

October 22–25, 2018
SAN FRANCISCO, CA

#OOW18

CAS4436
Customers Using Personalization, Configuration, Customization in PeopleSoft

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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

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Paul Kalinowski
NYS Statewide Financial System



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NYS Statewide Financial System

Using Personalization, Configuration, and
Customization in PeopleSoft

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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.

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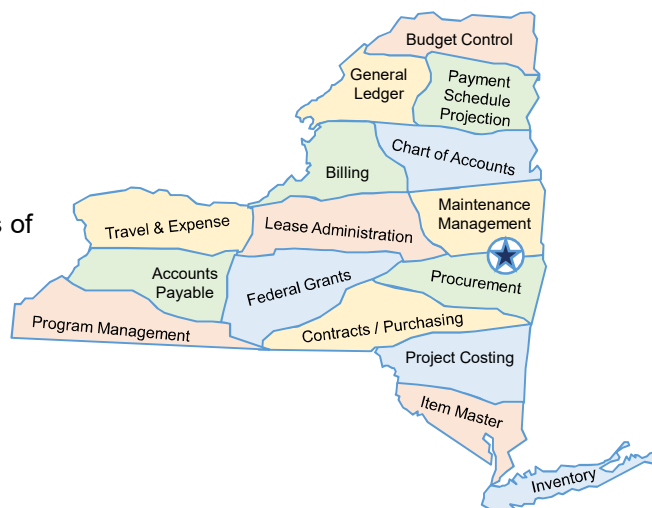
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New York State's Enterprise Solution

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

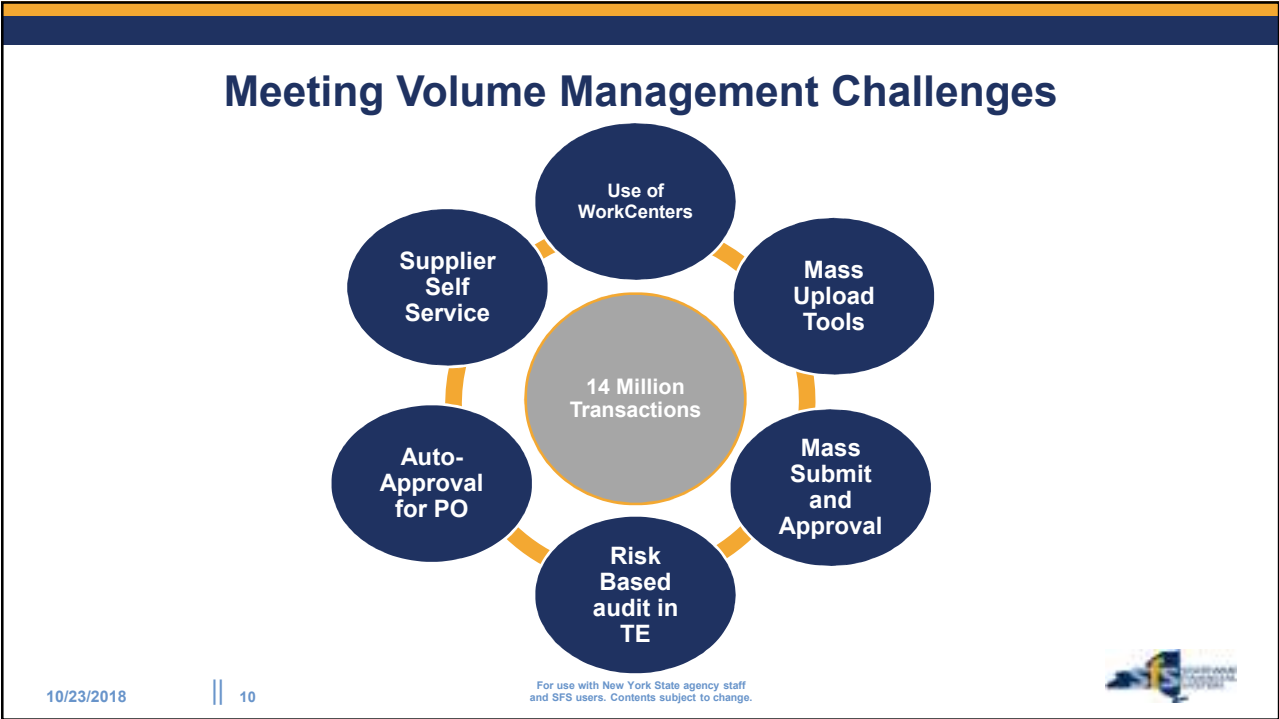
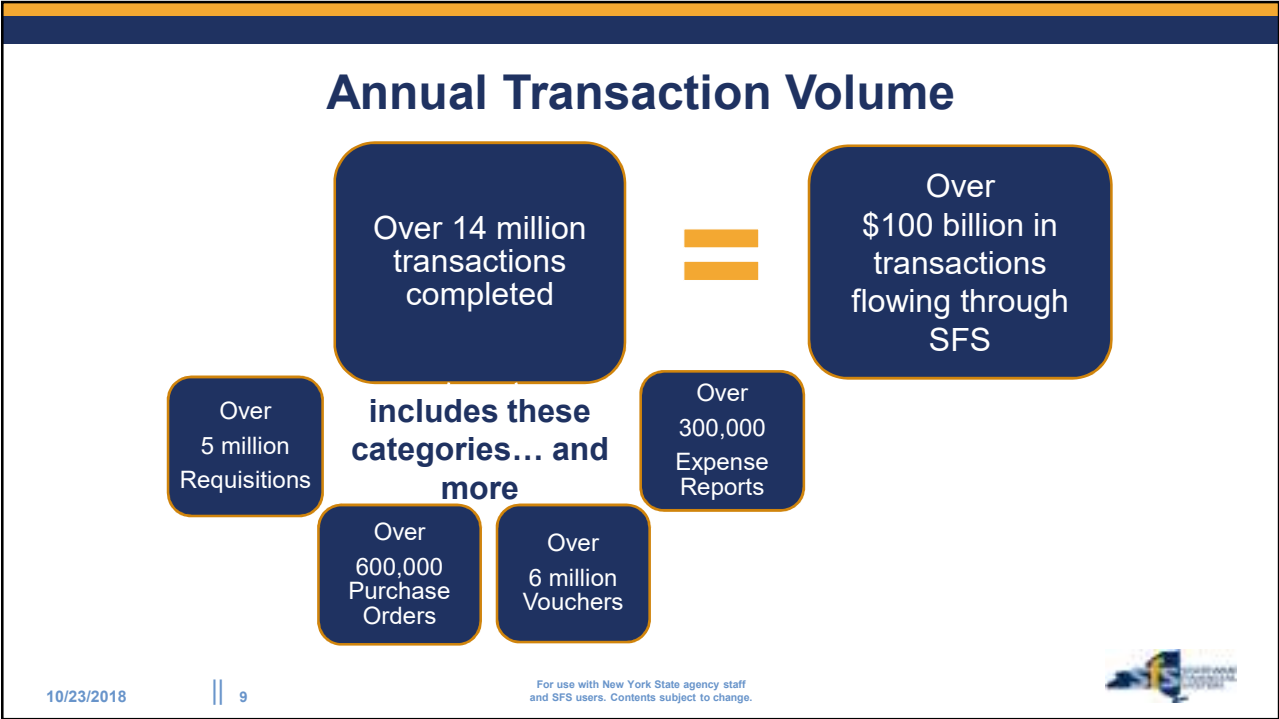


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Travel and Expense Volume Challenges

- 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

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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.

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TE Audit WorkCenter

Doc ID	Package	Report ID	Doc Num	Approval Status	Doc Type	Doc Subtype	Report Description	Doc Owner	Doc Status	Doc Date	Doc Amount	Doc Currency	
DO001	NONTR	0001220234	N01760414		PAR	55	Fraudulent Chrg/PFFY	rcarolus	TE Approver	2018-04-20-04-20	13,12,22,000000		
DO001	CTRAN	0001196492	N01463760		PAR	218.35	VARIOUS DAY TRIPS	Agency TE Approver	2	2018-04-20-04-17	13,36,29,000000		
DO001	TRAN	0001218719	N01148902		PAR	358	3/20 TRAINING	Agency TE Approver	2	2018-04-20-04-10	13,36,11,000000		
DO001	RTINE	0001168169	N01991691		PAR	26.75	09/04/17	rcarolus	Agency TE Approver	2	2018-04-20-04-10	13,41,01,000000	
DO001	CTRAN	0001215249	N01662874		PAR	282.49	DAY TRIP- MEDICAL	rcarolus	Agency TE Approver	2	2018-04-20-04-10	13,41,17,000000	
DO001	RTINE	0001218836	N01836589		PAR	174	3/20 OSI INVESTIGATIONS	rcarolus	Agency TE Approver	2	2018-04-20-04-10	13,49,40,000000	
CF801	MEETG	0001218300	N01601540		PAR	173	mtg at HO 4/11 & 4/12	rcarolus	Agency TE Approver	2	2018-04-18-04-18	14,35,31,000000	
LFD01	RTINE	0001194566	N01180014		PAR	14.74	Travel to Geneva Street	rcarolus	Agency TE	2	2018-2018-04-20-		

Custom Worklist and Queries work together to provide auditor

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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

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Risk Based Template

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

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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

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Supplier Self Service

Supplier Maintenance	
Enroll in ePayments (Direct Deposit)	Not Enrolled
Enroll in Electronic Invoicing (eInvoicing)	Not Enrolled
Enroll as a NY State Vendor (Pay State Business)	Not Enrolled
Enroll to Receive Purchase Orders via Email (ePO Dispatch)	Not Enrolled

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



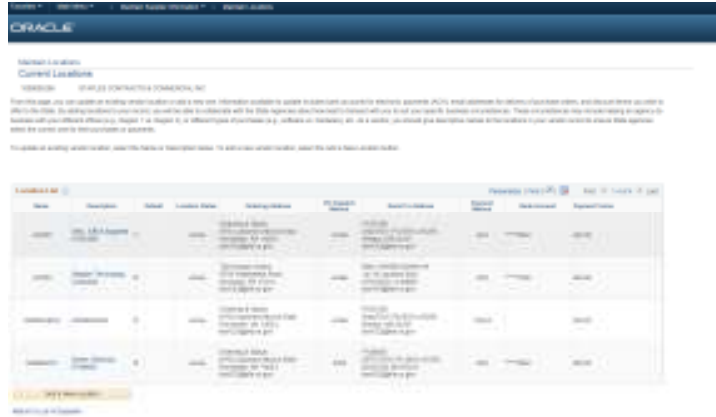
Viewing Payment Details

Vendor ID	Agency ID	Invoice Number	Invoice Date	Invoice Amount	Invoice Balance	Payment Date	Payment Method	Payment Status	Payment Date	Amount
044095	TO401	070010000 R-480001102E	01/17/2016	500.00	0.00	0.00/01/20/2016	Check	Paid	01/20/2016	\$1,025.00 USD
044095	TO401	070010000 R-480001102P	01/17/2016	525.00	0.00	0.00/01/20/2016	Check	Paid	01/20/2016	\$1,025.00 USD
0425614	TO401	AC000015 R-420000002C	01/24/2016	550.00	0.00	0.00/01/26/2016	Check	Paid	02/01/2016	\$550.00 USD
0427816	TO401	EP0010615 E-480001107E	01/31/2016	500.00	0.00	0.00/02/03/2016	Check	Paid	02/03/2016	\$1,000.00 USD
0427816	TO401	R0001 E-320000445P	01/31/2016	500.00	0.00	0.00/02/03/2016	Check	Paid	02/03/2016	\$1,000.00 USD
0434250	TO401	BBR040013 E-340000948E	02/07/2016	500.00	0.00	0.00/02/09/2016	Check	Paid	02/17/2016	\$1,025.00 USD

Payment combining can make receiving payments complicated



Vendor is able to Add and Update Locations

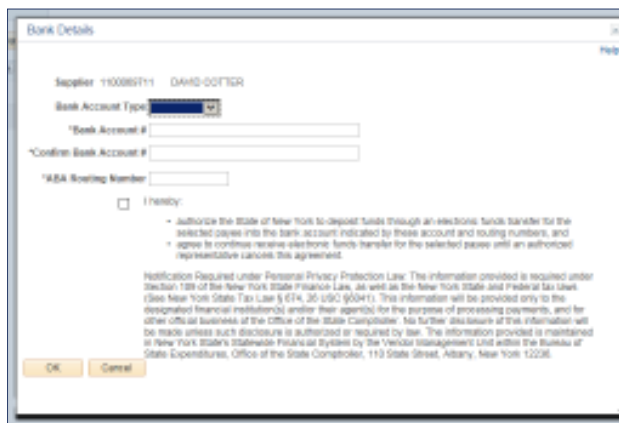


Create and maintain locations for business needs

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.

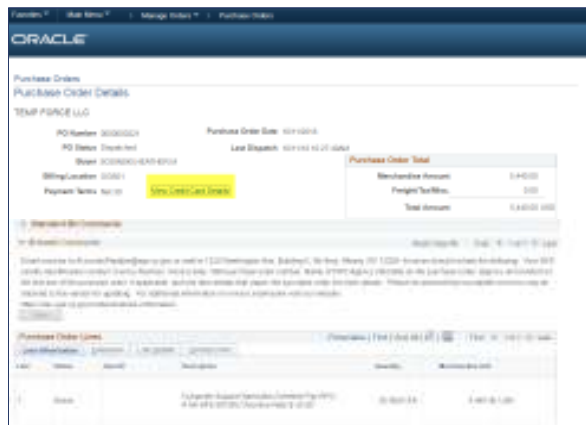
Standard Prompt payment interest begins after 30 days.



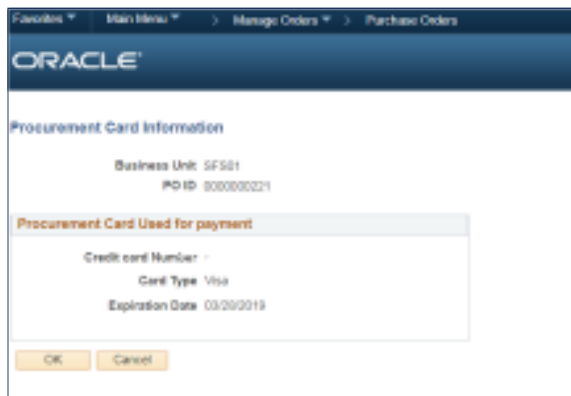
Using Credit Card as Method of Payment

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



The screenshot shows the Oracle Procurement Card Information dialog box. The title bar includes 'Favorites', 'Main Menu', 'Manage Orders', and 'Purchase Orders'. The Oracle logo is at the top. The main content area is titled 'Procurement Card Information' and contains the following fields:

- Business Unit: SFS01
- PO ID: 000000021
- Section: Procurement Card Used for payment
- Credit card Number: (blacked out)
- Card Type: Visa
- Expiration Date: 03/20/2019

At the bottom, there are 'OK' and 'Cancel' buttons.

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

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Keeping the Cost Down

Customization Maintenance


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

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Mark Boaz
Mutual of Omaha



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Mark Boaz – Mutual of Omaha

> Session CAS4436 Technical Personalization, Customization, and Configuration

October 23, 2018

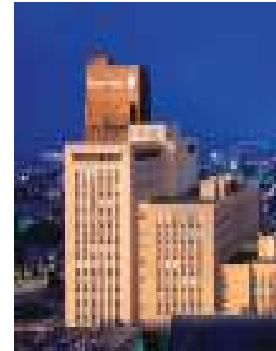


> Mark Boaz – Application Solution Architect

- 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



Accounts Payable



General Ledger



Expenses



Asset Management



Inventory



eProcurement



Purchasing



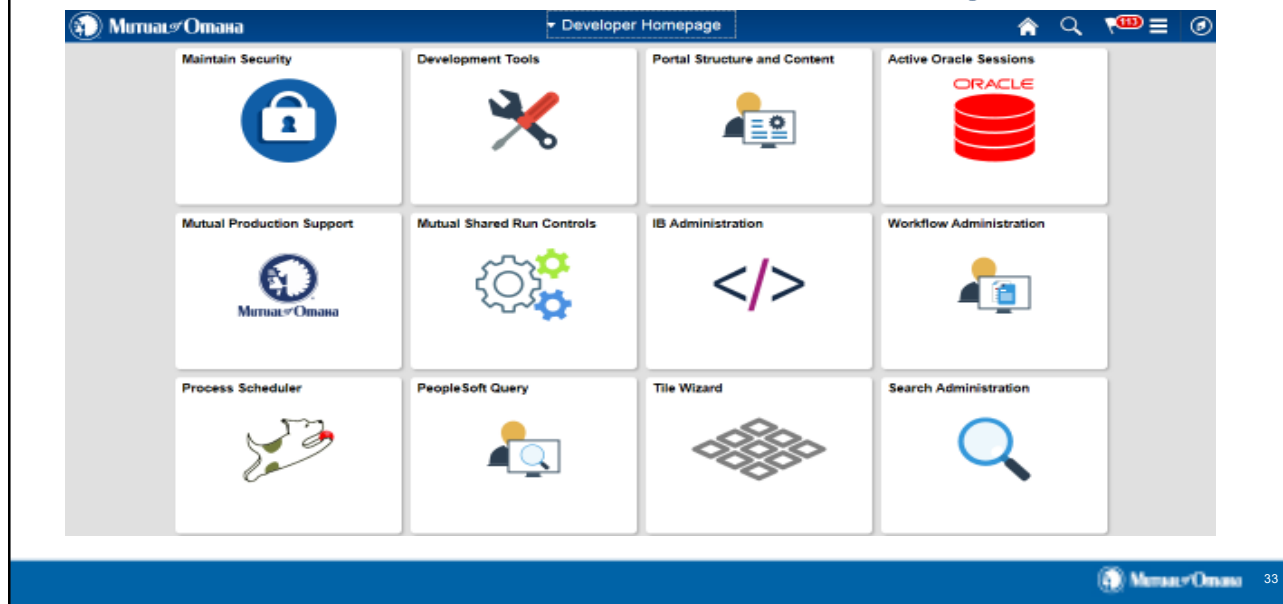
Treasury

> Personalization: Finance Homepage

The screenshot shows a personalized Finance Homepage with a grid of 12 modules. The top navigation bar includes the Mutual of Omaha logo, a dropdown menu for 'Financials Homepage', and home and search icons. The modules are arranged in three rows and four columns:

- Row 1: Approvals (with a '0' notification), PeopleSoft Query, Travel & Expense, Accounts Payable
- Row 2: Asset Management, Asset Management Inquiry, Contract Management, Corporate Retention Schedule
- Row 3: eProcurement, General Ledger, Inventory, Job Cost Application

> Personalization: Developer Homepage



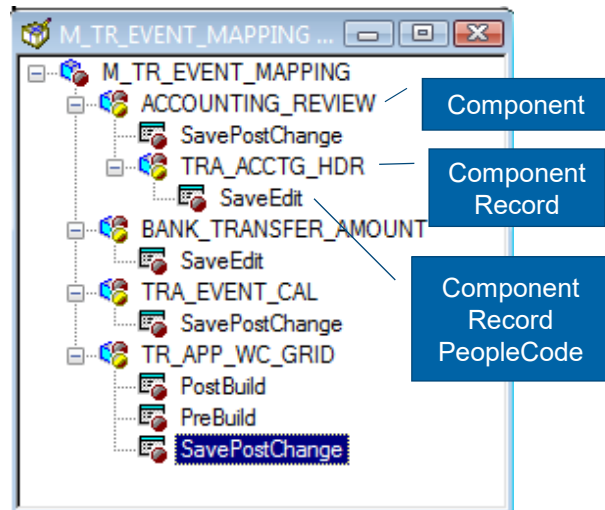
> Personalization: Developer Homepage Tiles

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



› 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

The screenshot shows the 'Page Configuration' window for 'Component'. It includes a 'Criteria' section with a search box for 'Criteria'. Below that is a 'Configure Field Properties' table with columns for 'Field Name', 'Label Text', 'Mandatory', 'Hide Field', 'Default Value', and 'Required Field'. At the bottom, there is a 'Hide Page' section for 'Configure Page Visibility'.

Field Name	Label Text	Mandatory	Hide Field	Default Value	Required Field
1. SUBSET	Customer Suffix	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>
2. HIND_CLASS	HCM Class	<input type="checkbox"/>	<input checked="" type="checkbox"/>		<input type="checkbox"/>
3. ADDR	Address Name	<input type="checkbox"/>	<input checked="" type="checkbox"/>		<input type="checkbox"/>
4. SUPPLIER_ID	Supplier ID	<input type="checkbox"/>	<input checked="" type="checkbox"/>		<input type="checkbox"/>
5. SUPPLATN_ID	Supplier ID	<input type="checkbox"/>	<input checked="" type="checkbox"/>		<input type="checkbox"/>
6. VOT_RAT	VOT Registration	<input type="checkbox"/>	<input checked="" type="checkbox"/>		<input type="checkbox"/>
7. VENDOR_CLASS	Classification	<input type="checkbox"/>	<input checked="" type="checkbox"/>		<input type="checkbox"/>
8. VENDOR_PREFERENCES	Preferences	<input type="checkbox"/>	<input checked="" type="checkbox"/>		<input type="checkbox"/>
9. VENDOR_NEST_FLG	Supplier Avail	<input type="checkbox"/>	<input checked="" type="checkbox"/>		<input type="checkbox"/>
10. UNDELINDED_CSE_F	Unavailable PPH	<input type="checkbox"/>	<input type="checkbox"/>		<input checked="" type="checkbox"/>

Page Field Configuration

Hide Page

> Supplier Component: Standard Suppliers

Summary Tab Hidden

All Page Fields set to Display-Only

The screenshot shows the 'Supplier Component' for 'Standard Suppliers'. It includes tabs for 'Identifying Information', 'Address', 'Contacts', 'Location', and 'Custom'. The main area displays supplier details like 'Supplier Name', 'Supplier ID', and 'Supplier Short Name'. Below this are sections for 'Supplier Relationships' and 'Create Bill-To Customer'. At the bottom, there are 'Delivered Group Boxes' for 'Supplier Rating', 'Supplier Logo', and 'Additional ID Numbers'.

Delivered Group Boxes

> Supplier Component: New Suppliers

The screenshot shows the 'New Suppliers' form in the Supplier Component. The form is annotated with four blue callout boxes:

- Contact Page Hidden:** Points to the top navigation tabs (Summary, Identifying Information, Address, Location, Custom).
- Fields Hidden:** Points to the 'Supplier Name' field.
- Default Value and Display-Only:** Points to the 'ID Numbers' table.
- Group Boxes Removed*:** Points to the 'Comments' text area.

The form includes the following fields and sections:

- SetID: MEDPR
- Supplier ID: 000000001
- *Supplier Short Name: PET PARKER
- PET PARKER-001
- *Supplier Status: Approved
- Customer SetID: MEDPR
- Customer ID: [Search]
- Our Customer Number: [Text]
- ID Numbers table with columns: Type, SetID, ID Number, DUNS Number
- Comments: [Text Area]

Buttons at the bottom include: Save, Return to Search, Previous in List, Next in List, Notify, Add, Update/Change, Include History, Correct History.

> Lessons Learned

- Mutual of Omaha is leveraging the image analysis process to gradually move existing customizations to configuration when possible
- Configuration tools should be used when possible to minimize the long-term cost of the change.
- Good development techniques (configuration & customization) will minimize the number of conflicts to work when applying images
- 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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