

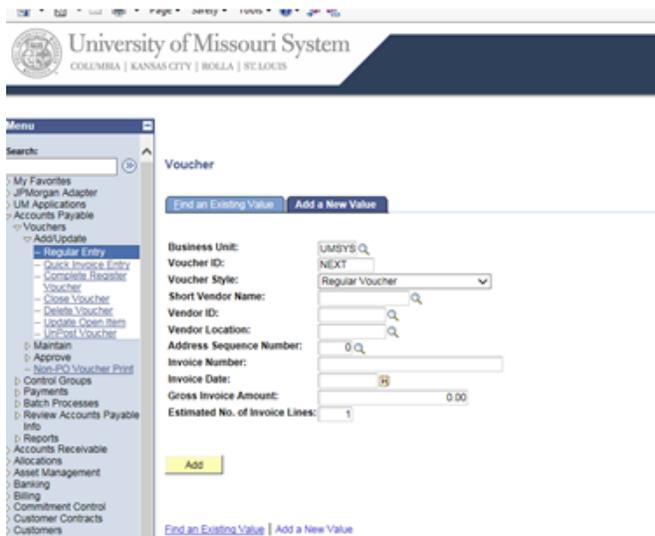
New Features and Functionality Available in PeopleSoft 9.2

The PeopleSoft Finance/Supply Chain upgrade project included a review of current business practices that could be improved by using functionality available in the new version. As a result of this review, several new features will be implemented with the upgrade. A summary of the features and changes by module are listed below.

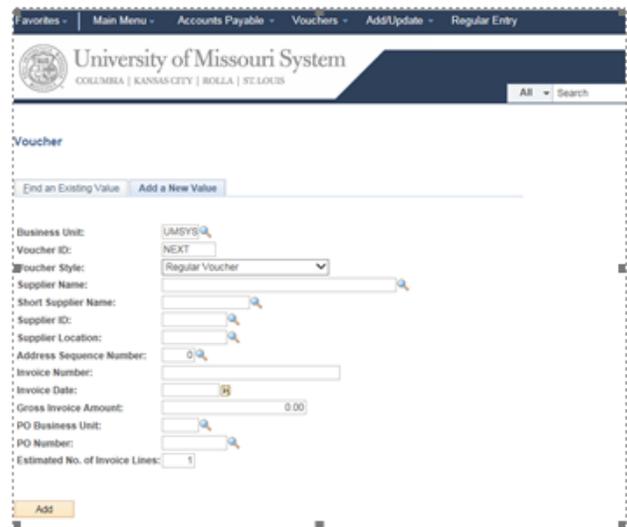
PeopleSoft 9.2 Look and Feel

The design of the menu has changed in version 9.2. When you log into the application, you will notice that the menu is no longer displayed along the left side of the screen, but is now located at the top of the page. Recently Used pages now appear under the Favorites menu, located at the top left. Menus cascade as you navigate to sub folders. Once you have navigated to a page, your menu path will continue to display along the top.

9.0 page



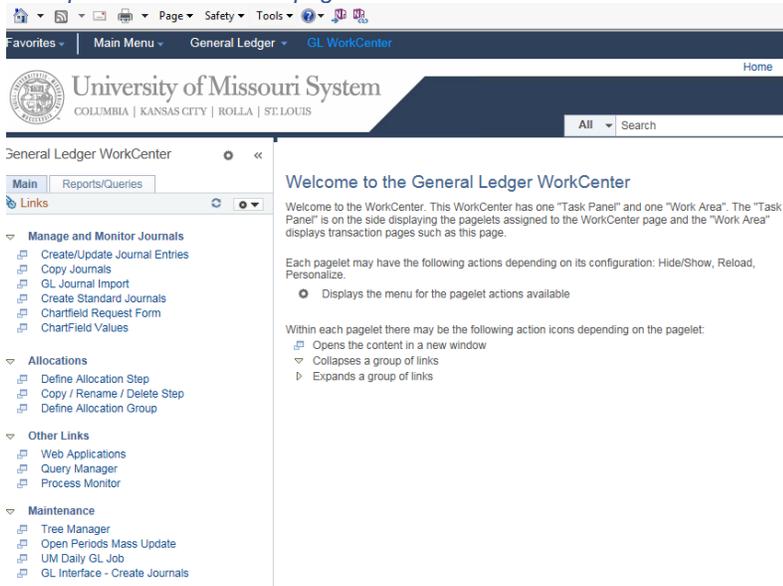
9.2 page



Work Centers

Work Centers are configurable pages that bring together the PeopleSoft elements that users require for most of their primary responsibilities within a module. Users may access the work center pages to navigate to their commonly used tasks and minimize the time drilling through menu items. They will only see links to the tasks they have security to perform. Work Centers will be available in General Ledger, Accounts Payable, Buyer, Inventory, Grants Management, Billing, and Accounts Receivable.

Example of a Work Center page



The screenshot shows the 'General Ledger WorkCenter' interface. The top navigation bar includes 'Main Menu', 'General Ledger', and 'GL WorkCenter'. The University of Missouri System logo and name are visible. The main content area is titled 'Welcome to the General Ledger WorkCenter' and contains the following text:

Welcome to the WorkCenter. This WorkCenter has one "Task Panel" and one "Work Area". The "Task Panel" is on the side displaying the pagelets assigned to the WorkCenter page and the "Work Area" displays transaction pages such as this page.

Each pagelet may have the following actions depending on its configuration: Hide/Show, Reload, Personalize.

- Displays the menu for the pagelet actions available

Within each pagelet there may be the following action icons depending on the pagelet:

- Opens the content in a new window
- ▾ Collapses a group of links
- Expands a group of links

Accounts Payable

There are several changes happening in Accounts Payable that will result in better business processes and efficiencies for the users and the university.

- **“Vendor” is now “Supplier”** – Terminology in the Accounts Payable and Supply Chain modules has changed and vendors are now referred to as suppliers. You will notice this change on all screens and help documents in version 9.2.

Electronic Workflow - The ability to do an electronic workflow will eliminate a manual paper based process and replace it with a new business process for approvals, similar to what was designed for the Travel and Expenses system. Once the user has completed the voucher or request for payment and hit submit, the voucher will edit and then move into workflow. If the voucher contains a detailed project chartfield, it will be routed to the project manager for approval. It will then route to the fiscal approver. If there is not a detailed project, it will go directly to the fiscal approver. Once those approvals have been completed, it will route to the Accounts Payable Shared Services (APSS) office to be released for payment. [Training materials and Quick Reference Guides will be available on the Training web site.](#)

Payment Request Form – The majority of users will begin using a simplified non-PO voucher form when requesting payments to suppliers. This form is designed to prompt for the necessary information and walks the user through each step. Once it has been completed, it will create the voucher behind the scenes and begin the electronic workflow process. [Training materials and Quick Reference Guides will be available on the Training web site.](#)

Supplier Request Form – PeopleSoft has delivered a process for users to request the creation of/or changes to a supplier. The information will route electronically to the APSS for approval and setup. The use of this delivered functionality will replace a large customized application. [Training materials and Quick Reference Guides will be available on the Training web site.](#)

Travel & Expenses

Travel & Expenses pages will have a different look in version 9.2 but there are no major changes to the business process of completing a Travel Authorization, Cash Advance or Expense Report. Attachments are handled differently and certain methods of adding expenses have changed, but all changes should be beneficial to the users of the module.

- **Look and Feel** – There are changes to the look of pages within Travel & Expenses in version 9.2. Information, such as accounting or expense details, that is currently available to view through hyperlinks or additional pages is now displayed on the page, but can be hidden using an expand/collapse arrow.

9.0 page

The screenshot displays the 'Create Expense Report' page in PeopleSoft 9.0. The page title is 'Expense Report Entry' and the Report ID is 'NEXT'. The form includes the following sections:

- General Information:**
 - *Description: test
 - *Business Purpose: Professional Development
 - Default Location: KANSAS CITY, MO, USA
 - Reference: (empty field)
- Accounting Defaults:**
 - Accounting Defaults: (dropdown)
 - Apply Cash Advance(s): (checkbox)
 - More Options: (dropdown)
- Receipt Info:**
 - View Receipts: (button)
- Details Table:**

Effective Date	Select	Expense Type	Expense Date	Amount	Currency	Payment Type	Billing Type	
03/15/2015	<input type="checkbox"/>	Transp - Mileage (Persnl Ver)	03/15/2015	106.00	USD	Cash/Check	In State - Domestic	[Details] [X]
03/27/2015	<input type="checkbox"/>							[Details] [X]
03/27/2015	<input type="checkbox"/>							[Details] [X]
03/27/2015	<input type="checkbox"/>							[Details] [X]
- Totals:**

Employee Expenses:	106.00 USD	Due Employee:	106.00 USD
Non-Reimbursable Expenses:	0.00 USD	Due Vendor:	0.00 USD
Prepaid Expenses:	0.00 USD		
Employee Credits:	0.00 USD		
Vendor Credits:	0.00 USD		
Cash Advances Applied:	0.00 USD		

9.2 page

University of Missouri System
COLUMBIA | KANSAS CITY | ROLLA | ST. LOUIS

FSDEV

Create Expense Report

*Business Purpose: Professional Development
*Report Description: test
Reference:

Default Location: KANSAS CITY MO USA

Expenses

Totals (1 Line) 106.00 USD

*Date: 03/15/2015
*Expense Type: Transp - Mileage (Persnl Veh)
*Payment Type: Cash/Check
*Amount: 106.00
*Currency: USD

*Billing Type: In State - D
**Originating Location: COLUMBIA MO USA
**Destination Location: KANSAS CITY MO USA
*Miles: 200 x 0.5300

Accounting Details

Amount	SpeedType	GL Unit	Monetary Amount	Currency Code	Exchange Rate	Account	Fund	Dept	Program	Class	PC Bus Unit	Project
106.00		UMSYS	106.00 USD	1.00000000		721000	0000	A0701004	0	0	UMSYS	00

Totals (1 Line) 106.00 USD

- **Attachments** – Receipts and attachments can be added by clicking the attachment link on the page. No more scanning documents and emailing to ImageNow. The attachments can be retrieved and viewed from the page by approvers as the document goes through workflow.
- **Hotel wizard no longer required** – When Travel & Expenses was implemented, a modification was done to require the use of the Hotel Wizard to itemize a hotel bill. This was done to assist the users in learning how the new system worked and to ensure all detail was included on the expense report. Now that employees are more comfortable using T&E and understand the detail required, they will be allowed to select the itemized expense types for hotel expenses and enter them manually. The Hotel Wizard will no longer be required but will still be available if the users prefer that method.

[Training materials and Quick Reference Guides will be available on the Training web site.](#)

ePro/Purchasing

The eProcurement Requisition and Purchase Order pages will have a different look and feel in 9.2, but there are no changes to the business processes, other than electronic workflow routing.

- **Requisition Electronic Workflow** - The University has been using electronic workflow for approvals of Supply Chain eProcurement requisitions, but it has been based on a one to one relationship between the requestor and approver (an intensely manual maintenance effort), not on the funding for the purchase. With functionality changes in 9.2 and in an effort to have consistent business practices across the university, the

approval workflow for ePro requisitions will be redesigned as part of the upgrade. If the requisition contains a detailed project chartfield, it will be routed to the project manager for approval and then route to the fiscal approver. If there is not a detailed project, the requisition will go directly to the fiscal approver.

- [Purchase Order Electronic Workflow - Approval Framework](#) will replace the process currently being used where Purchase Order approvals are required based on delegation of authority. In version 9.2, the new workflow will include automatic notifications when approvals are required and after an approval is performed.

General Ledger

General Ledger has very little changes in the new version. A few distinctions are listed below:

- Pages used to set up chartfields have changed very little. Some fields that formerly displayed on the page may now be hyperlinks, but still produce the same data.
- The journal screens may require scrolling when viewing the line detail, but the extent will depend on your monitors, display size and if you have personalized the page to hide any fields.
- Standard journal procedures have not changed and will follow the same instructions.
- Allocations have new features that allow the use of excluded values or exceptions in the pool values ([see separate documentation regarding Changes to Allocations in v9.2](#)).
- Writing and running Queries will look the same. There have been some changes to tables where new fields have been added, field lengths have changed, or a field in version 9.0 is no longer in the table. If you have any problems running your existing queries, you will want to check the cross reference document ([see separate documentation regarding Table and Field cross reference for changes between 9.0 and 9.2](#)).

Commitment Control/ UM Budget

The process for entering and maintaining budgets in PeopleSoft and Hyperion will remain the same after the upgrade takes place. Cognos reports to view budget to actual data will be unchanged as well.

Accounts Receivable/Billing

A new feature in Accounts Receivable/Billing is the ability to email invoices to customers or you may choose to print and mail the invoice as we have done in the past. How the invoices are sent can be set at the customer level or at the individual invoice level. This will be extremely helpful when working with foreign customers and provides a solution for workarounds that have been utilized for several years.

Asset Management

There are no business process or significant functionality changes for the Asset Management module. Data entry into the system may change under certain scenarios to follow best practices, but the impact is minimal.

Grants Management

There are no business process or significant functionality changes for the Grants Management module. A Work Center will be deployed for use with the module.

Inventory

The Inventory module is used by the Hospital business units for the ordering, inventory, and distribution of medical supplies. Several features that will be implemented with version 9.2 will be extremely helpful in streamlining business processes for this module.

- **Mobile Inventory (Hospital)** – Mobile Inventory is an application that enables users in the warehouses to perform inventory transactions using mobile handheld devices. This will replace the current At Par technology.
 - **Return to Vendor** – Using the delivered Return to Vendor functionality will eliminate the current workarounds used to handle items returned to vendors. This will also streamline processes in AP when dealing with invoices associated with inventory items which were returned to vendors
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UM Web Applications & Reports

Finance Applications and Reports will function in the same manner with a few exceptions due to business process changes. Applications such as FIN Journal Entry, FIN CRR/ARR, and FIN MoCode will be unchanged. FIN Financial Reports will also work in the same manner as it does today, with drilldown capabilities to transactions and detail payroll, travel expense, and transaction checklist reports available.

- **FIN Authorization** – Changes to business processes have necessitated modifications regarding how users are set up with approval and view authority in the system. The FIN Authorization application will be the source of fiscal approvers for electronic workflow in PeopleSoft Finance 9.2. It is currently used for the Travel and Expenses module and will also be used with Accounts Payable and eProcurement after the upgrade.
 - Data currently in this application is being reviewed and updated by the campuses during the months preceding the upgrade. At the point electronic workflow begins in version 9.2, ALL approvers at the designated levels will receive email notification of transactions that require approval. Only one approval is required, but all of those listed in the application will receive the email. Since some deptids or nodes may

have many approvers listed, a review is necessary to ensure that the correct people are listed and the number is appropriate for the organization.

- Approval or View authorization will no longer be determined by module. If you are set up as an approver at a deptid or node level, you will be the approver for all transactions, regardless of the origin.
 - Some modules, such as T&E and AP will only use the approvers at specific node levels and below. View access and Journal Entry approval can be designated at any node level in the organization.
 - The option to set a maximum amount or Expiration Date will be eliminated. These fields cannot be configured in electronic workflow and were rarely used in the past, so the decision was made to no longer maintain the information.
- **Viewing Attachments on Vouchers** – Beginning in version 9.2, attachments for vouchers will be stored on a web server and available for viewing in PS Search Options. The ability to see the attachments will be secured to the person who created the voucher and the approvers or those with view authorization for the deptid that are listed in FIN Authorizations. Others will still have the ability to view the voucher as they do today, but will not be able to see any attachments.
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