

# PeopleSoft Mobile Expenses

UMRUG Presentation

- **Silence Audible Devices**
- **Note Fire Exits**
- **Partake of Refreshments**
- **Note Quest Staffers (green shirts)**
- **Complete Feedback Form**
- **Ask Questions**

# Agenda

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- **About SpearMC and Your Presenter**
- **Version 9.2 and Tools 8.55 – Classic & Fluid Pages**
- **Demo of Mobile Expenses**

# About SpearMC and Your Presenter



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- **Over 20 years consulting experience focused predominantly in PeopleSoft implementations and upgrades covering all stages of the Project Life Cycle.**
- **System Business Process Analysis, Requirements Study, Fit-Gap Analysis, High Level Design, ChartField and Codeblock Design, Application Development, Testing, Configuration, Training, Deployment and Post-Implementation Support**

## About SpearMC

Founded in 2004, SpearMC is a technology and professional services firm specializing in

- PeopleSoft Financials and Supply Chain Management
- PeopleSoft Human Capital Management and Payroll
- ERP Architecture and Application Development
- Project and Program Management (PMO)
- Change Management
- ERP Training
- Mobile Technology
- Maximo Enterprise Asset
- Oracle Business Intelligence

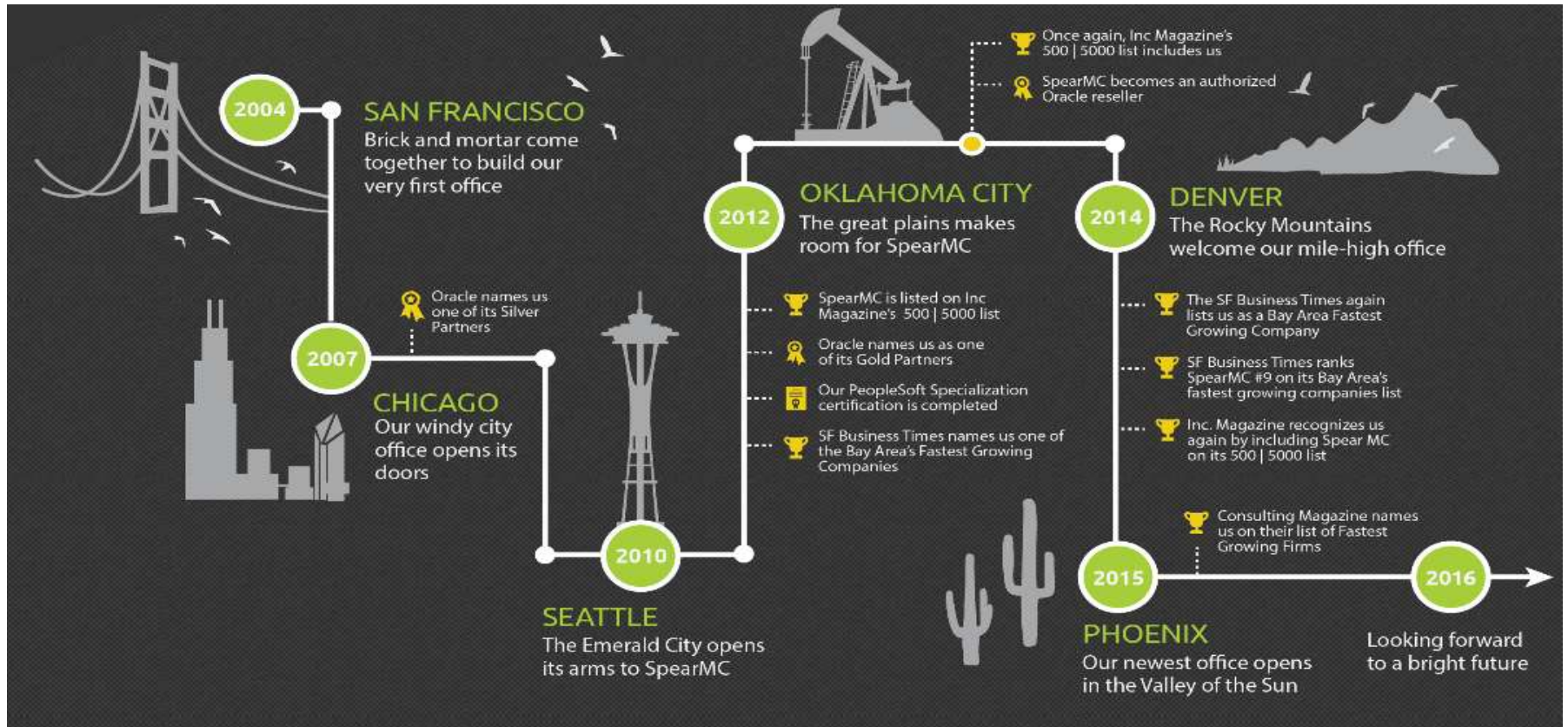
## About SpearMC

### Regional offices in Chicago, Oklahoma City, Seattle and San Francisco

- We focus on local market delivery and capability development in line with industry focus areas unique to the regions we serve.
- Our local and well-connected network of top-tier business analysts, technical leads, developers and project managers keep travel cost to a minimum.

# About SpearMC

A decade of sustained and focused growth.





# About SpearMC

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Each member of our Leadership Team leverages over 20 years of experience in Technology, Financial and Business Transformation.

# About SpearMC

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## Industry focus areas include:

- Energy
- Transportation
- Healthcare/Biotech
- Government
- Media/Technology
- Consumer Products
- Financial Services
- Higher Education

# About SpearMC

## Oracle Gold Partner Since 2008

- PeopleSoft Specialization



Specialized PeopleSoft 8.53  
PeopleTools



Specialized PeopleSoft 9.2



## IBM Advance Business Partner



# PeopleSoft 9.2 Mobile Expenses



# Expenses Module

- **Processing of employee expense reports via PeopleSoft**
  - Utilize classic pages
  - AND/OR
  - Utilize fluid pages
- **Interface with HCM, AP, Payroll, and Banking**
- **Image 19 – Fluid UI (formerly JQUERY)**
- **Image 23 – Fixes 300+ Bugs from Image 19**
- **Image 24 – Promised enhancements**

# Classic Pages

## Creating Expense Reports

Navigation: **Travel and Expenses > Expense Report > Create/Modify**  
 or **Employee Self-Service > Travel and Expenses > Expense Reports > Create/Modify**

Quick entry options:

- User Defaults
- Populate from existing report, entries from my wallet, template
- Quick-Fill
- Copy Expense Lines

Select	Logo	Date	Expense Type	Merchant	Amount	Currency	Non-Reimbursable
<input type="checkbox"/>		06/17/2005	Currency Conversion Fees	DELINQUENCY CHARGE ON 2,177.35	59.88	USD	<input type="checkbox"/>
<input type="checkbox"/>		06/15/2005	Conference/Meeting		11.00	USD	<input type="checkbox"/>
<input type="checkbox"/>		06/02/2005	Hotel/Lodging	THE RITZ CARLTON BOSTON	389.01	USD	<input type="checkbox"/>
<input type="checkbox"/>		06/01/2005	Air Travel	DELTA AIR 0062122059871	202.00	USD	<input type="checkbox"/>
<input type="checkbox"/>		05/31/2005	Meals and Incidental Expenses	LEGAL SEA FOODS #6	80.00	USD	<input type="checkbox"/>

# Fluid Pages

## Creating Expense Reports

Navigation: *Employee Self Service* > *Expenses* > *Create Expense Report*

Quick entry options:

- User Defaults
- Add from Wallet
- None other as of image 19

The screenshot displays the Oracle Expense Reporting interface. At the top, the 'Expenses' dashboard includes a 'Notices' section with two items: one about a 30-day submission deadline and another about the Global Preferred Hotel Program. A 'Create Expense Report' button is also visible. Below this is the 'Add Quick Expense' section with a wallet icon and a plus sign. To the right is the 'My Wallet' section, which features a bar chart showing transaction amounts for categories: LOBBING, MEETING, JOURNAL, MILE, SUPPLY, AIRFARE, CURRENCY, and DINNER. The chart shows LOBBING at approximately 200, MEETING at 150, and others at lower values. Below the chart, it indicates '10 Wallet Transactions'. The main part of the screenshot is the 'Expense Report' form for user Kenneth Schumacher. It includes a 'My Expense' sidebar with a bar chart showing 5 reports. The form has sections for 'General Information' (Business Purpose: General Travel and Expense, Description: Consulting and product demo, Default Location, Reference) and 'Expense Details' (No expenses have been entered). There are buttons for 'Add Expense' and 'Add from My Wallet (10)'. On the right, there are options to 'Attach Receipt' and 'Accounting Details', along with creation and update dates.

# Lessons Learned

## ➤ Do NOT attempt to implement image 19

- Classic page functionality is fine
- Fluid page functionality is lacking

## ➤ Implement image 23 or higher

- Hundreds of bugs fixed in image 23
- Still lacking some functionality

## ➤ Define your external access protocol prior to the implementation

- Don't force your project to define enterprise wide strategy
- Consider alternatives to traditional VPN

## ➤ Work with your bank early and often

- Don't underestimate the timeline to receive test files

## ➤ Expenses workflow is different from traditional AWE

- Delivered approval is at the header level (not line level)



# Demo of PeopleSoft 9.2 Expenses



# SpearMC.com/insights: Tools & Resources

CONSULTING / TRAINING / TECHNOLOGY / INSIGHTS / EXPERIENCE / TEAM

## INSIGHTS

Attending workshops is one way we stay at the forefront of our industry, but speaking at these workshops is really what helps us stay on top. We know not everyone can make it to see us in person, so we also share our knowledge with you here.

### REGIONAL USER GROUPS

[PACIFIC NORTHWEST RUG ▶](#)

[ROCKY MOUNTAIN RUG ▶](#)

[OKLAHOMA CITY EVENTS ▶](#)

[NORCAL RUG ▶](#)

### ORACLE & QUEST CONFERENCES

[QUEST COLLABORATE CONFERENCE PRESENTATION ▶](#)

[QUEST RECONNECT CONFERENCE PRESENTATION ▶](#)

[ORACLE OPEN WORLD PRESENTATIONS ▶](#)

# SpearMC.com/training: Training Options

The screenshot shows a web browser window with the URL <http://spearmc.com/peoplesoft-live-training/>. The page features a navigation menu with 'CONTACT' and 'SEARCH' highlighted. Below the menu, there are several training options listed in a dark grey box with green text and a green chevron icon on the right:

- Public Health Institute: PeopleTools 8.54 Training Success
- Hyatt: PeopleSoft 9.2 HCM Training Success

## PEOPLESOFT V9.2 FOUNDATIONS AND ORACLE UPK

- PeopleSoft v9.2 Foundations (FSCM) ✓
- PeopleSoft v9.2 Foundations (HCM) ✓
- Oracle User Productivity Kit (UPK) Version 12.1 ✓

## PEOPLESOFT V9.2 FINANCIALS AND CASH MANAGEMENT

- PeopleSoft v9.2 Introduction to Financials (FSCM) ✓
- PeopleSoft v9.2 General Ledger ✓
- PeopleSoft v9.2 nVision ✓
- PeopleSoft v9.2 Accounts Payable ✓



# Questions?

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