PeopleSoft Mobile Expenses

your modern fluid expense management and reporting tool







Agenda

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







About SpearMC and Your Presenter







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.







About SpearMC

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

- PeopleSoft FSCM, HCM, ESA
- PeopleTools Development and System Administration
- PeopleSoft Test Framework
- Oracle Cloud ERP and HCM

- PeopleSoft Training
- **Project Management**
- **Oracle Public Cloud**
- QA & Test Automation
- **Host Analytics EPM**







Our History







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

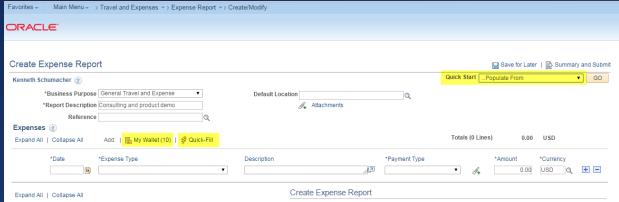




Classic Pages

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







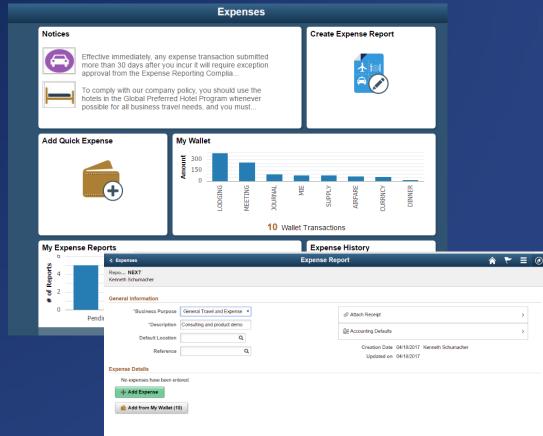


Fluid Pages

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









SpearMC Packaged Solutions – PeopleSoft Mobile Expenses

SpearMC	Basic Plan	Deluxe Plan	Platinum Plan
Number of Expense Reports	0 – 1,000	1,001 – 5,000	5,001 – 10,000
Currency	Single Currency	Single Currency	Multi- Currency
Timeline	7-8 Weeks	9-10 Weeks	13-15 Weeks
PeopleSoft Mobile Expenses*	Included	Included	Included
PeopleSoft Mobile Approvals*	Included	Included	Included
Workflow Levels	Single - Manager	Single - Manager	Multi-Level
Credit Card Bank	Citibank Visa/Master card	Citibank Visa/Master card	Customer Choice
Fixed Cost	\$64,500	\$97,500	\$140,000

^{*} Must be on PeopleTools 8.55; PeopleSoft 9.2, Image 23







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)
 - Image 23 'breaks' workflow, some retro-fixes are needed







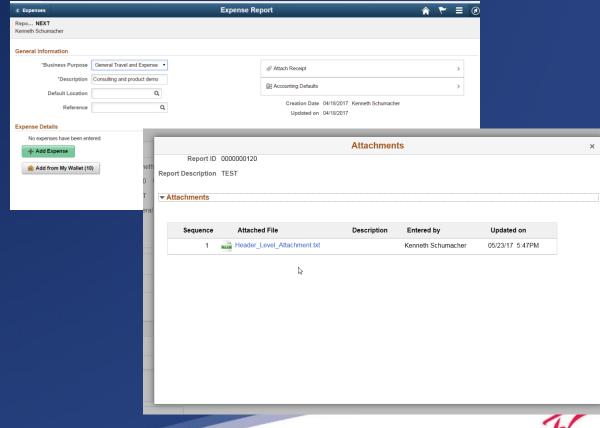
Image 23 Fluid Approval Pages

Approving Expense Reports

Navigation: *Employee Self Service > Approvals*

Approver View:

- Attachments at header
- Attachments at line









Demo of PeopleSoft 9.2 Expenses







SpearMC.com/insights: Tools & Resources

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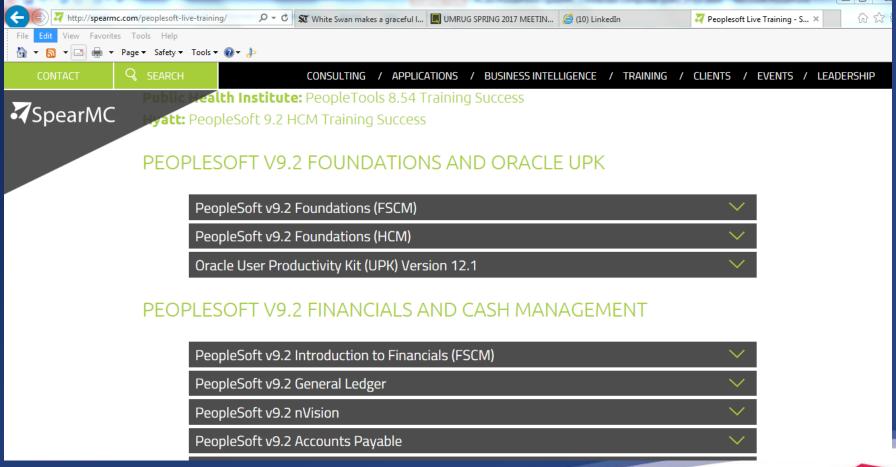
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SpearMC.com/training: Training Options









Questions?





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