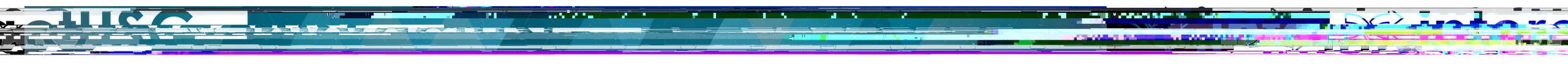


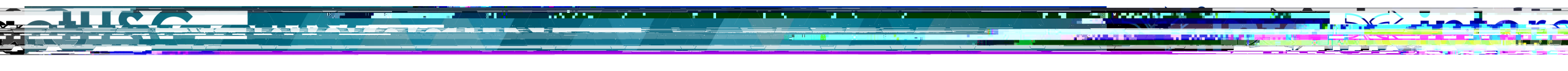
PeopleSoft Travel and Expenses

Kristi Bradshaw

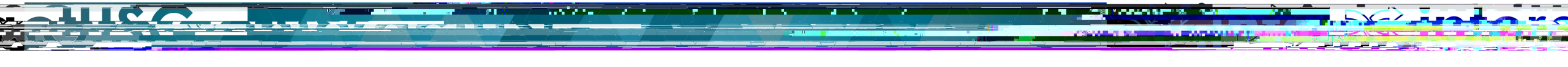


Agenda

- Annual Maintenance Release 5.50 Updates
- Known Issue Updates
- Ticket Reminders
- Submitted Questions / Open Discussion
- Documentation Updates

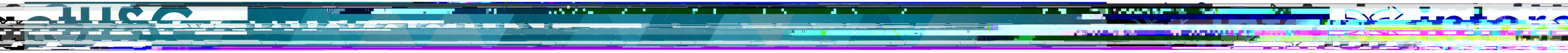
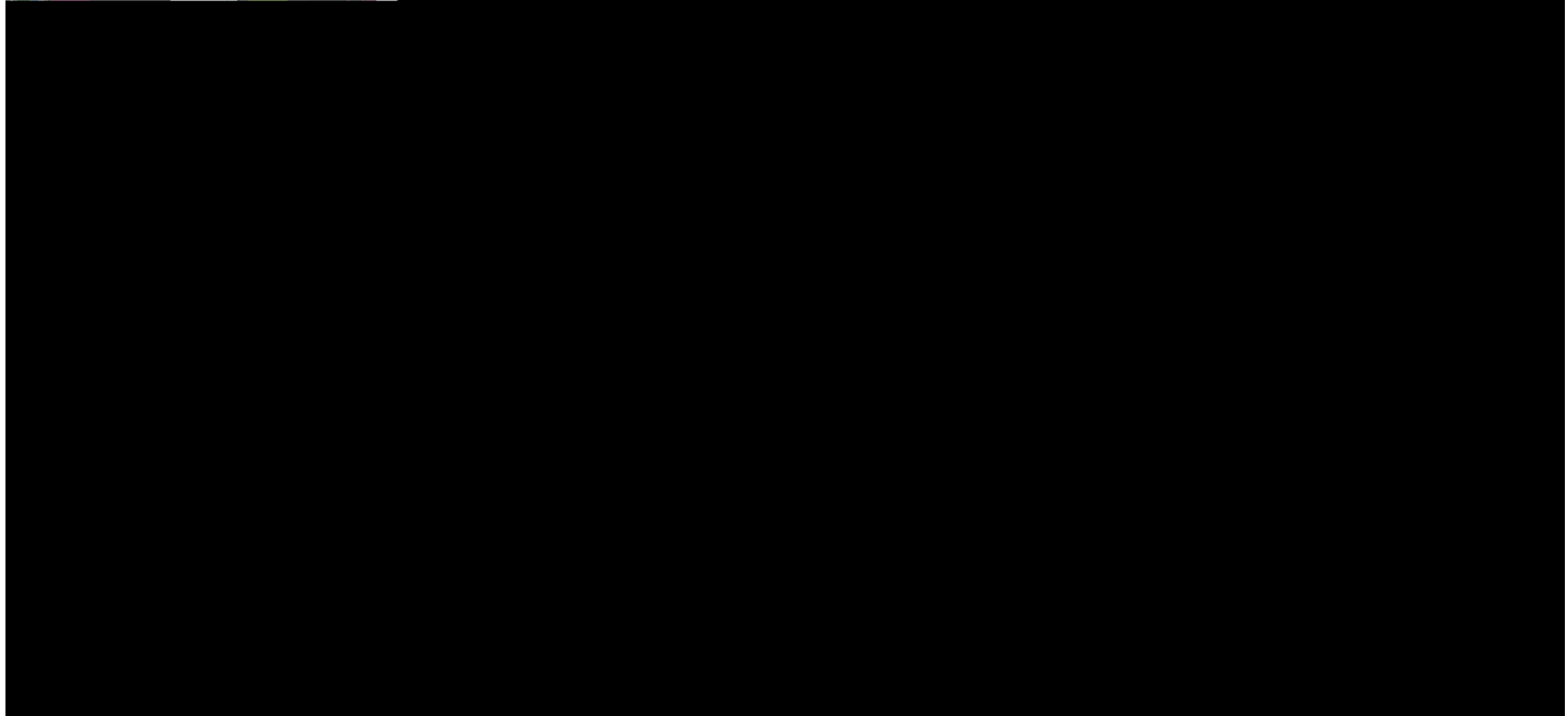
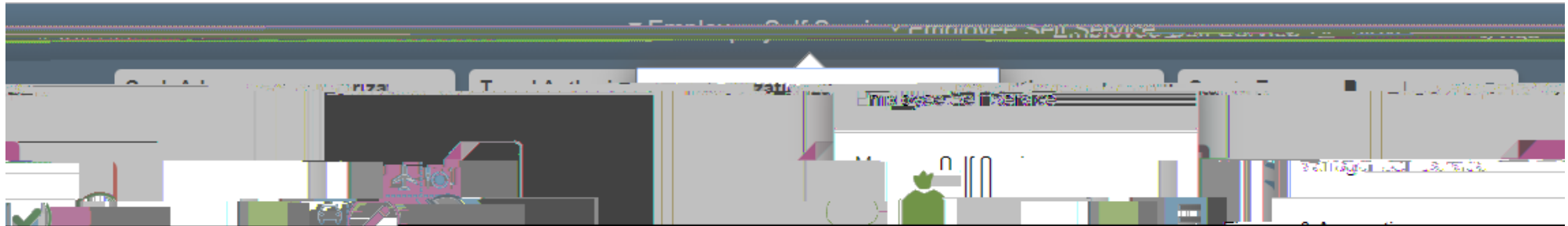


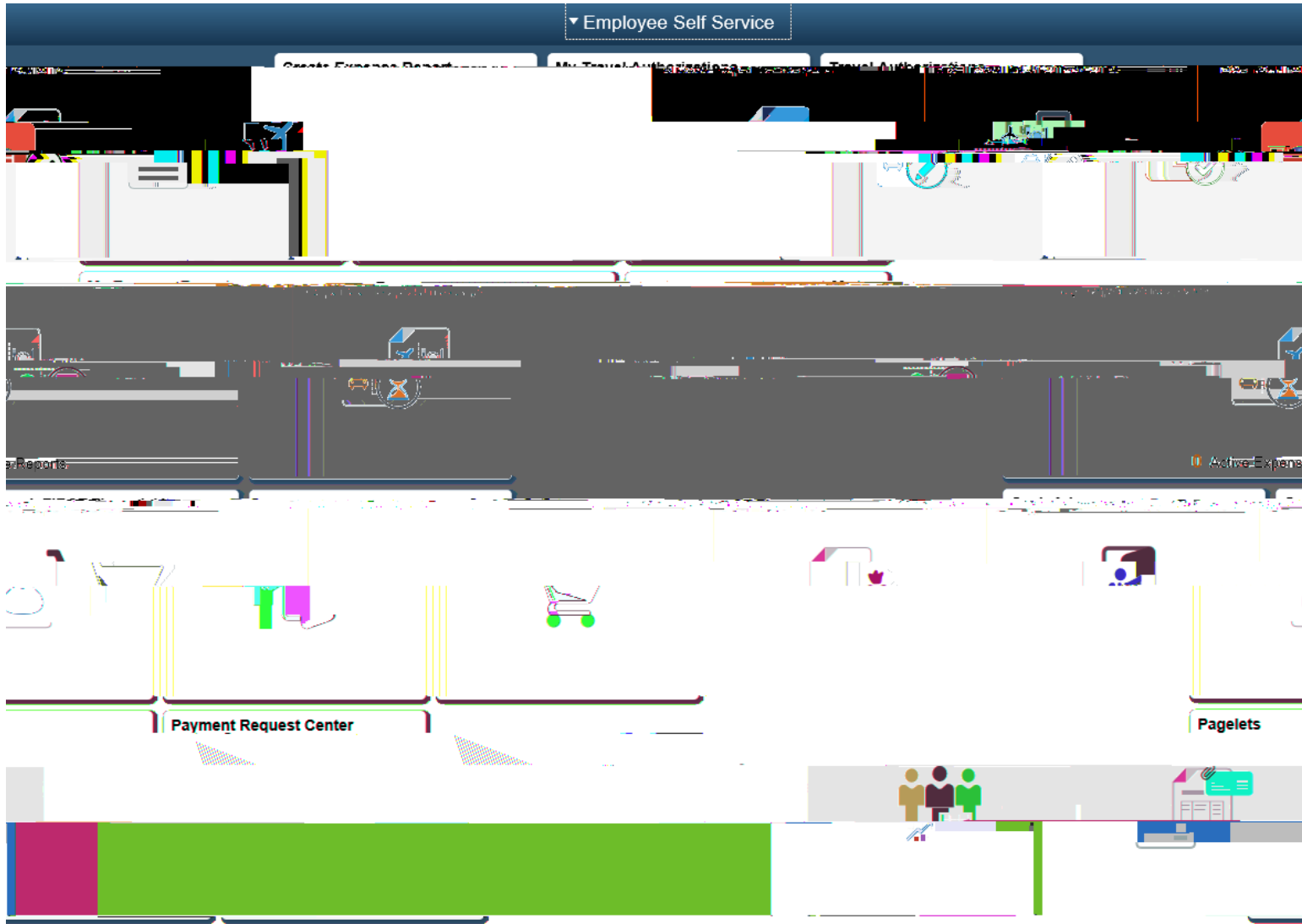
Annual Maintenance Release 5.50 Updates



Annual Maintenance Release 5.50 Updates

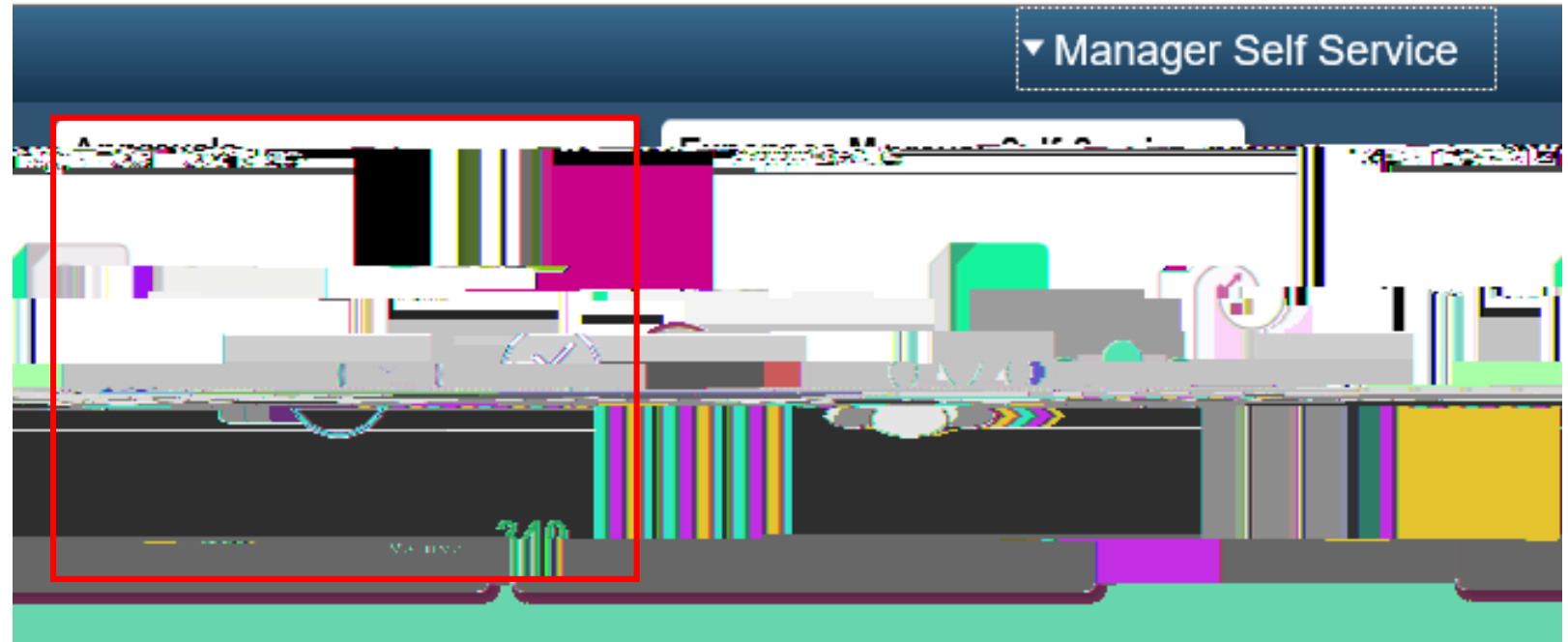
- As part of REL 5.50 we are hoping to implement additional fluid pages. Testing is ongoing as part of the annual maintenance release cycle.
- Performance related tasks in place
 - T & E Travel Authorization Delete page
 - T & E Post Liabilities and Close Liabilities processes





Annual Maintenance Release 5.50 Updates

- Manager Self Service
 - New Approvals tile



Grouping

The screenshot shows a web-based interface for expense report approval. At the top, there are buttons for 'Approve', 'Deny', and 'More'. A 'View By' dropdown menu is set to 'Requester Type'. A red arrow labeled 'Grouping' points to a 'Date Routed' header. A red box highlights a filter icon. Below the header, a table lists expense reports. A red arrow labeled 'Name of selected Category' points to the 'Expense Report' category in the table. A red box highlights a '50' icon. A red bracket on the left side of the table is labeled 'Categories'. The table contains the following data:

Expense Report	Requester	Amount	Currency	Status
Expense Report	Helen Howells	2,911.79	USD	Routed
Expense Report	Wendy Tabl	177.84	USD	Routed

Categories

Name of selected Category



50 rows

Expense Report Approval

Travel Authorization

50

Expense Report

Wendy Tabl

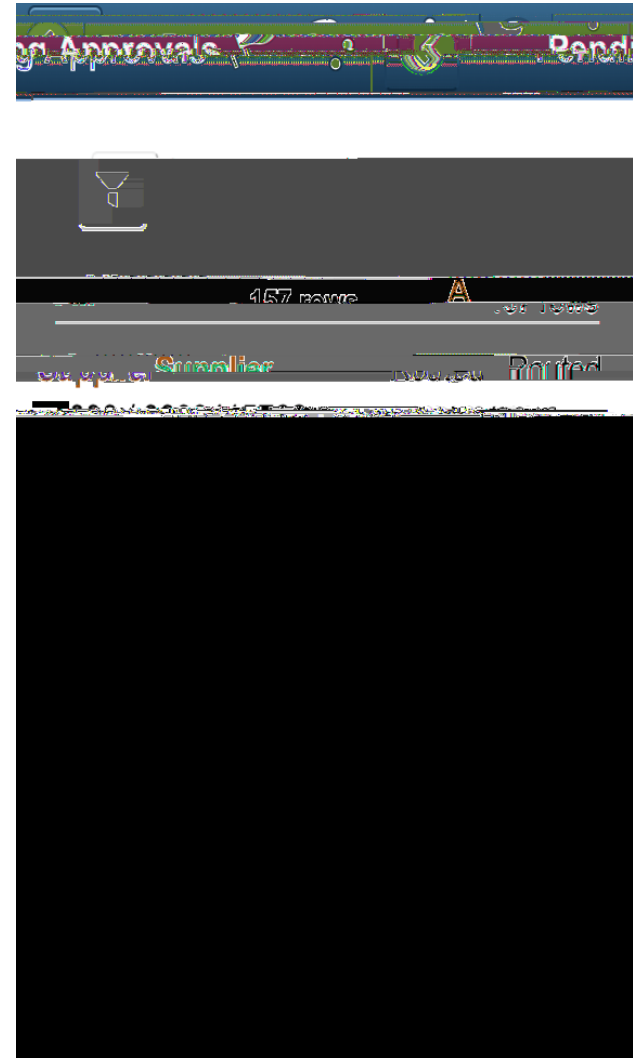
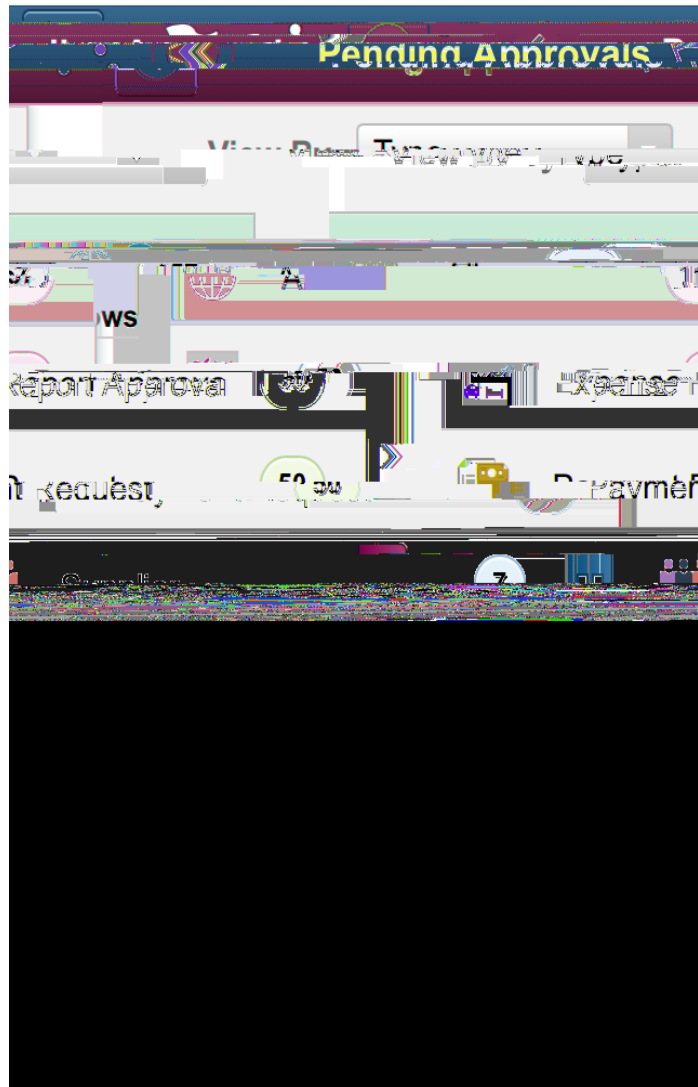
Expense Report

Helen Howells

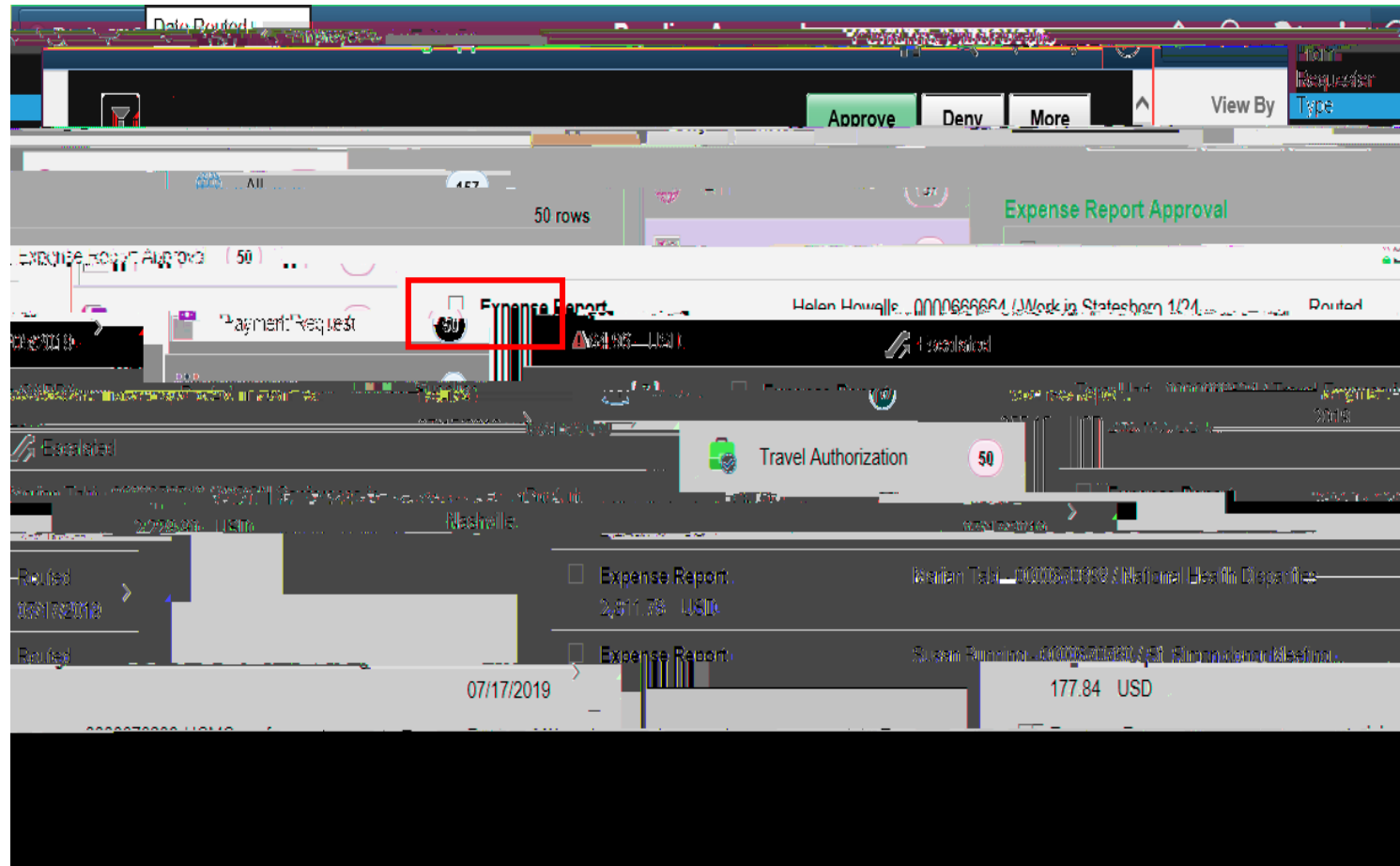
07/17/2019

177.84 USD

2,911.79 USD



- As of REL 5.50: Exceptions and Risks Link available in Fluid User Interface



Helen Howells

Approve Deny More

64.96 USD

Summary

Report ID: 0000666664 Approvals in Process

Name: Helen Howells

Total Due Employee: 64.96 USD

Reference

Purpose: Campus Visits & Satellite Locs

Myeloid cell 07/16/19 - 7/01/19

Exceptional Expense

Exceptions and Risks

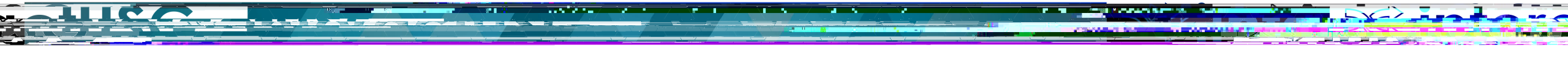
Expense Details

Lines

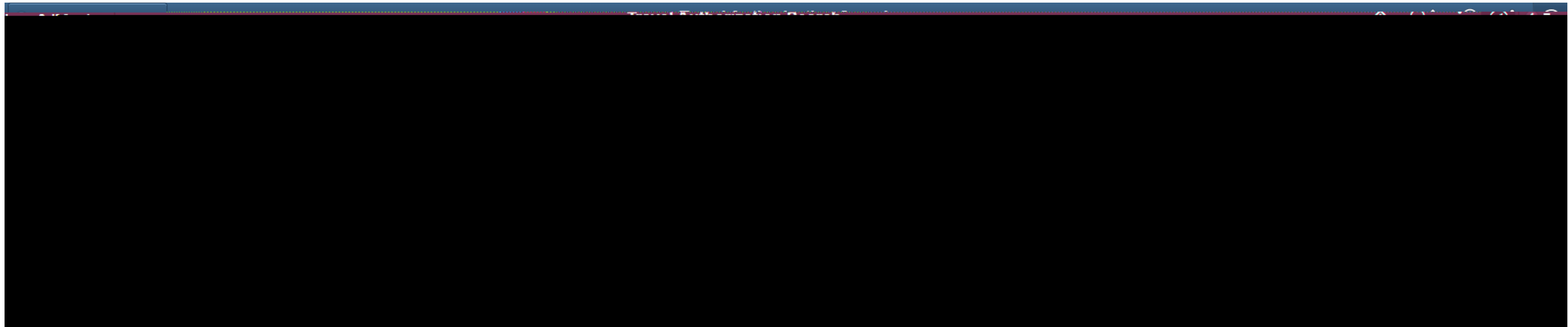
Pending All

1 row

Reimbursement Amount	Select	Risk/Exception	Date/Expense Type
64.96 USD	<input type="checkbox"/>		01/24/19 Emp Mileage T1



- As of REL 5.50: Able



Sheilah Daniels

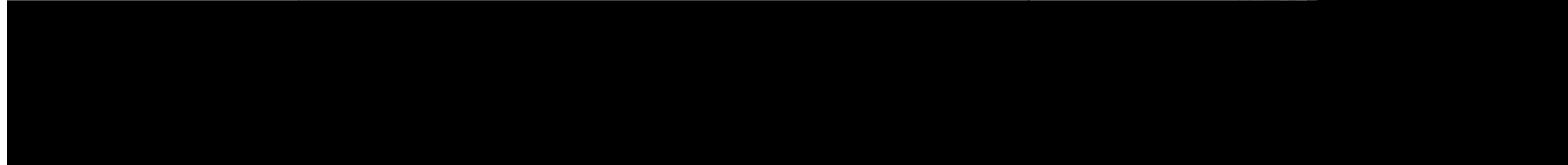
Approved Authorizations

Returned

0

Authorization	Status	Start Date	End Date	Amount	Category	Submitted
	Denied					
	Pending					
	Approved					
	Submitted					

Pending



Travel Authorization Search Expense Entry

Save Review and Submit

Sheilah Daniels

Emp Mileage T1 - 09/13/2019

Expense Entry Errors

*Date 09/16/2019

Emp Parking 15.00

Emp Meals - Full Day 36.00

Emp Mileage T1 44.08 USD

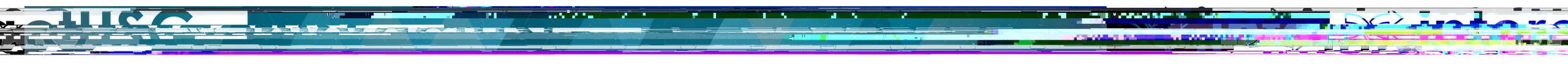
*Reimbursable Miles

*Miles x 0.5800

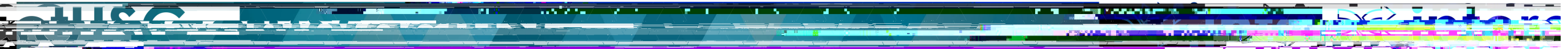
Payment Details

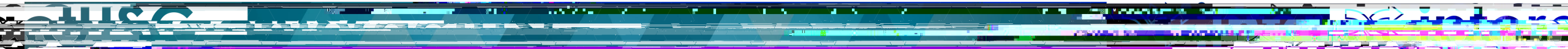
Annual Maintenance Release Preparation

- Fully approve OR send back all transactions
-

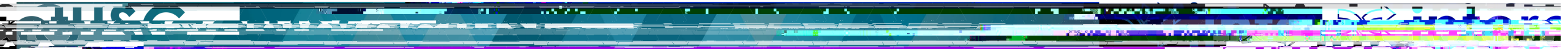


Known Issue Updates



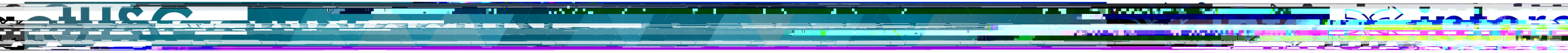


Ticket Reminders



- Please include as much information as possible when submitting a ticket/incident.
 - Transaction ID
 - Navigation
 - Screen Shots if applicable
 - Contact Phone number

Submitted to The 2015 MDA Tea Dinner



Documentation Updates

- Travel and Expenses Business Processes
 - Currently in the process of updating the business processes

Questions?

