PeopleSoft Mobile Expenses

UMRUG Presentation

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- **Silence Audible Devices**

- **Note Fire Exits**

- **Partake of Refreshments**

- **Note Quest Staffers (green shirts)**

- **Complete Feedback Form**

- **Ask Questions**

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SpearMC

Agenda

- **About SpearMC and Your Presenter**

- **Version 9.2 and Tools 8.55 – Classic & Fluid Pages**

- **Demo of Mobile Expenses**

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SpearMC

About SpearMC and Your Presenter

Randall Johnson
Managing Director
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www.SpearMC.com

- **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

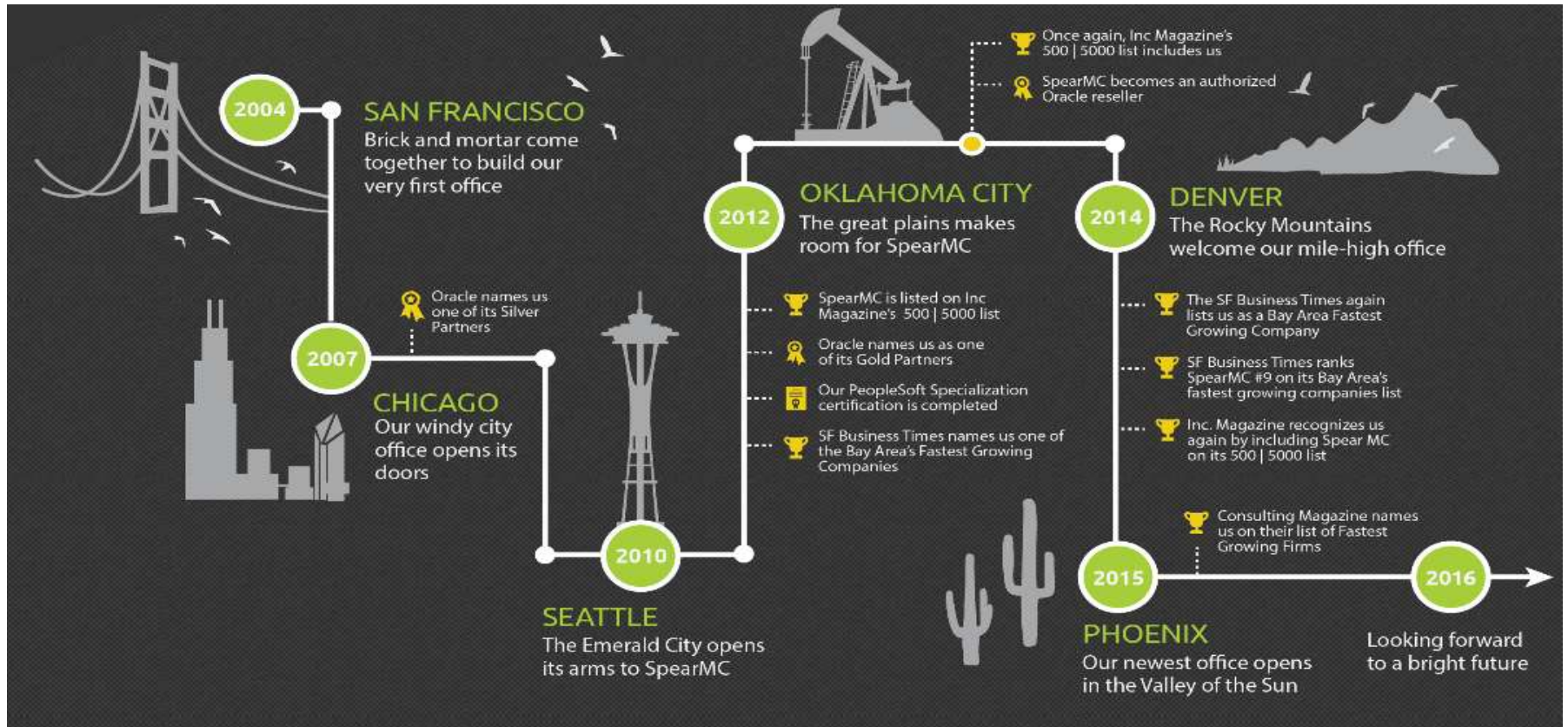- Maximo Enterprise Asset

- Oracle Business Intelligence

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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.

A decade of sustained and focused growth.

About SpearMC

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

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About SpearMC

Industry focus areas include:

- Energy

- Transportation

- Healthcare/Biotech

- Government

- Media/Technology

- Consumer Products

- Financial Services

- Higher Education

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About SpearMC

Oracle Gold Partner Since 2008

- PeopleSoft Specialization

ORACLE Gold Partner
Specialized PeopleSoft 8.53 PeopleTools

ORACLE Gold Partner
Specialized PeopleSoft 9.2

ORACLE PARTNER STORE

IBM Advance Business Partner

Business Partner IBM

NETSUITE

ORACLE Gold Partner

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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

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

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)

SpearMC

Demo of PeopleSoft 9.2 Expenses

SpearMC.com/insights: Tools & Resources

SpearMC.com/training: Training Options

Questions?

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