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CAS4436
Customers Using Personalization, Configuration, Customization in PeopleSoft

Paul Kalinowski**, Project Manger, NYS Statewide Financial System**
Mark Boaz**, Application Solution Architect, Mutual of Omaha**
Greg Kelly**, Product Strategy Manager, Oracle**

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Agenda

1. Introduction
2. Paul Kalinowski, NYS Statewide Financial System
3. Mark Boaz, Mutual of Omaha
4. Wrap Up and Q&A

Paul Kalinowski
NYS Statewide Financial System

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STATEWIDE FINANCIAL SYSTEM

NYS Statewide Financial System

Using Personalization, Configuration, and Customization in PeopleSoft

10/23/2018

For use with New York State agency staff and SFS users. Contents subject to change.

SFS Overview

The Statewide Financial System (SFS) is New York State government's accounting and financial management system implemented in April 2012.

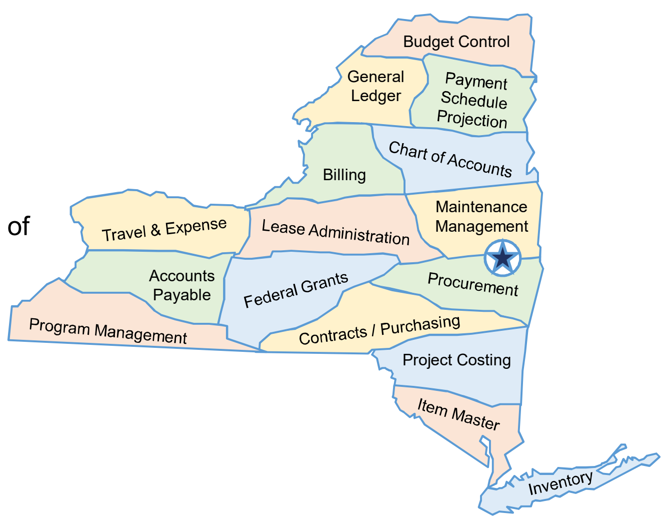
SFS facilitates the sharing of financial information among:

- NYS agencies,
- Control agencies (the Division of the Budget and the Office of the State Comptroller),
- The State Legislature, and
- Vendors doing business with New York State.

The enterprise system supports the transaction processing of all NYS Agencies and supports the processing of the NYS Business Services Center – the state's shared administrative services center.

New York State's Enterprise Solution

A comprehensive system that meets the financial needs of New York State



Annual Transaction Volume

Over 14 million transactions completed

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Over $100 billion in transactions flowing through SFS

includes these categories… and more

Over 5 million Requisitions

Over 300,000 Expense Reports

Over 600,000 Purchase Orders

Over 6 million Vouchers

Meeting Volume Management Challenges

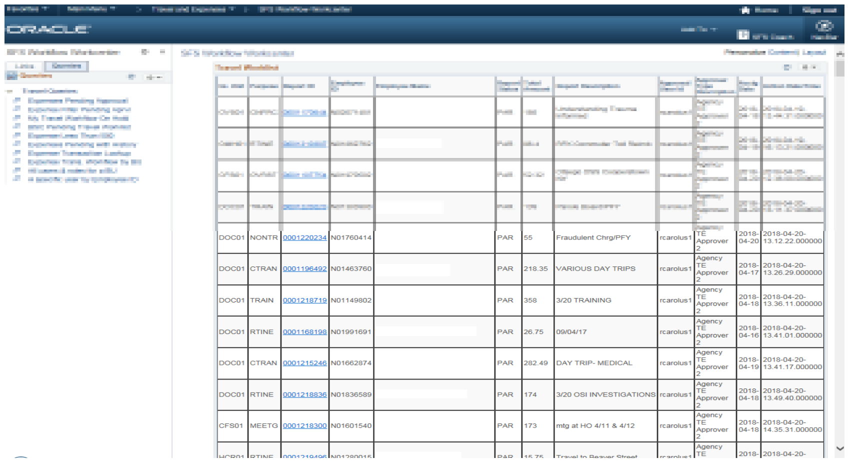
Travel and Expense Volume Challenges

- Over 300,000 Expense Reports are processed in NYS annually – 1.9 M Expense Reports paid since April 2012
- Audit for most occur at the NYS Business Service Center
- Custom work list used by BSC for managing workload and work assignments
- Configured WorkCenter to deliver custom and delivered content
- Configured risk templates to help reduce volume required auditor review

Travel and Expense Audit WorkCenter

- Provides travel audit staff delivered and custom content necessary for efficient review and processing of Expense Reports
- Using WorkCenter rather than building in modifications to statuses and pages minimizing retrofit effort when applying image updates.

TE Audit WorkCenter



Custom Worklist and Queries work together to provide auditor

Risk Based Template

- NYS Travel Policy has many business rules
- Risk Template configured to identify Expense Reports that don't require a manual audit
- Risk Based evaluation applies to approximately 155,000 Expense Reports
- Annually, approximately 17%, 26,000 Expense Reports approved automatically based on risk evaluation

Risk Based Template

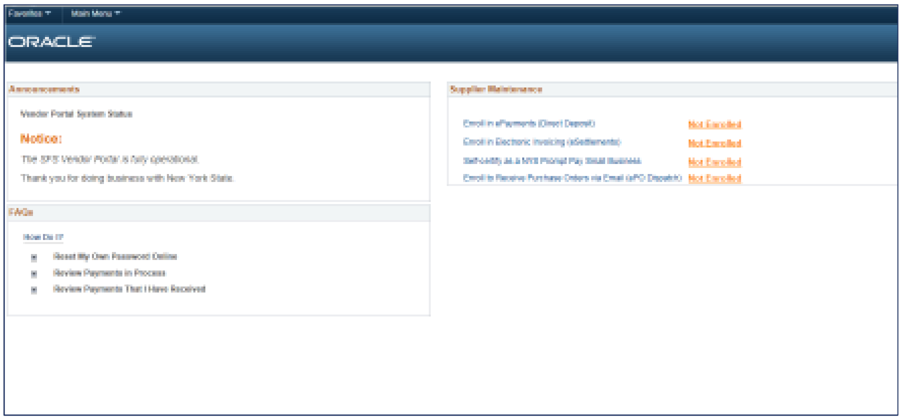
Configured for Final Approvers only – Supervisor and Agency approval on all Expense Reports required

The NYS Vendor File

- The vendor file went live January 2011, file is managed by the NYS Vendor Management Unit.
- Consists of more than 275,000 vendor records.
- Add 100 vendor records per day.
- Issue nearly 40,000 1099s annually.
- Increase in Supplier users from 4,200 in 2017 to 5,400 in 2018

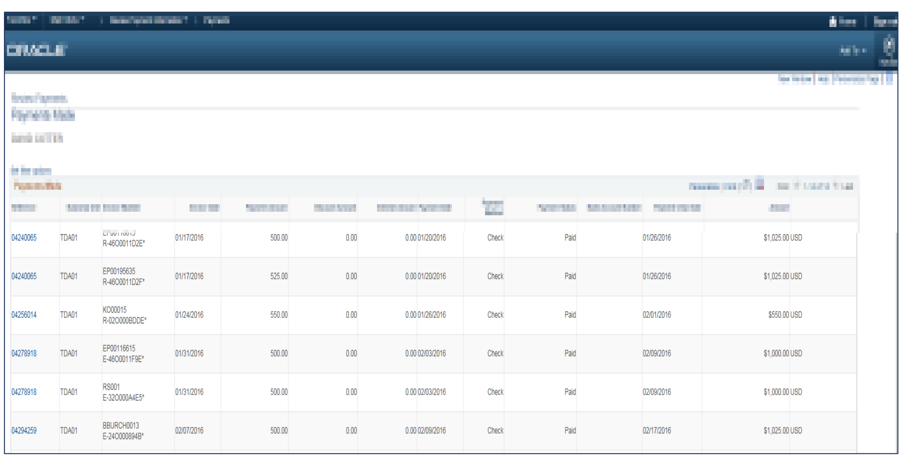
For use with New York State agency staff and SFS users. Contents subject to change.

Supplier Self Service



Vendor is able to maintain own information online and enroll for eProcesses

Viewing Payment Details

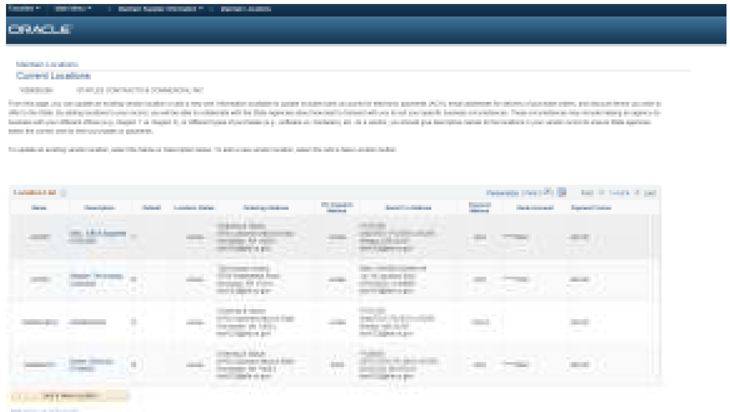


Payment combining can make receiving payments complicated

For use with New York State agency staff
and SFS users. Contents subject to change.

Vendor is able to Add and Update Locations

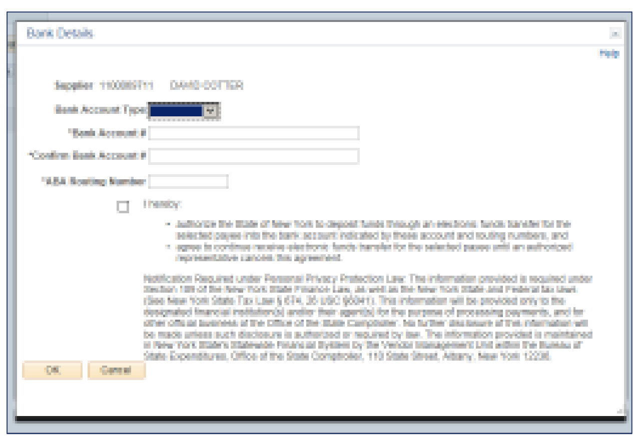
Create and maintain locations for business needs



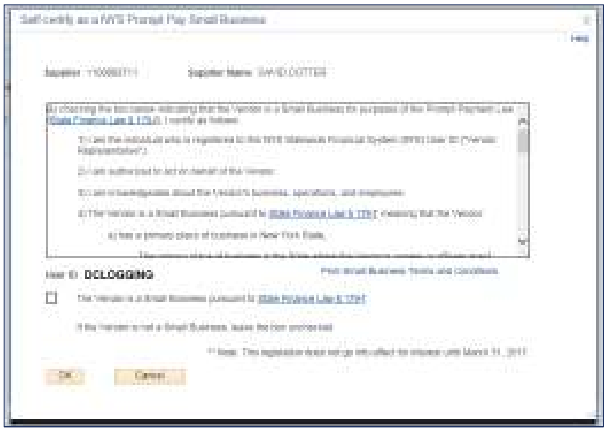
Agency users select the correct location for the purchase/payment they are making

Add or Update Bank Information

Vendor can add banking information when adding a new location and update banking information on existing locations.



Vendors can Self-Certified for SB Benefits



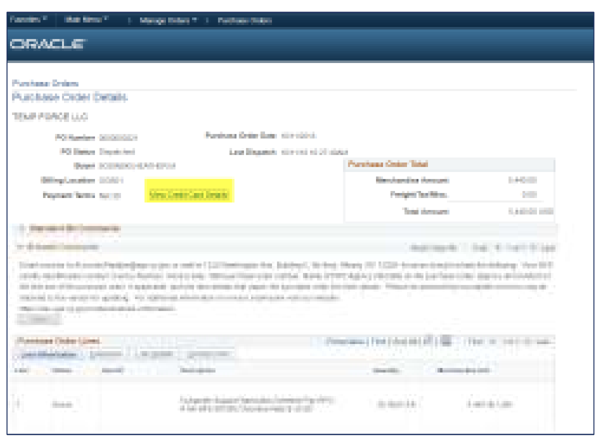
Certified Small Businesses are eligible for prompt payment interest after 15 days on invoices submitted electronically.

Standard Prompt payment interest begins after 30 days.

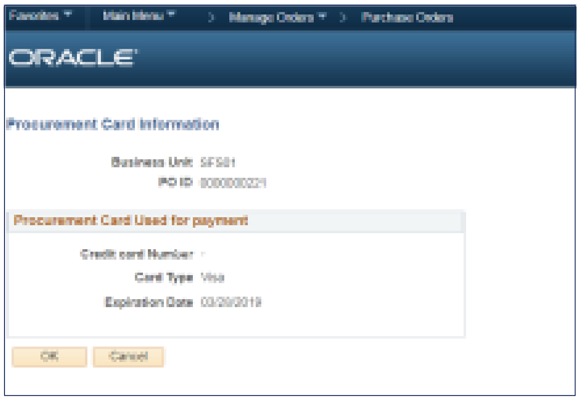
Using Credit Card as Method of Payment

The email that delivered the PO informs the vendor that a credit card is being used as a method of payment for this order and provides them a link to the eSupplier log in.

Vendor can see that a credit card was used on the purchase order and clicking on the link



Vendor is able to access CC Info



With access to the card information payment can be received once order fulfillment is complete

Keeping the Cost Down

Customization Maintenance

- Apply Business Rules as a process not a customization
- Configuration where possible
- Image Upgrade Retrofits
- Applying fixes

Mark Boaz
Mutual of Omaha

Mark Boaz – Mutual of Omaha

Session CAS4436
Technical Personalization, Customization, and Configuration

October 23, 2018

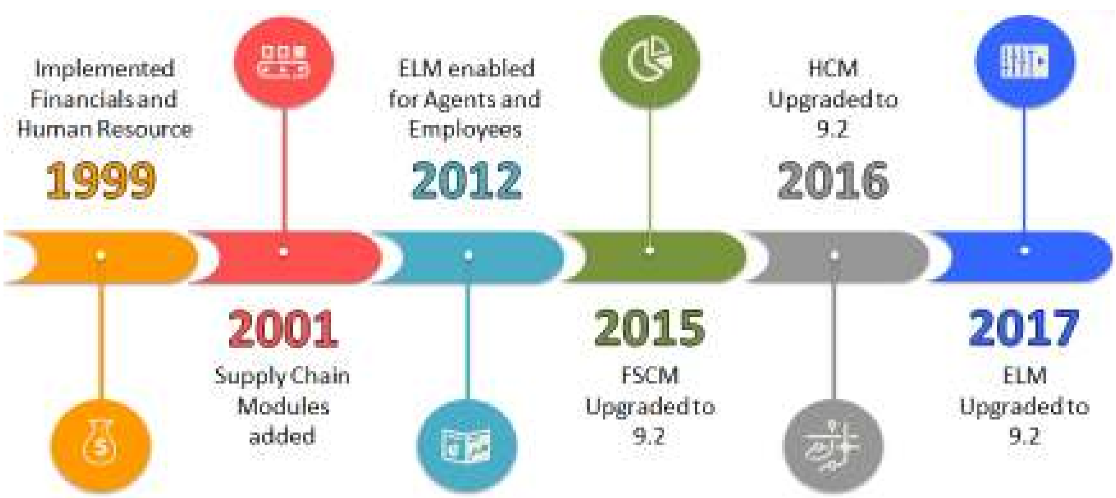
Mark Boaz – Application Solution Architect

- Mutual of Omaha Employee for over 30 years, currently supporting the Finance area.
- Helped select and implement the PeopleSoft Financials suite in 1998 and have supported the PeopleSoft Financial/SCM applications for the last 20 years.
- Involved with the management and support of over 40 other finance and investment applications.

› Mutual of Omaha

- Founded in 1909
- Ranked #342 on the Fortune 500 list
- Multi-line insurance, banking and financial products for individuals, businesses and groups in the USA
- Sponsored the Mutual of Omaha's Wild Kingdom TV series that aired for 25 years

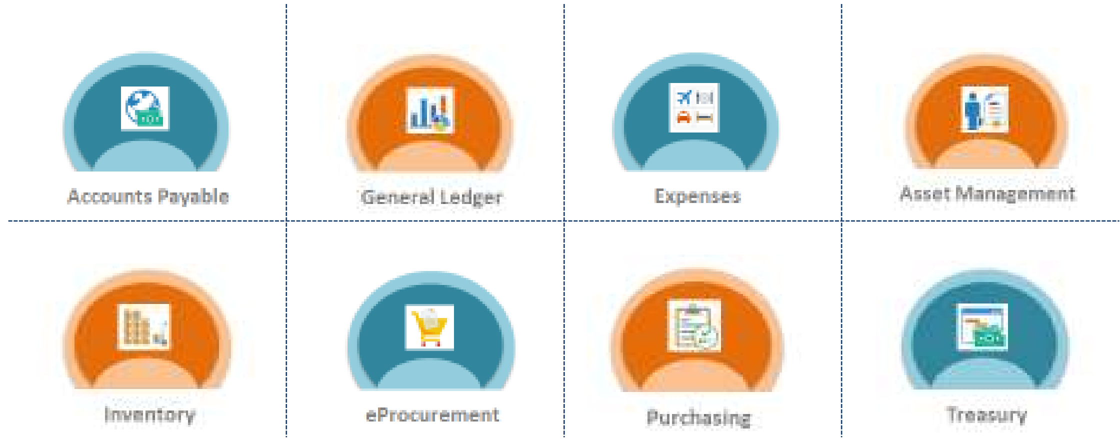
› PeopleSoft Timeline @Mutual of Omaha



› PeopleSoft Financial/SCM Modules

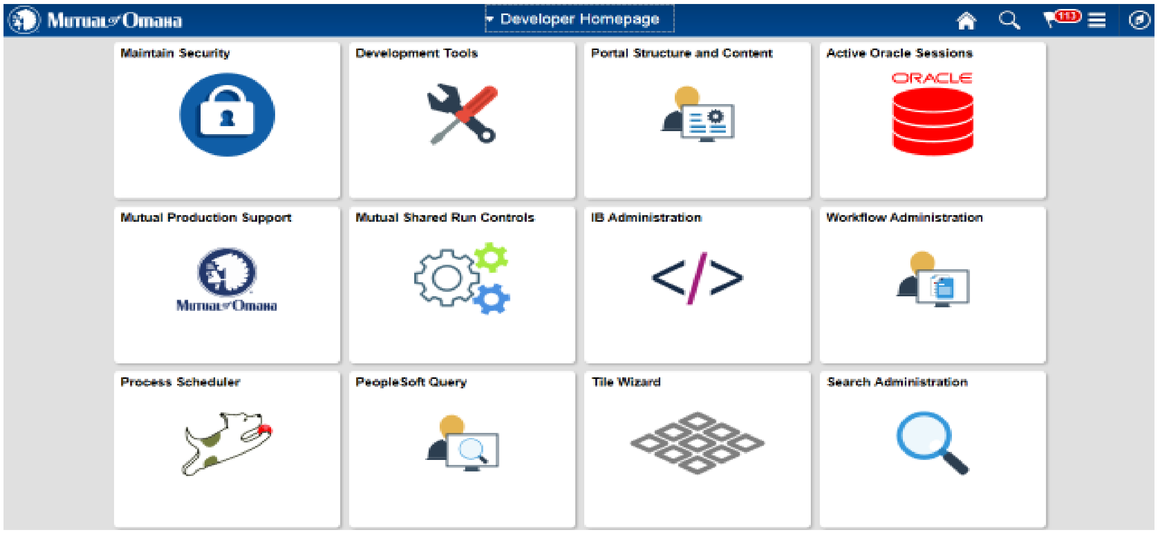
Application: 9.2.24 **PeopleTools**: 8.55.17

Next update scheduled for 2019-Q2



› Personalization: Finance Homepage

› Personalization: Developer Homepage



Mutual of Omaha 33

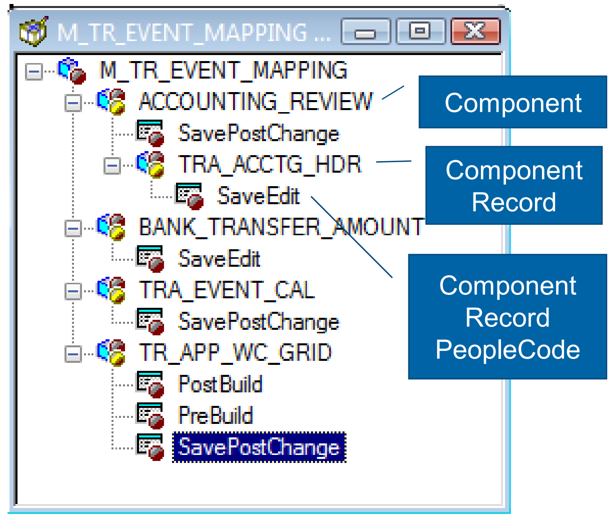
› Personalization: Developer Homepage Tiles

- Navigation Collections of commonly used tools
  - Saves time, clicks just like tiles for business users
  - Makes new tools visible to all developers

Mutual of Omaha 34

› Configuration: Event Mapping

- Use Event Mapping to isolate custom PeopleCode
- Create an Event Mapping App Package for each module
  - Structured the App Package based on the context of the event
  - Consolidate functional logic to simplify impact analysis

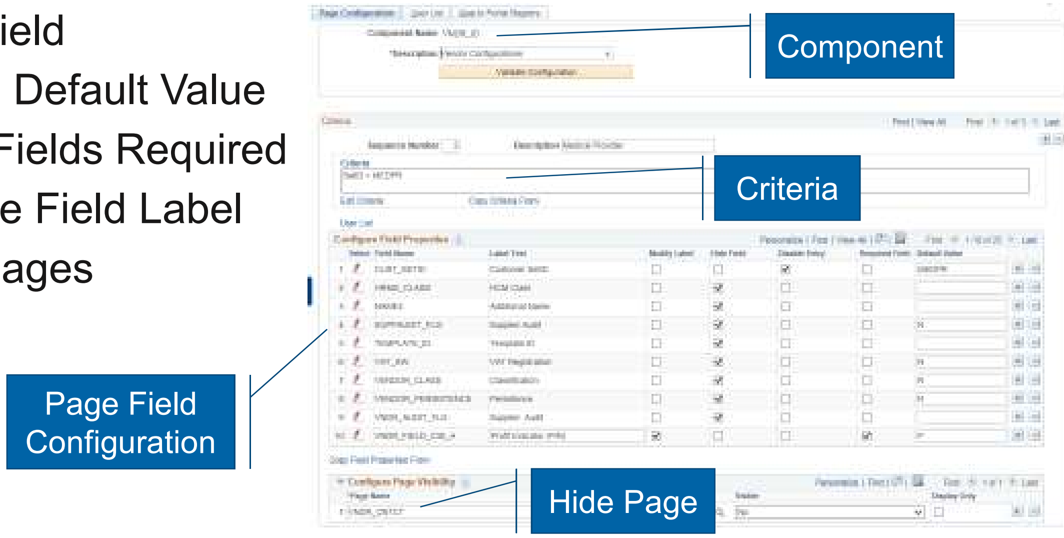


› Configuration: Page Field Configurator

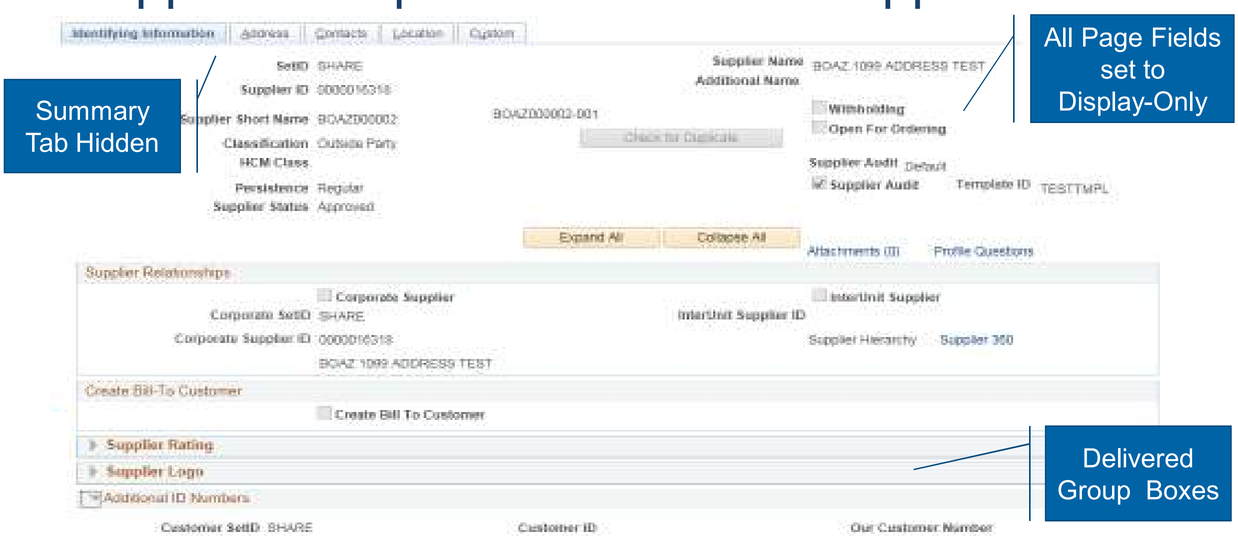
- Use Case
  - New set of suppliers required to support a business process
  - Users needed a simpler maintenance page with only the pages and fields required for their function
  - Update labels and assign default values on the delivered custom supplier fields used to support this new set of suppliers
  - Allow users to update their suppliers, but have only view access for other suppliers

› Configuration: Page Field Configurator

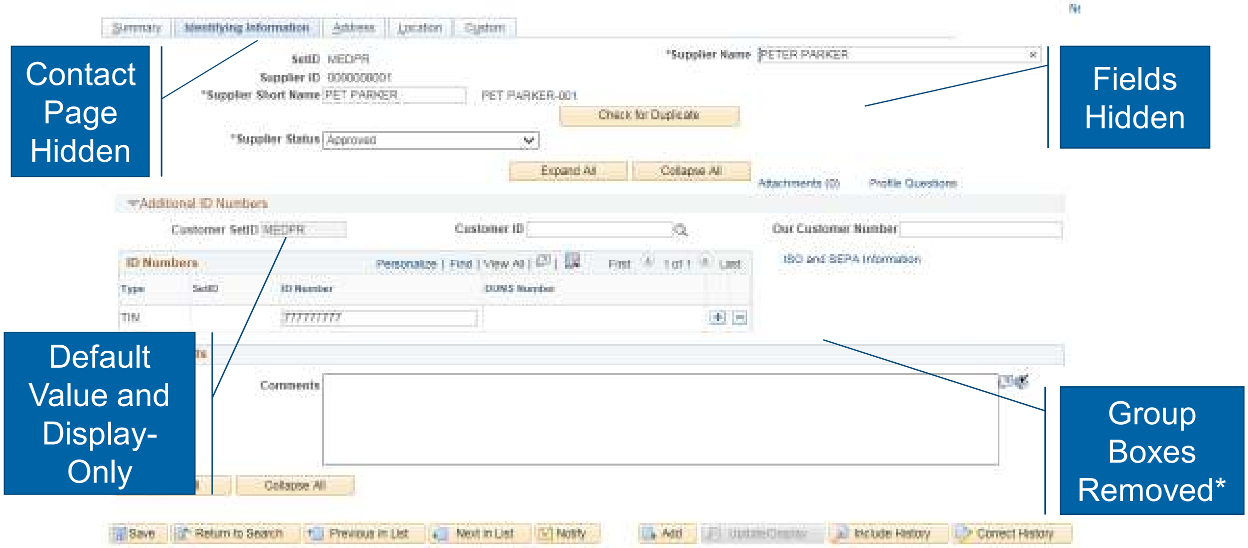
- Hide Field
- Assign Default Value
- Make Fields Required
- Change Field Label
- Hide Pages



› Supplier Component: Standard Suppliers



› Supplier Component: New Suppliers



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› Lessons Learned

- Mutual of Omaha is leveraging the image analysis process to gradually move existing customizations to configuration when possible
- Good development techniques (configuration & customization) will minimize the number of conflicts to work when applying images
- Configuration tools should be used when possible to minimize the long-term cost of the change.
- Personalization options (Homepages, Tiles, Navigation Collections, etc.) will continue to be used to improve efficiency and usability of PeopleSoft for all users

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