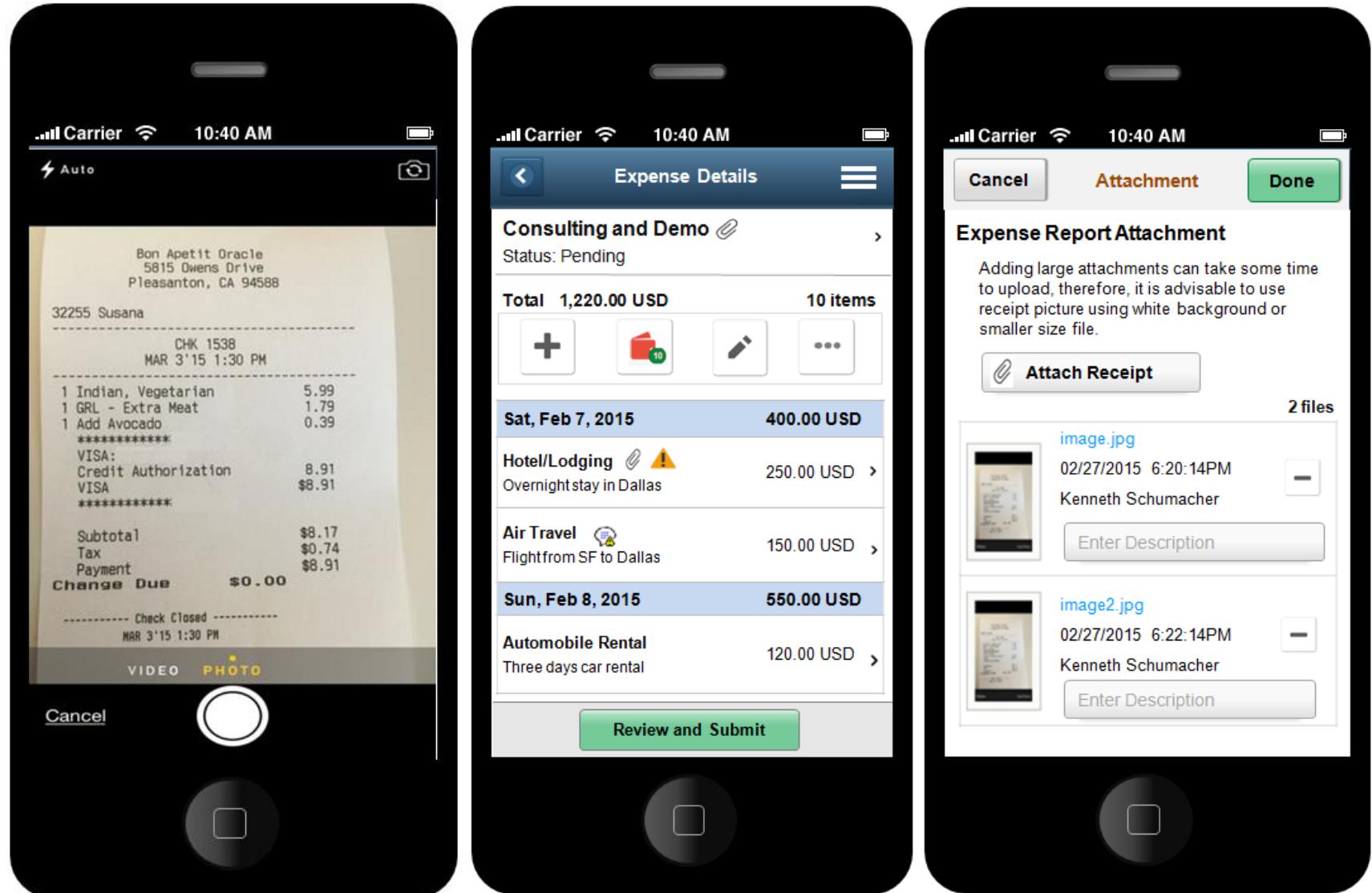
# Automate

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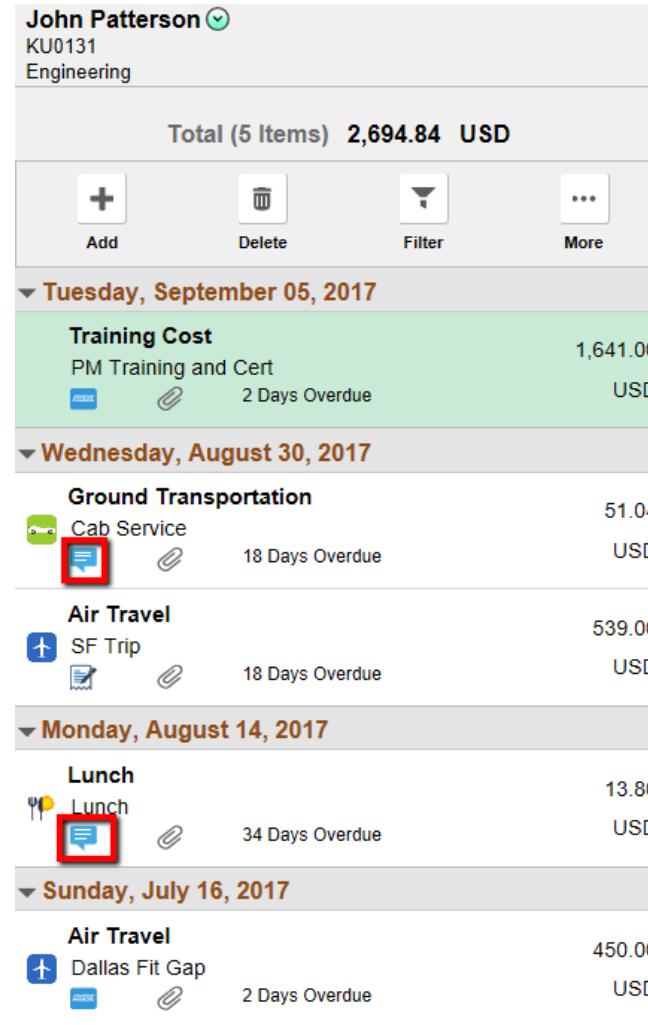
# Automate *Twilio Text Messages*

Delivered in  
PI-24



# Automate

## Twilio Text Message Integration with “My Wallet”



John Patterson 

KU0131  
Engineering

Total (5 Items) 2,694.84 USD

Add Delete Filter More

▼ Tuesday, September 05, 2017

Training Cost	1,641.00
PM Training and Cert	USD
 	2 Days Overdue

▼ Wednesday, August 30, 2017

Ground Transportation	51.04
Cab Service	USD
 	18 Days Overdue

Air Travel	539.00
SF Trip	USD
 	18 Days Overdue

▼ Monday, August 14, 2017

Lunch	13.80
Lunch	USD
 	34 Days Overdue

▼ Sunday, July 16, 2017

Air Travel	450.00
Dallas Fit Gap	USD
 	2 Days Overdue

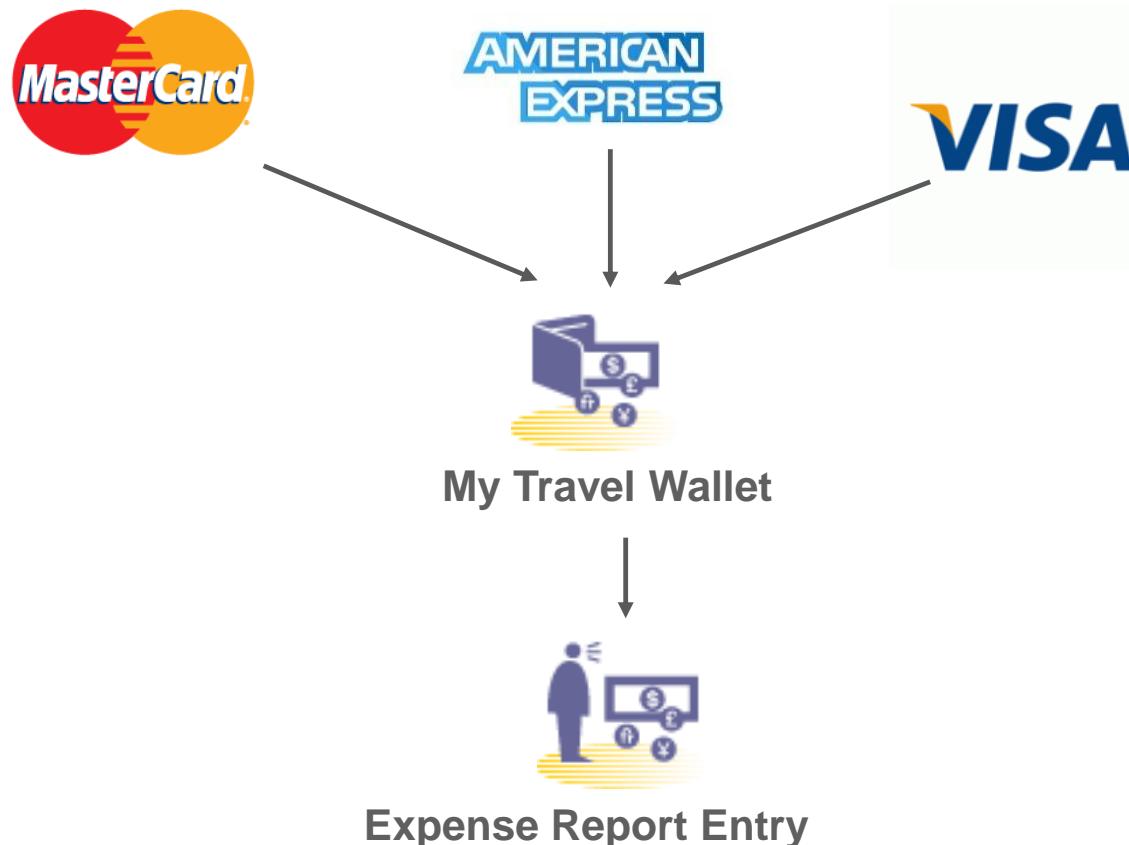
- New source type represented by a new text message image
- Save time (and multiple steps) by eliminating need to log into VPN and/or PeopleSoft to upload expense receipts
- Take a picture of your expense receipts using your phone and send via text message to a central number for your organization
- System identifies user and date/time via incoming text message and phone number
- Attachments are integrated into PeopleSoft Expenses “My Wallet”, allowing user to later add to an expense report
- View Attachments in Fluid Approvals (PI23)

# Automate

## Multiple Credit Card Integration - Overview

Delivered in  
PI-28

### In the Past



### Now Available!



# Automate

## GPS Mileage Integration

Delivered in  
PI-32

- New functionality to assist in mileage policy enforcement
- Utilizes Oracle Maps/eLocation Services (No license required)
- New settings at the Expenses Business Unit indicate whether functionality is implemented \*
- Utilizes other existing Expenses setup for Mileage tracking \*

Employee Self Service

Business Unit 1 Business Unit 2 Business Unit Privileges VAT Options Receipts Required

GL Unit US001 US001 NEW YORK OPERATIONS

Journal Generator Templates

\*Accruals EXACCRUA Expense Accruals  
\*Payments EXPAYMENT Expense Payments

Distance Rate

SetID SHARE  
Expense Type MILEAGE Mileage  
Country USA

\*Effective Date 01/01/1900 Status Active  
Distance Type Miles  
Distance Rate Type Standard Rate Split Rate  
Standard Distance Rate 0.5400 \*Currency USD

Varied Distance Rates

*Transportation Type	Description	From Distance	Through Distance	*Distance Rate	Rate Adjustment Factor		
<input type="button" value=""/>		0	0			<input type="button" value="..."/>	<input type="button" value="-"/>

Save Return to Search Previous in List Next in List Notify Add Update/Display Include History Correct History

# Automate

## GPS Mileage Integration

Delivered in  
PI-32

- Only available on Fluid Expense Report
- New options for calculating mileage between 2 points
- Option to see Map and Directions to confirm mileage calculations \*
- Available on all Form Factors – Phone/Tablet/Desktop or Laptop

Automobile Mileage - 07/12/2019

\*Date

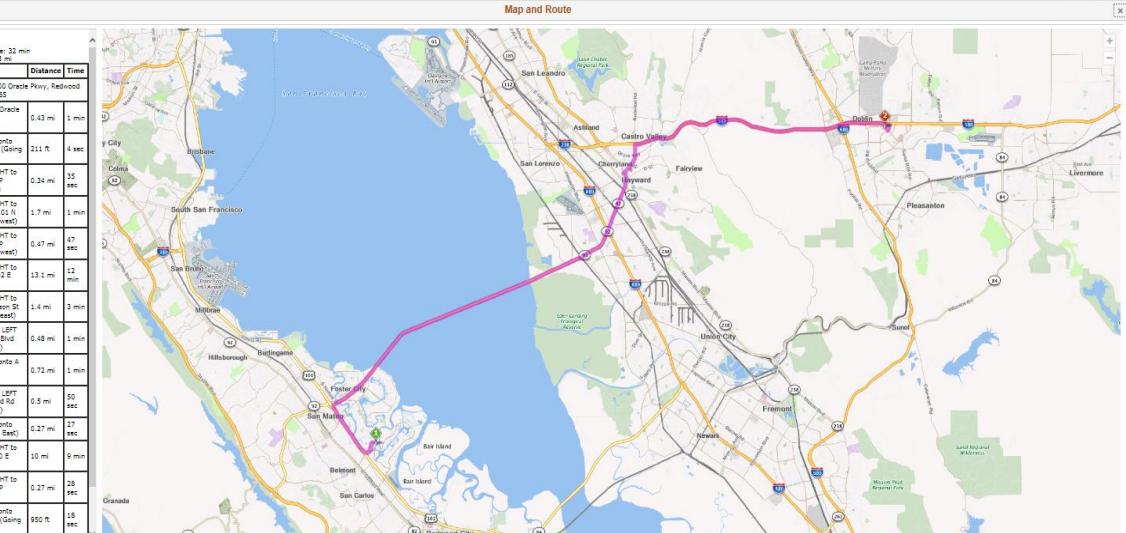
\*Expense Type

Description

**Mileage**

Direction	Distance	Time
Start out on Oracle Pkwy (Going Northeast)	0.63 mi	1 min
Turn RIGHT onto Pkwy (Going West)	211 ft	4 sec
Stay STRAIGHT to go onto RAMP (Going North)	0.34 mi	35 sec
Stay STRAIGHT to go onto US-101 N (Going Northwest)	1.7 mi	1 min
Stay STRAIGHT to go onto US-101 N (Going Northwest)	0.47 mi	47 sec
Stay STRAIGHT to go onto I-280 E (Going East)	13.1 mi	12 min
Stay STRAIGHT to go onto Jesmond St (Going East)	1.4 mi	3 min
Turn SLIGHT LEFT onto Foothill Blvd (Going North)	0.48 mi	1 min
Turn SLIGHT LEFT onto St (Going Northeast)	0.72 mi	1 min
Turn SLIGHT LEFT onto St (Going Northeast)	0.5 mi	50 sec
Turn RIGHT onto RAMP (Going East)	0.27 mi	27 sec
Stay STRAIGHT to go onto I-280 E (Going East)	10 mi	9 min
Stay STRAIGHT to go onto I-280 E (Going East)	0.27 mi	28 sec
Turn RIGHT onto Hacienda Dr (Going South)	950 ft	19 sec
Turn SLIGHT right		

**Map and Route**



**Payment Details**

**Additional Information**

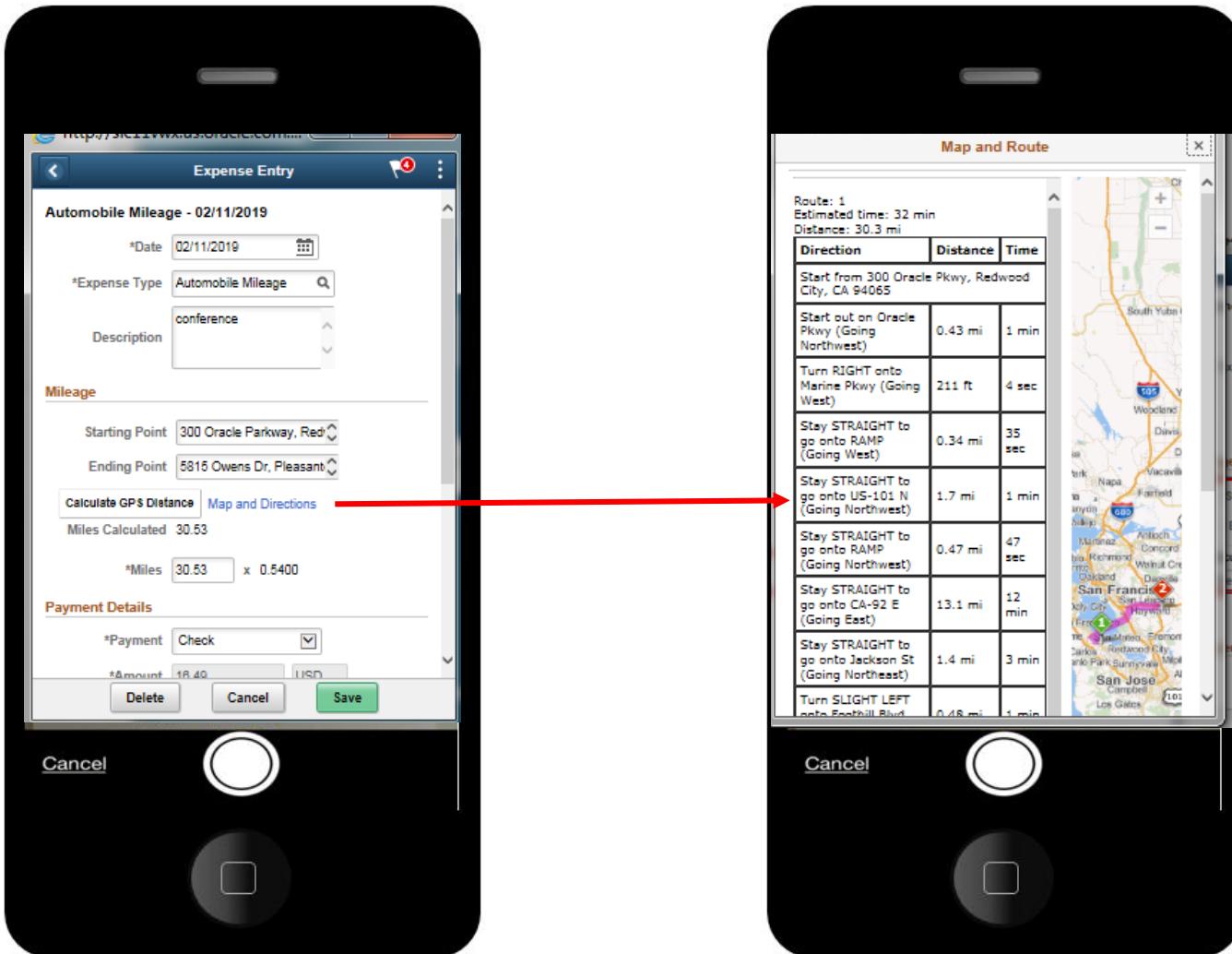
**Exceptions**

Personal Expense  No

No Receipt  No

# Automate *GPS Mileage Integration*

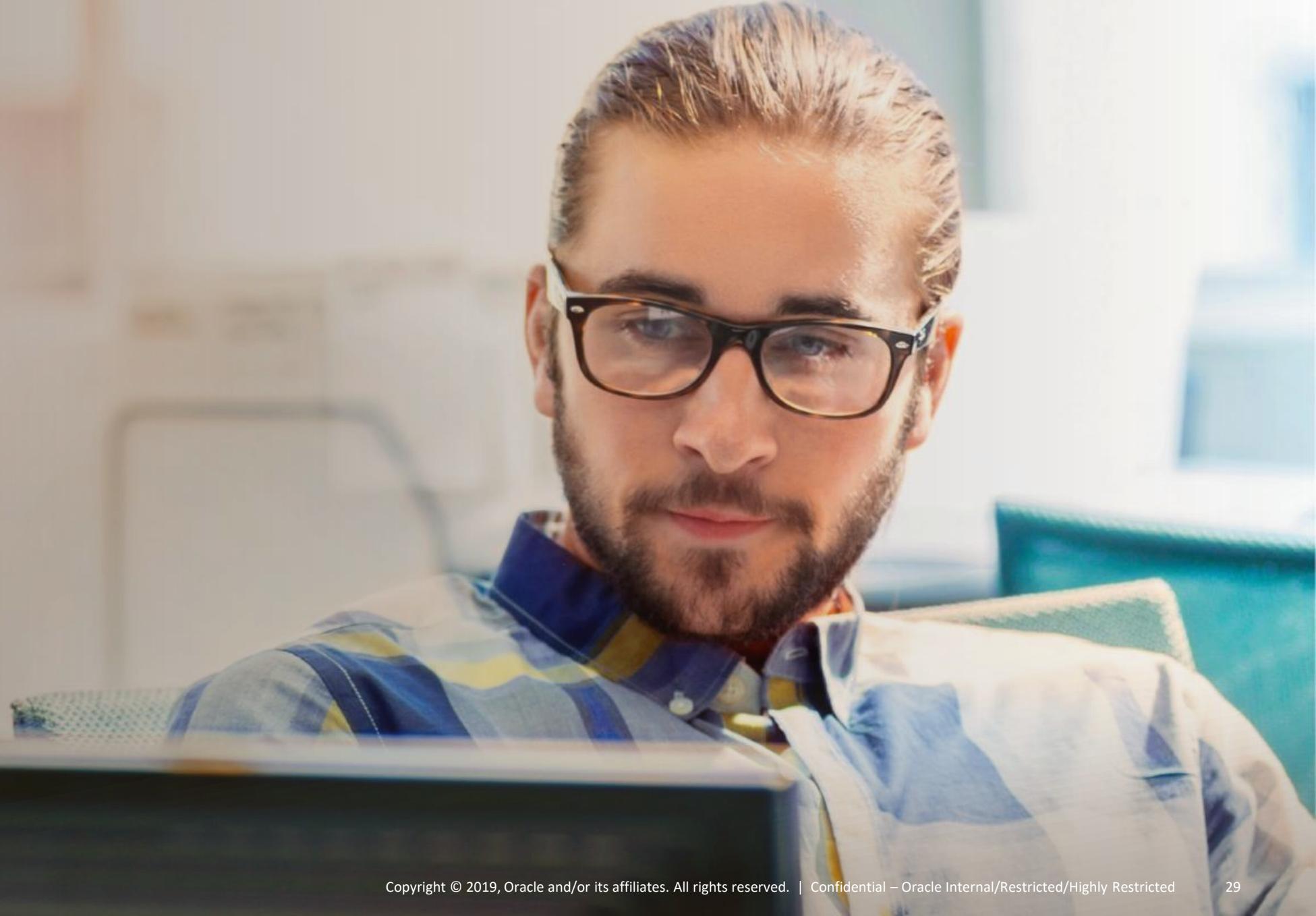
Delivered in  
PI-32



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# Control



# Control

## Fluid Approvals – Giving Approvers More Visibility Into What They’re Approving

Existing

- Existing capability to define Risk thresholds for monitoring Expense Overspend and non-compliance with policies
- Approvals now provide visibility into where Expense Reports have possible violations to Expense policies
  - Per Diem violations
  - Using Non-Preferred vs Preferred Airlines, Hotels, etc
  - Missing Receipts and more....
- Approvers are notified with a flag on the Risk Expense Report
- Drill-down can also show detail of violations
- Visibility of Attendees and Per Diem amounts from Drill-down to Expense Report
- Clarity around action for Approvers to “Send Back”

**Risk Criteria**

<input type="checkbox"/> Travel Authorization Days < Expense Report Actual Days	<input type="checkbox"/> Tolerance	<input type="text"/> Days
<input type="checkbox"/> Travel Authorization Totals < Expense Report Totals	<input type="checkbox"/> Tolerance	<input type="text"/> %

**Business Purpose Criteria**

Business Purpose	Description
00007	General Travel and Expense

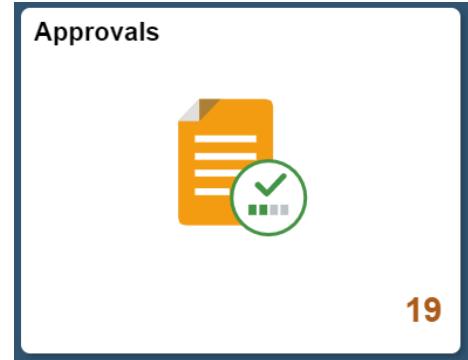
**Expense Type Authorized Amounts**

Expense Type	Description	Authorized Amount	% Variance	+	-
BRKFAST	Breakfast	<input type="text"/> 20	<input type="button"/> + <input type="button"/> -		
DINNER	Dinner	<input type="text"/> 20	<input type="button"/> + <input type="button"/> -		
LUNCH	Lunch	<input type="text"/> 20	<input type="button"/> + <input type="button"/> -		

# Control

## Fluid Approvals – Risks and Alerts Visibility

Delivered in  
PI-29



Employee Self Service

### Pending Approvals

View By Type

Approve Deny More

Expense Report 8 rows

<input type="checkbox"/>	Expense Report ⚠ 3,000.00 USD	John Bendetto - 0000000091 / Off-site Meeting	Routed 08/12/2014 >
<input type="checkbox"/>	Expense Report ⚠ 4,100.00 USD	Theresa Monroe - 0000000092 / Annual Software Conference	Routed 08/12/2014 >
<input type="checkbox"/>	Expense Report ⚠ 4,700.00 USD	Jessica Bendetto - 0000000093 / Campus Recruiting	Routed 08/12/2014 >
<input type="checkbox"/>	Expense Report 50.00 USD	Kenneth Schumacher - 0000000120 / Consulting and product demo	Routed 01/15/2018 >
<input type="checkbox"/>	Expense Report ⚠ 260.00 USD	Kenneth Schumacher - 0000000122 / Consulting and product demo	Routed 01/16/2018 >
<input type="checkbox"/>	Expense Report ⚠ 20.00 USD	Kenneth Schumacher - 0000000124 / Consulting and product demo	Routed 01/22/2018 >

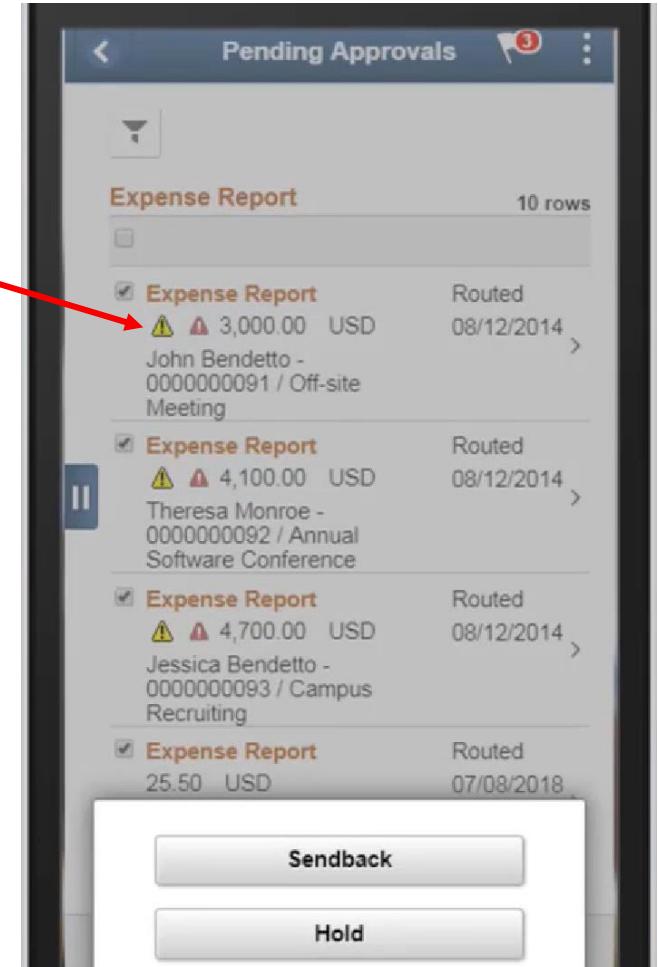
## Fluid Approvals – Risks & Alerts

# Control

## Fluid Approvals – Risks and Alerts Visibility

Delivered in  
PI-29

- New indicators show the Approver there's a Risk associated with the Expense Report
- New drill-down allows the Approver to view Risk Level, the Risk Description, the criteria that triggered the Risk, and the details of the Risk.
- New “Sendback” button text replaces the “Pushback” button to make action consistent with what is done in Classic Expense Approvals



# Control

## Fluid Approvals – Risks and Alerts Visibility

Delivered in  
PI-29

### Expense Report Header

[Pending Approvals](#) **Expense Report** [Home](#) [Flag \(3\)](#) [More](#)

Theresa Monroe  
4,100.00 USD

4 line(s) are pending your approval

[Approve](#) [Deny](#) [More](#)

**Summary**

Name	Theresa Monroe	Report ID	0000000092	Submitted for Approval
Total Due Employee	4,100.00 USD	Reference		
Report Description	Annual Software Conference	Submission Date	08/12/14	
Business Purpose	User Conference	Updated on	08/12/14 - 12:33 PM	
Location	New York, New York		<a href="#">Exceptions and Risks</a>	

**Lines**

Pending	All	4 rows		
<input type="checkbox"/>				
<input type="checkbox"/>	Risk/Exception	Date/Expense Type	Reimbursement Amount	
<input type="checkbox"/>		07/07/14 Breakfast	600.00 USD	>
<input type="checkbox"/>		07/08/14 Automobile Rental	1,000.00 USD	>
<input type="checkbox"/>		07/09/14 Hotel/Lodging	2,000.00 USD	>
<input type="checkbox"/>		07/10/14 Lunch	500.00 USD	>

# Control

## Fluid Approvals – Risks and Alerts Visibility

Delivered in  
PI-29

### Exceptions and Risks

Exception Comments and Risks						
Theresa Monroe	Report ID 0000000092					
<b>General Information</b>						
Report Description Annual Software Conference						
Business Purpose User Conference						
Reference						
<b>Exception Information</b>						
Line	Expense Type	Exception	Comment			
1	Breakfast	None	No exceptions associated with this line.			
2	Automobile Rental	No Receipt	Receipt was shredded by accident.			
2	Automobile Rental	Non-Preferred Merchant	Budget offered the best rates.			
3	Hotel/Lodging	No Receipt	Receipt was shredded by accident			
3	Hotel/Lodging	Non-Preferred Merchant	Hotel 6 offered best rates available in area.			
4	Lunch	Amount Exceeded				
4	Lunch	No Receipt	Receipts were shredded by accident.			
<b>Risk Details</b>						
Line	Risk Level	Risk Description	Risk Criteria			
4	Project Manager Level 4	Expense Type Amount Limits	The amount for Breakfast was over the limits by 100 USD on US001.			
3	Project Manager Level 3	Authorized Amount Exceeded				
2	Project Manager Level 2	Non-Preferred Merchant				
1	Project Manager Level 1	No Receipt Included				

# Control

## Fluid Approvals – View Attendees and Per Diems w/Drill-Down

Delivered in  
PI-29

[Back to Header](#)

### Approval Line Detail

[Home](#)

Dinner  
30.98 USD

**Line Detail**

Transaction Date	05/03/18	Payment Method	Cash
Expense Type	Dinner	Merchant	
Description	Conference - Future of Finance	Location	Minneapolis, Minnesota
Billing Action	Internal	Personal Expense	N
		Receipt Verified	N

**Additional Information**

<a href="#">View Attachments</a>	<a href="#">&gt;</a>	<b>Attendees</b>
<a href="#">View Accounting</a>	<a href="#">&gt;</a>	Date 05/03/2018
<a href="#">Attendees</a>	<a href="#">&gt;</a>	Expense Type Dinner

**Attendees**

Name	Company
Patterson,John	US001 NEW YORK OPERATIONS

# Control

## Receipts Required Configuration - Refinement Rules

Delivered in  
PI-10

Business Unit 1 Business Unit 2 Business Unit Privileges VAT Options Receipts Required

GL Unit US004 US004 ILLINOIS OPERATIONS

**Receipts Configuration**

Receipt Required Always Minimum Receipt Amount 25.00 USD

**No Receipt Default Comment**

Comments Required

**Exceptions**

Personalize | Find | View All | | First 1-6 of 6 Last

	Attributes	No Receipt Comments					
	*Expense Type	*Payment Type	*Receipt Required	Minimum Receipt Amount			
1	Air Travel	(All Values)	Yes Except CC Fee	0.00	USD		
2	Entertainment - Other	(All Values)	Always	0.00	USD		
3	Automobile Mileage	(All Values)	Never	0.00	USD		
4	Miscellaneous Charges	Cash	Always	5.00	USD		
5	Per Diem - Hourly Range	(All Values)	Never	0.00	USD		
6	Spouse Airfare	(All Values)	Always	0.00	USD		

- Establish rules for when receipts (or comments) are required
- Override capability down to expense type and payment type
- Default no receipt comments
- Printed expense report has a grid to indicate to the user which receipts are needed

# Control

## Pivot Grid Thresholds

Before



# Control

## Pivot Grid Thresholds

### Setup

Pivot Grid Wizard

1 2 3 4 5 < Previous

#### Specify Data Model Options

Specify the values for the Display and View Options for the Pivot Grid and Chart.

**Title** Top 20 Employees Spenders

**View Options**

**Default View**

Pivot Grid Only  Chart Only

**Specify Axis Information**

Data Source Columns	Field Format	Grid Axis	Chart Axis
1 Name	String	Row	X-Axis
2 Department	String	Filter	Filter
3 Business Purpose	String	Filter	Filter
4 Expense Type	String	Filter	Filter
5 Amount	Signed Number	Column	Y-Axis
6 Currency	String	Filter	Filter

Configure Thresholds

Data Source Column: Amount

Threshold Type: Range

Lower Limit: 7800 Higher Limit: 8000

Threshold Color: Red

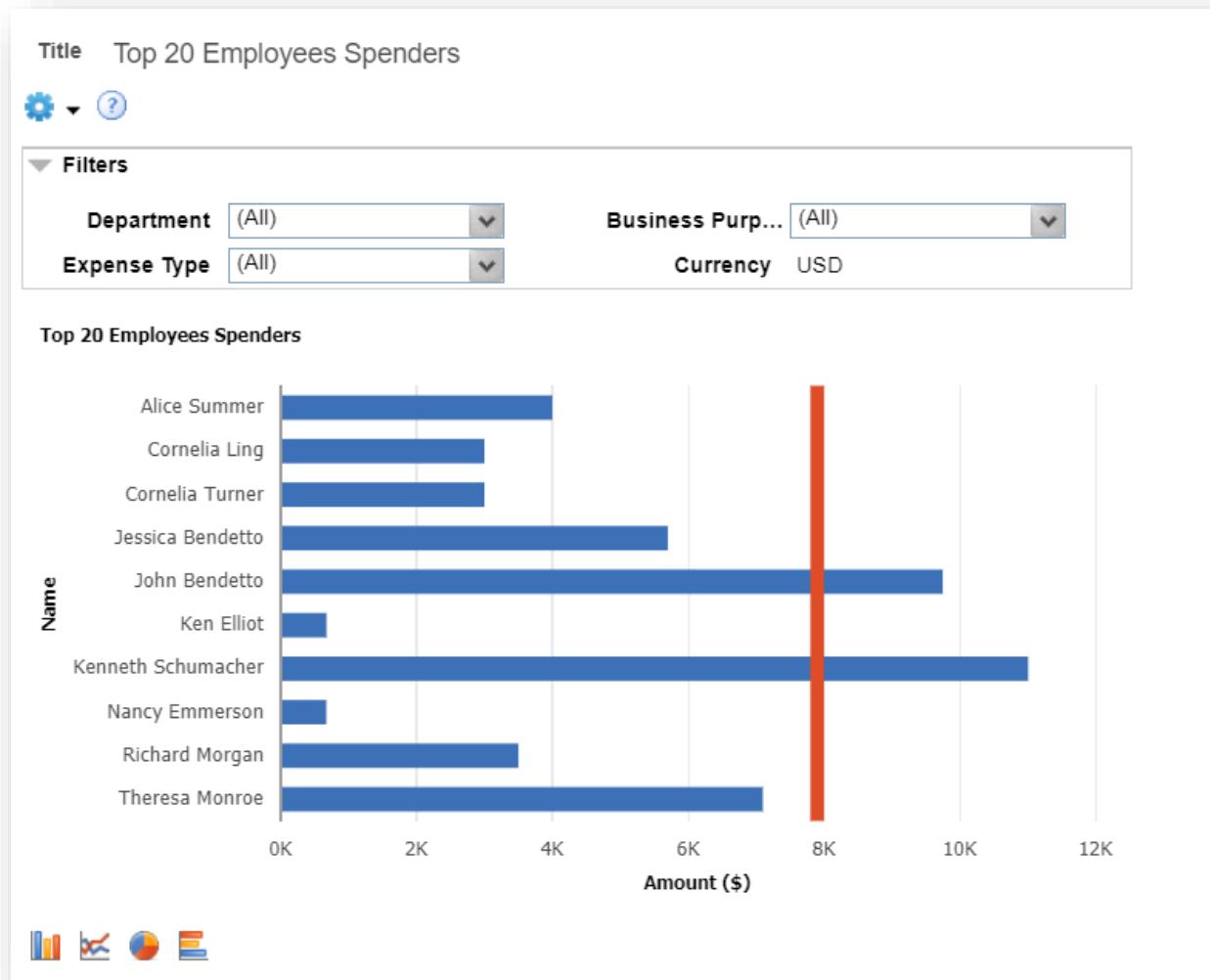
Threshold Description: Need to take action

OK Cancel Return

# Control

## Pivot Grid Thresholds

After



Notify Manager

\*To:

CC:

BCC:

\*Subject:

Message:

**Send Email**

# Control

## Data Privacy Framework

Delivered in  
PI-29

Employee Self Service

### Maintain Data Privacy Settings

Reference Last Run Details

+ Add

Record Name/ Description	Field/ Default Label	Category	Classification	Person Identifier
CC_CARD_DATA_EX	EMPLID	Person Identifier	Person Number	
Cardholder - Credit Card Info	Empl ID			
EX_AATM_TRAN_VW	EMPLID	Person Identifier	Person Number	
Employee ATM Transactions	Empl ID			
EX_AA_EE_ORG_VW	EMPLID	Person Identifier	Person Number	
Employee Default Profile Vw	Empl ID			
EX_ACRM_SRCH_VW	EMPLID	Person Identifier	Person Number	
Accounting Line Sheet Srch Vw	Empl ID			
EX_ACTN_RJCT_VW	EMPLID	Person Identifier	Person Number	

Manage References  Save

Filters

Product: Expenses

Record

Field

Category

Classification

Personal Identifier: All

Sensitive: All

Delivered: All

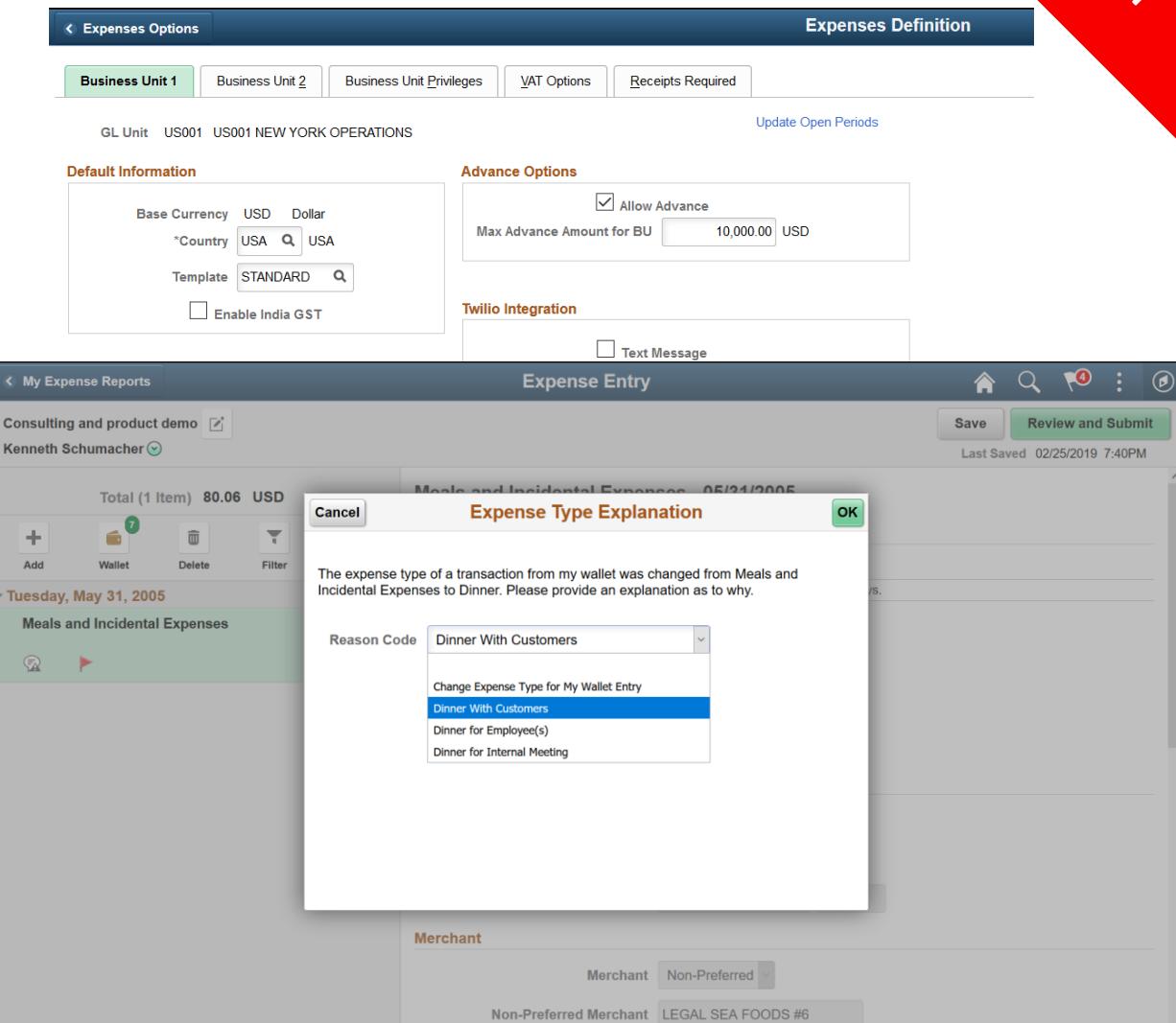
Search Clear

# Control

## Change The Expense Type on The Expense Report

- New functionality to allow changing the Expense Type when credit card charges come from “My Wallet” transactions
- Delivered “turned off”, must set a Business Unit option \*
  - Enable Expense Type changes
  - Require a Reason Code for Change
- If Expense Type Changes are allowed, users may enter a different Expense Type than what is indicated from the entry imported from “My Wallet”
- If Reason Code is required, window opens to allow User to enter a reason for change. \*
- Changes to the “My Wallet” dates are allowed
- Changes are written to an Audit table for “Before” and “After” comparisons and reporting.

Delivered in  
PI-32



# Control

## Expense Type Changes – Audit Report

Delivered in  
PI-32

- If you are allowing Expense Type Changes, those changes are written to an audit table
- Written even if no Reason For Change is required
- Shows last current and “new” values
- Data is stored for customers to create their own Query and series of reports

### Sample Report from Audit Table

Expense Report ID	Line Number	Field Name	Seq No	Operator ID	Name	Current Value	Current Value Descr	Original Value	Original Value Descr	Reason Code	Date/Time	More....
0000023	1	Expense Type	1	CROTH	Calvin Roth	DINCUST	Dinner w/Customer	MISC	Misc. Meal	UPDATE	Feb 20 – 2019 11:00AM	XXXX

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# Optimize

# Optimize

## *Drop Zones on Key Expenses Pages*

### How Are Customers Trying to Modify PeopleSoft?

#### Why Customers Have Historically Customized



Custom pages, requests, and processes that are currently outside of PeopleSoft.

#### **Forms & Approval Builder**



Change the appearance (i.e. label) or behavior (e.g. hide) of delivered fields on a page.

#### **Page & Field Configurator**



Extend and/or modify delivered business logic to provide custom processing.

#### **Event Mapping**



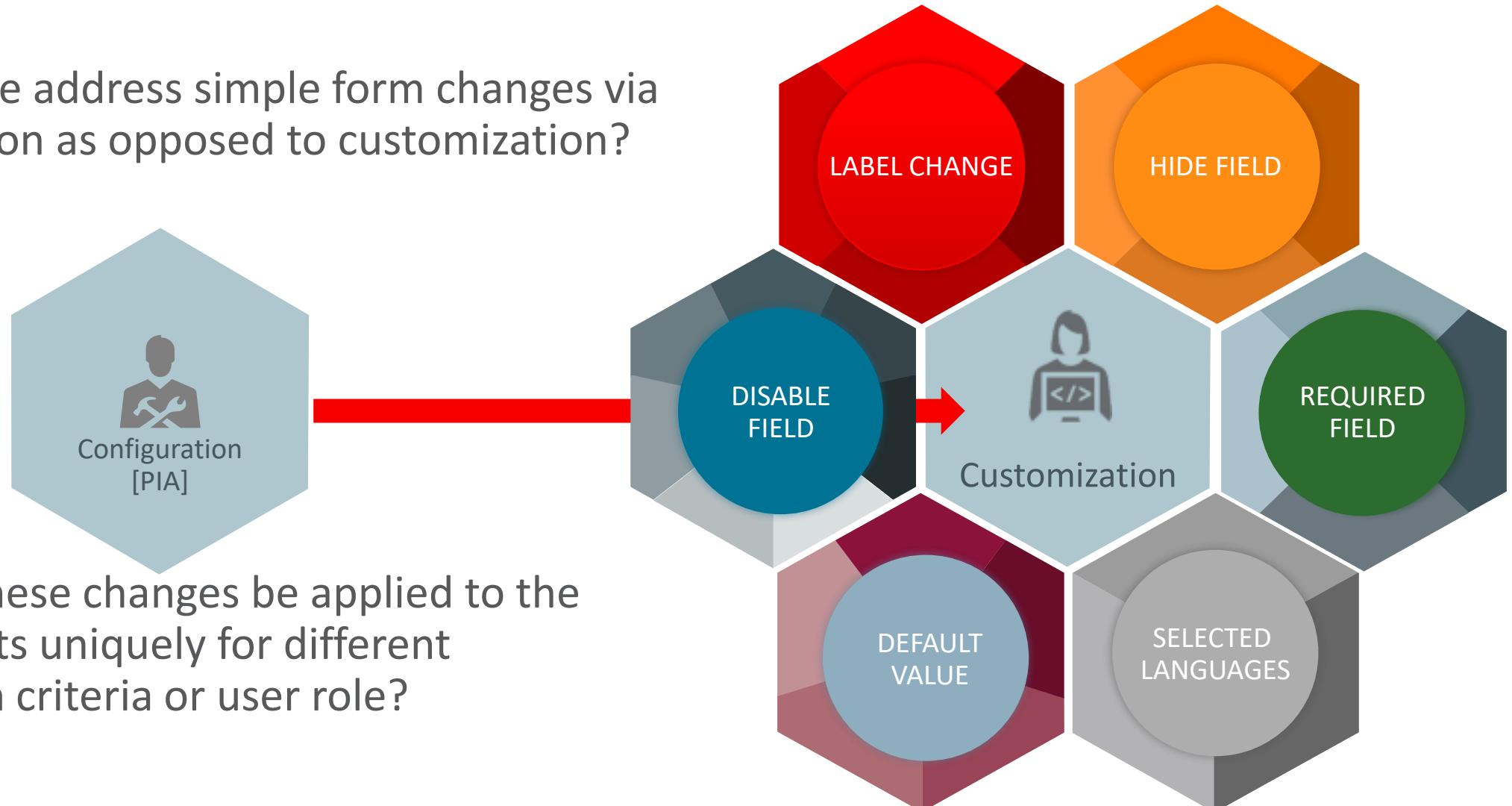
Add new fields to delivered pages to capture additional data for future processing.

#### **Drop Zones**

# Optimize

## *Page and Field Configurator*

- How can we address simple form changes via configuration as opposed to customization?

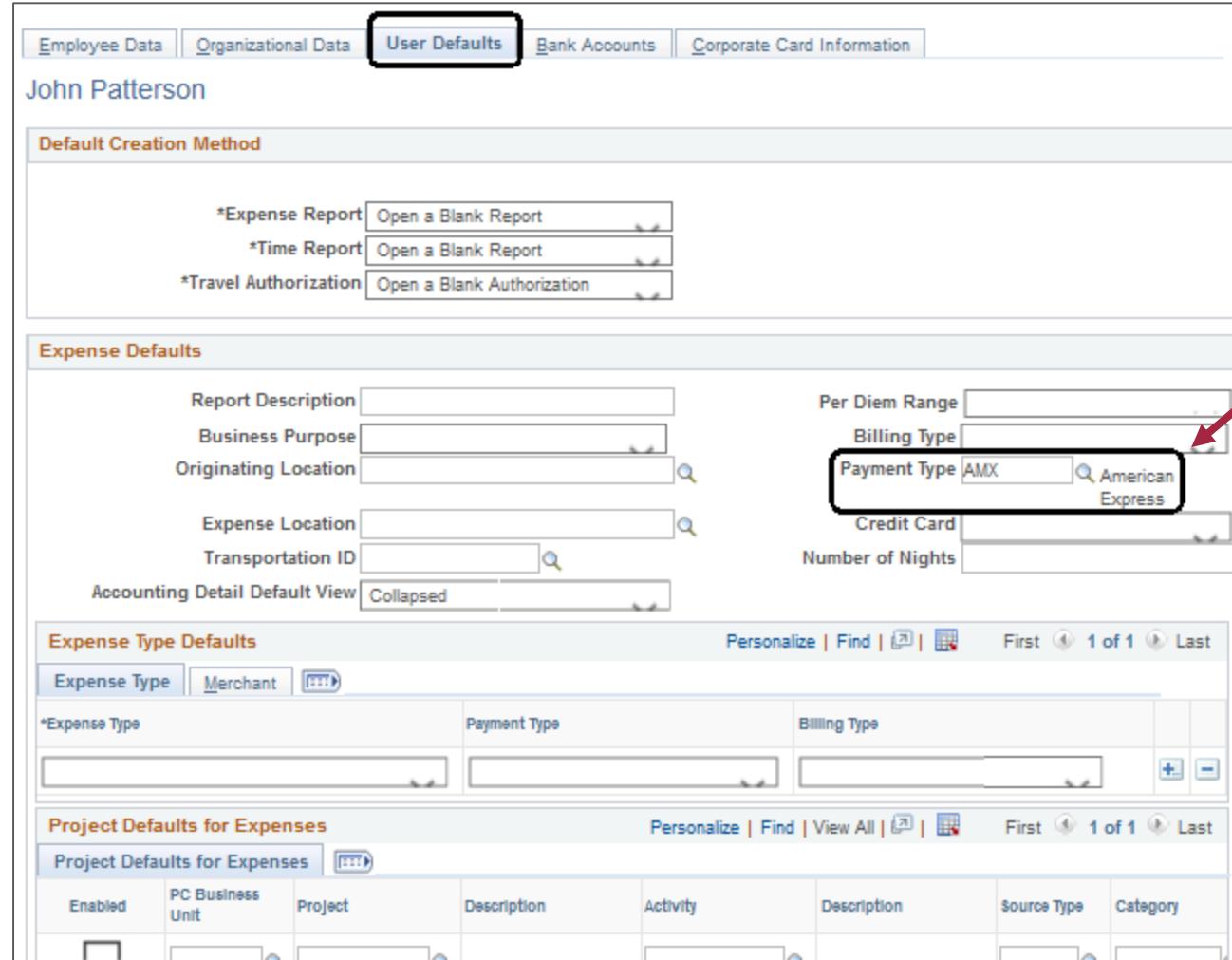


- How can these changes be applied to the components uniquely for different transaction criteria or user role?

# Optimize

## Page and Field Configurator

### Before Applying the Update



The screenshot shows the Oracle Page and Field Configurator interface. The 'User Defaults' tab is selected. In the 'Expense Defaults' section, there is a 'Payment Type' field with 'AMX' selected. A red arrow points from this field to a list of four bullet points on the right, indicating a proposed change to disable payment type selection.

Employee Data | Organizational Data | **User Defaults** | Bank Accounts | Corporate Card Information

John Patterson

**Default Creation Method**

\*Expense Report: Open a Blank Report  
\*Time Report: Open a Blank Report  
\*Travel Authorization: Open a Blank Authorization

**Expense Defaults**

Report Description:   
Business Purpose:   
Originating Location:    
Expense Location:    
Transportation ID:    
Accounting Detail Default View: Collapsed

Per Diem Range:   
Billing Type:   
Payment Type: **AMX**  **American Express**

Credit Card:   
Number of Nights:

**Expense Type Defaults**

Expense Type: Merchant 

*Expense Type	Payment Type	Billing Type
<input type="text"/>	<input type="text"/>	<input type="text"/>

**Project Defaults for Expenses**

Project Defaults for Expenses 

Enabled	PC Business Unit	Project	Description	Activity	Description	Source Type	Category
<input type="checkbox"/>	<input type="text"/>						

- Modify User Defaults
- Limit use of defaults for end users
- Disable the Payment Type selection
- Would like their end users to consciously select a payment type when they create an expense report

# Optimize

## Page and Field Configurator

### After Applying the Update

The screenshot shows the Oracle Page and Field Configurator interface. The 'User Defaults' tab is selected and highlighted with a red box. The interface displays various configuration options for a user named 'John Patterson'. A red arrow points from the 'Disable a field' bullet point to the 'Payment Type' field, which is also highlighted with a red box. The interface includes sections for 'Default Creation Method' and 'Expense Defaults'.

- Disable a field
- Other Possibilities:
  - Specify a default value
  - Hide fields
  - Hide entire pages within a component
  - Modify labels
  - Change labels for selected languages (multi-lingual environment)

# Optimize

## Page and Field Configurator

### Behind the Scenes

Page Configuration | User List | Map to Portal Registry

Component Name EX\_EE\_PROFILE2

\*Description Expenses Profile

Market Global

\*Status Active

Validate Configuration

Criteria

Sequence Number 1 Description

Criteria

No Criteria Defined.

Define Criteria Copy Criteria From

User List

Configure Field Properties

Select	Field Name	Label Text	Modify Label	Hide Field	Disable Entry	Required Field	Default Value
1	EXPEND_MTHD	Payment Type	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	

Copy Field Properties From

Configure Page Visibility

*Page Name	Visible	Display Only
1	No	<input type="checkbox"/>

- Identify criteria for applying the page changes
- Multiple configurations to the same component based on user /role

Page Configuration | **User List** | Map to Portal Registry

Component Name EX\_EE\_PROFILE2

Market Global

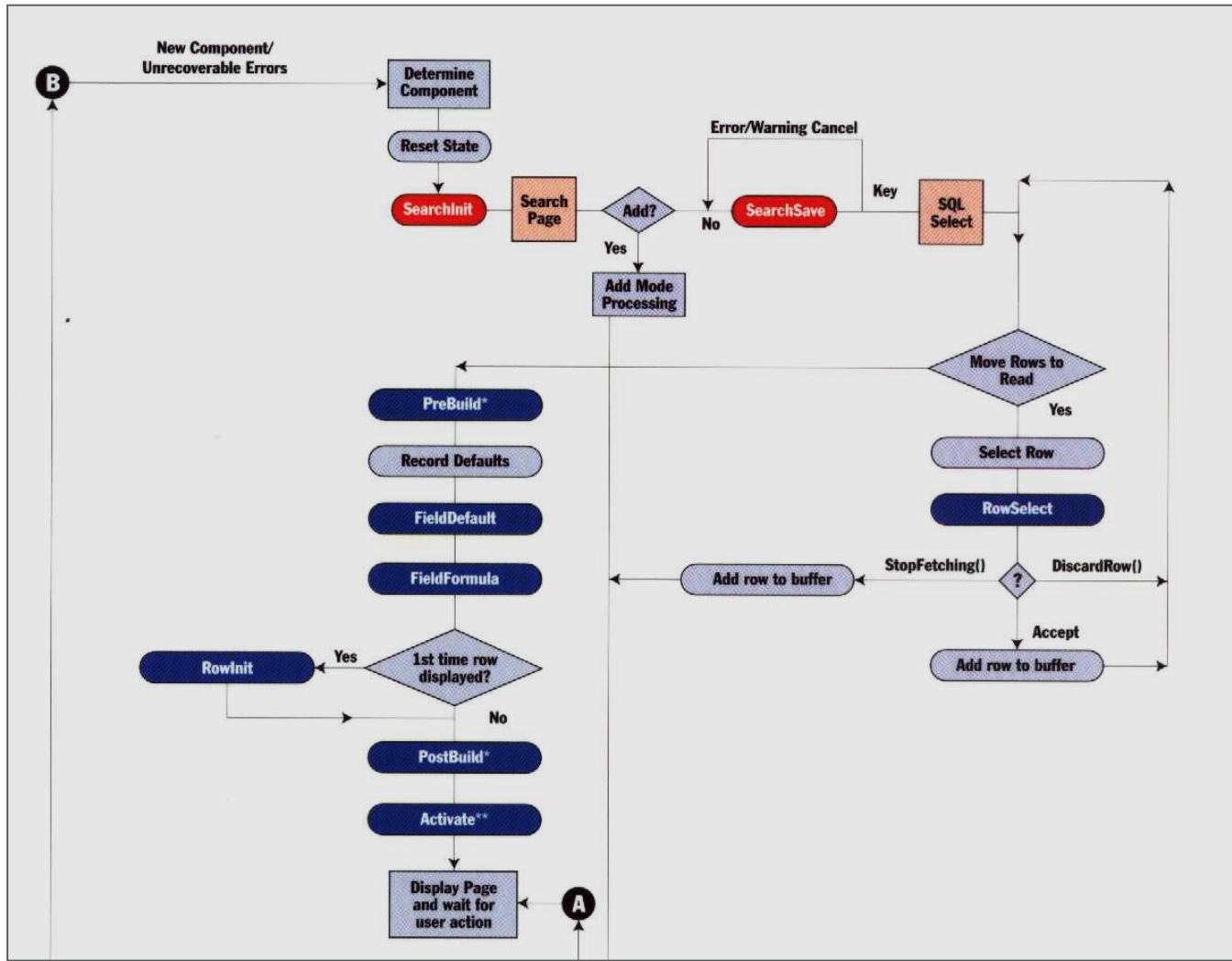
Level Header Level

AppliesTo All Users With Exceptions

Excluded Users

User ID	User Description
1 DVP1	Smith,Jane

# Optimize Event Mapping



```

Application Designer - Untitled - [LOCATION_TBL] LOCATION_SavePostChange [Record PeopleCode]
File Edit View Insert Build Debug Tools Go Favorites Window Help
[File] [Edit] [View] [Insert] [Build] [Debug] [Tools] [Go] [Favorites] [Window] [Help]
[LOCATION] [SavePostChange]
[Field]
local Message aMSG;
Local Rowset &RS0, &RS01, &RS11;
Local Row &RL;
PanelGroup string &PubNodeName;
PanelGroup boolean &ActionCodeRowAdd;
If ActiveRowCount() = CurrentRowNumber() Then
  aMSG = CreateMessage(Message.LOCATION_SYNC);

If aMSG.IsActive Then
  /* If the program is called by a Component Interface, then flush the extra row (Created by Component Create(), CopySetupRowset on Component Interface "LOCATION") from panel buffer.*/
  /*=====
  If (&ComponentName = Component.LOCATION) And
  (&ActionCodeRowAdd = True) Then
    &RS0 = GetLevel0();
    &RS01 = CreateRowset(&RS0);
    &RS0.CopyTo(&RS01);
    &RS01 = &RS01(1).GetRowset(Scroll.LOCATION_TBL);
    &RS01.Flush();
    &R1 = &RS01(1).GetRowset(Scroll.LOCATION_TBL).GetRow(1);
    &R1.CopyTo(&RS11.GetRow(1));
    &RS01.CopyTo(&RS0);
  End-If;
  /*=====
  aMSG.CopyRowsetDelta(GetLevel0()(1).GetRowset(Scroll.LOCATION_TBL));
  /* prevent circular publishes, do not publish back to originating node */
  If AllPubNodeName() Then
    aMSG.DoNotPubToNodeName = &PubNodeName;
  End-If;
  aMSG.Publish();
  End-If;
End-If;
Ready

```

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PEOPLESOFT

Delivered  
Code

&state = IS\_REG\_WRK.IS\_SLNO.Value;  
 &fullname = IS\_REG\_WRK.IS\_DESC.Value;  
 &city = IS\_REG\_WRK.CITY.Value;  
 &FLDNAME = "IS\_STATE";  
 &FLD = GetRecord(Record.IS\_EMP\_TBL).GetField(Field.IS\_STATE);  
  
 SQLExec("Select IS\_STATE FROM PS\_IS\_REGION\_TBL WHERE IS\_STATE = :1", &state, &st);  
  
 If &st <> &state Then  
 SQLExec("SELECT MAX(ROWID) FROM PSXLATITEM WHERE FIELDNAME = 'IS\_STATE' AND SYNID = :1", &SYNID);  
 &SYNID = &SYNID + 1;  
 SQLExec("insert into PSXLATITEM values('IS\_STATE':1,:2,'A':3,:4,:5,'PS':6)", &state,  
 &city, &fullname, &state, &Datetime, &SYNID);  
 End-If;  
 SQLExec("Insert into PS\_IS\_REGION\_TBL (IS\_STATE,IS\_SLNO,IS\_DESC,IS\_CITY,IS\_DATES,IS\_SYNID) values(:1,:2)", &state, &city);  
 &FLD1 = GetRecord(Record.IS\_EMP\_TBL).GetField(Field.IS\_STATE);  
 &rec1 = CreateRecord(Record.PSXLATITEM);  
 &Sql1 = CreateSQL("SELECT \* FROM PSXLATITEM WHERE FIELDNAME = 'IS\_STATE'");  
 &FLD1.ClearDropDownList();  
 While &Sql1.Fetch(&rec1);  
 &CodeIn = &rec1.FIELDVALUE.Value;  
 &DescIn = &rec1.XLATLONGNAME.Value;  
 &FLD1.AddDropDownItem(&CodeIn, &DescIn);  
 End-While;

Your Custom Code

# Optimize

## Drop Zones on Key Expenses Pages – Current Page w/No Drop Zones

Delivered in  
PI-32

Expenses

### My Expense Reports

Kenneth Schumacher 

KU0042  
Engineering

Returned	0
Not Submitted	5
Awaiting Approval	5
Pending Payment	1
View All	11

**Not Submitted** 5 rows

 Create Expense Report

Actions	Description	Business Purpose	Report ID	Updated Date	Amount		
	Consulting and product demo	General Travel and Expense	0000000140	08/16/2018	0.00	USD	
	Consulting and product demo	General Travel and Expense	0000000138	08/03/2018	0.00	USD	
	Training	Customer Visit	0000000068	04/10/2012	0.000		
	Meeting costs	Off-site Meeting	0000000063	04/10/2012	0.000		
	Training	Customer Visit	0000000050	04/10/2012	0.000		

# Optimize

## Drop Zones on Key Expenses Pages – Drop Zone Top and Bottom of Page

Delivered in  
PI-32

My Expense Reports

Kenneth Schumacher  KU0042 Engineering

Returned 0

**Not Submitted** 6

Awaiting Approval 6

Pending Payment 1

View All 13

Page Name EX\_EXP\_LIST\_FL

Description This is the top drop zone of page EX\_EXP\_LIST\_FL.

**Not Submitted**

Create Expense Report

Actions	Description	Business Purpose	Report ID	Updated Date	Amount
	Consulting and product demo	General Travel and Expense	0000000142	01/29/2019	0.00 USD >
	Consulting and product demo	General Travel and Expense	0000000140	08/16/2018	0.00 USD >
	Consulting and product demo	General Travel and Expense	0000000138	08/03/2018	0.00 USD >
	Training	Customer Visit	0000000068	04/10/2012	0.000 >
	Meeting costs	Off-site Meeting	0000000063	04/10/2012	0.000 >
	Training	Customer Visit	0000000050	04/10/2012	0.000 >

Subpage DZ\_BOTTOM\_SBP

Description This is the bottom drop zone of page EX\_EXP\_LIST\_FL.

# Program Agenda

- 1 ➤ PeopleSoft Overall Investment Strategy
- 2 ➤ Automate
- 3 ➤ Control
- 4 ➤ Optimize
- 5 ➤ Expenses Roadmap

# Get Connected and Stay Informed

## ***Be Heard! PeopleSoft Community Ideas***

My Oracle Support Community (MOSC)

Space List

All Places > My Oracle Support Community > PeopleSoft (MOSC)

## PeopleSoft (MOSC)

Overview Content People Subspaces

SPACES YOU FOLLOW

- Spaces
- Find Space

PEOPLESOFT SPACES

- Accounts Payable & Cash Management - PSFT (MOSC)
- Advanced Benefits - PSFT (MOSC)
- Asset Lifecycle Management (ALM) - PSFT (MOSC)
- Campus Solutions - PSFT (MOSC)
- CRM - PSFT (MOSC)
- Enterprise Performance Management - PSFT (MOSC)
- Expenses & Resource Management - PSFT (MOSC)
- General Ledger - PSFT (MOSC)
- Global Payroll & Absence Management - PSFT (MOSC)
- Grants, Contracts, & Projects - PSFT (MOSC)
- Human Resources & ELM - PSFT (MOSC)
- Lifecycle Management (MOSC)
- Patch Reviews - PSFT (MOSC)

Space List

Submit enhancement requests

Vote on submissions

Share information and best practices

Ask the community questions

On *My Oracle Support*

Spotlight Visit our Communities

### Bring On The IDEAS

Connect..... Collaborate..... Co-Innovate!!!

We have launched a new initiative to capture Enhancement Requests in My Oracle Support Community for Oracle PeopleSoft products. This new process comes in an effort to be more transparent with product improvement ideas and to build a closer, collaborative environment with the PeopleSoft Customer Base. For complete details, see [FAQ Document 2048019.1](#).

Welcome to the PeopleSoft Community Spaces on My Oracle Support. Oracle's PeopleSoft applications are designed to address the most complex business requirements. They provide comprehensive business and industry solutions, enabling organizations to increase productivity, accelerate business performance, and provide a lower cost of ownership.

Quick Links

- PeopleSoft Cumulative Feature Overview Tool (CFO Tool)
- PeopleSoft Update Manager Homepage (in My Oracle Support)
- PeopleSoft Online Documentation (HTML)
- PeopleSoft Video Channel (VFOs and PeopleSoft Talks)

POPULAR CONTENT

- Patch 22522470: PeopleSoft HCM 9.2 for Generic Platform - PEOPLESOFT HCM UPDATE IMAGE 9.2.016 - VIRTUAL BOX by system 2 weeks ago
- Patch 22524316: PeopleSoft FMS 9.2 for Generic Platform - PEOPLESOFT FSCM UPDATE IMAGE 9.2.017 - VIRTUAL BOX by system 4 weeks ago
- Upgrading to PeopleTools 8.54 (Tools Only Upgrade) by CarlaG-Oracle 2 months ago
- Another ACA Round Table scheduled 03/23/16 11:00 AM (PT) by Kristen Emery-Oracle 4 hours ago
- ADVISOR WEBCAST: PeopleSoft HCM Updates for the Affordable Care Act on February 17, 2016 by TracyLavelle -Oracle 1 month ago
- Patch 19905809: PeopleSoft HCM 9.1 for Generic Platform - HRMS 9.1 BUNDLE #21 by system

VIEW BLOGS

- 2016 FMS Maintenance Schedule has been Released! in PeopleSoft Enterprise Support
- Changes introduced with the HCM 9.1 to 9.2 Image 16 Upgrade process in PeopleSoft Enterprise Support
- Oracle Support Delivery Cloud (OSDC): Changes Coming in PeopleSoft Enterprise Support

TWEETS BY @PSFT\_SUPPORT

Tweets by @PSFT\_Support

PeopleSoft Support @PSFT\_Support

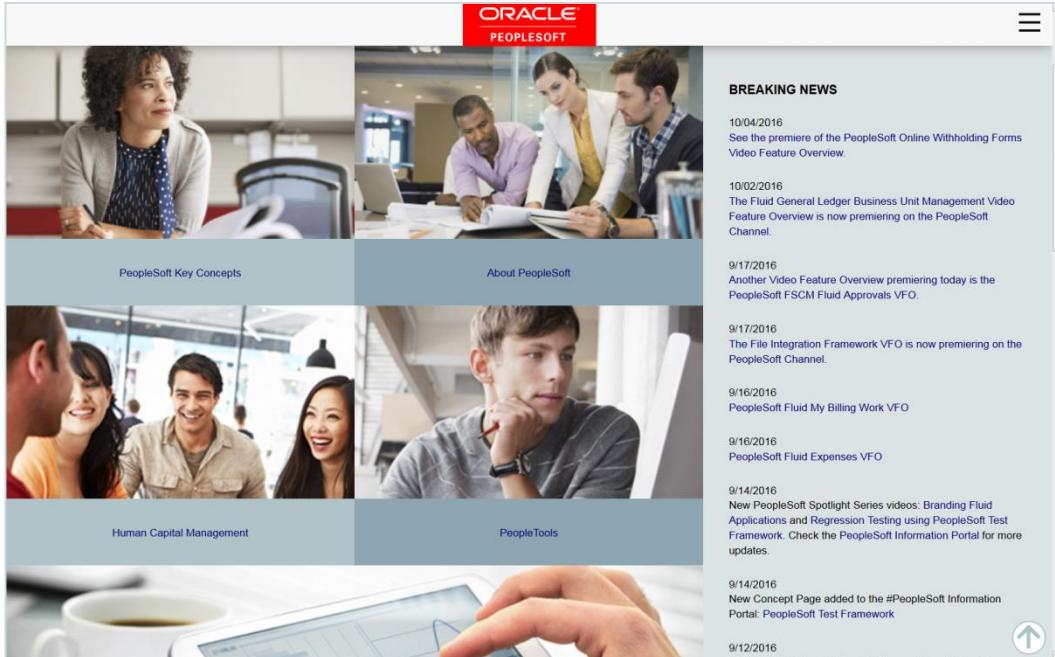
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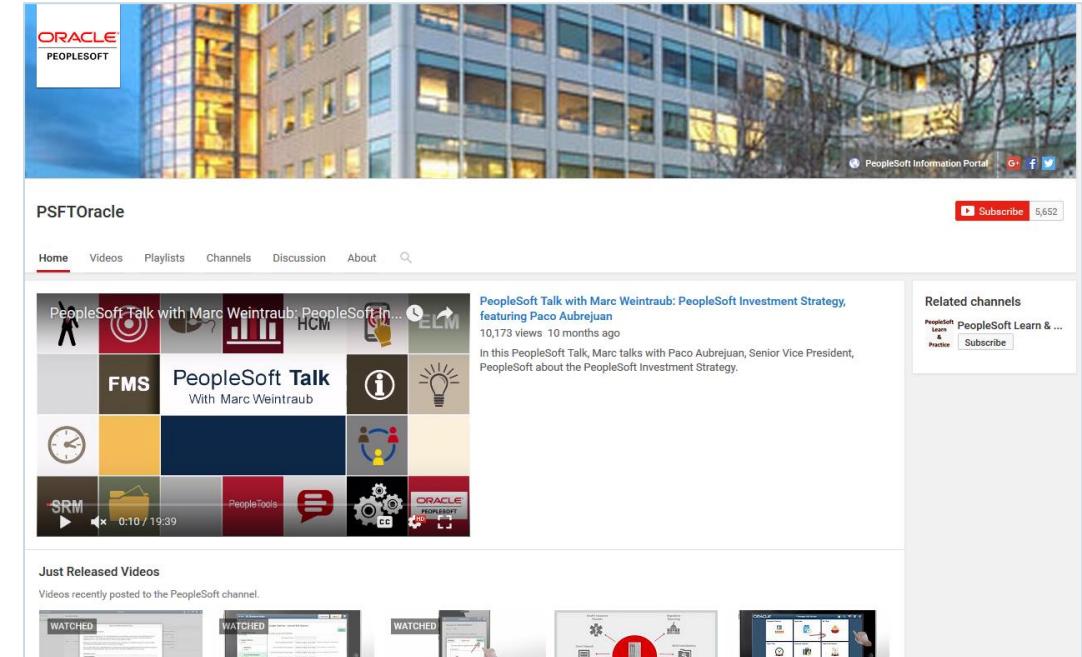
# Get Connected and Stay Informed

## *Key PeopleSoft Information Sources*

### PeopleSoft Information Portal



### PeopleSoft YouTube Channel



@PeopleSoft\_Info



Find us on  
Facebook

Oracle PeopleSoft Page

### Social Media



Oracle PeopleSoft Development  
Group



Blogs

# Experienced Partners

## SpearMC

These partners submitted qualifying case studies in this subject area



# Fluid Expenses - Case Study

PEMCO Insurance - Travel and expense reporting at PEMCO Insurance was a highly manual effort. There were virtually no system integration points in place, and reconciliation of expenses had become a daunting task. A modern toolset was needed, with minimal impact to end users. PEMCO turned to SpearMC to propose the use of Oracle's PeopleSoft Expense Reporting module. SpearMC developed a ten-week program for the deployment program. In order to take advantage of the latest mobile functions available in Image Release 19, SpearMC also proposed an upgrade to the PeopleTools infrastructure to 8.55. In just four weeks SpearMC deployed the PeopleTools upgrade, and then ten weeks later the Expenses toolset was deployed. Visa bank files for expenses on corporate cards began to be integrated on a daily basis, allowing users to pull in expenses without manually coding them. Mobile functionality was deployed to allow users to download pictures of receipts. Expense approvals were automated through a workflow engine, further reducing the movement of paper transactions. - SpearMC

Hackensack Meridian Health - As the HMH system brought on additional hospitals, they needed an integrated, secure, mobile travel expense authorization and approval application. PeopleSoft Expenses with mobile functionality, coupled with Appsian/Duo multi-factor authentication. Travel authorization and mobile approval functionality saved over 60% on uncontrolled travel spend. HMH and SpearMC also won coveted Oracle Innovator Awards - SpearMC



# On-Premise/PeopleSoft Application Sales Contacts

**Peter Hogenson**  
Healthcare & Public Sector



**Nicolas Chavez**  
Financial Services



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