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PeopleSoft Financial Update & Roadmap

Taking Innovation to Higher Levels

Madhavi Makkapati
Product Strategy Director
June 2018

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PeopleSoft Financial Management Solutions

Intuitive, Powerful & Expansive

Collaborative

User Interaction

Innovative

Solutions to Business Problems

Expansive

Insights into your Financials

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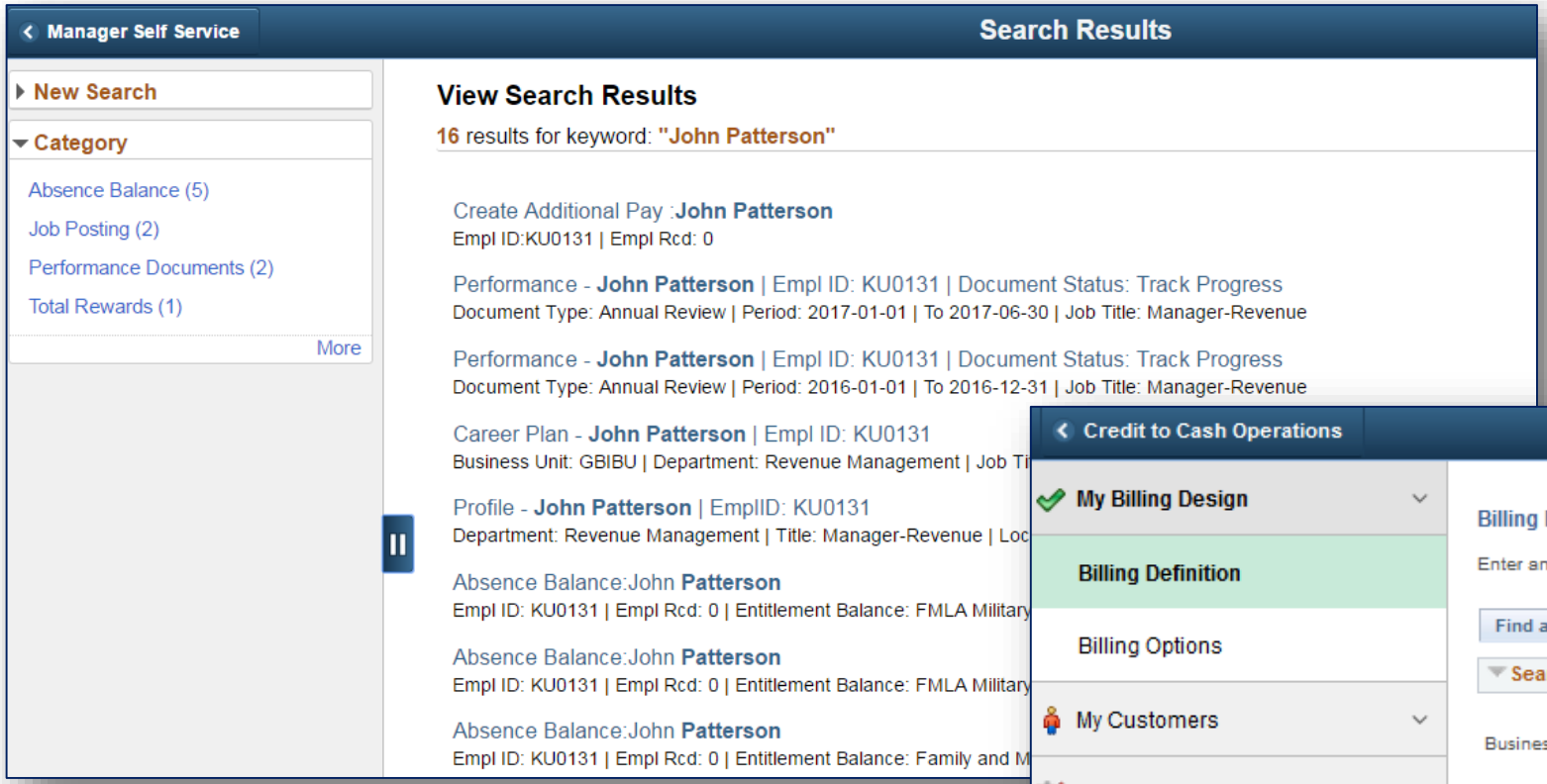
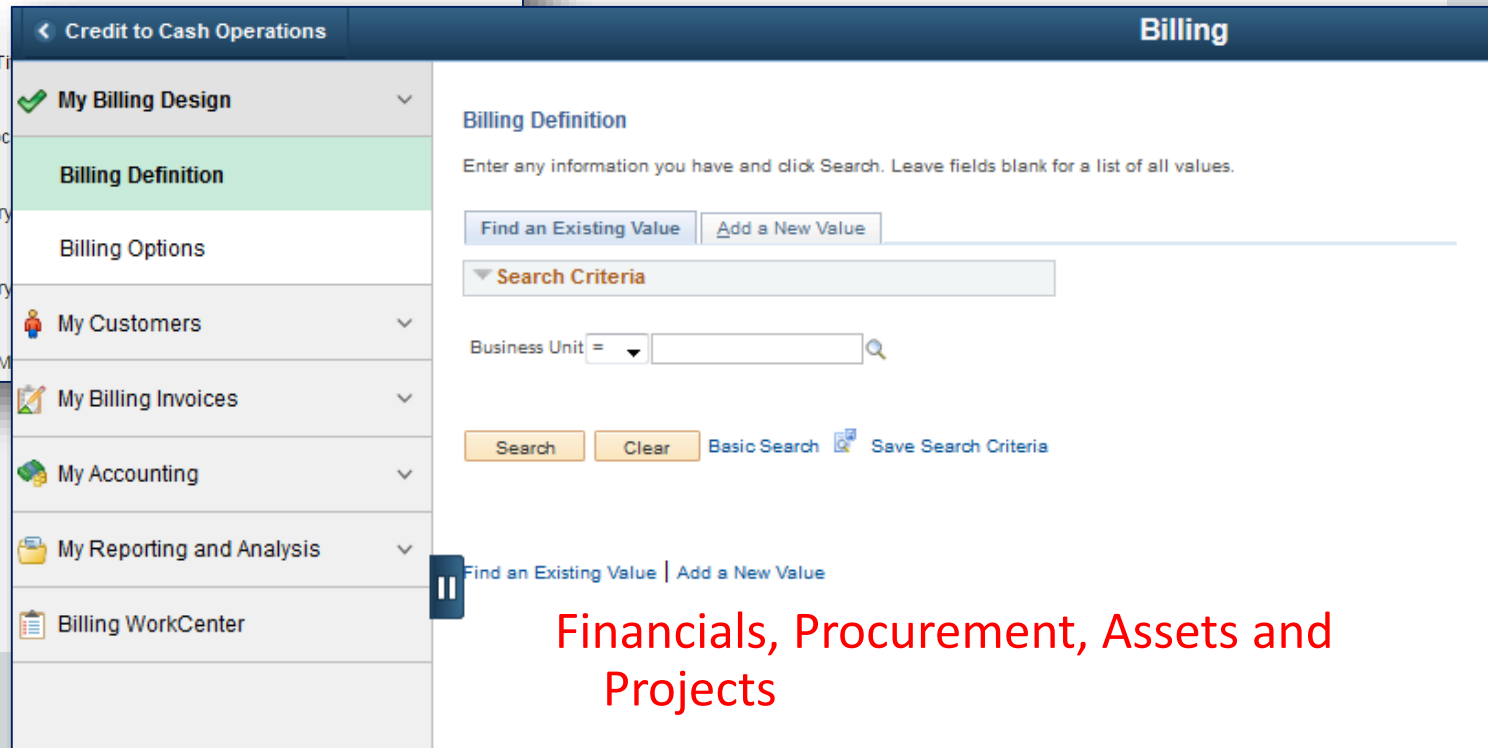
Simplify Navigation & Execution for *All Users*

Global Search and Navigation Collections





- Global search for Procure to Pay Component search for Contracts, Billing and AR Delivered in Image 28

Financials, Procurement, Assets and Projects

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Simplicity Improves Operational Efficiency

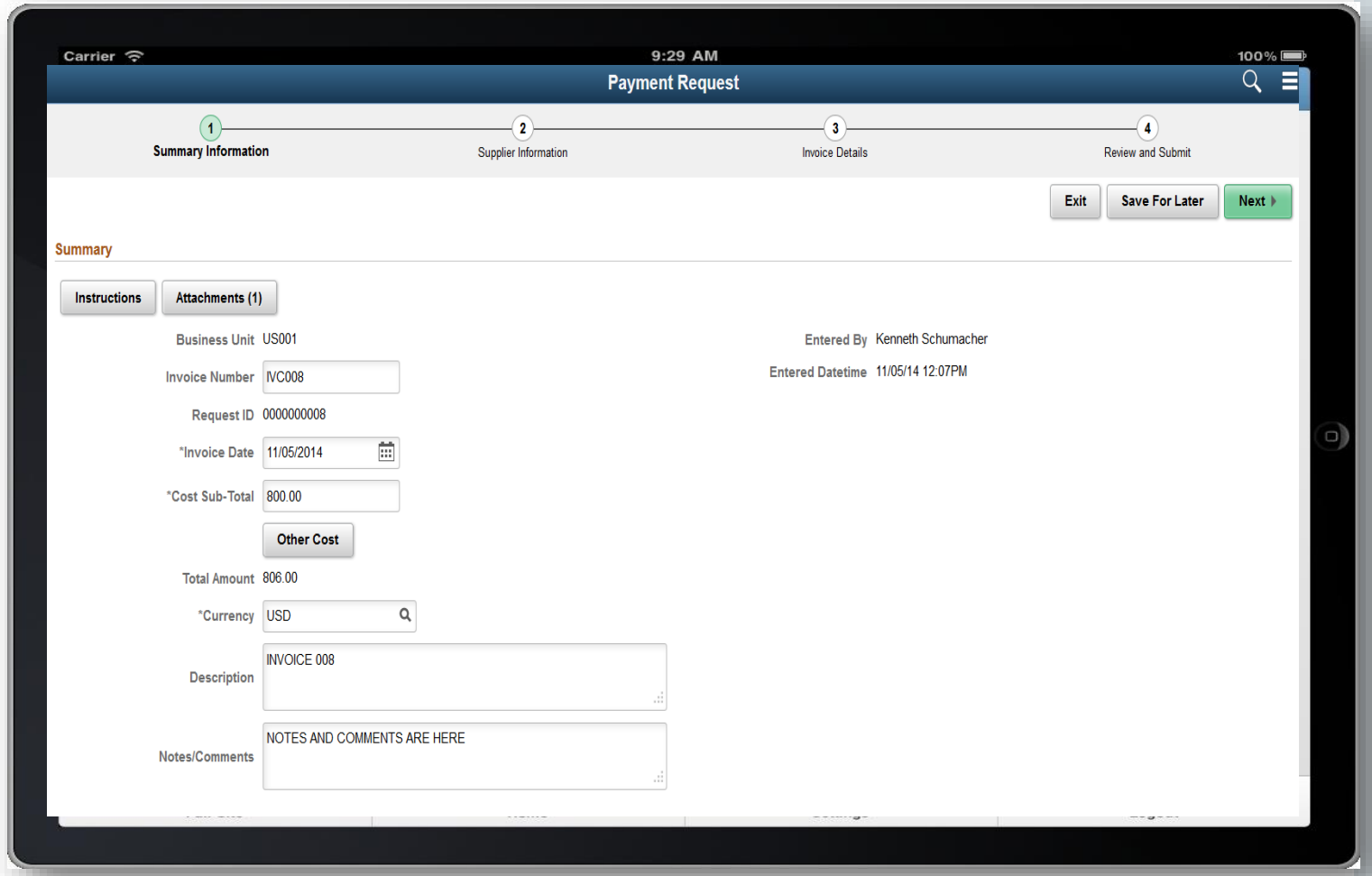
Fluid Payment Request Copy *(Image 18 & 25)*

✓ Reduce Workload for Accounts Payable

✓ Reduce Training Effort for Business Users

KEY Attributes

- Access via Self Service
- Easy to Use
- Full Control via Workflow
- ***Now with Copy*** *(Image 25)*



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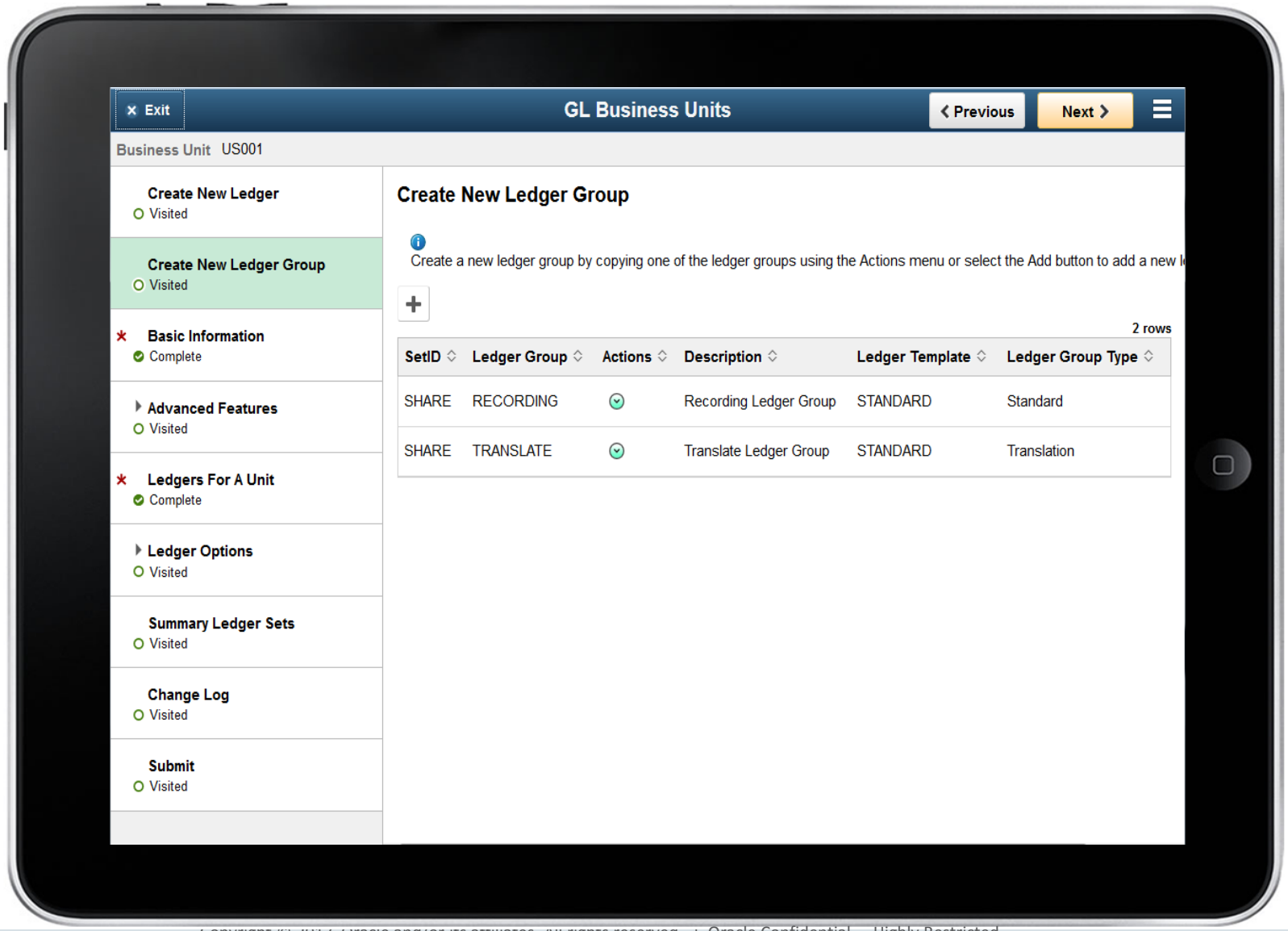
Support Business Expansion and Growth

Business Unit Management *(Image 19)*

✓Support Business Growth and Expansion Swiftly

✓Drive Efficiency

- Leverage Questionnaires
- *Copy* Existing Structure
- Use Default Values with Updates as Needed
- Support Maintenance Activities



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Connecting Business Users to Simple Request

Financial Structure Change Request *(Image 25)*

KEY BENEFITS

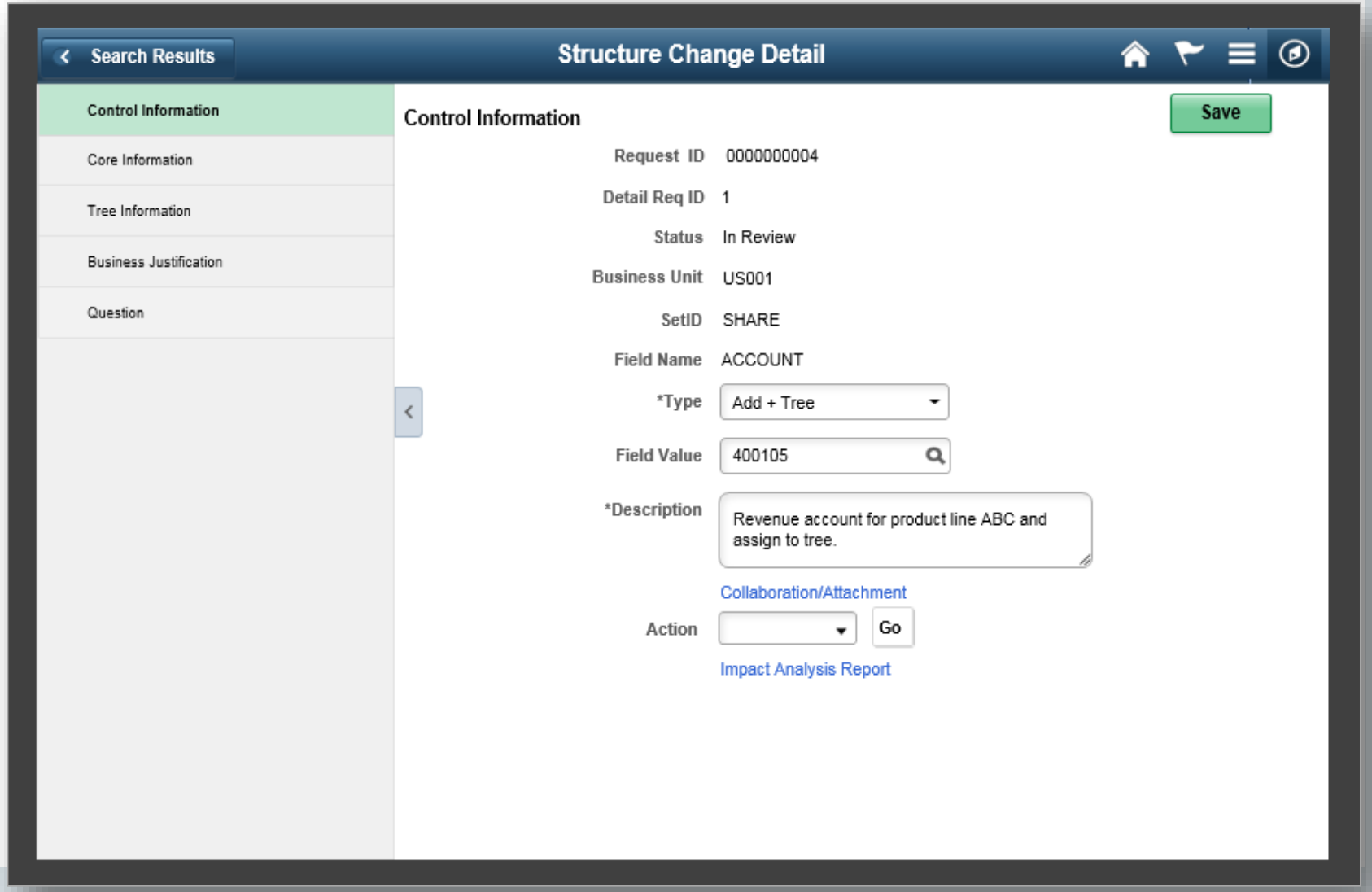
✓ Increase Productivity Thru Simplicity

✓ Anywhere, Anytime

✓ Empower Business Users

KEY FEATURES

- Access via Self Service
- Leverage Questionnaires and Configurable Templates
- Manage ChartField Trees
- Perform Impact Analysis
- Collaborate with Approvers



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Improve Financial Accounting Efficiency

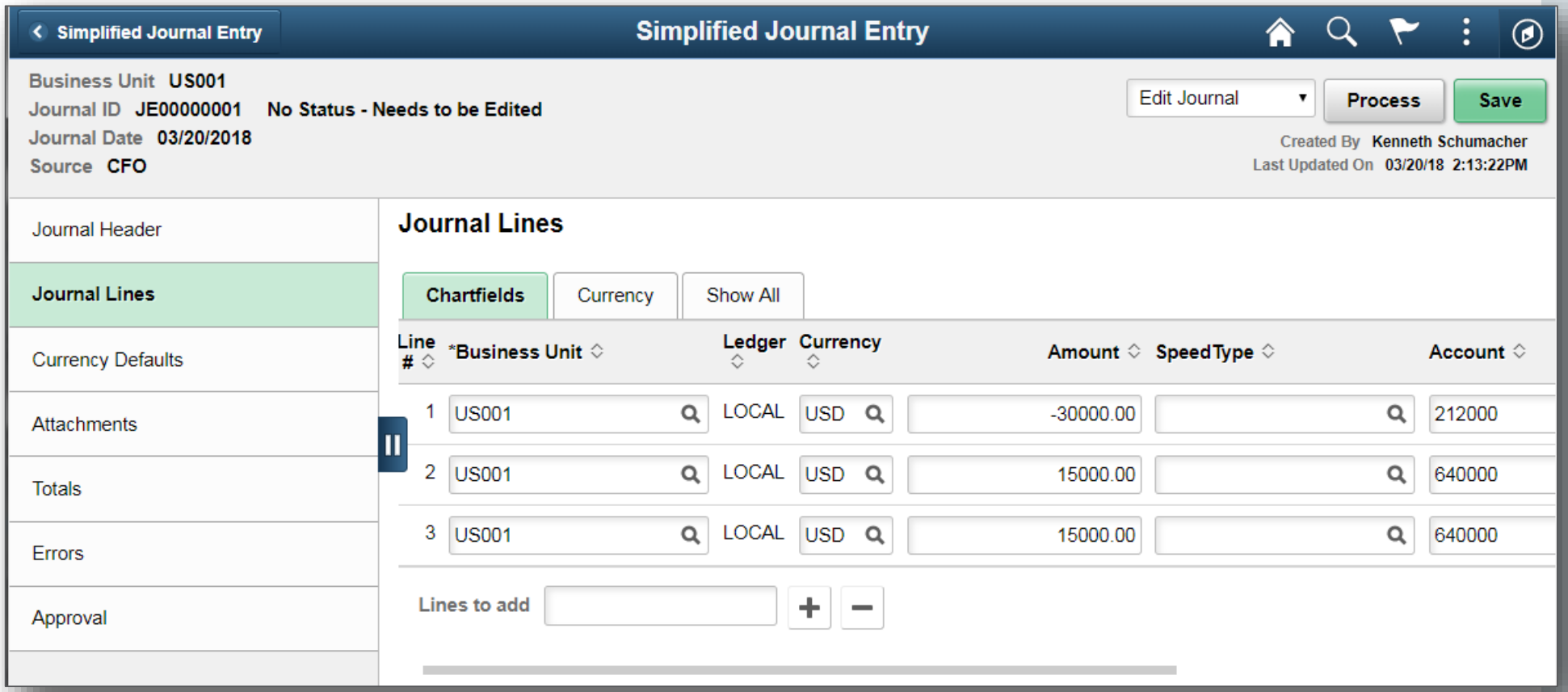
Simplified Journal Entry

Planned for Roadmap

✓Improve Operational Efficiency ✓Reduce Complexity for Business Users

KEY FEATURES

- Configurable Template
- Access via Self Service
- Render by User or Role
- Upload Attachments



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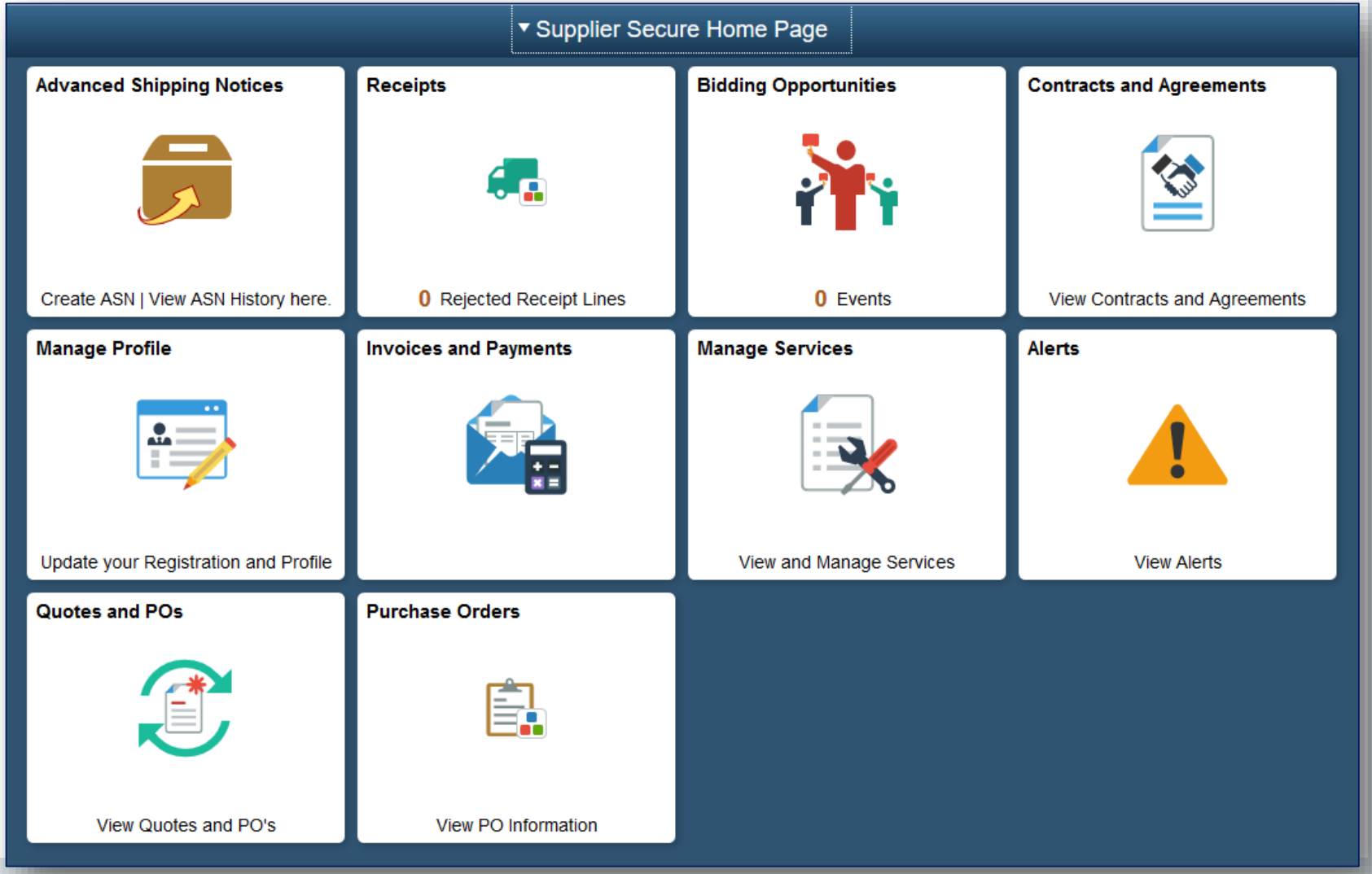
Intuitive Self Service Reduces Costs

PeopleSoft Fluid Supplier Portal – Secure Access Content

✓ Reduce Buying Organization Workload

✓ Improve Supplier Relationships

- Manage ASNs, Receipts, Bidding Opportunities, Profiles, Contracts/Agreements
- *Image 23*



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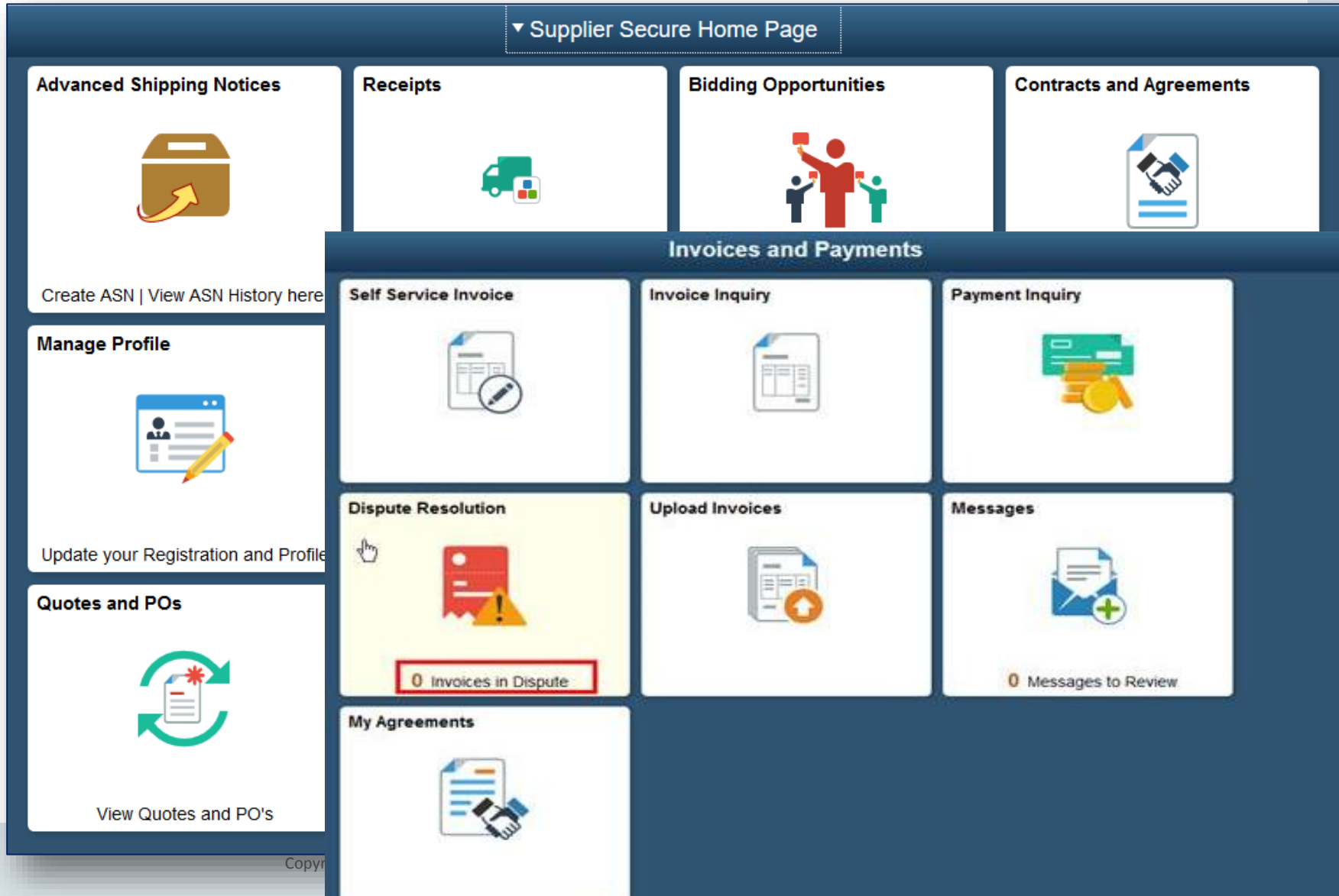
Intuitive Self Service Reduces Costs

PeopleSoft Fluid eSettlements – *Reduce the Annoying Vendor Calls*

✓ Reduce Workload for Accounts Payable

✓ Improve Supplier Relationships

- Invoice Submissions
- Supplier Self Service and Inquiry
- Real Time Dispute Resolution



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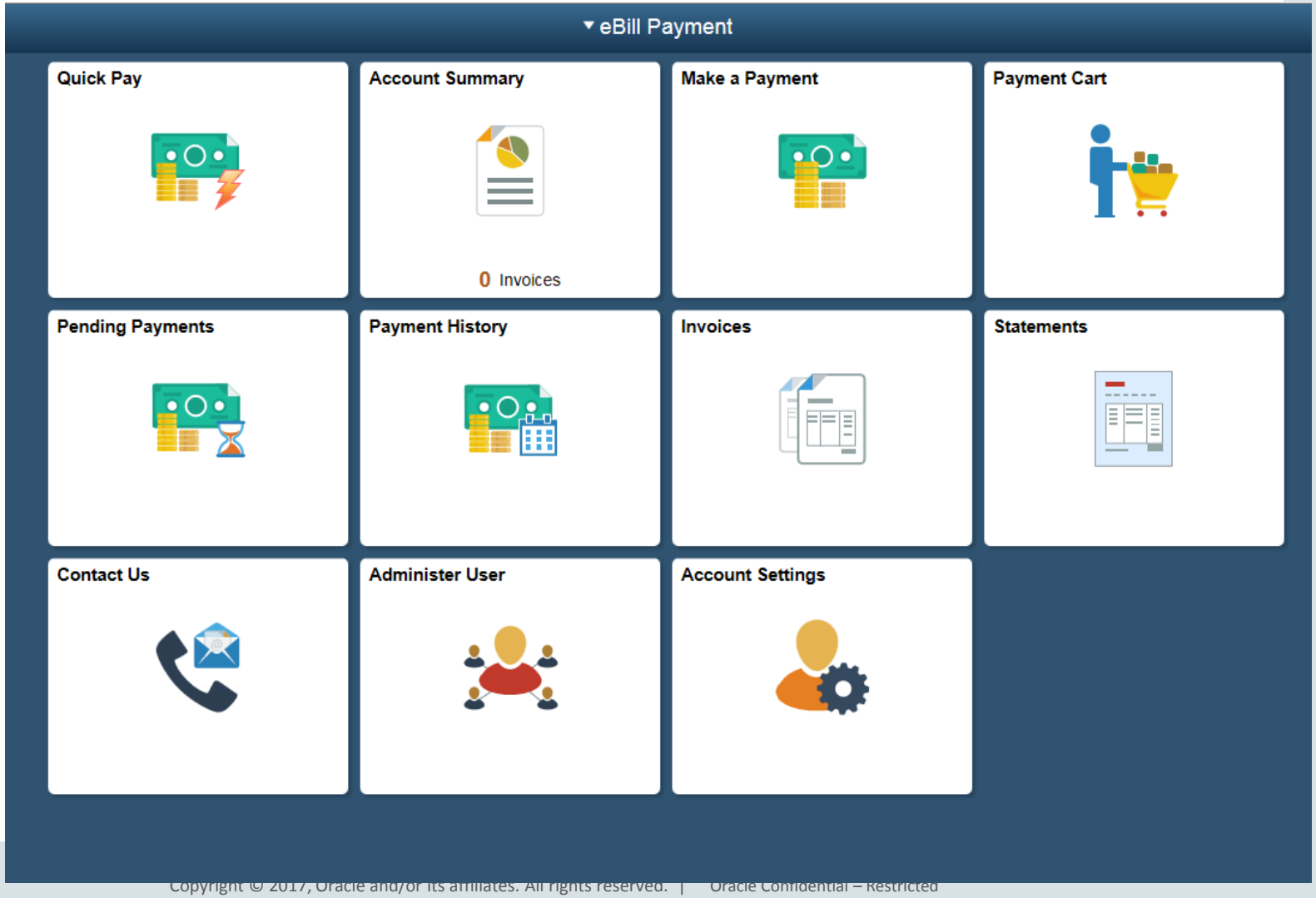
Simplicity Improves Customer Satisfaction

PeopleSoft Fluid eBill Payment *(Image 24)*

- ✓ Reduce Collection Costs
- ✓ Improve student/customer relationships
- ✓ Improve asset position

- Easy to use
- Step by step payment cart
- Robust payment methods



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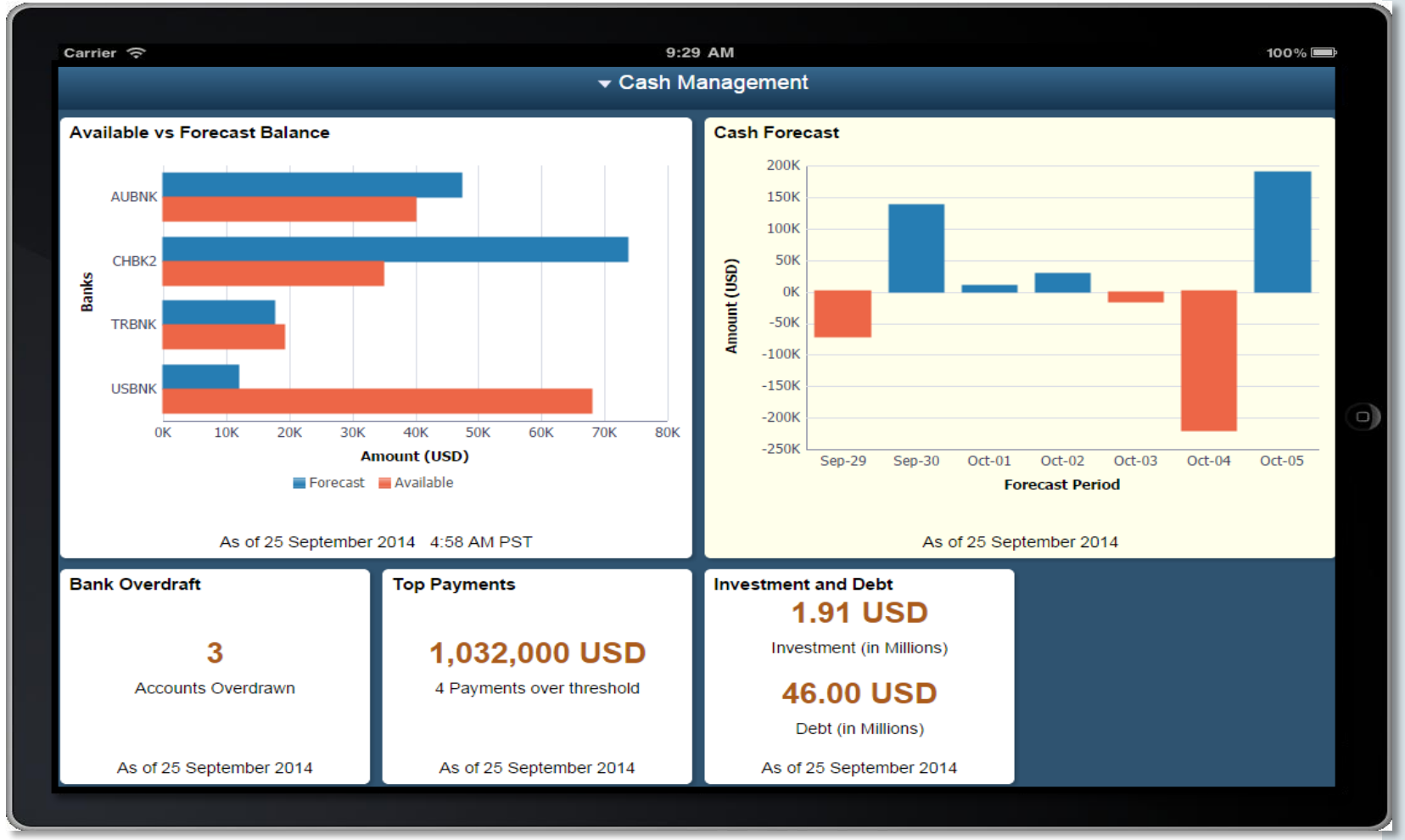
Expansive Visibility of Cash

Cash Management Home Page *(Image 10,25,27)*

- ✓Ensure sufficient funding
- ✓Improve bottom line
- ✓Increase return on investment
- Global cash position
- Drill down to source
- Fluid bank transfer



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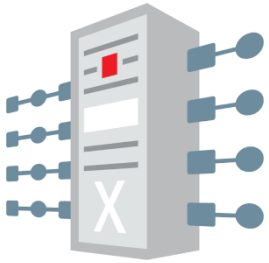
The Next Big Thing

Emerging Technologies

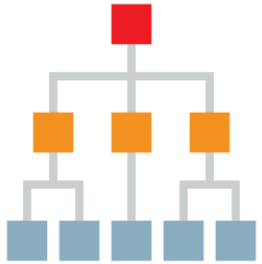
Chatbots

Machine Learning



Recommendations

Natural Language Processing



Blockchain

Artificial Intelligence

- Value Additive
- Targeted
- Secure
- Mobile
- Auditable
- Contextual

Investigation Phase

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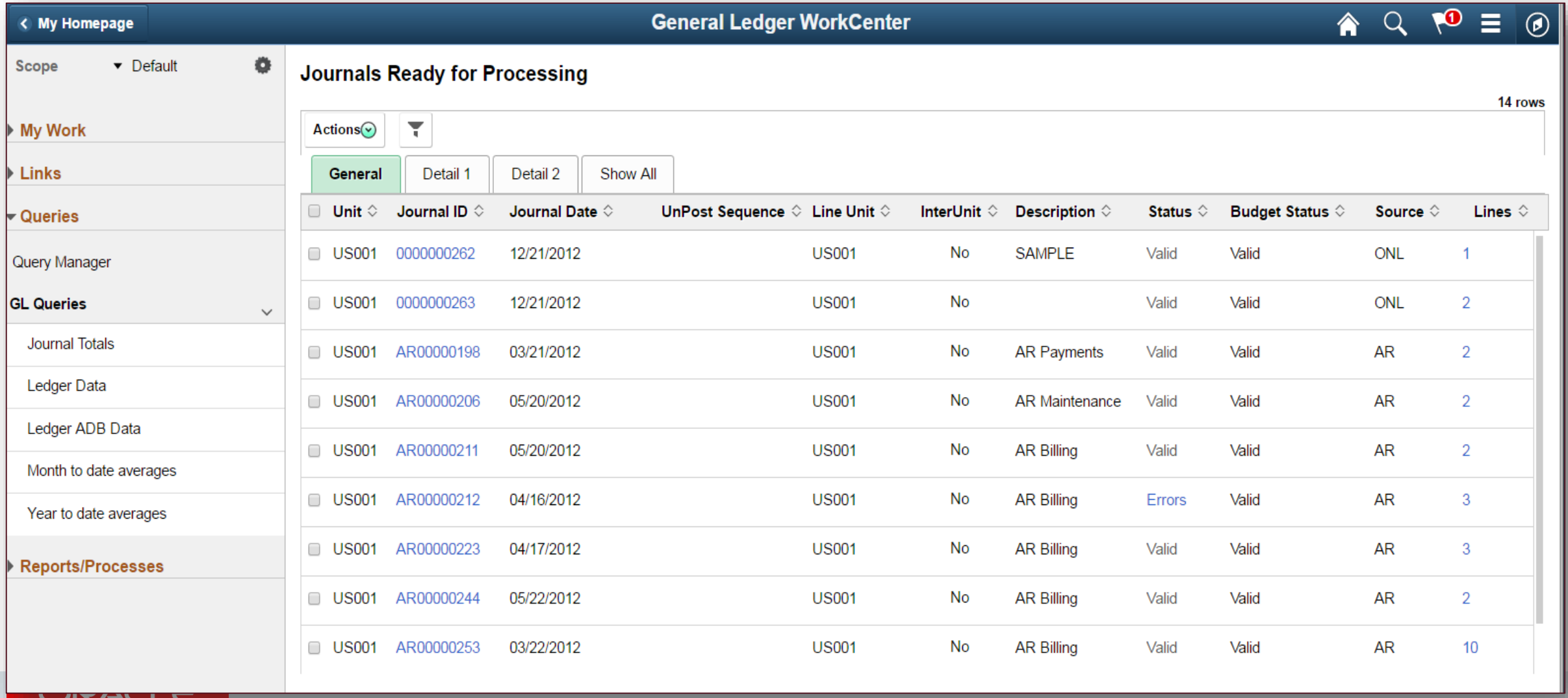
Improve Departmental Productivity Through Simplicity

Fully Fluid Financial WorkCenters – *Work, Links, Queries, Processes & Reports (AP, AR, GL, BI, TR)*



Unit	Journal ID	Journal Date	UnPost Sequence	Line Unit	InterUnit	Description	Status	Budget Status	Source	Lines
US001	0000000262	12/21/2012		US001	No	SAMPLE	Valid	Valid	ONL	1
US001	0000000263	12/21/2012		US001	No		Valid	Valid	ONL	2
US001	AR00000198	03/21/2012		US001	No	AR Payments	Valid	Valid	AR	2
US001	AR00000206	05/20/2012		US001	No	AR Maintenance	Valid	Valid	AR	2
US001	AR00000211	05/20/2012		US001	No	AR Billing	Valid	Valid	AR	2
US001	AR00000212	04/16/2012		US001	No	AR Billing	Errors	Valid	AR	3
US001	AR00000223	04/17/2012		US001	No	AR Billing	Valid	Valid	AR	3
US001	AR00000244	05/22/2012		US001	No	AR Billing	Valid	Valid	AR	2
US001	AR00000253	03/22/2012		US001	No	AR Billing	Valid	Valid	AR	10

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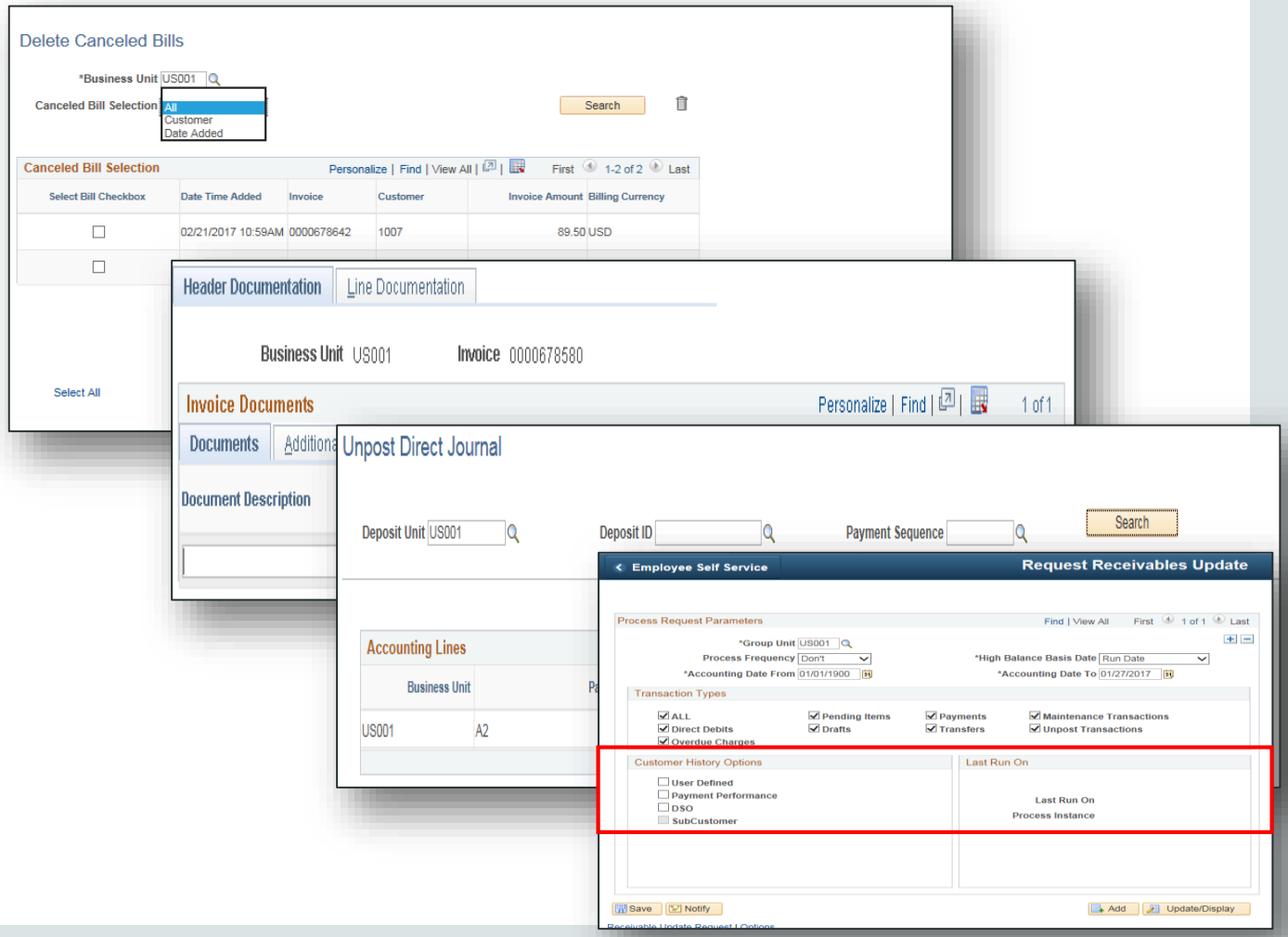
Improve Departmental Productivity Through Simplicity

Highly Requested for Credit to Cash

- ✓ Increase staff productivity
- ✓ Reduce operational cost
- ✓ Speed up collections

- Ability to delete bills in cancelled status
- Include supporting documents in email or in printing of invoice
- Unpost direct journals posted
- AR Update Expansion
- Disallow Activity in Closed Period



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Improve Departmental Productivity Through Simplicity

Planned for Roadmap

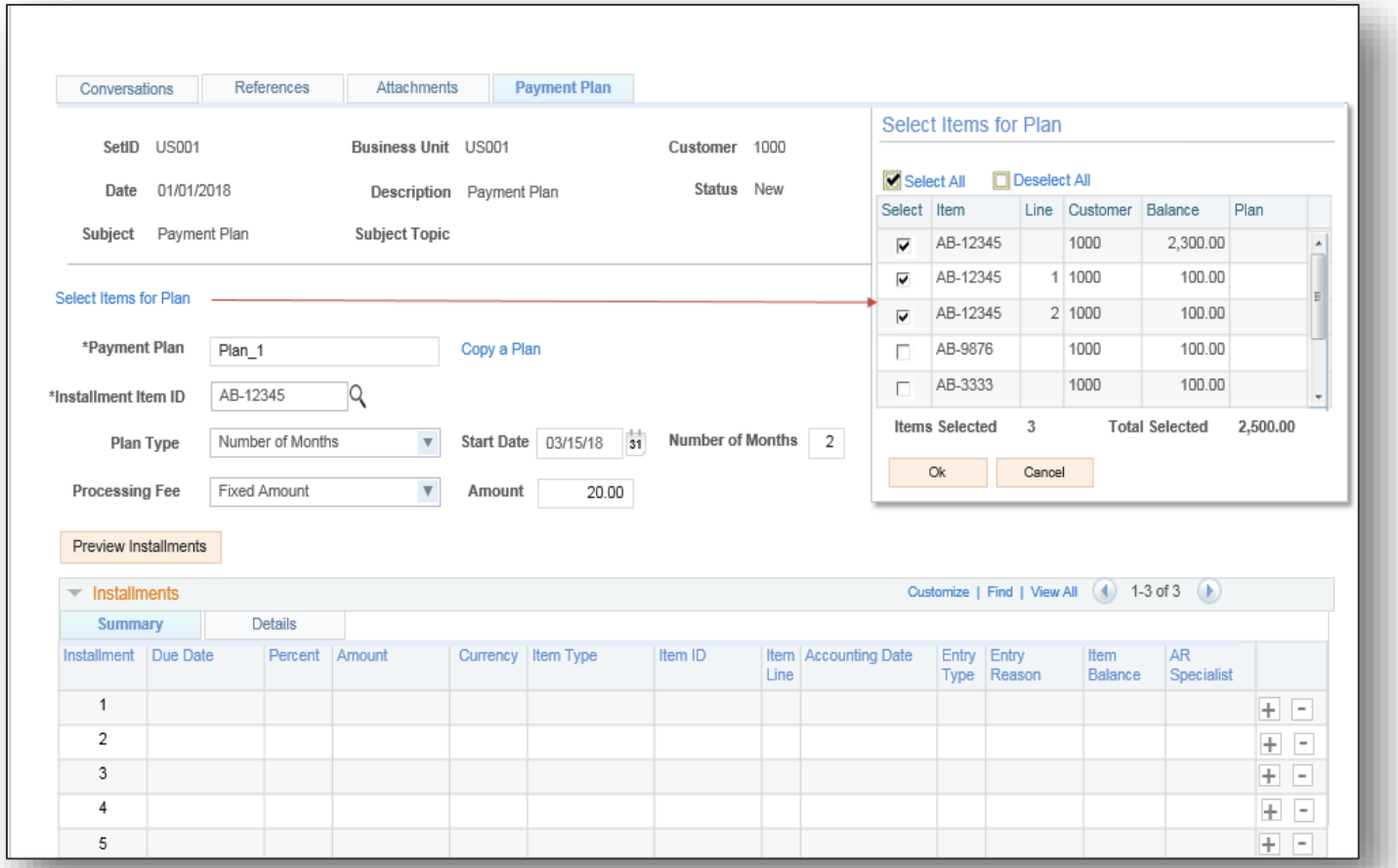
Payment Plans

Key Benefits

- ✓ Improves customer satisfaction
- ✓ Increase cash inflow
- ✓ Reduce costs

Key Feature

- Allow customers to pay in installments



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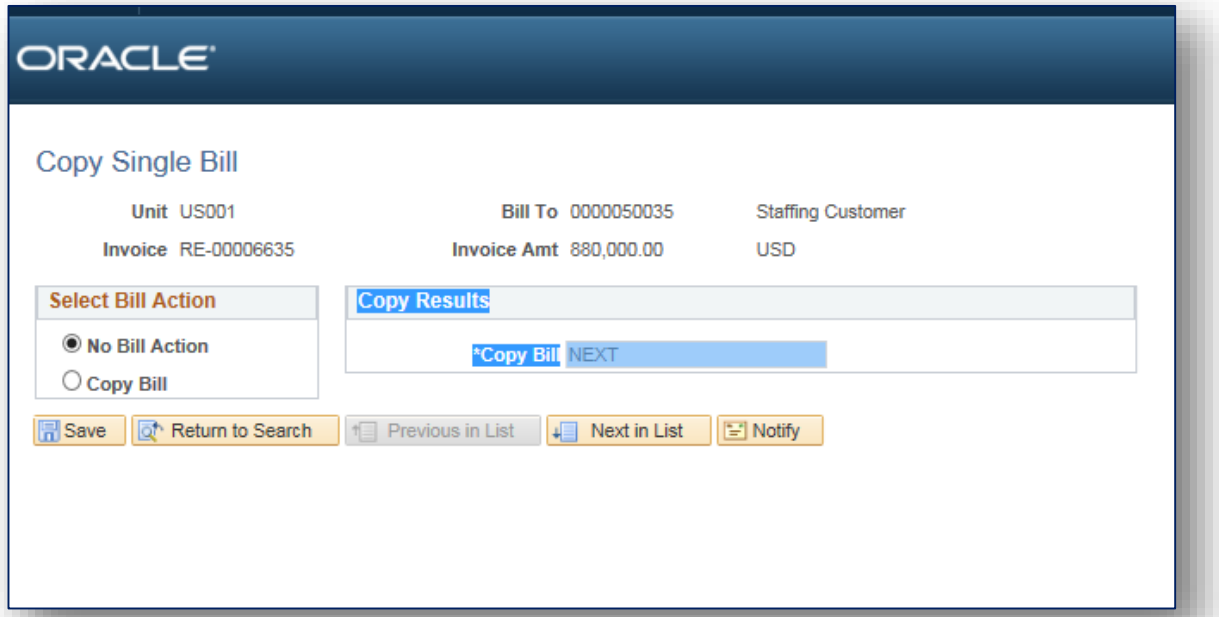
Improve Departmental Productivity Through Simplicity

Planned for Roadmap

Highly Requested for Credit to Cash

- ✓ Increase staff productivity
- ✓ Reduce operational cost
- ✓ Speed up collections

- Ability to Mass update of Invoices
- Expand Copy functionality in Billing
- Fluid Collector Performance
- Email Statements and Dunning from AR Collection Workbench
- Include Payment Method on Item activity



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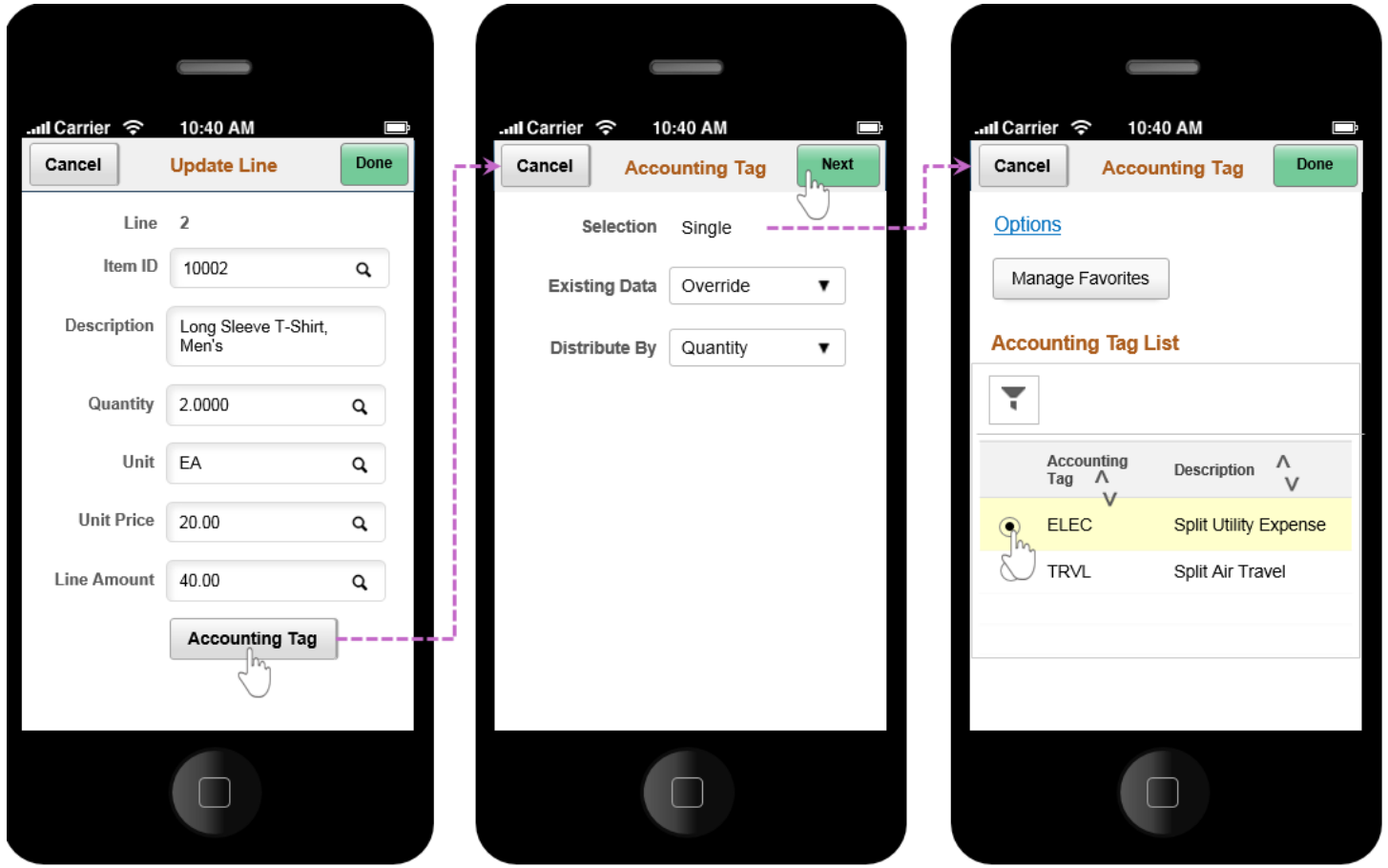
Intuitive Accounting for Self Service

Accounting Tag Simplifies Data Entry *(Image 18)*

✓Reduce Manual Entry

✓Standardize ChartField Display

- Combine classic SpeedChart and SpeedType
- Standardize accounting entry definition for Fluid



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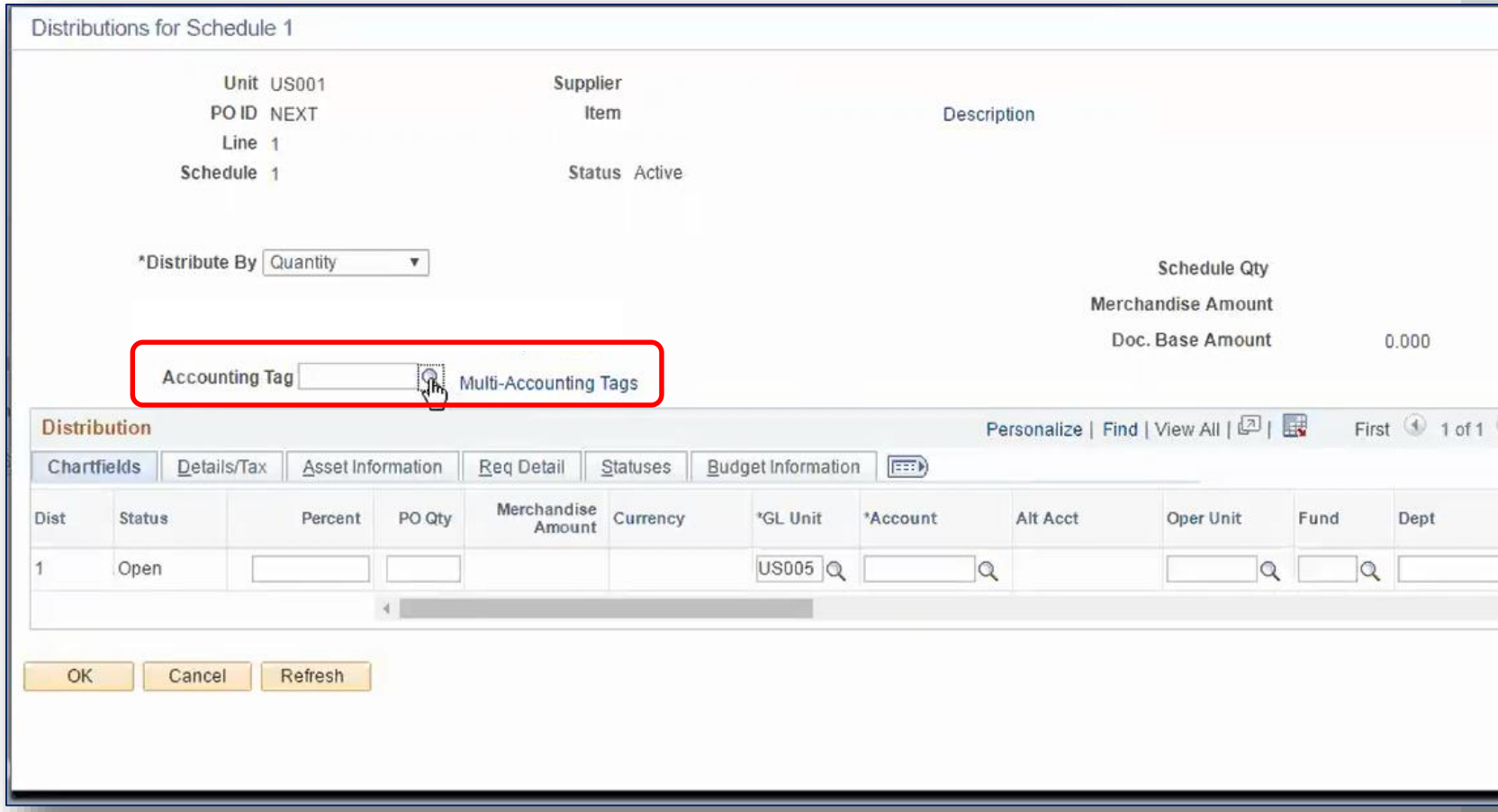
PeopleSoft Accounting Tag Expansion

Rollout to Classic Financial Transactions *(Starting Image 22 with PO & AP, Image 27 for GL)*

- ✓ Increase Productivity Thru Simplicity
- ✓ Standardized Accounting Input

- Extend to All Transactions
- Combine SpeedChart, SpeedType, & Distribution Code
- Adopt as Needed
- Control by Product



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Powerful Solutions to Increase Efficiency

Match Collaboration Center

Planned for Roadmap

- ✓ Streamline Match Exception Resolution
- ✓ Reduce Cost of Financial Operations
- ✓ Maintain Segregation of Duties

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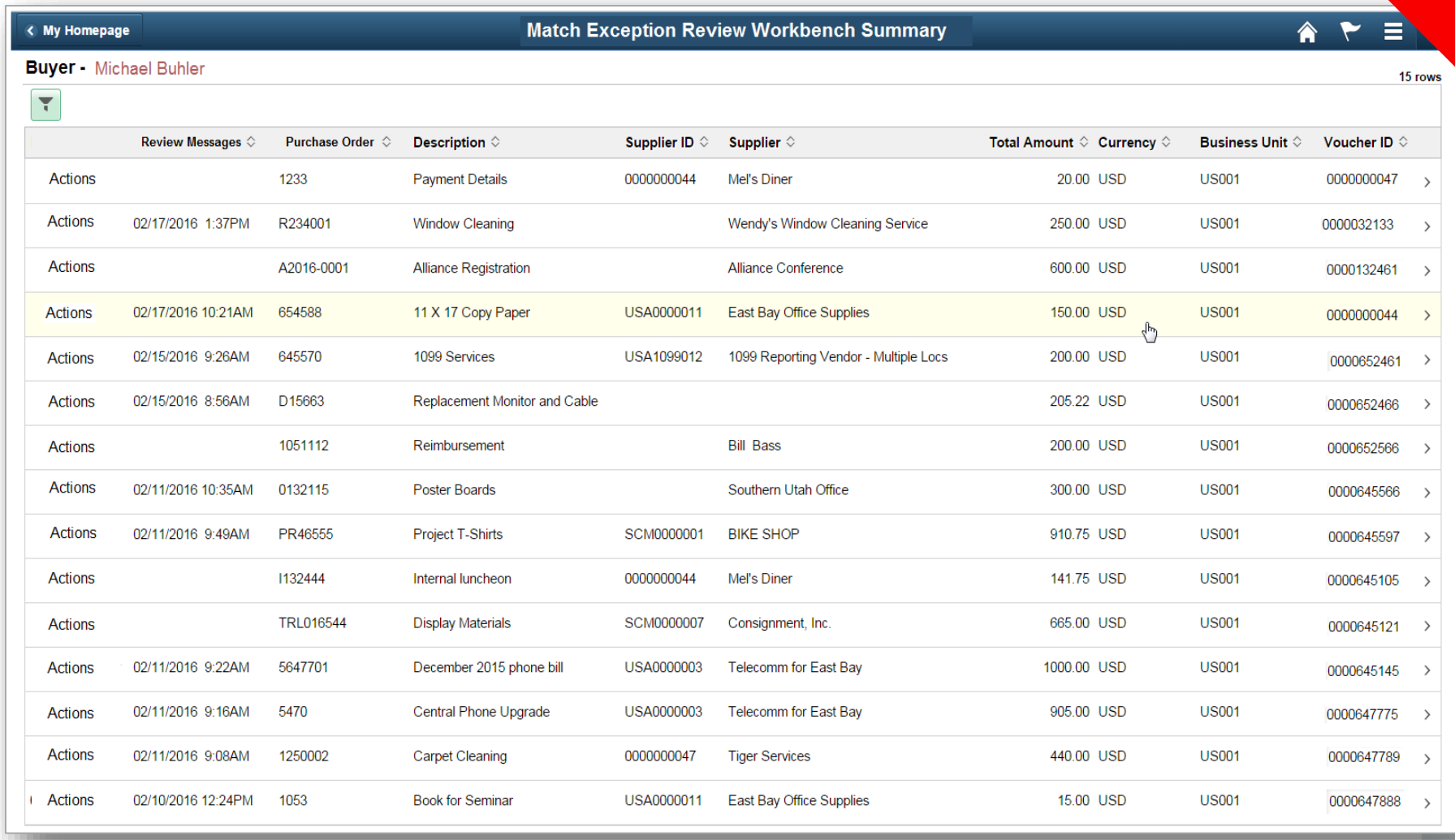
Powerful Solutions to Increase Efficiency

Match Exception Collaboration Center

Planned for Roadmap

- Collaboration Between Stakeholders
- View Transactions by Critical Filters
- Update Communications to Resolve Exceptions



	Review Messages	Purchase Order	Description	Supplier ID	Supplier	Total Amount	Currency	Business Unit	Voucher ID
Actions		1233	Payment Details	0000000044	Mel's Diner	20.00	USD	US001	0000000047
Actions	02/17/2016 1:37PM	R234001	Window Cleaning		Wendy's Window Cleaning Service	250.00	USD	US001	0000032133
Actions		A2016-0001	Alliance Registration		Alliance Conference	600.00	USD	US001	0000132461
Actions	02/17/2016 10:21AM	654588	11 X 17 Copy Paper	USA0000011	East Bay Office Supplies	150.00	USD	US001	0000000044
Actions	02/15/2016 9:26AM	645570	1099 Services	USA1099012	1099 Reporting Vendor - Multiple Locs	200.00	USD	US001	0000652461
Actions	02/15/2016 8:56AM	D15663	Replacement Monitor and Cable			205.22	USD	US001	0000652466
Actions		1051112	Reimbursement		Bill Bass	200.00	USD	US001	0000652566
Actions	02/11/2016 10:35AM	0132115	Poster Boards		Southern Utah Office	300.00	USD	US001	0000645566
Actions	02/11/2016 9:49AM	PR46555	Project T-Shirts	SCM0000001	BIKE SHOP	910.75	USD	US001	0000645597
Actions		I132444	Internal luncheon	0000000044	Mel's Diner	141.75	USD	US001	0000645105
Actions		TRL016544	Display Materials	SCM0000007	Consignment, Inc.	665.00	USD	US001	0000645121
Actions	02/11/2016 9:22AM	5647701	December 2015 phone bill	USA0000003	Telecomm for East Bay	1000.00	USD	US001	0000645145
Actions	02/11/2016 9:16AM	5470	Central Phone Upgrade	USA0000003	Telecomm for East Bay	905.00	USD	US001	0000647775
Actions	02/11/2016 9:08AM	1250002	Carpet Cleaning	0000000047	Tiger Services	440.00	USD	US001	0000647789
Actions	02/10/2016 12:24PM	1053	Book for Seminar	USA0000011	East Bay Office Supplies	15.00	USD	US001	0000647888

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Improve Efficiency via Streamlined Business Process

Delivered in Image 20

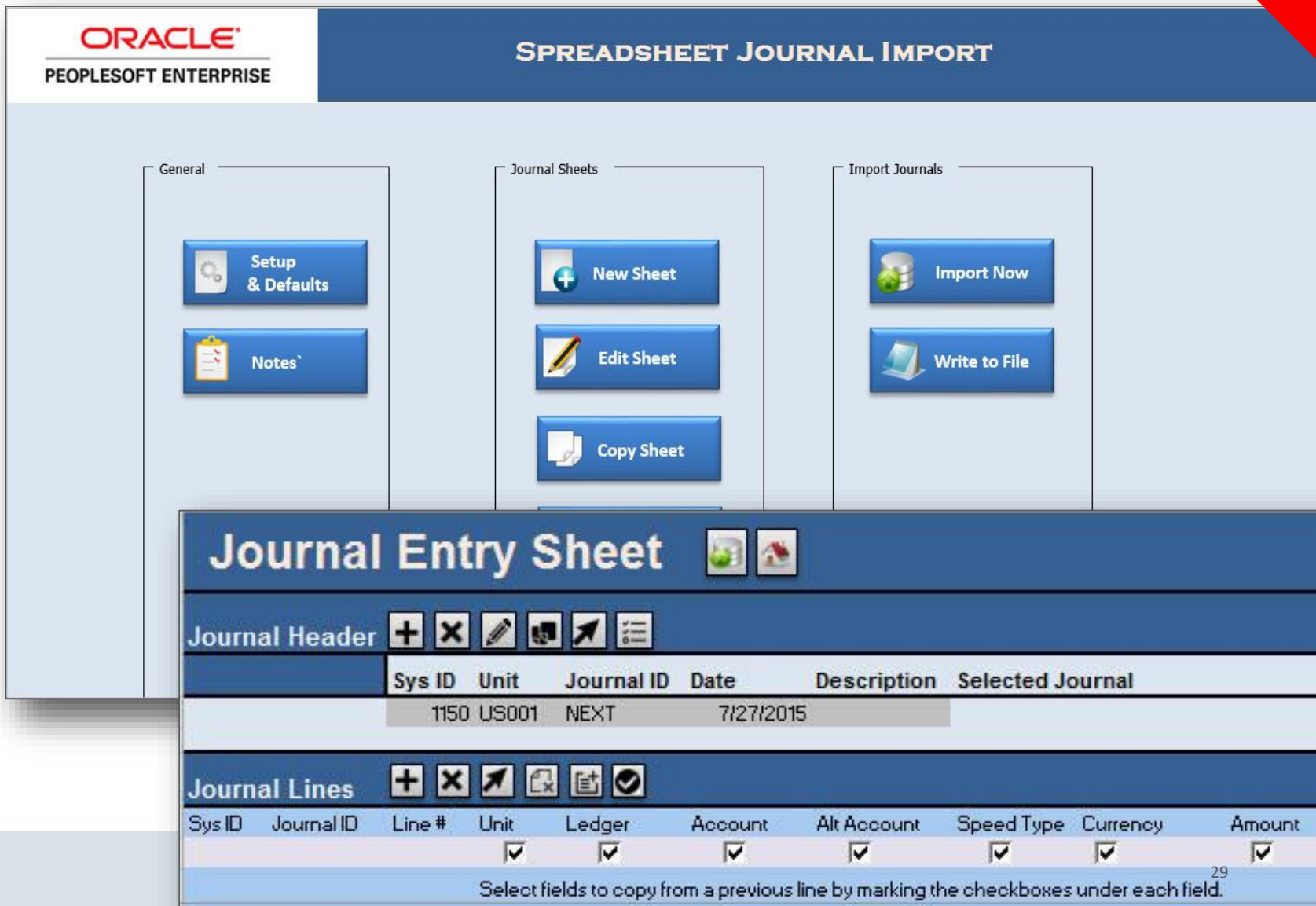
Spreadsheet Journal Upload Expansion *(Image 20)*

KEY BENEFITS

- ✓ Increase User Productivity
- ✓ Web Service Technology

KEY FEATURES

- Use “Staging Area”
- Include Accounting Tag *(Image 27)*
- Errors Pass Back to Spreadsheet



Modernize Your Technology Platform

GL Spreadsheet Upload Expansion/Change

What It Means To You

- Web Services Based Technology *(Image 20)*
- PeopleTools deprecated XML Link in PeopleTools 8.46 (Doc ID 1296834.1)
- Microsoft has started deprecating ActiveX objects
- Extended validation of spreadsheet data
- *Expected Deprecation of XML spreadsheet upload as of March End 2019*

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Improve Efficiency in Financial Operations

GL WorkCenter Expansion *(Image 24)*

KEY BENEFITS

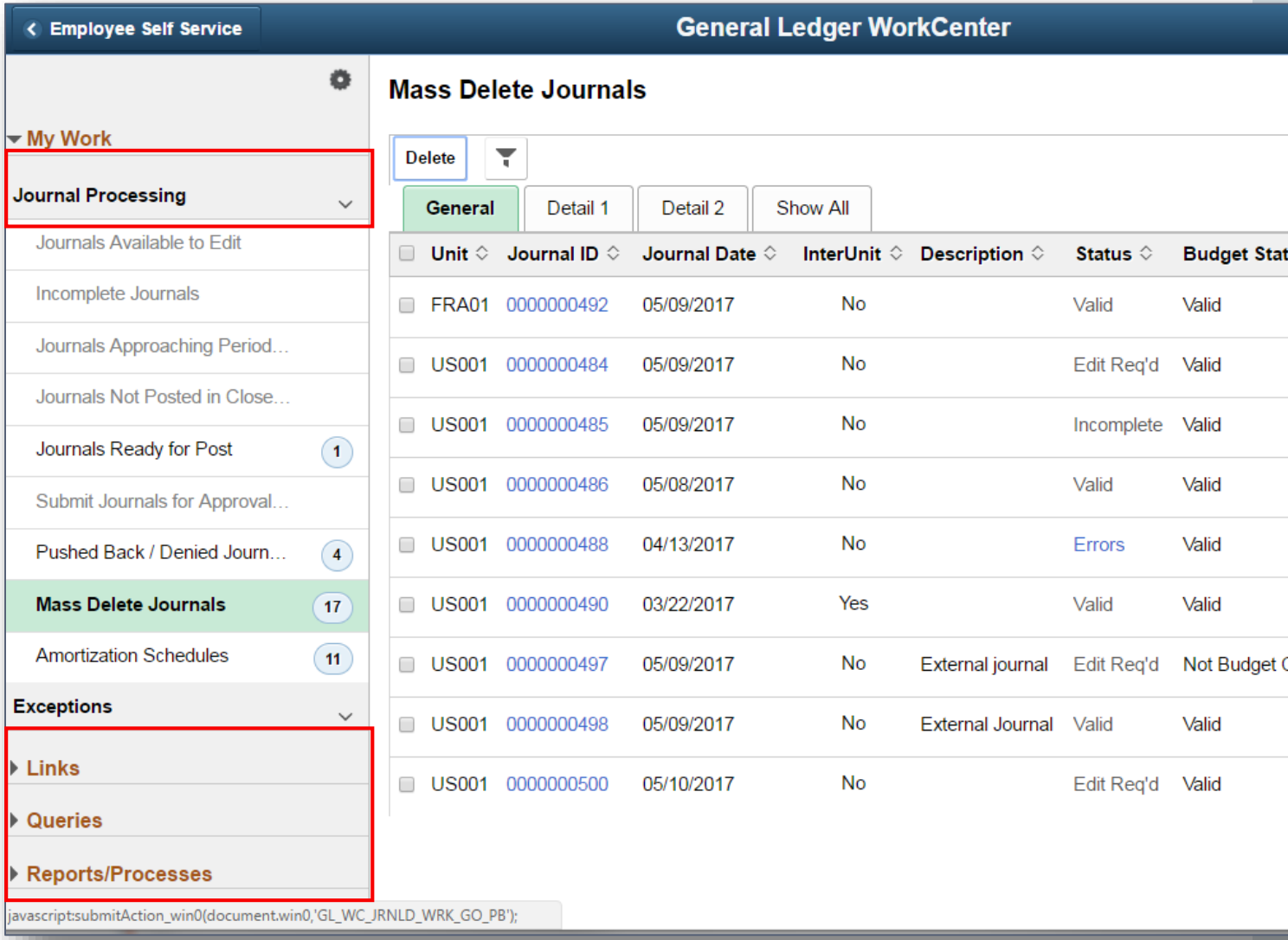
✓Speed Through Transactions

✓Expand Value Add Analysis

✓Focused Period-end Activities

KEY FEATURES

- New Journal Processing Works
  - Specific Journal Actions -Journal Edit, Push Back/Denials, Ready for Post
- **Submit Journal for Approval in Mass**
- **Mass Journal Delete**



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Improve Efficiency in Financial Close

Focus on Period Close Efficiency

Planned for Roadmap

KEY BENEFITS

✓Speed up Period Close

✓Focus on Period End Activities

KEY FEATURES

- Mass Update for Run Control As of Date
- Mass Delete of Run Controls
- Control Activity During Period Close
- Visualization into Open Periods by Business Units
- Mass Update Multiple Business Units' Open Period

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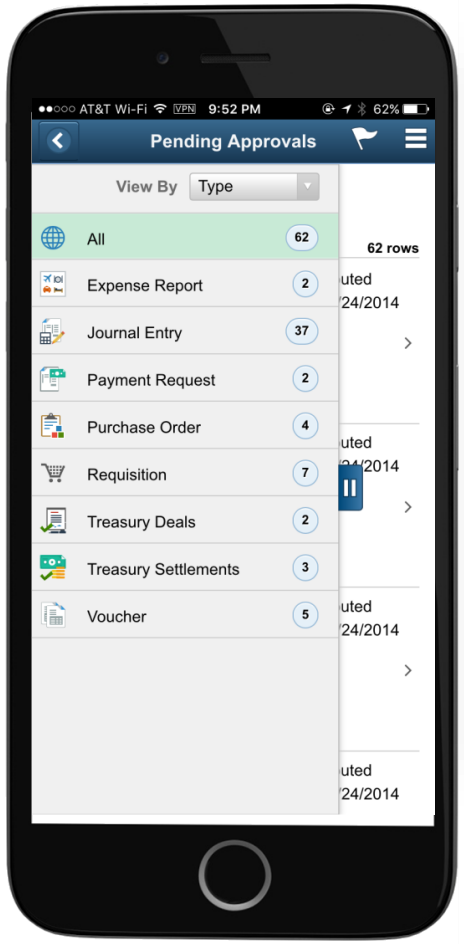
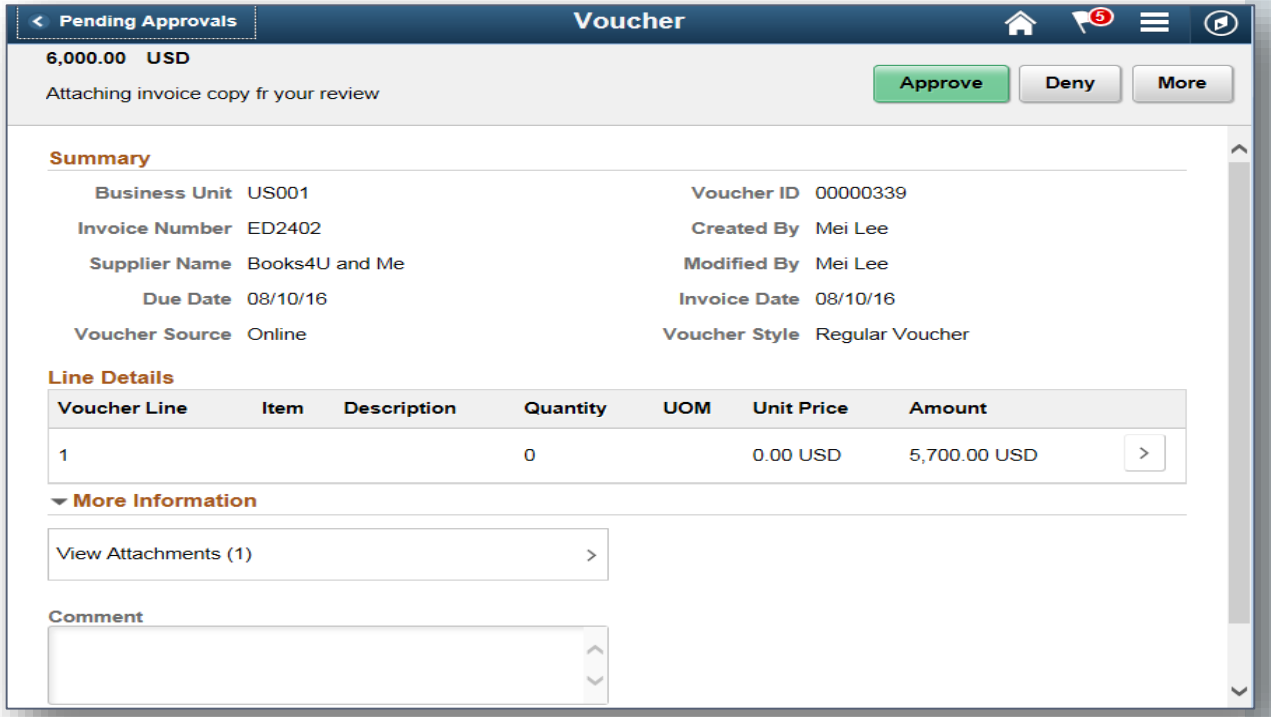
Implement PeopleSoft Fluid UI

PeopleSoft Financials Mobile Approvals

✓ Efficient Support for Expanding Controls

- Delivered using Fluid UI
- Mobile
- Visually Appealing
- Configurable via Page Composer
- Richer Capabilities (e.g. Attachments, Comments)
- Already Available *Starting with Image 20*





Journals, Vouchers, Payment Requests, Credit/Rebill, Control Budget Journals, AR Worksheets, Treasury, Reconciliations, ChartField Request, AR Refunds via Maintenance & Draft Worksheets, Deal Confirmation, Financial Structure Request, AR Refunds, Supplier

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Increase Transparency in Financial Controls

Fluid Approvals

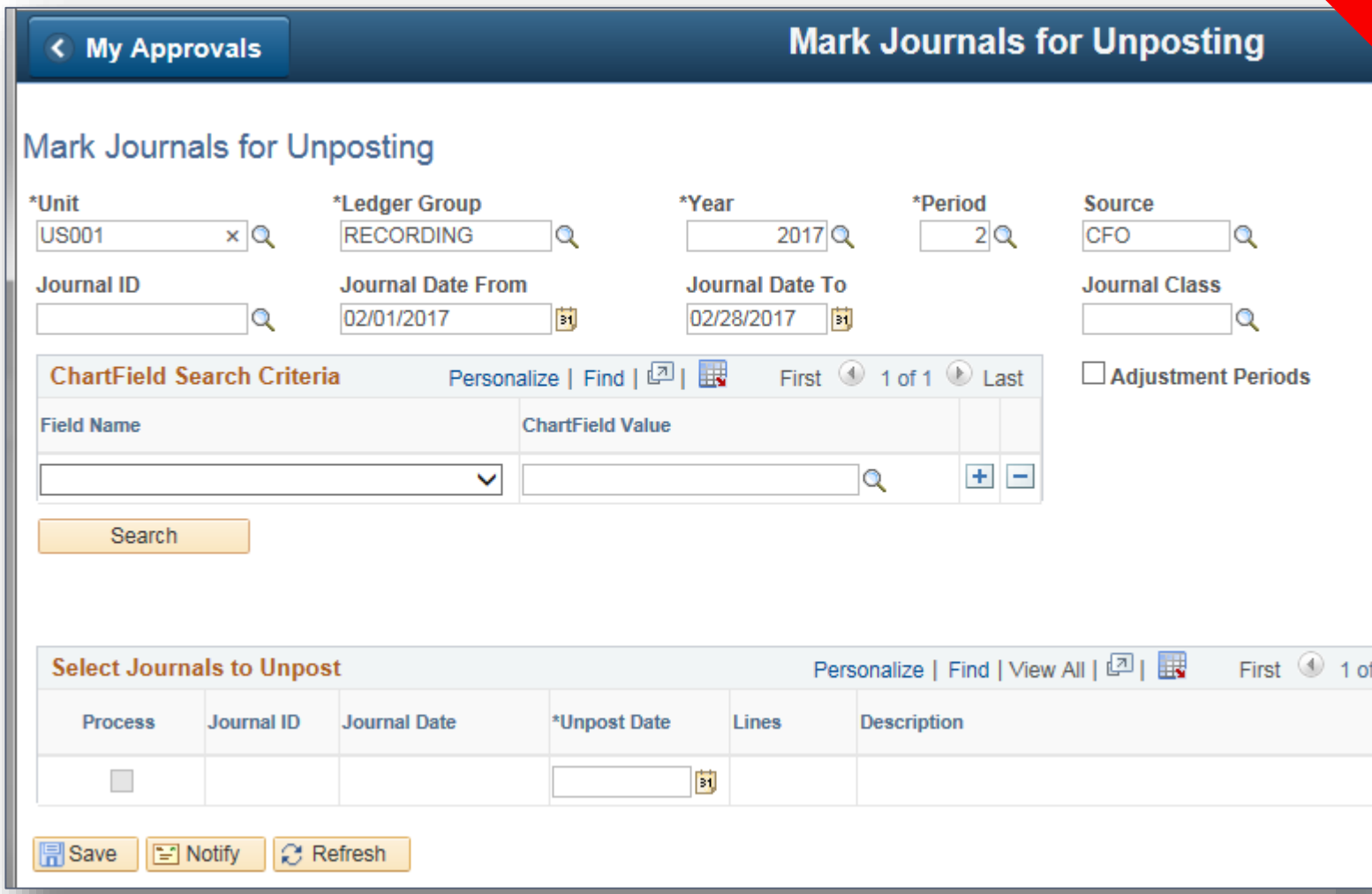
Planned for Roadmap

KEY BENEFITS

- ✓Visibility in Approval Rule Application
- ✓Maintain Audit Trail
- ✓Better Internal Control

KEY FEATURES

- Apply Approval Rules for Journal Unposting
- Visibility to Previous Denied Reasons for Subsequent Journal Approval Flow



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Expansive Insight to Improve Decision Making

Payables Operations Home Page

Managers & Supervisors

- ✓ Take Action & Delegate Work
- ✓ Navigate within AP
- ✓ Analyze Operational Flows

KEY FEATURES

- WorkCenter Access
- Navigation Collection
- Access to Operational Dashboard
- Act on Approval Tasks

Expansive Insight to Improve Decision Making

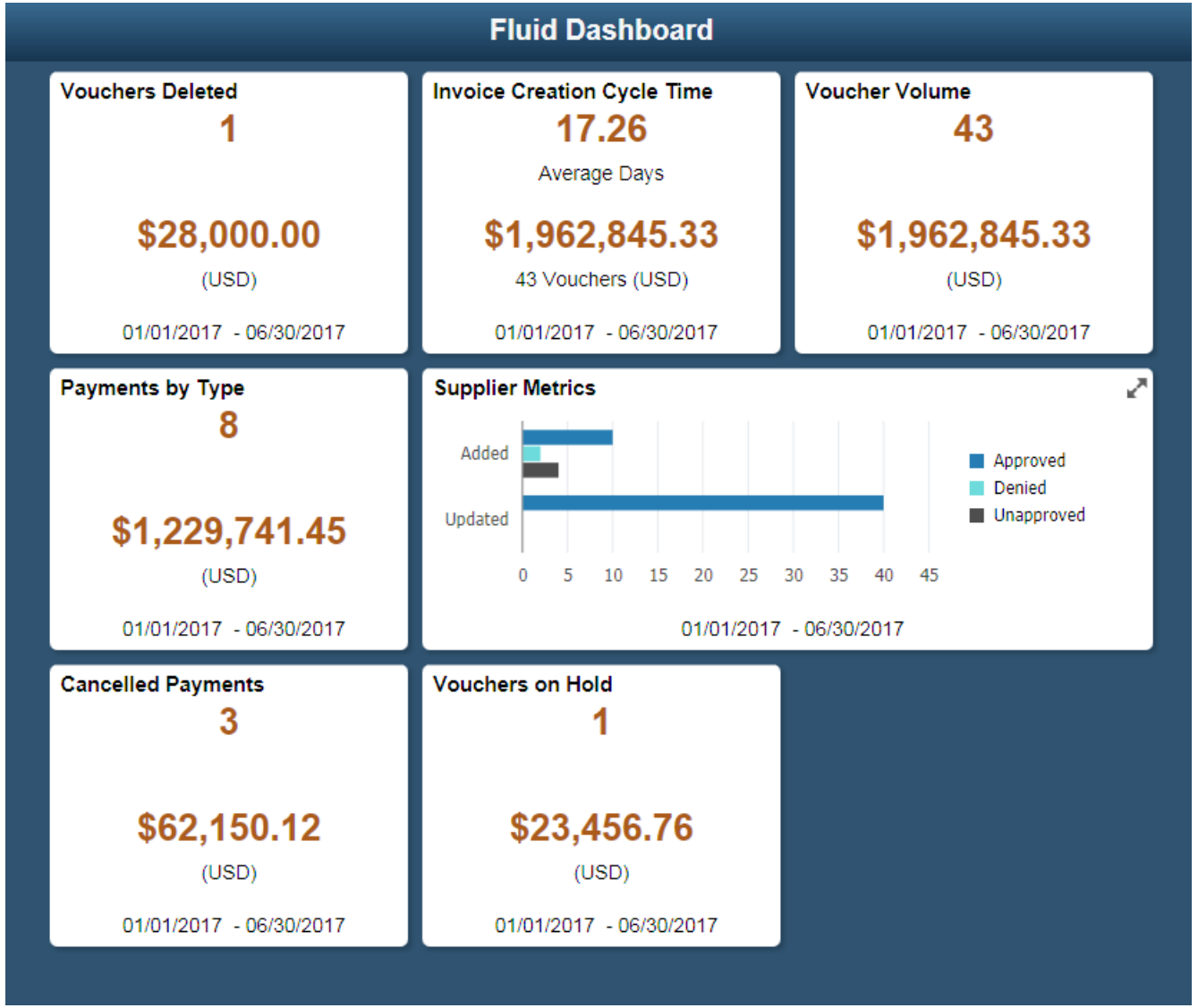
Payables Operational Metrics

Managers & Supervisors

- ✓ Identify Timing Inefficiencies
- ✓ Stream Line Processing
- ✓ Recognize discounts & reduce costs

KEY FEATURES

- Voucher & Payment Processing
- Analyze Exceptions
- Manage Suppliers
- Proactive Team Metrics



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Intuitive User Interface to Manage Your Operations

Credit to Cash Operations Home Page

KEY BENEFITS

- ✓ Identify inefficiencies and potential bottlenecks
- ✓ Reduce collection cycles
- ✓ Reduce DSO

KEY FEATURES

- Measure operation performance
- Define metrics relevant to credit to cash operations
- Provide frequent summaries to management

Intuitive User Interface to Manage Your Operations

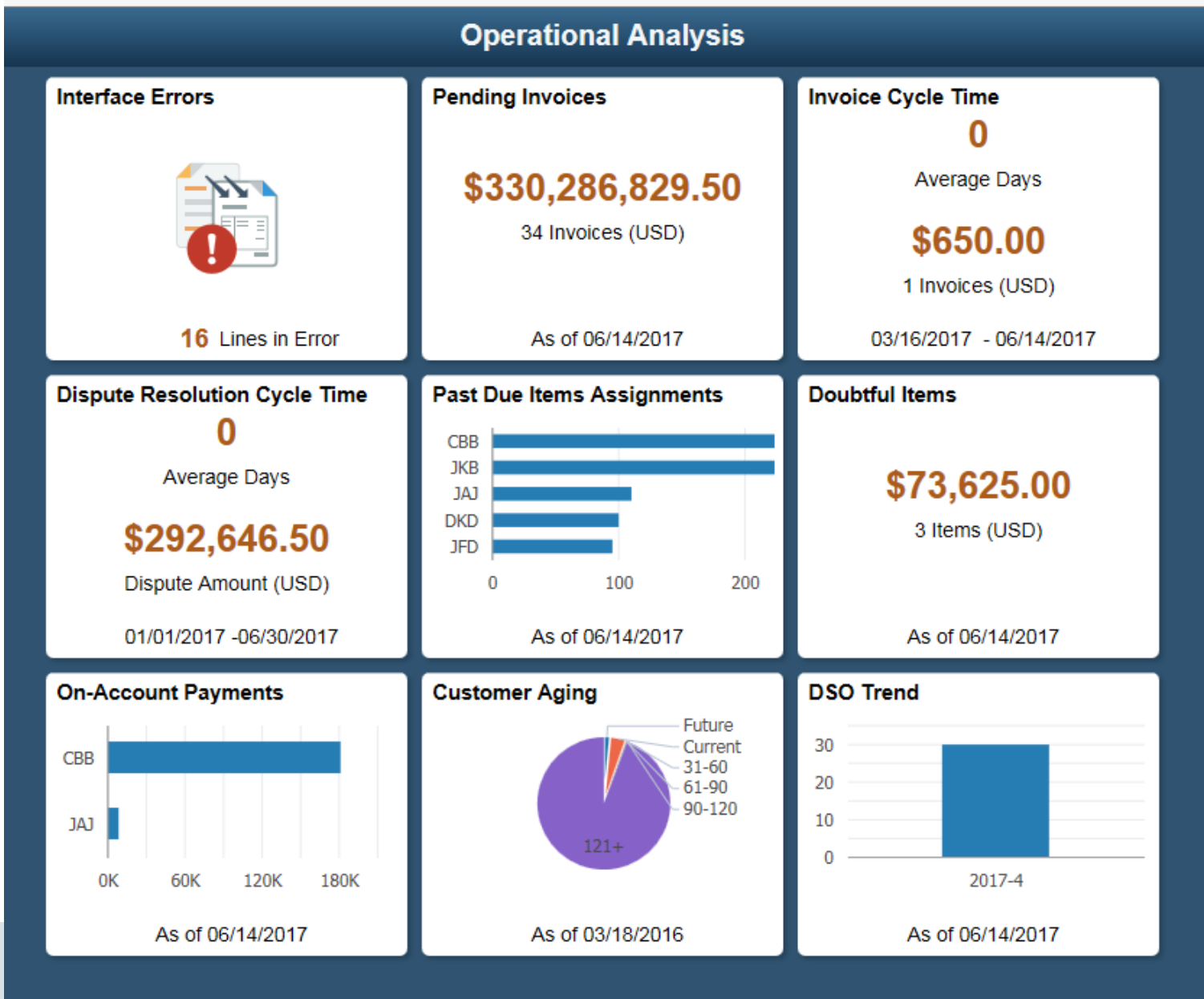
Credit to Cash Operational Metrics

KEY BENEFITS

- ✓ Identify inefficiencies and potential bottlenecks
- ✓ Reduce collection cycles
- ✓ Reduce DSO

KEY FEATURES

- Measure operation performance
- Define metrics relevant to credit to cash operations
- Provide frequent summaries to management



Streamlined Business Processes

Finance and Accounting Home Page *(Image 26)*

KEY BENEFITS

✓Support Business Growth and Expansion Swiftly

✓Drive Efficiency in Finance

KEY FEATURES

- Focus on Finance & Accounting users
- Manage and delegate work
- Easy to navigate to critical tasks

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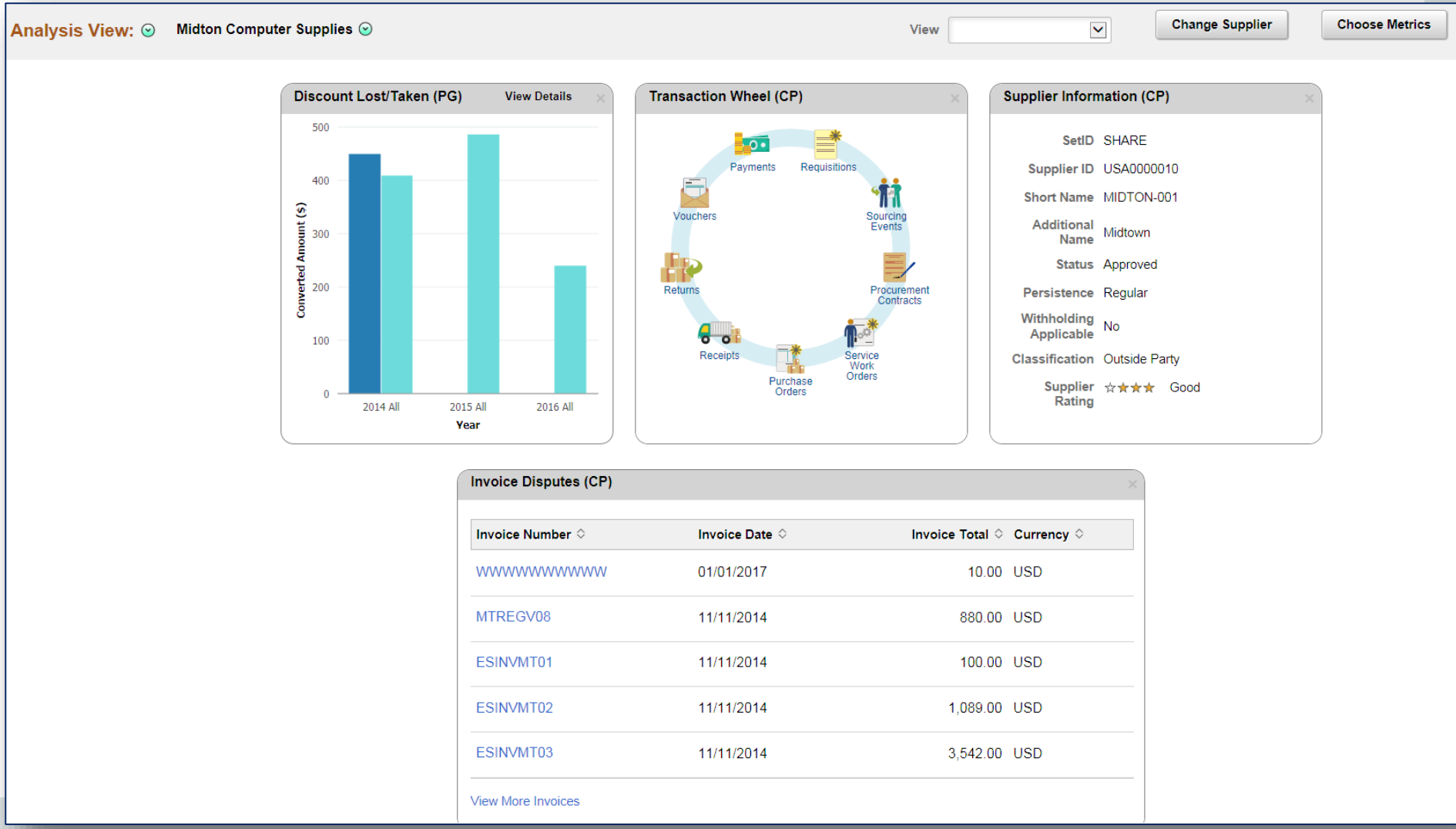
Improve Analysis of Supplier Spend

Supplier 360 FLUID

- ✓Reduce cost of managing suppliers
- ✓Improve data management
- ✓Improve Supplier relationships



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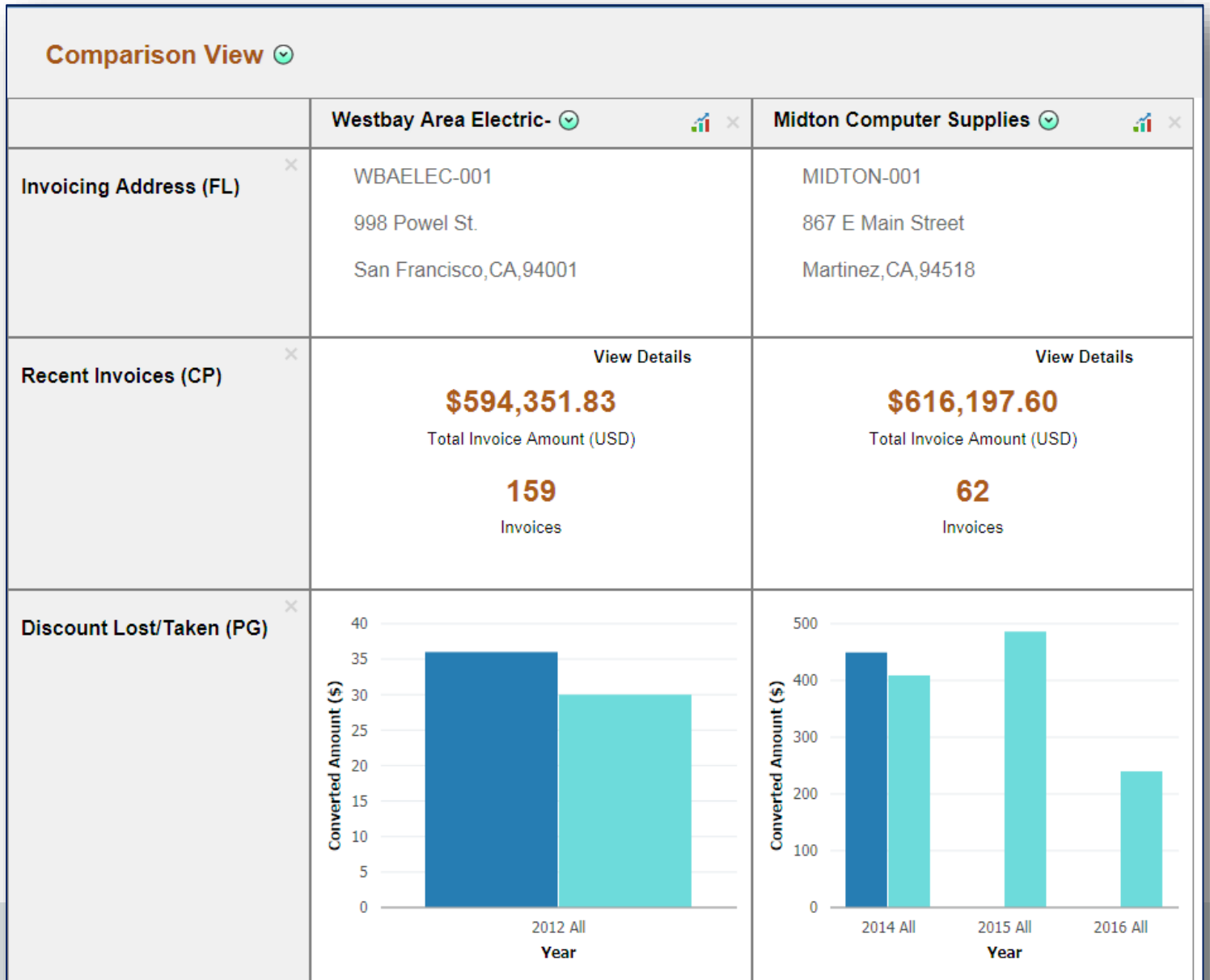
Comparative Analysis of Strategic Spend

Comparative Supplier 360 FLUID

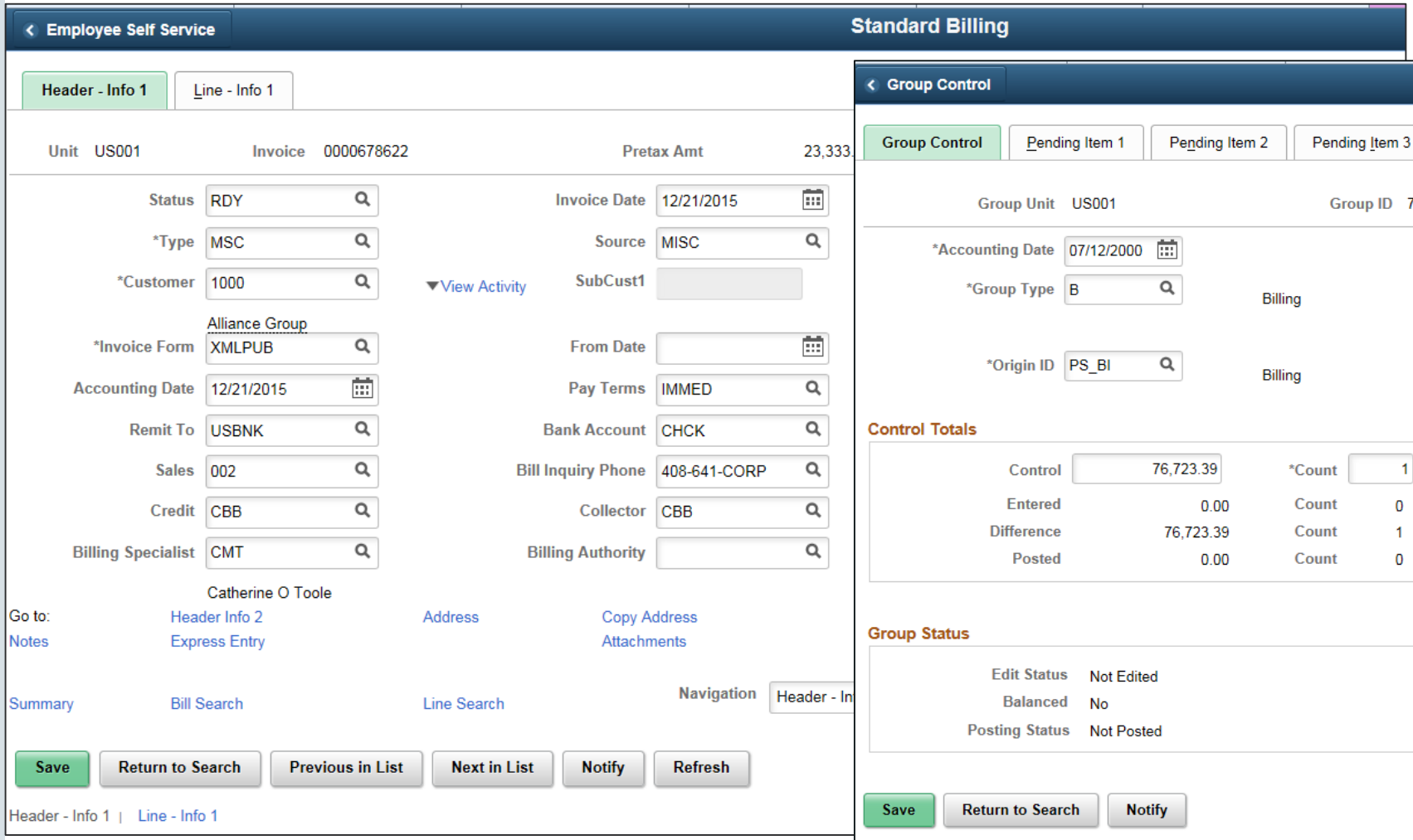
- Expand Access to Stakeholders Throughout Organization
- Configurable to Include Needed Business Content
- Visibility to Many Supplier Specific Data Elements
- *Leverage the Fluid Configurable Analysis Framework (Image 24)*

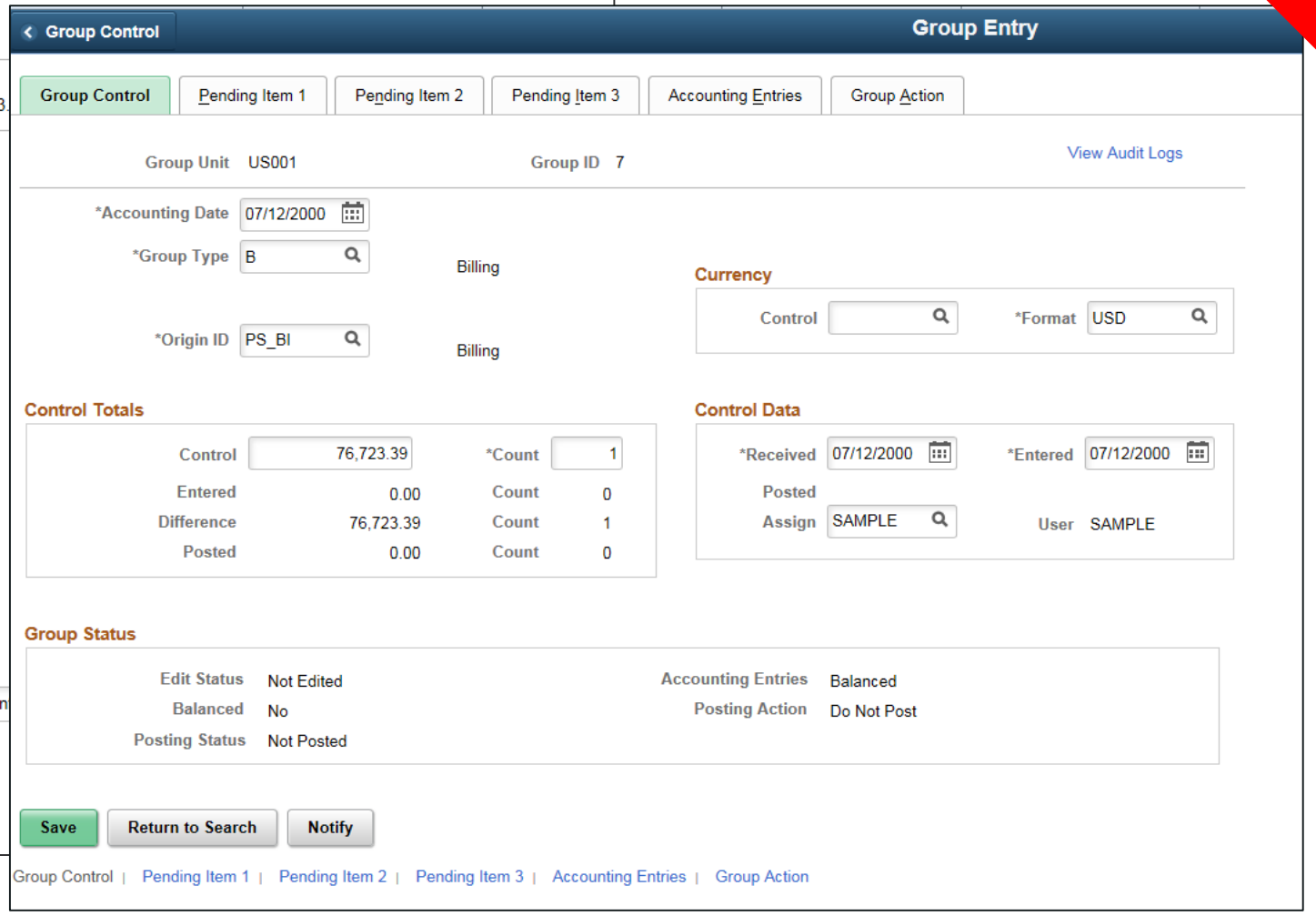


Modernize Your Applications and UX

"Classic Plus" Style to Align Classic and Fluid Pages

PeopleTools 8.56 & Image 26





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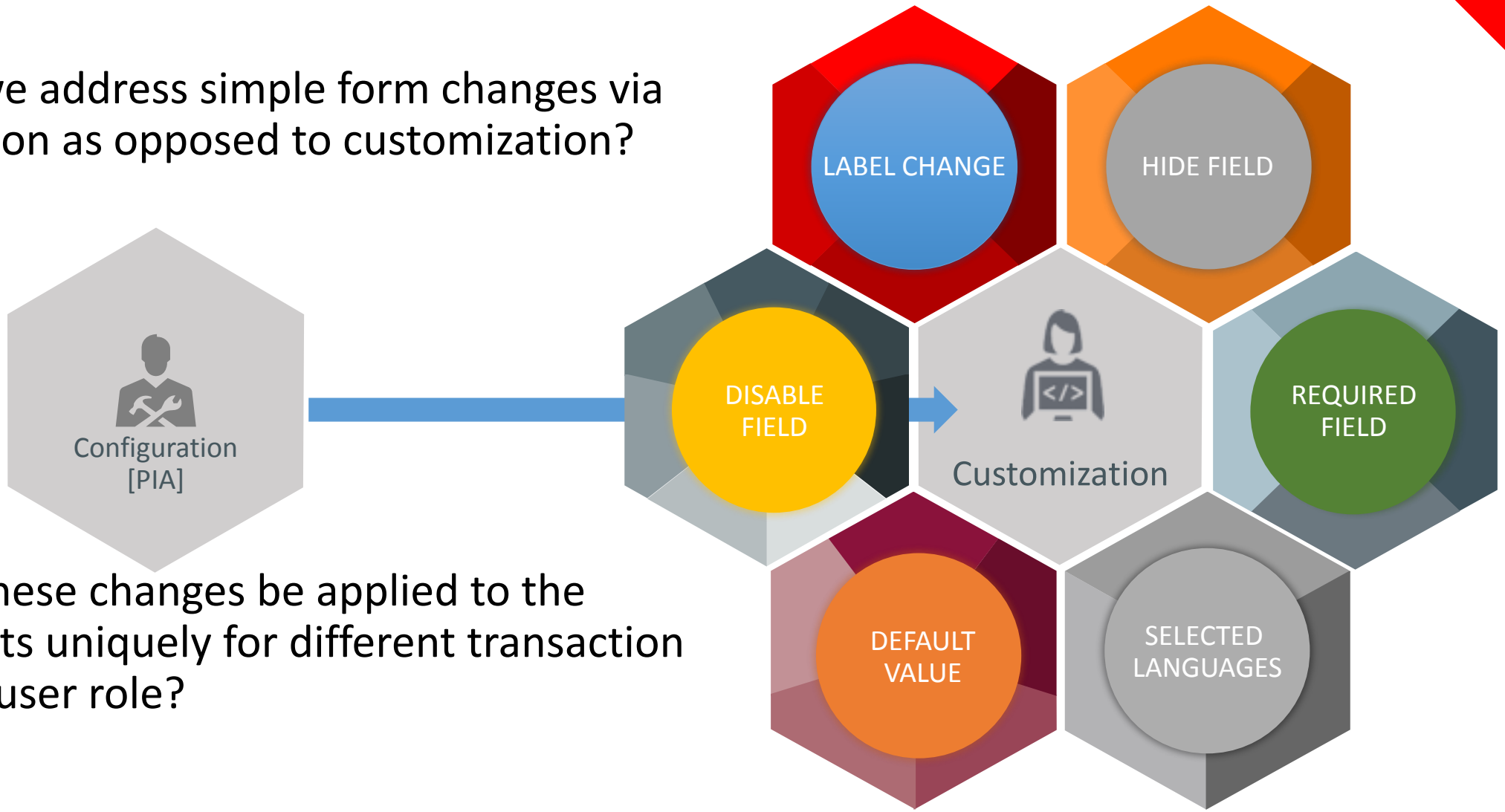
Reduce Customizations & Costs

Image 25

Versatile: Page & Field Configurator

- How can we address simple form changes via configuration as opposed to customization?



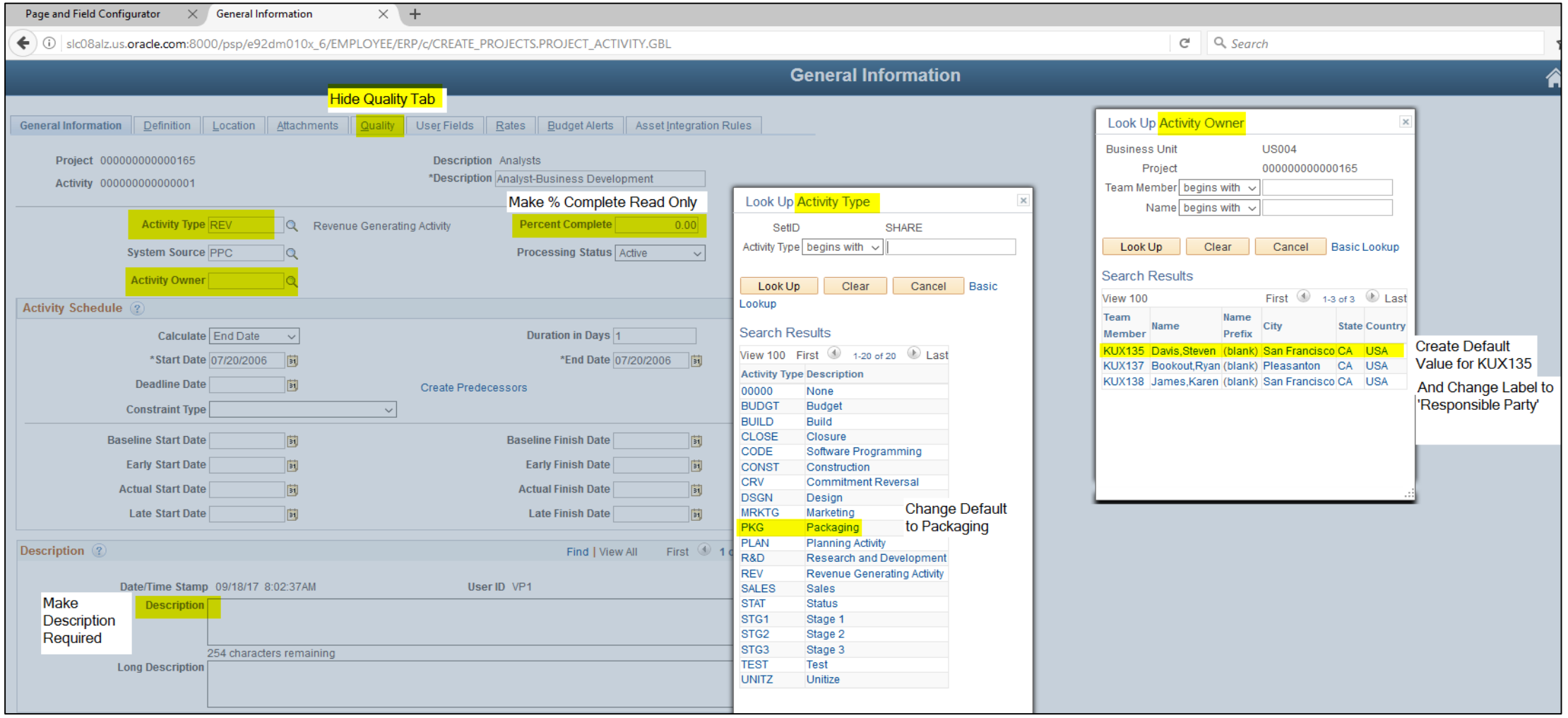
- How can these changes be applied to the components uniquely for different transaction criteria or user role?

PFC VFO

Reduce Customization Costs

Image 25

Versatile: Page & Field Configurator (Desired Changes)

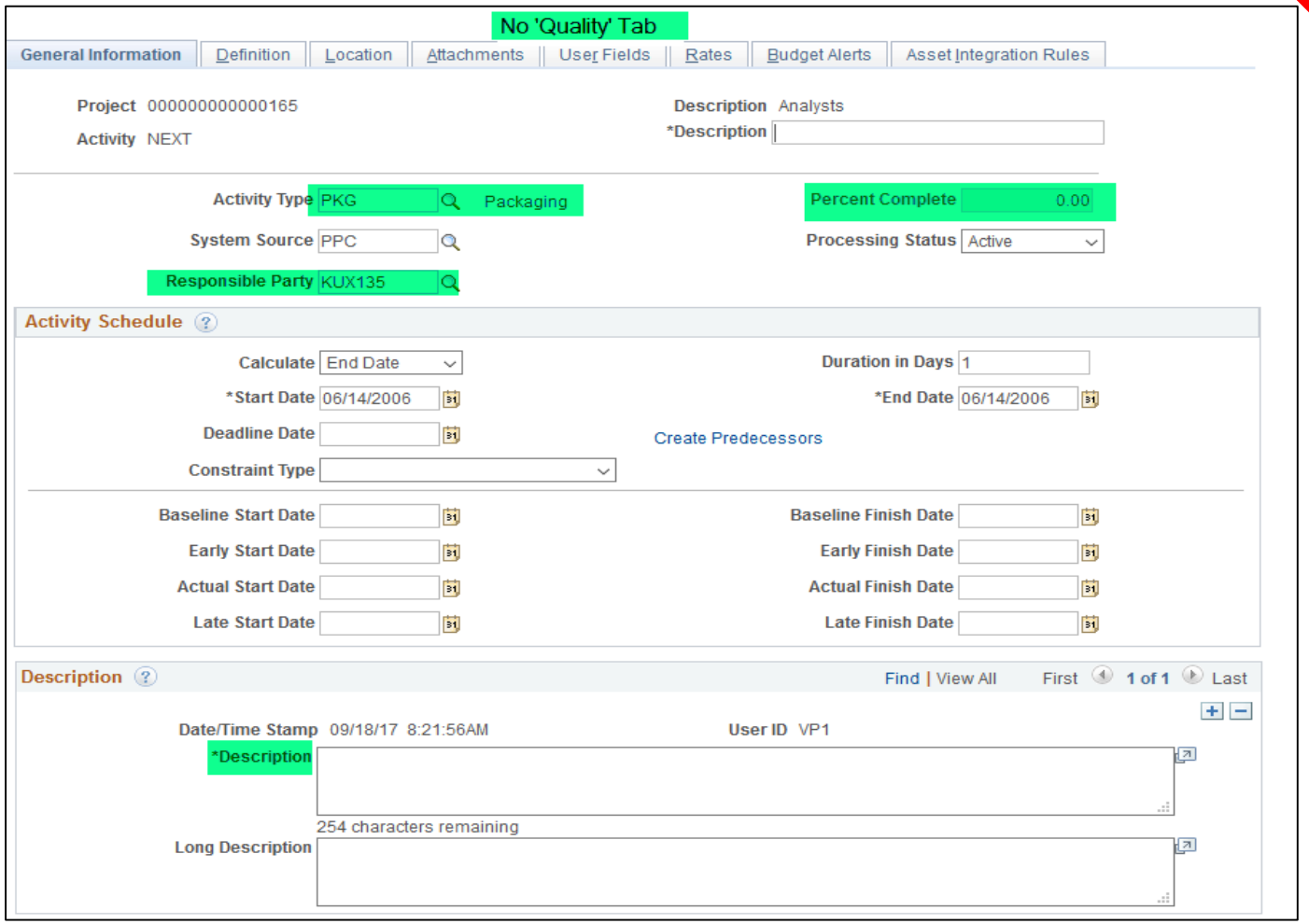


Reduce Customizations & Costs

Versatile: Page & Field Configurator (Expected Outcome)

Image 25

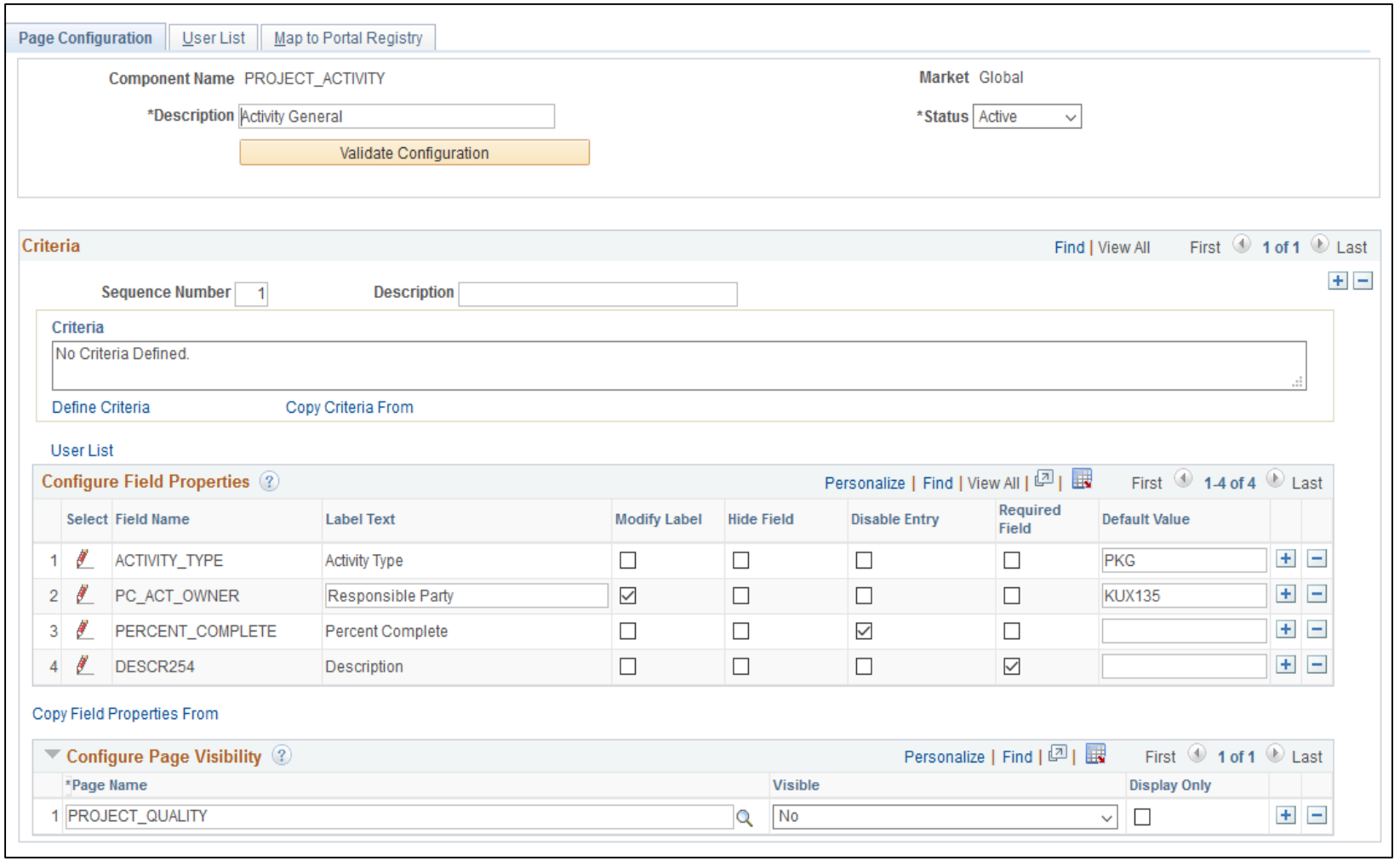
- Modify labels for fields in a component
- Hide fields in a component
- Disable a field for data entry
- Specify a default value for a field
- Multiple configurations to the same component based on user role/transaction data
- Select a field for enforcing required edits
- Change the field labels only for selected languages (in a multi-lingual environment)

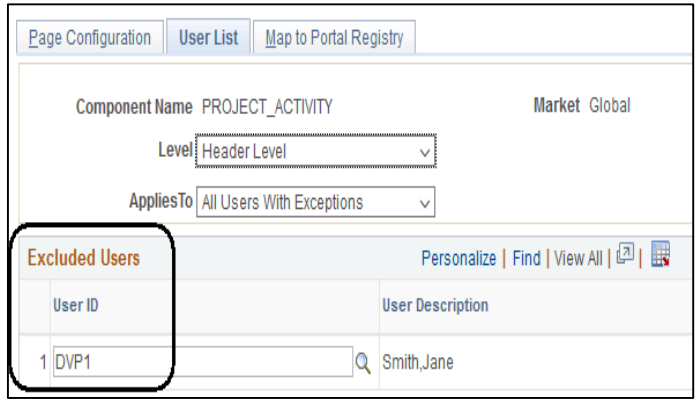


Reduce Customizations & Costs

Image 25

Versatile: Page & Field Configurator (Behind-the-Scenes)





PeopleSoft Projects and Assets – Recent Updates

Asset Lifecycle Management (ALM)

- **Lease Administration**
  - Phases 1 (PI10) & 2 (PI19) Foundation accounting for new lease accounting standards (ASC 842 and IFRS 16)
  - Phase 3 (PI24) Lessee Accounting
  - Phase 4 (PI27) Migration & Transition
- **Asset Management**
  - New Fluid Approval Transactions
  - Single Data Structure and UI for Payables Leases
  - Parent-Child Relationships for capitalized and non-capitalized assets
  - Non-Capitalized Asset Disposal
  - Asset Profile Status
  - Transaction Comments and Attachments
  - Error Handling of Pre-Interface and Interface Transactions
- **Maintenance Management**
  - Mobile Technician
  - Preventive Maintenance Schedules for Disposed Assets
  - Enhanced Labor Time Entry from Technician Workbench
  - Auto Assignment Extensions

Enterprise Services Automation (ESA)

- **Contracts**
  - Import Letter of Credit Funding into Contracts
  - Contracts Administrators Homepage
  - Component Keyword Search
  - Contract Activation and Bill Plan Updates en masse
- **Project Costing**
  - Project Hierarchy
  - Project Costing Simplified Analytics
- **Grants**
  - Grants Administrators Homepage
  - Fluid Pivot Grids
  - Retroactive F&A Enhancements
- **Program Management**
  - Fluid Approval Page Composer for Project Requests & Program Budgets
- **Expenses**
  - Text messaging via twilio platform
  - Expanded visibility for fluid approval
  - Multiple Issuer Credit Card Integration
  - India GST
- **Resource Management**
  - Fluid Approval Page Composer for Resource Assignments
  - Fluid Resource Profile
- **Cross Product**
  - Extend/Modify End Dates in Grants, Contracts, Project Costing
  - Page & Field Configurator

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Continued Investment in Projects and Assets

Planned for Roadmap

Asset Lifecycle Management (ALM)

- **Lease Administration**
  - GASB 87 for Lessees
  - Intercompany Leases
  - Operating Receivables Leases
- **Asset Management**
  - Asset Management Self Service
  - Transaction Comments and Attachments for Worksheets
  - Approval Workflow for Mass Transaction Manager
- **Maintenance Management**
  - Mobile Asset Inspections

Enterprise Services Automation (ESA)

- Expanding elastic search capabilities for projects, contracts, grants, billing, AR and eBill payment
- Building a performance enhancement framework for Project Costing
- Enhancing the Contract Billing Process to Exclude Unpaid Cost on Federal Awards
- Expenses GPS Mileage Calculator
- Continued visibility enhancements for fluid expense reports & fluid approvals
- Generating Grant Awards en Masse
- Supplementing capabilities for Page & Field Configurator

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PeopleSoft SCM and SRM – Recent Updates

Non Exhaustive

eProcurement

- Configurable Landing page w/ Navigation (18)
- Cancel Requisition and Cancel Line (18)
- Special Requests and Browse Catalog Capability (18)
- Requisition Summary, Accounting Visibility and Line Overrides (18)
- Fluid Approvals for ePro (18)
- Multiple Images for Items (20)
- Mobile Receiving (22)
- Edit Requisition , Advanced Search , Special Request Item Check (24)
- Req Defaults, Line Details & Amount Only Lines (27)

Strategic Sourcing

- Download All Bidder Attachments (12)
- My Sourcing Events Tile and Metrics (PI15)
- Fluid Approvals for Sourcing (20 & 24)
- Notice of Intent to Award, Notice of Award (21)
- Improvements to Bidder Invitations (23)
- Event Invitation search by Category & Diversity (28)

Purchasing

- P-Card Reconciliation Chunking (14)
- Group Contracts (18)
- Contract Styles (18)
- Procurement Simplified Analytics (18)
- Fluid Approvals for Purchasing (18)
- Fluid Contract Approvals (20)
- ProNumber Field Expansion (21)
- Auto-Approval for Draft Contract Versioning (22)
- Amount Only PO's to support MM Work Orders (23)
- Federal DATA Act – File C Interface (23)
- India GST for Purchasing (24)

Supplier Contracts

- Digital Signatures (16) and (18)
- Fluid Supplier Contract Approvals (22)
- Supplier Document and Contract Reporting (22)

Supplier Lifecycle Management (SLM)

- Alerts for Suppliers (14)
- Supplier Change Request Pivot Grids (15)
- Configurable Registration Pagelet (18)
- Fluid Public and Secure Supplier Portal (23)
- Fluid Approvals – Supplier/Bidder Registration (24)
- Supplier Scorecarding (25)
- Fluid Approval – Supplier User Registration (25)
- Fluid Approval – Supplier Change Requests (26)
- Fluid Supplier facing POA (27)

Mobile Inventory

- 7 Fluid Mobile Inventory Transactions (15)
- 9 Fluid Mobile Inventory Transactions (18)

Cross Products

- Accounting Tag (18)
- Page Composer for Approvals Layout (20)
- Classic Plus (26)
- Page and Field Configurator (26)

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Continued Investment in SCM and SRM

Planned for Roadmap

- **eProcurement**
  - Guided Buying capability for Search
  - Quickbuy Capability
  - Store UPN data on P2P transactions
  - Next round of Classic to Fluid enhancements
  - Quick Receive for ePro Receiving
- **Strategic Sourcing**
  - Event Invitation search by Category & Diversity (28)
  - Fluid Event Analysis using Simplified Analytics
  - Improvements to Bidder Responses
  - User access to Bid Opportunities on behalf of multiple Suppliers
  - Ability to Add/Update Event Lines and Bid Factors
  - Bidder Invitation Notifications for Bid Events
- **Purchasing**
  - Procurement Contract Usability
  - Manufacturer / Distributor Contracts
  - Ship To Pricing
  - Procurement Contracts to support Punchout and Adhoc Item Requests
  - Store UPN data on P2P transactions
  - Fluid Buyer facing POA
  - Track Procurement Spend
  - Tokenization of Credit Card data for PCards
- **Supplier Contracts**
  - Convert SOAP API's to Rest API's
- **Cross Products**
  - Page Composer Email Approvals
  - GDPR (Sensitive Data Masking)
- **Supplier Lifecycle Management (SLM)**
  - Supplier Portal – User Preference to support Time Zones, Bidder Notifications and Contract Documents
  - Supplier Diversity and Certificate Management
  - Supplier Scorecard KPI's
  - Review step to Supplier Registration and Change Requests
  - POA Analytics
- **Inventory/Mobile Inventory**
  - Partial Item Substitutions (INV)
  - Par Location Replenishment Source of Supply Inquiry (INV)
  - Mobile Par Counts (MI)
  - Enhancements to Par Counts and Cycle Counts (MI)
- **Researching**
  - Artificial Intelligence Initiatives

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Modernize Your Technology Platform

GL Process Conversion to Application Engine

What It Means To You

- Provided Application Engine to Replace Cobol *(Image 15)*
  - Multi-Currency Revaluation
  - Multi-Currency Translation
  - Multi-Currency Translate within Ledger
  - Year-End Closing
- Reduce Code Maintenance
- Cobol Not to be Removed
- Regression on Application Engine only

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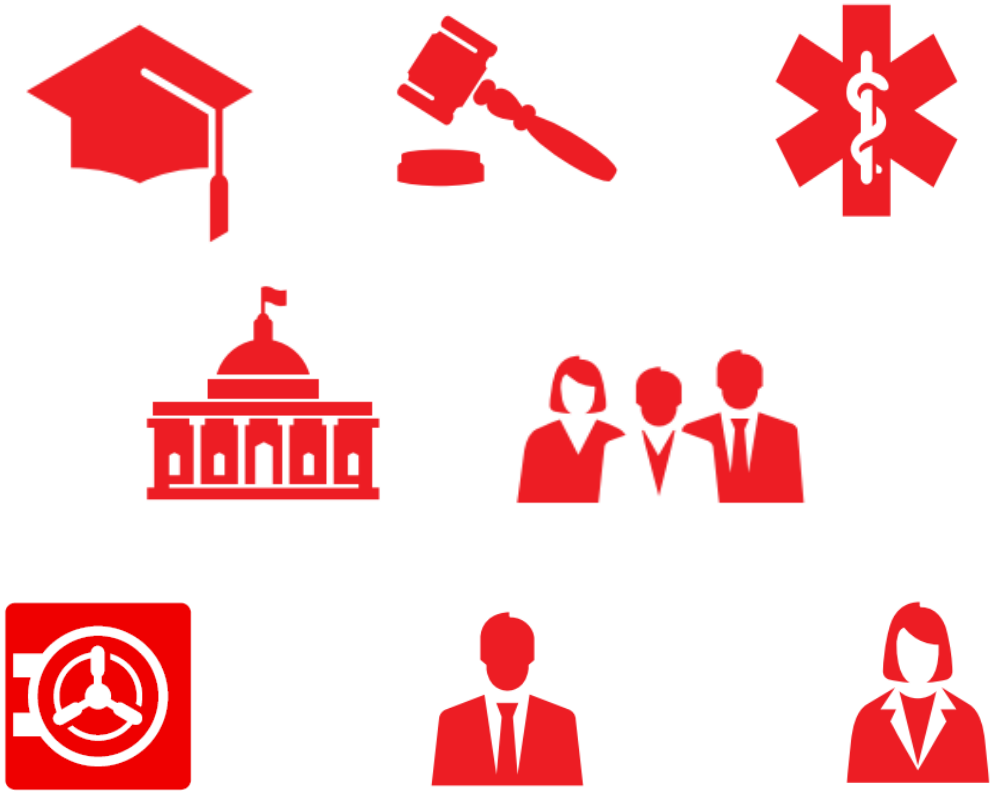
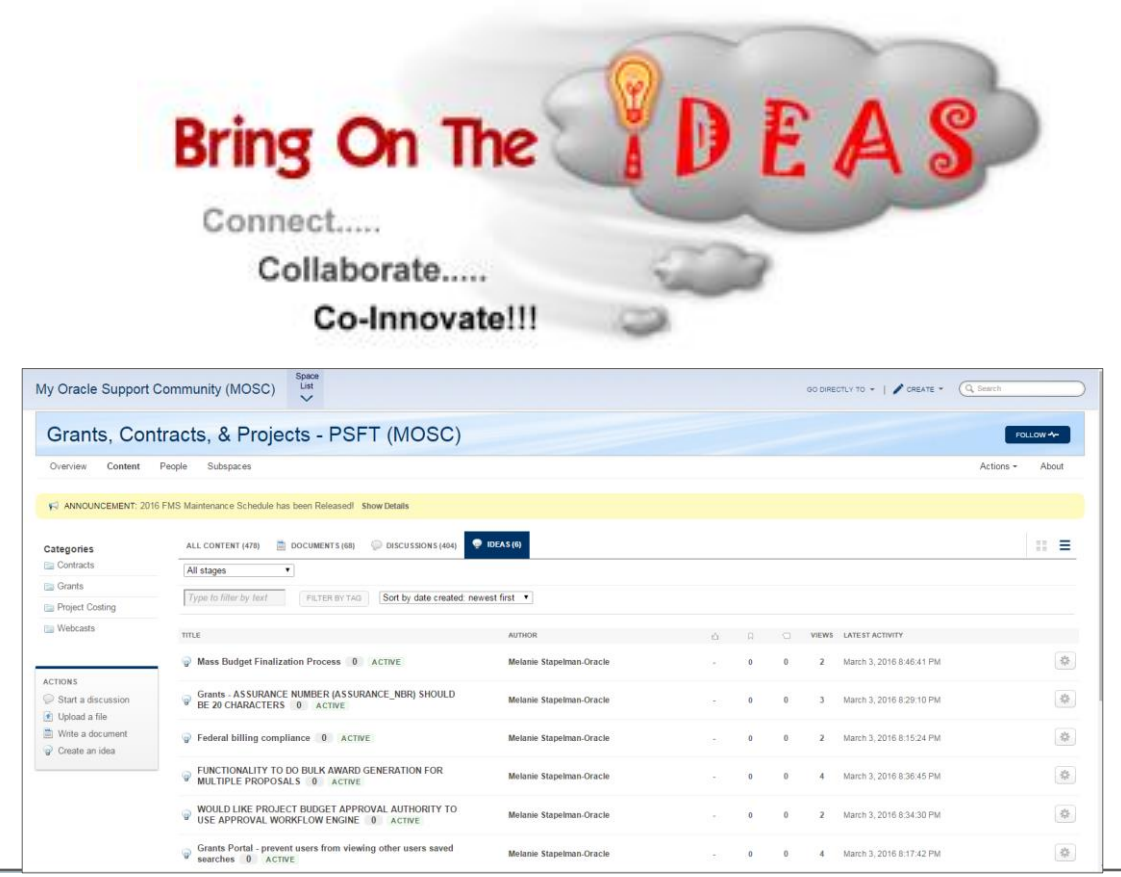
PeopleSoft Investment Strategy

Vote on the Roadmap

Community Groups



Community Ideas



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PeopleSoft Financials Strategy and Update

Key Points

- Empower Users with Intuitive Interface
- Drive Efficiency into Financial Operations
- Deliver Unparalleled Decision Support

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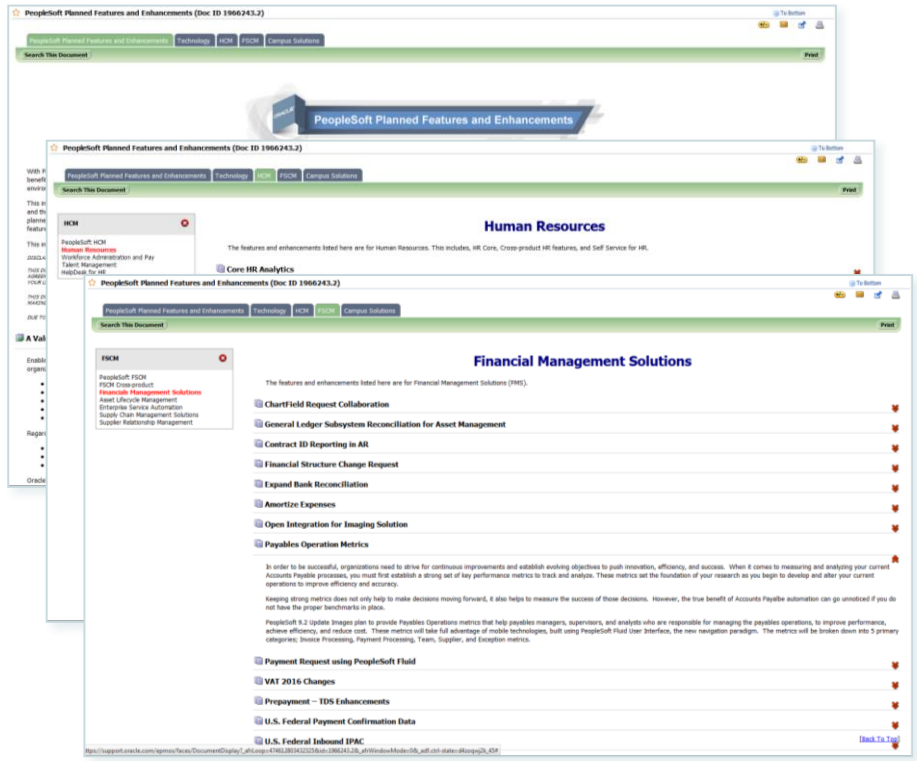
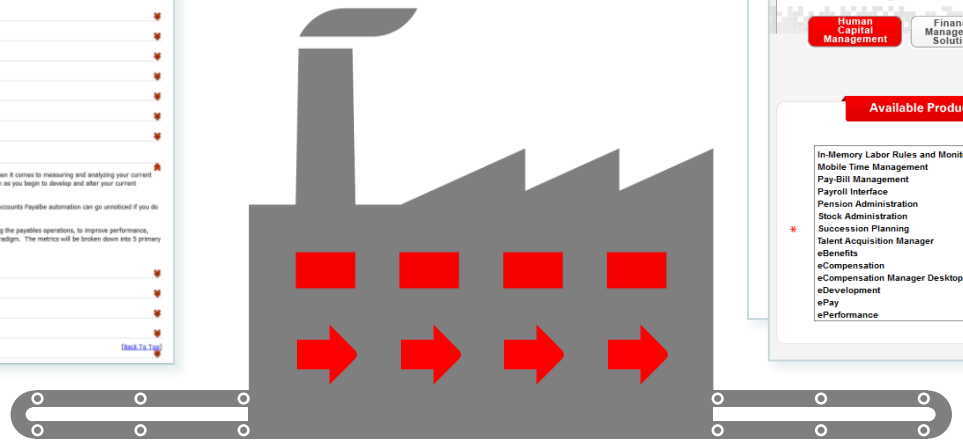
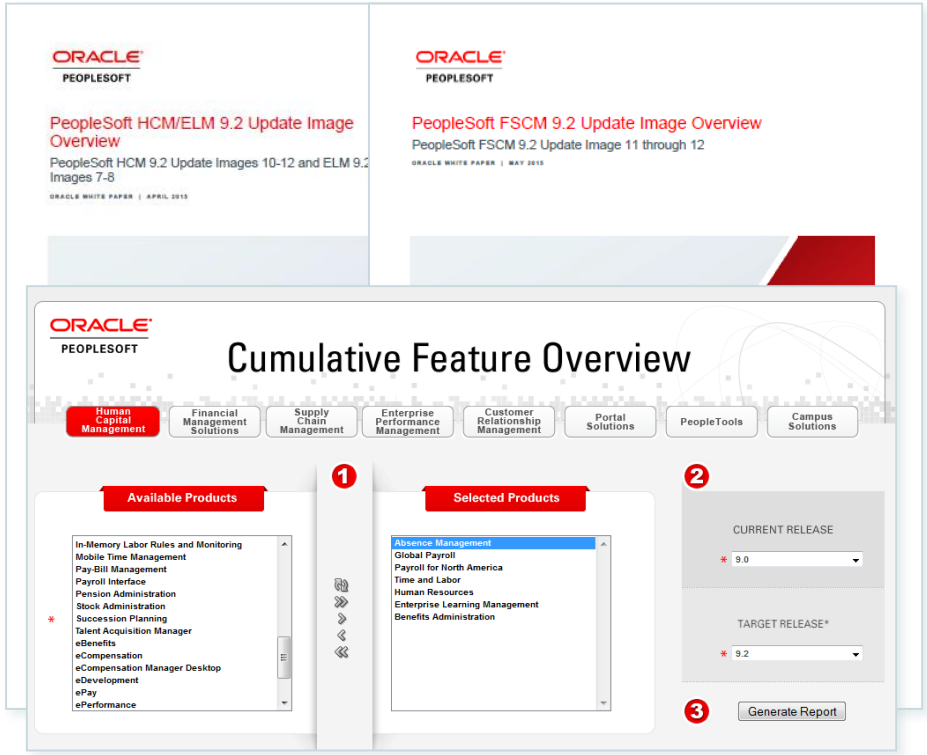
Delivering on Roadmap

Keeping Up with What Has Been Delivered and What Is Planned for Delivery







Planned Features and Enhancements

Update Image Overviews Cumulative Feature Overview

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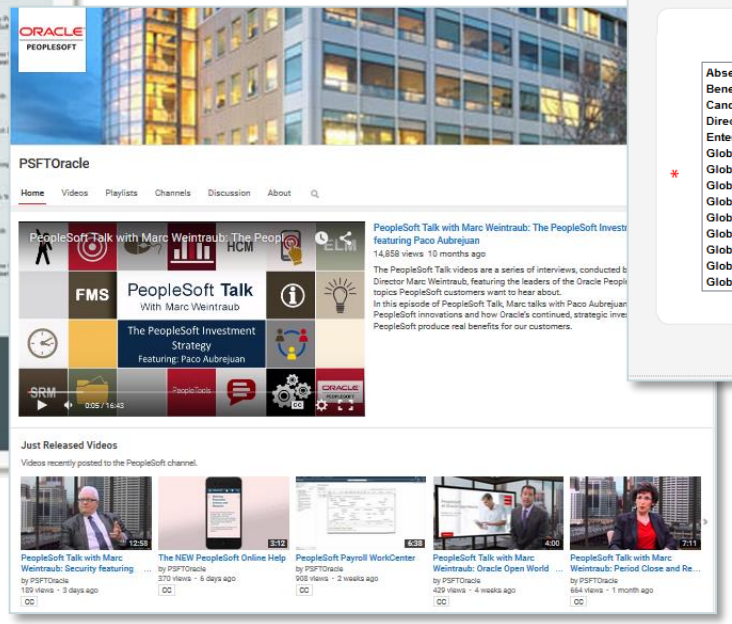
Get Connected and Stay Informed

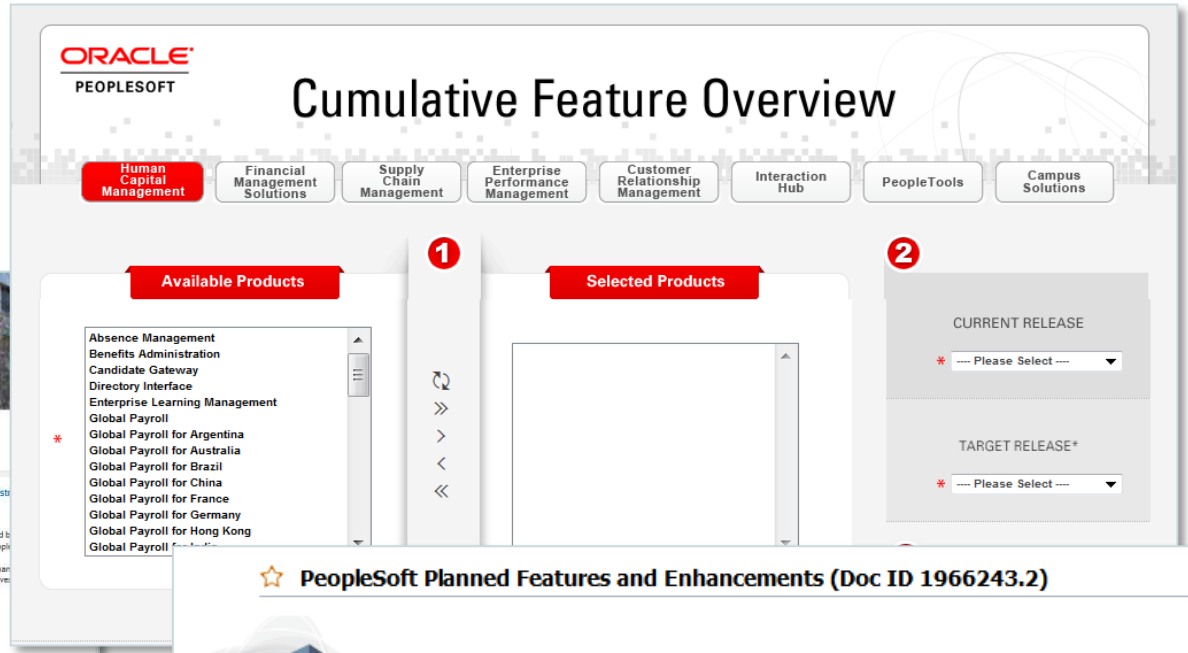
Key PeopleSoft Information Sources

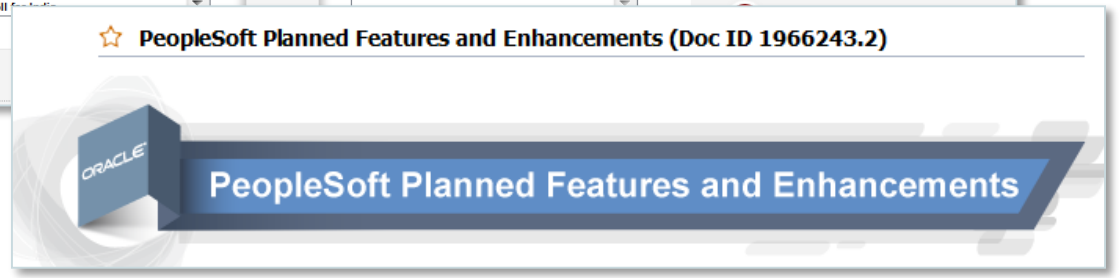
PeopleSoft Information Portal

PeopleSoft Video Feature Overviews and PeopleSoft Talks



PeopleSoft CFO Tool





PeopleSoft PFE

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Blogs

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Questions and Answers

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Effectively Execute in the Face of Complexity

Easily Find and Act On Information – *Elastic Search for PeopleSoft*

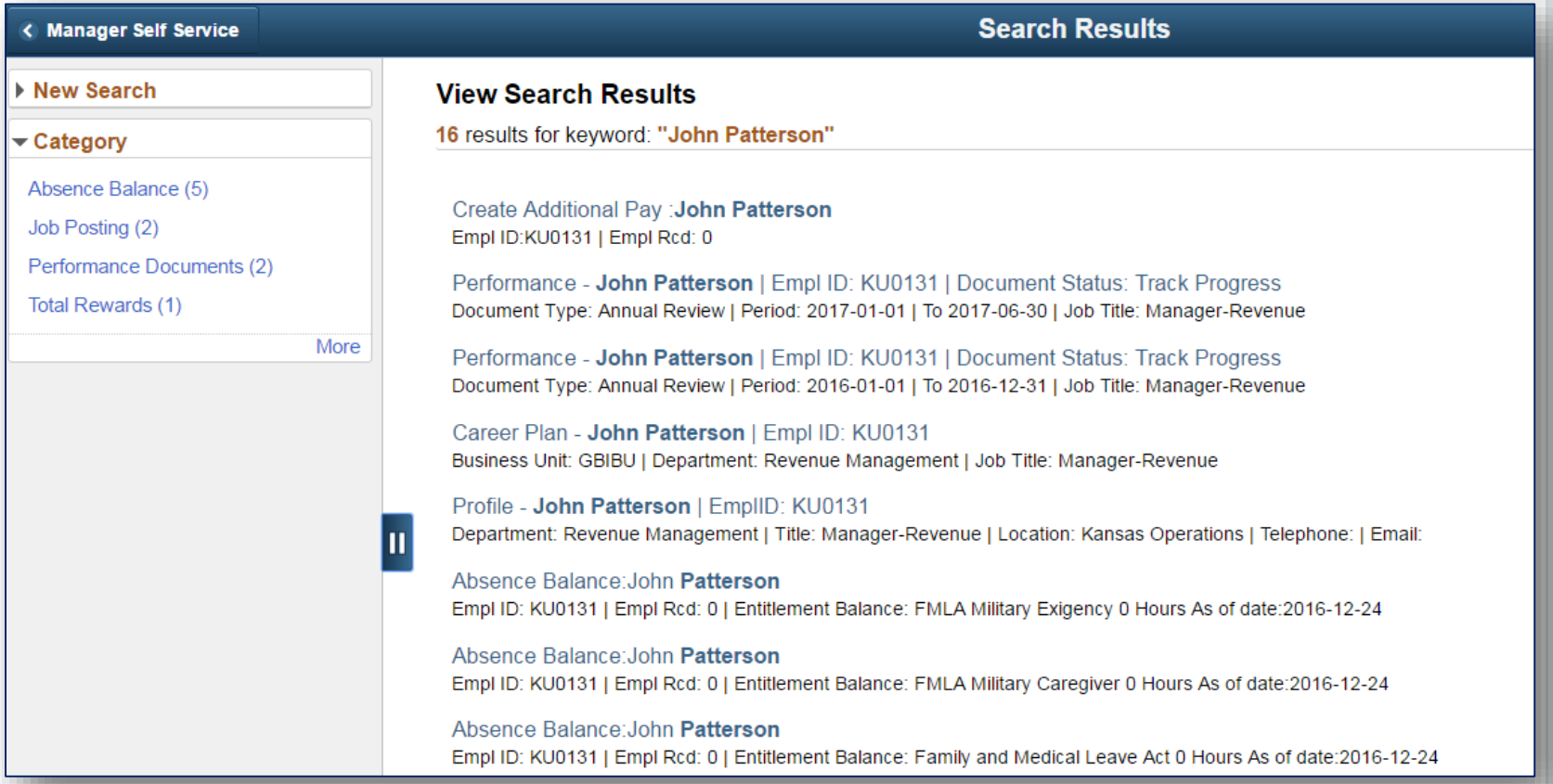
✓ Meet current and future business needs

✓Improved performance in indexing and results retrieval

✓Horizontally scalable, supporting distributed architecture

✓Easy to install, administer and maintain

https://youtu.be/ETj_1zcgT6Y



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PeopleSoft's Move to Elasticsearch

What is Elasticsearch?

- Distributed, open source search and analytics engine
- Designed for scalability, reliability, and easy management
- Based on Apache Lucene, a popular search library, world-wide popular use

PeopleSoft and Elastic Search

- Elasticsearch is a deployment Choice
  - SES and Verity deprecated in 8.56 (SES will be supported with 8.55 until April 2018)
- PeopleSoft delivers a specific version of Elasticsearch as a Deployment Package
- Deploy Elasticsearch on the separate search host instead of SES
- Uses PeopleSoft Security Model

https://youtu.be/ETj_1zcgT6Y

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