



De-Customize and Get Current



CAMERON MCCLURG

Vice President

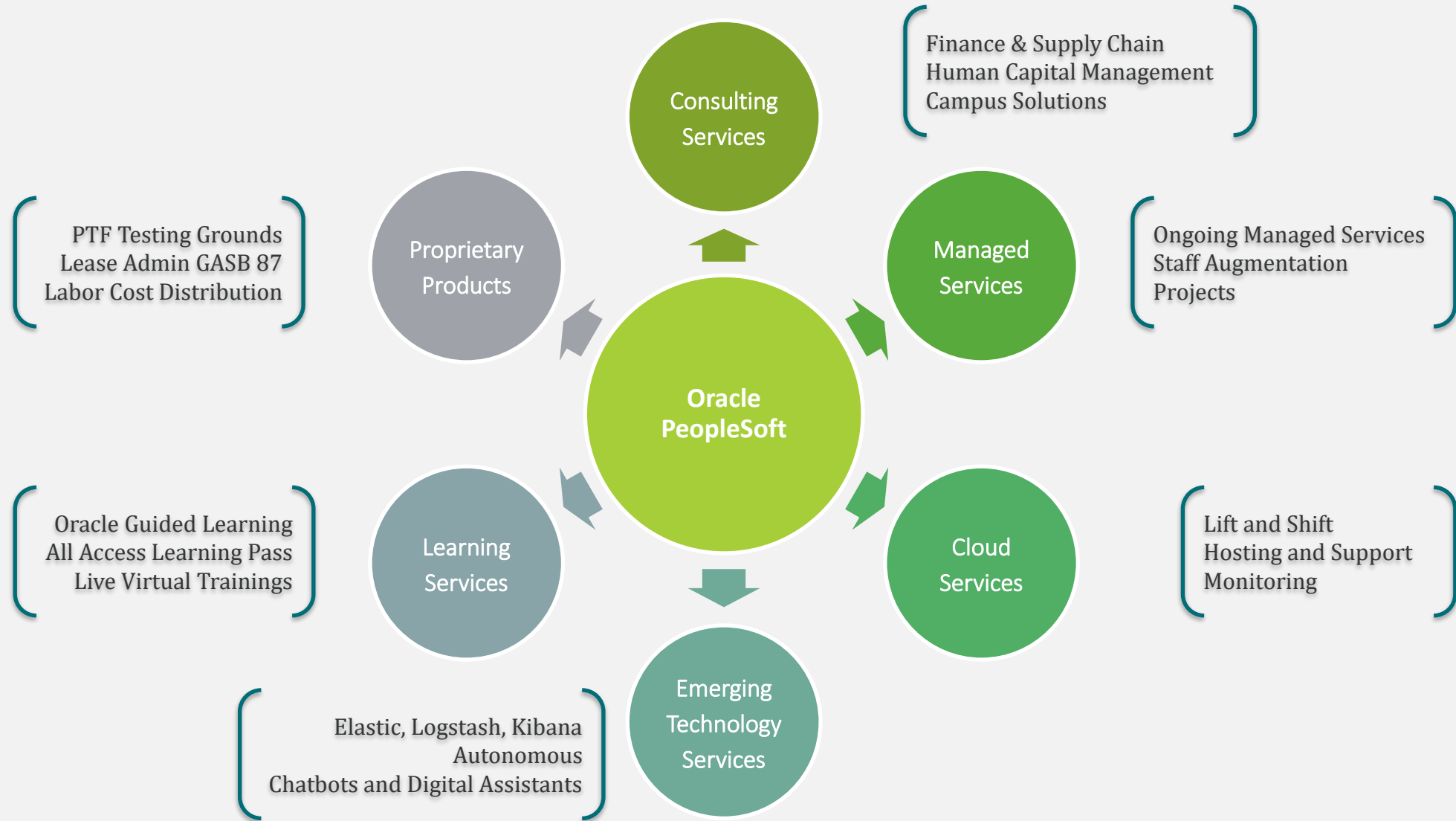
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<p>ORACLE Partner</p> <p>Since joining Oracle's Partner Program in 2006, SpearMC was elevated to Platinum Partner level in 2017 and to Oracle Applications Managed Partner in 2018.</p>	<p>ORACLE Expertise in PeopleSoft in North America</p> <p>SpearMC is an authorized PeopleSoft Resale Partner, allowing us to resell, host and finance PeopleSoft at steep discounts.</p>	<p>ORACLE Expertise in Oracle EPM Cloud in North America</p> <p>SpearMC is an authorized Oracle EPM Cloud, Analytics and Hyperion Resale and Implementation Partner.</p>
<p>ORACLE Expertise in Oracle Cloud Platform in North America</p> <p>SpearMC is an authorized Oracle Cloud Infrastructure (OCI) Resale Partner and North America's only PeopleSoft Partner recognized by Gartner for OCI Professional and Managed Services.</p>	<p>ORACLE Education Reseller</p> <p>SpearMC is an authorized Oracle University Education Reseller and PeopleSoft Training Provider. We are the sole PeopleSoft Partner authorized to resell and implement Oracle Guided Learning.</p>	<p>ORACLE Public Sector Addendum</p> <p>Reflecting our deep domain expertise in state and local government, SpearMC has a Public Sector Addendum in place allowing us to resell Oracle applications and technology to public sector organizations.</p>



SOC 2 Type II Certified Oracle Partner

Reduce risk with a partner you can trust. This certification demonstrates our deep commitment to protecting data.



SpearMC is the sole featured PeopleSoft vendor in the latest Gartner Market Guide for Oracle Professional Services.

1. Current State of PeopleSoft
2. Application Designer
3. De-Customization Analysis
4. Customization Use Cases

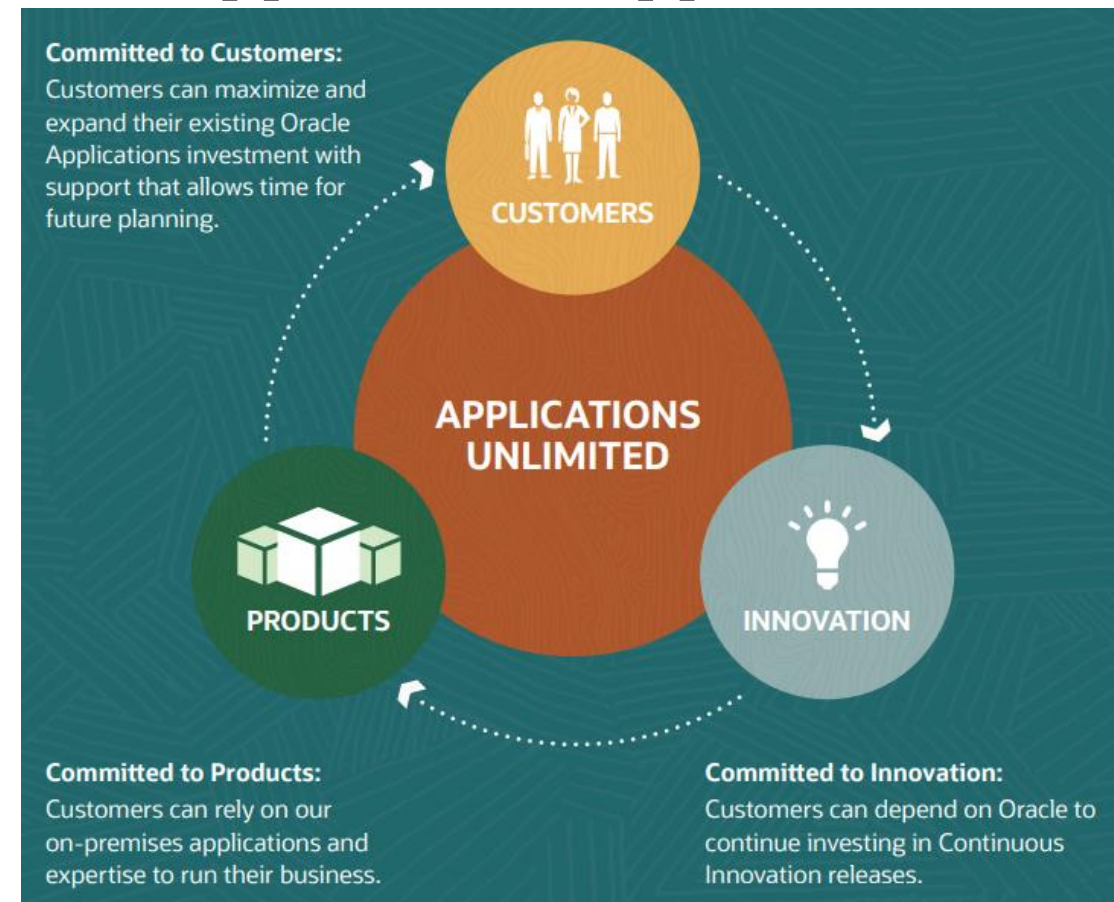
Current State of PeopleSoft

- Oracle has committed to a rolling 10 years of Application Support and Continuous Innovation.

Key Benefits Of Applications Unlimited


- On-premises or in Oracle Cloud Infrastructure, your choice**
- New features without major upgrades in the Continuous Innovation release**
- Ample time to allocate resources for the future**
- More value from your business customizations**


<https://www.oracle.com/a/ocom/docs/support/apps-unlimited-letter.pdf>




Strategic Investments

 Simplification and modernization

 Analytics

 Cloud and emerging technologies

 Frameworks to eliminate customizations

ORACLE
PeopleSoft

Customer Driven Enhancements

- ✓ Product-specific features
- ✓ Business process capabilities
- ✓ 175+ features sourced from the Idea Spaces on My Oracle Support



Continual Improvement through PeopleSoft Update Manager



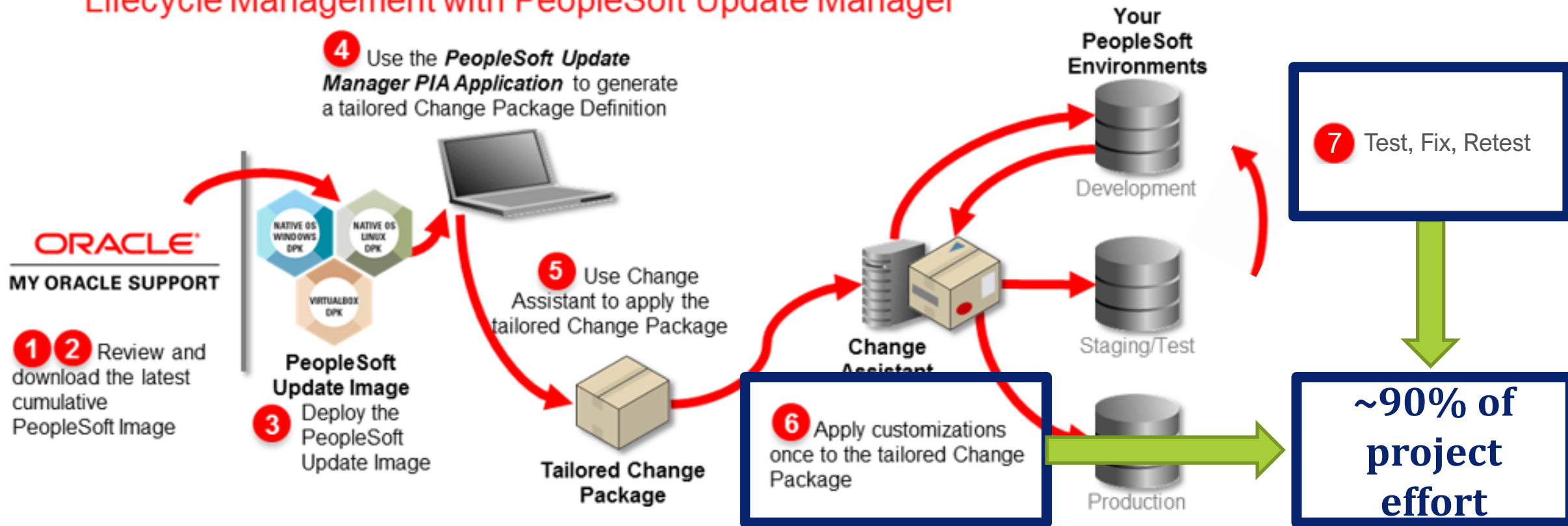
3 images per year including Bug Fixes and Enhanced Functionality (Features)



Adhoc Patching & Regulatory Updates (Tax Updates, 1099, etc.)

PeopleSoft Maintenance

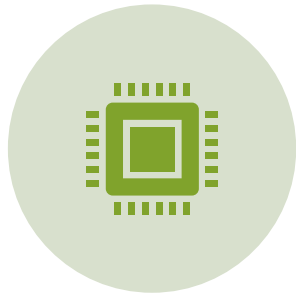
Lifecycle Management with PeopleSoft Update Manager



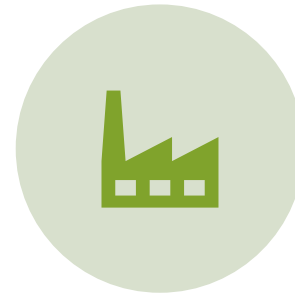
Customization Retrofitting and Long Test Cycles are the number 1 reasons Organizations don't (can't) stay current.

How did we get here?

Or... a Brief History of PeopleSoft Development



Version 1 released in 1989 as the first fully integrated, client-server HRMS application suite.



Expansions to Financials in 1992, Distribution in 1994 and Manufacturing in 1996.



Proprietary software (PeopleTools) built as open source.



Platform independent

Application Designer – The Enabler!

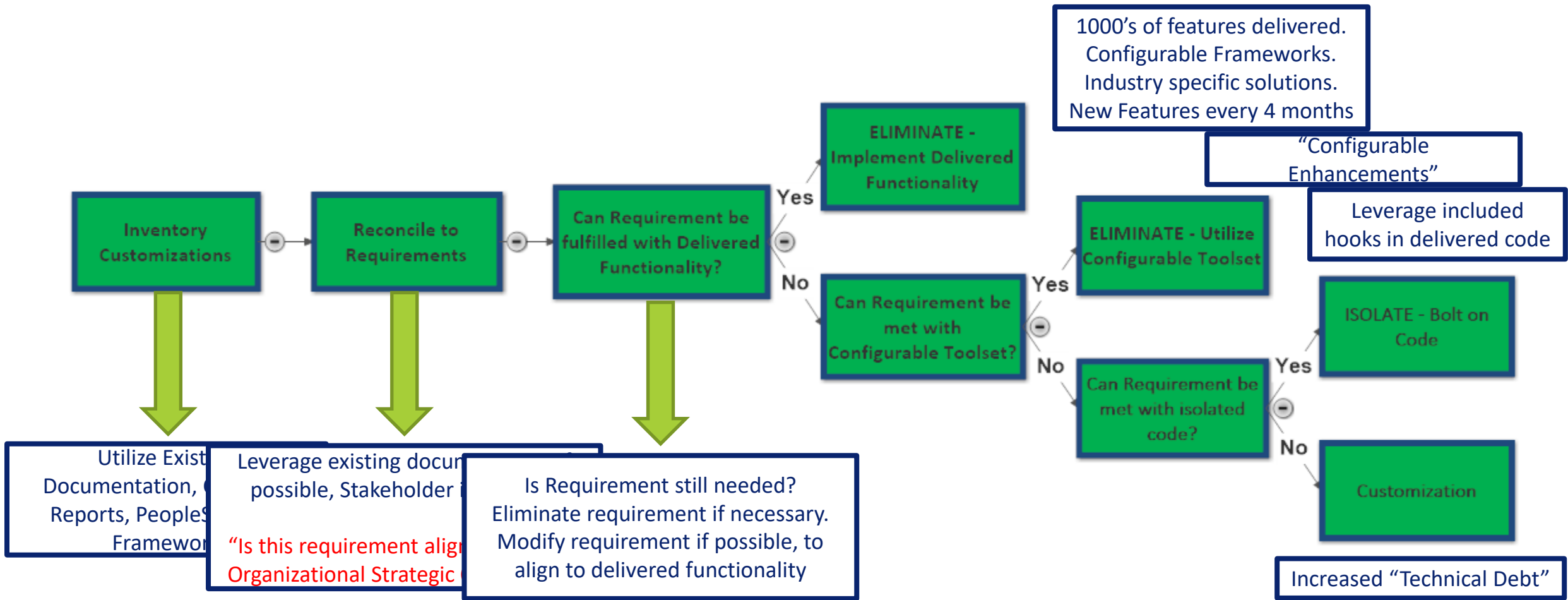
The screenshot displays the Oracle Application Designer interface for configuring a user. The main window is titled "Application Designer - FIN92PRD - Untitled - [USER_GENERAL (Page)]". The "General" tab is selected, showing the following configuration details:

- User ID:** VP1
- Description:** Kenneth Schumacher
- Logon Information:** Includes a dropdown for "Symbolic ID" (set to SYSADM1) and checkboxes for "Change Password?".
- Account Locked Out?:**
- Language:** English
- Currency:** US Dollar
- Default Mobile Page:** (Searchable field)
- Enable Expert Entry:**

A large blue-bordered box with the text "YES!" is overlaid on the configuration details, indicating a successful or enabled state.

Strength, taken to an Extreme, can become your Weakness

De-Customization Analysis



Why Do We Customize?

Organization-Specific Terminology, Defaulting of Values, Required Fields, Hide Fields, Data Masking

OLD:

- Field Relabel
- PeopleCode
- Page Modifications
- Security Restrictions



NEW:

- Page & Field Configurator
- Data Privacy Framework
- Event Mapping

[Cameron's Homepage](#) **Project Activity**

General Information | Definition | EA Rates | Location | Attachments | Quality | User Fields | Rates | Budget Alerts

Project 000000000000163 Description The effects of insulin on labo
Activity NEXT *Description

Activity Type Percent Complete
System Source PPC Processing Status Active
Activity Owner

Activity Schedule

*Start Date 01/14/2012 Duration in Days 0
*End Date 01/14/2012
Deadline Date
Constraint Type

Baseline Start Date Baseline Finish Date
Early Start Date Early Finish Date
Actual Start Date Actual Finish Date
Late Start Date Late Finish Date

Description | | 1 of 1 |

Date/Time Stamp 04/29/20 12:42:46AM User ID CMCCLURG
Description
254 characters remaining

Before

Project Activity

General Information

Project 000000000000163 Description The effects of insulin on labo
Activity 000000000000001 *Description TEST

Activity Type **BUILD** Build Percent Complete **0.00**
System Source PPC Processing Status Active
Responsible Party

Activity Schedule

*Start Date 01/14/2012 Duration in Days 0 *End Date 01/14/2012
Deadline Date [Create Predecessors](#)
Constraint Type

Description

Date/Time Stamp 04/29/20 12:40:33AM User ID CMCCLURG
***Description**
254 characters remaining

After



< ChartField Values

Department

SetID SHARE

Department 10000

Effective Date



1 of 1



View All

*Effective Date 01/01/1900

*Status Active

*Description Human Resources

*Short Description HR

Manager ID KU0079

Company

Attributes

Long Description



Before

Budgetary Only

Manager Name Ball,Nancy

Save

Return to Search

Previous in List

Next in List

Notify

Add

Update/Display

Include History

Correct History

< CharField Values

Department

SetID SHARE

Department 10000

Effective Date



1 of 1



View All

*Effective Date 01/01/1900

*Status Active

*Description Human Resources

*Short Description HR

Manager ID XXXXXX

Manager Name XXXX,XXXXX

Company

After

Attributes

Long Description



Budgetary Only

Save

Return to Search

Previous in List

Next in List

Notify

Add

Update/Display

Include History

Correct History

When Prompt Masking is enabled, only authorized users can view sensitive fields in prompt records.

Delegation Transaction Setup | Page and Field Configurator

Masking | User List | Map to Portal Registry

Component Name: BANK_BALANCES | Market: Global | Configuration Type: Masking

*Description: [] | *Status: Active

Validate Configuration

Review Sequence Processing

Criteria [?] | 1 of 1 | View All

Sequence Number: 1 | Description: [] | Status: Active

Criteria: No Criteria Defined.

Define Criteria | Copy Criteria From | Apply Additively

Configure Masking

Source Type: Search and Prompt Fields | Select Fields

Configure Fields

Page Fields

Label	Record Name	Field Name	Mask Field	Mask Profile	Profile Status	
1			<input type="checkbox"/>	Select Profile	Default	-

Bank ID	Bank Name
XXXXXXXX4567	State Bank
XXXXXXXX4093	Royal Bank of Canada

Page Configuration **User List** [Map to Portal Registry](#)

Component Name: PROJECT_ACTIVITY Market: Global
Level: Header Level Configuration Type: Standard
Applies To: All With Excluded Roles/Users

Excluded Roles

1-1 of 1 | View All

	Role Name	Description		
1	<input type="text"/>		+	-

Excluded Users

1-1 of 1 | View All

	User ID	User Description			
1	DVP1	Smith, Jane	+	-	

Save Return to Search Add Update/Display

- Event Mapping allows for ISOLATED code to process at the component, page or record level.
- Every time X happens, do Y
- PeopleTools – Portal – Related Content Service – Manage Related Content – Event Mapping
- HCM – Add a button to generate time report.
- FSCM – When data is entered on page, run calculation and display. Display a subpage in a drop zone.

Content References
Configure Event Mapping

Component Record Level Event Mapping

Map the custom application class to the Component Record level event.

1-4 of 4
View All

General

Enable	Unrestricted Prompt	Record Name	Event Name	Select	Service ID	Event Map Parameter	Sequence Number	Processing Sequence		
<input checked="" type="checkbox"/>	<input type="checkbox"/>	DEPT_TBL	RowInit	<input type="checkbox"/>	E OCC_MASK_ROWINIT		999	Post Process	<input style="width: 20px; height: 20px;" type="button" value="+"/>	<input style="width: 20px; height: 20px;" type="button" value="-"/>
<input checked="" type="checkbox"/>	<input type="checkbox"/>	DEPT_TBL	RowInsert	<input type="checkbox"/>	E OCC_MASK_ROWINSERT		999	Post Process	<input style="width: 20px; height: 20px;" type="button" value="+"/>	<input style="width: 20px; height: 20px;" type="button" value="-"/>
<input checked="" type="checkbox"/>	<input type="checkbox"/>	DEPT_TBL	RowInit	<input type="checkbox"/>	E OCC_ROWINIT1			Post Process	<input style="width: 20px; height: 20px;" type="button" value="+"/>	<input style="width: 20px; height: 20px;" type="button" value="-"/>
<input checked="" type="checkbox"/>	<input type="checkbox"/>	DEPT_TBL	RowInsert	<input type="checkbox"/>	E OCC_ROWINSERT1			Post Process	<input style="width: 20px; height: 20px;" type="button" value="+"/>	<input style="width: 20px; height: 20px;" type="button" value="-"/>

Component Record Field Level Event Mapping

Map the custom application class to the Record Field level event.

1-1 of 1
View All

General

Enable	Unrestricted Prompt	Record Name	Field Name	Event Name	Select	Service ID	Event Map Parameter	Sequence Number	Processing Sequence		
<input checked="" type="checkbox"/>	<input type="checkbox"/>			FieldChange	<input type="checkbox"/>					<input style="width: 20px; height: 20px;" type="button" value="+"/>	<input style="width: 20px; height: 20px;" type="button" value="-"/>

[Return to Event Mapping](#)

- Delivered as a Fluid Nav Collection

Manager Self Service | Event Mapping Configuration

*Search By: Content Reference

Content Reference Label:

Search | Add Configuration

9 rows

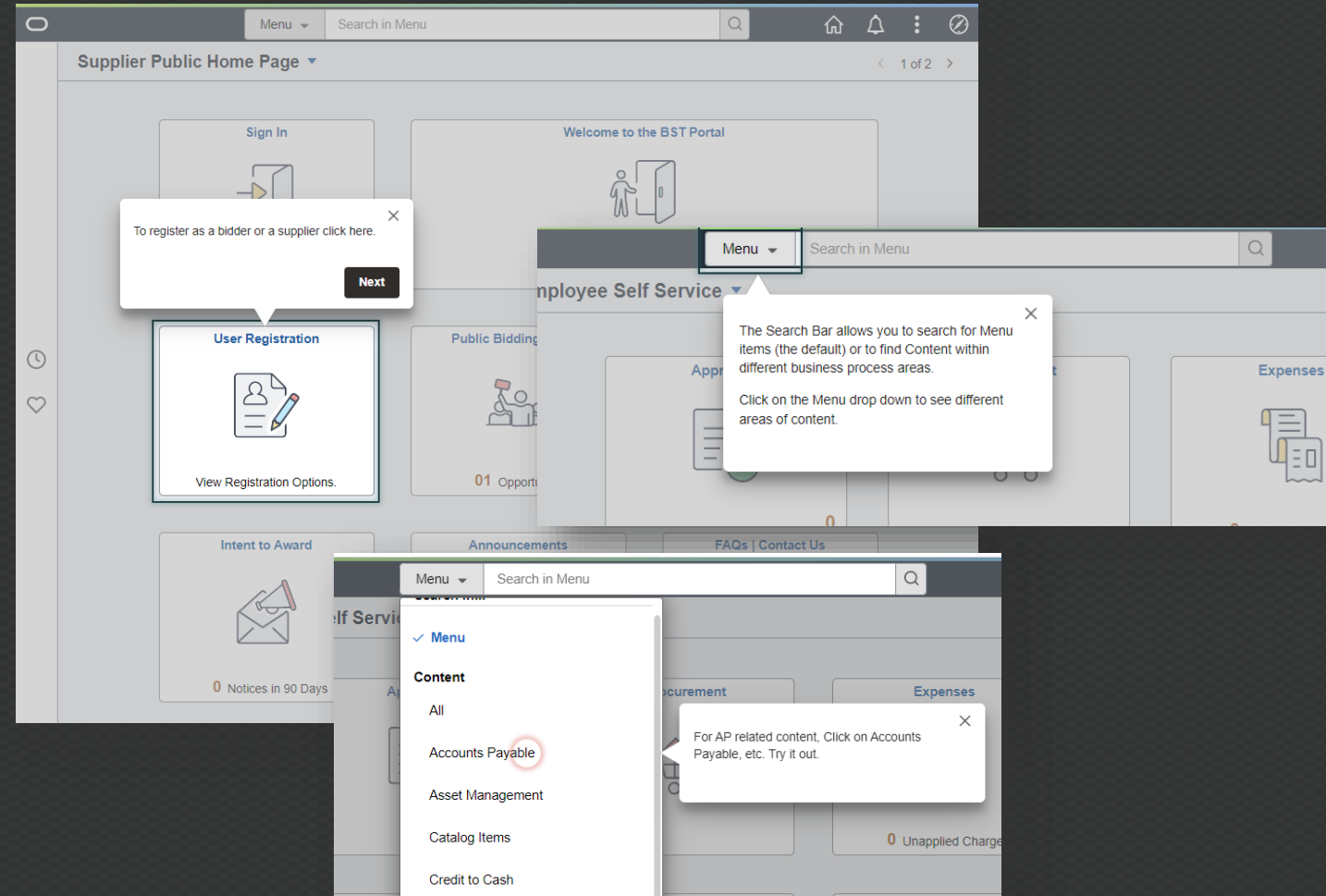
Content Reference	Edit	Remove	Navigation
1 Dependent Information			>
2 Create/View Personnel Action			>
3 Job Data Fluid			>
4 Manage Job			>
5 Modify a Person			>
6 Maintain Bank Accounts			>
7 Fluid Home			>

28

In-application guidance to accelerate PeopleSoft adoption

Oracle Guided Learning provides guided processing, messages, task lists, and more to help you influence user behavior and reduce support tickets.

- Immediate **productivity** from day one
- Reduces adoption costs over software term
- Easily configured and **personalized**
- Easily maintained and updated
- Learning and guidance **in the flow of work**, converging learning and business process docs
- **Deployment flexibility**: with managed service and/or self-service options
- Initially developed to support Oracle SaaS Applications. Now supports PeopleSoft.



Organization-Specific Data (Entry) Needs

OLD:

- Page Changes
- Record Changes
- Additional Pages in Components



NEW:

- User Defined Fields
- Activity Guides
- Forms and Approvals
- Drop Zones

Payment Request Next >

1 Summary 2 Supplier 3 Invoice Details 4 Review and Submit

Step 1 of 4: Summary

Attachments (0)

*Business Unit
US001 NEW YORK OPERATIONS

Entered Datetime 12/12/18 10:45PM
Request ID

*Invoice Number

*Invoice Date

*Cost Sub-Total

Total Amount 0.00

*Currency

Description

Notes/Comments

Make complex transactions simple with guided user entry with validation

Tuition Reimbursement

Review Cancel Approval

*Description Continuing Education - Project Management

Approval Status Pending Approval Created On 02/21/2020

Course Information

Course Title PMP Level 1 School State University

Term Fall Course Credit Yes

Start Date 09/01/2020

Cost Information

Department 13000 Tuition Amount 895.00

More Information Level 1 class. In anticipation of PMP certification in 2021.

Attachments

There is no attachment uploaded.

Add Attachment

Custom built forms within PeopleSoft that leverage field validation and approval workflow

Add your fields to existing pages in pre-configured “drop zones”

Create Requisition

Checkout

▼ Requisition Summary

Business Unit: WCGEN

Requisition Name:

Priority:

Requester: BMURKAM

Currency: USD

Header Comments/Attachments

Has the Physician suggested a preferred supplier?

Has a non-approved Manufacturer been requested?

Surgery Date:

Supplier Contact:

Surgeon Name:





Surgeon Units/Room:

Patient Name:

▼ Requisition Lines

2 rows

★ Add to Favorites Add to Template(s) Delete Selected Mass Change

Line	Item Description	Quantity	Unit of Measure	Price	Total	
1	 Hospital robes	1,000	Box	52.95 USD	52.95 USD	  

Component

Component EX_EXP_SHEET_FL

Description Expense Report Entry

Type Fluid

Drop Zones by Page

9 rows

Page Name	Tab Order	Drop Zone	Subpage Name
EX_SHEET_HDR_FL	2	DZ-Top of ER Header	CUSTOM_SUBPAGE 🔍
EX_SHEET_HDR_FL	13	DZ-Bottom of ER Header	<input type="text"/> 🔍
EX_SHEET_LN_FL	2	DZ-Top of ER Line	<input type="text"/> 🔍
EX_SHEET_LN_FL	10	DZ-Bottom of ER Line	<input type="text"/> 🔍

Custom Logic

OLD:

- Customization to Application Engine
- Customization to SQR



NEW:

- Event Mapping
- Pluggable App Engine

- Pre-defined hooks embedded in delivered Application Engine programs that allow space for custom logic.
- “Drop Zones for App Engine”
- PeopleTools – Application Engine – AE Action Plugin
- Example: Any time a delivered App Engine needs to be customized.

AE Action Plugin

Program Name AMPS1000

Enabled	*Section	*Step	*Action	*Plugin Name	*Section	*Step	*Action	*Mode
1 <input checked="" type="checkbox"/>	100000	Step10	SQL	FC_REMINDER	00000000	Step01	SQL	After

Save Return to Search Previous in List Next in List Notify

Custom Portal, Menus and Workflow

OLD:

- Bring back the Breadcrumbs!
- Favorites
- Home Grown Portal or Integration Hub



NEW:

- WorkCenters
- Nav Collections
- Unified Navigation

← Credit to Cash Operations Billing WorkCenter

Scope
▼ My Scope

▼ My Work

Current Work

- Invoices Not Finalized** (28)
- Consolidated Invoices Not F... (3)
- Invoices Pending My Approval
- Invoices Not Submitted for A...
- Invoices Pending Approval
- Installment Invoices Not Ge... (2)
- Recurring Invoices Not Gen... (2)
- Recurring Schedules Expiring
- Invoices Entered Today

Invoices Not Finalized

Actions [dropdown] [filter]

General Details

<input type="checkbox"/>	Business Unit	Invoice	Bill To	Customer Name	Invoice Amount	Currency	
<input type="checkbox"/>	US001	TMP-00000025	1000	Alliance Group	16,500.00	USD	TMR >
<input type="checkbox"/>	US001	TMP-00000013	1005	Golden Inc.	75,000,000.00	USD	TMR >
<input type="checkbox"/>	US001	TMP-00000012	1005	Golden Inc.	1,100.00	USD	TMR >
<input type="checkbox"/>	US001	TMP-00000011	1005	Golden Inc.	1,100.00	USD	TMR >
<input type="checkbox"/>	US001	TMP-00000005	1001	Apex Systems	52,747,154.02	USD	TMR >
<input type="checkbox"/>	US001	RE-00006633	1010	Florence Garden	1,515.00	USD	FNL >
<input type="checkbox"/>	US001	RE-00006632	1010	Florence Garden	2,235.00	USD	FNL >
<input type="checkbox"/>	US001	RE-00006621	1010	Florence Garden	50,295.71	USD	FNL >

WorkCenters
Focus Work on
Business Processes

Only take action
when needed

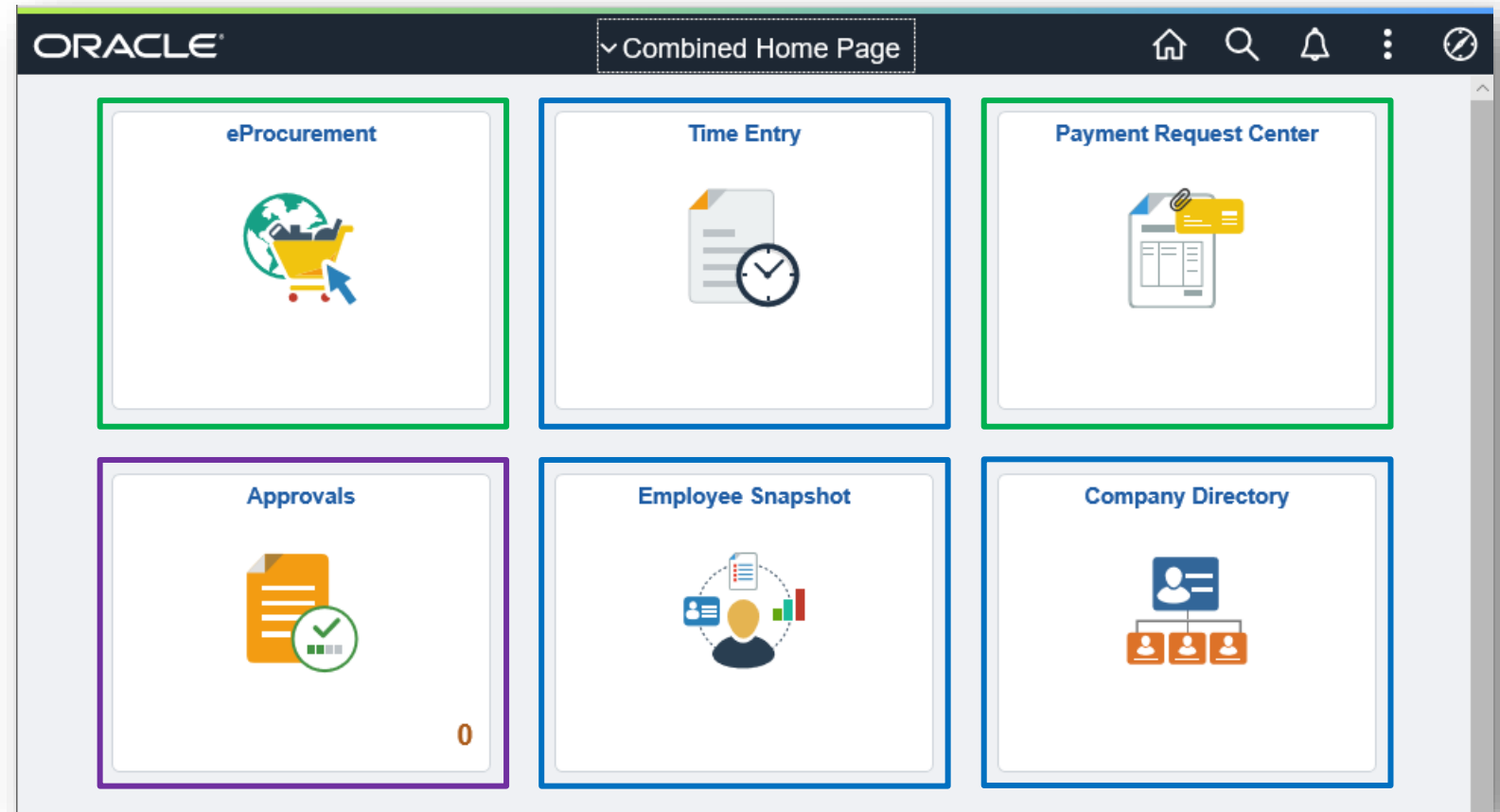
Actions

- * Finalize and Print
- * Single Action Job
- * Change Bill Status
- * Email Notification
- View Proforma / Image
- Copy Bill
- Bill Summary
- Invoice Maintenance
- Supporting Documentation

Bill To	Customer Name	Invoice Amount	Currency	Bill Status	More			
1000	Alliance Group	16,500.00	USD	TMR	>			
1005	Golden Inc.	75,000,000.00	USD	TMR	>			
1005	Golden Inc.	1,100.00	USD	TMR	>			
1005	Golden Inc.	1,100.00	USD	TMR	>			
1001	Apex Systems	52,747,154.02	USD	TMR	>			
<input checked="" type="checkbox"/>	US001	RE-00006633	1010	Florence Garden	1,515.00	USD	FNL	>
<input checked="" type="checkbox"/>	US001	RE-00006632	1010	Florence Garden	2,235.00	USD	FNL	>
<input checked="" type="checkbox"/>	US001	RE-00006621	1010	Florence Garden	50,295.71	USD	FNL	>
<input checked="" type="checkbox"/>	US001	RE-00006620	1010	Florence Garden	77,144.02	USD	FNL	>
<input type="checkbox"/>	US001	OE-00091098	1002	Easy Solutions	15,200.00	USD	FNL	>

The screenshot shows the 'Job Data' search interface in the HR Administration system. The left sidebar contains navigation categories: Job Information (with sub-items: Job Data, Workforce Job Summary, Person Profiles), Headcount (with sub-items: Headcount Movement, Current Headcount, Workforce Turnover), Labor Administration, HR Configuration, Dotted Line, Export Org Chart, and OnBoarding. The main content area is titled 'Job Data' and includes a search instruction: 'Enter any information you have and click Search. Leave fields blank for a list of all values.' Below this are two buttons: 'Find an Existing Value' and 'Keyword Search'. A 'Search Criteria' section follows, containing several search fields: 'Empl ID' (dropdown: 'begins with'), 'Empl Record' (dropdown: '='), 'Name' (dropdown: 'begins with'), 'Last Name' (dropdown: 'begins with'), 'Second Last Name' (dropdown: 'begins with'), 'Alternate Character Name' (dropdown: 'begins with'), and 'Middle Name' (dropdown: 'begins with'). At the bottom of the search criteria are three checkboxes: 'Include History', 'Correct History', and 'Case Sensitive'. The interface concludes with 'Search', 'Clear', 'Basic Search', and 'Save Search Criteria' buttons.

- Unified navigation provides a framework to federate multiple PeopleSoft applications as a cluster under a designated, central portal system.



Movement of Data in or out of PeopleSoft

OLD:

- Customization to SQR
- Customization to Application Engine
- Customer specific SQR's

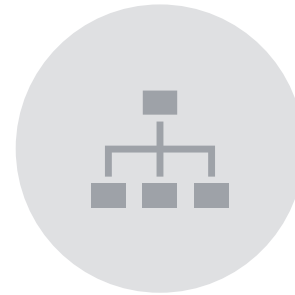


NEW:

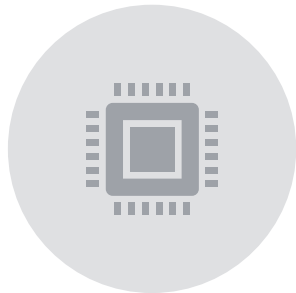
- Integration Broker
- Inbound: Excel to CI, Transaction Uploads
- Outbound: SQR, Web Services
- Application Data Sets



API built to access, modify and upload data into PeopleSoft.



Most PeopleSoft Components have delivered Component Interfaces.

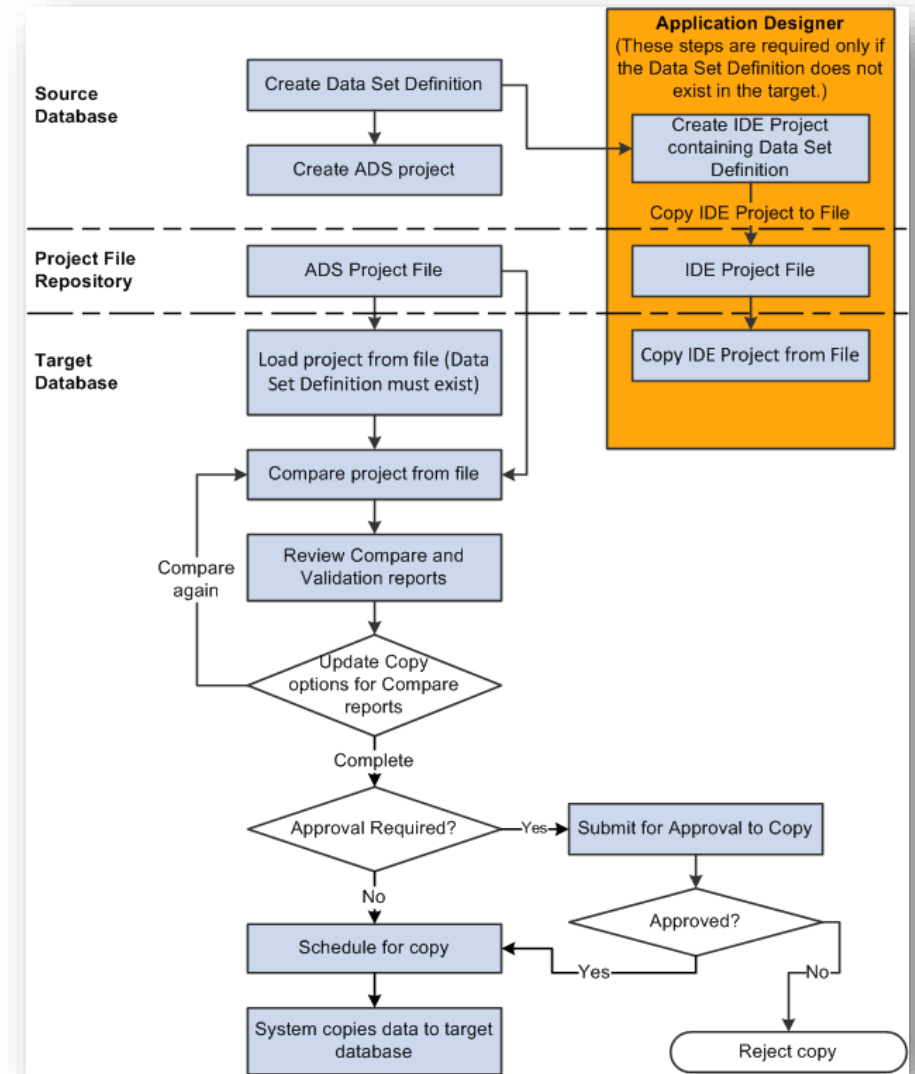


Leverages existing PeopleSoft components with all the validation and record hierarchy built in.



An Excel to Component Interface tool is delivered as a free form utility that can be hooked up to any C.I.

- Lifecycle Management Tool for Configuration and other Data
- Pros: Repeatable process, Confidence in Migrations to Prod
- Cons: Upfront Setup time, Testing



Custom Lookups/References

OLD:

- Page Customization, Add links
- Query
- Offline Reports



NEW:

- Related Content Framework

Enables ability to link application pages with contextually relevant collaborative content, which creates opportunities for the user to view or quickly access information that supports, extends, and augments any PeopleSoft transaction.

Oracle delivers related content to many pages (and continues to add more)

Two Flavors: Related Content and Related Actions

Basic Add

Unit US001 Asset ID 000000000001 SOLARIS WORKSTATION Tag In Service

Asset Information

Description: SOLARIS WORKSTATION Short Desc: SOLARIS WO

CAP #: Seq #: Tag Number: Auction Status: Allowed to be Auctioned

Taggable Asset

Asset Class: Auction Status: Allowed to be Auctioned

Related Content **Cost History**

Unit US001 Asset ID 000000000001 SOLARIS WORKSTATION Asset Cost History

Book 1 of 2

Book Name: CORP Corporate Currency: USD

Total Cost: 7,500.00

*Acquisition Code: FER Code: Financing Code:

- Designed to not only view but take action.
- Secondary tab, secondary browser window or a modal (hovering) window to take an action prior to returning to original action.

Manager Self Service | Team Time

Enter Time

Branda Abad (dropdown)
Data Entry Operator
[Return to Select Employee](#)

Previous | Next

April - 26 April 2020
Weekly Period - PS Delivered
Reported 0.00 | Unapproved Time 0.00

[Show All Punch Columns](#) | [Clear](#) | [Save for Later](#) | [Submit](#)

[View Legend](#)

Day Summary		In	Out	Time Reporting Code	Quantity	Time Details	Comments
20	Monday						
Apr	Reported 0.00 /Scheduled						
21	Tuesday						

Actions x

- Attendance Violation
- View Exceptions
- Time Summary
- Cancel Absences
- Payable Time
- Attendance Violations

Analysis/Reporting

OLD:

- Query
- Reports
- Home grown analytics



NEW:

- Pivot Grids
- Kibana Analytics

The screenshot displays the Oracle EPM Cloud interface for a Pivot Grid titled "Top 20 Employees Spenders". The interface includes a navigation bar with "Cameron's Homepage" and "Top 20 Employees Spenders". A left sidebar contains filters for "Business Unit" (US001), "From Date" (01/01/2000), "To Date" (09/02/2014), "Currency" (USD (26)), "Business Purpose" (General Travel and Demonstrations (8), Off-site Meeting (5), Technical Training (3), Consulting Services (1)), and "Name". The main area shows a Pivot Grid with a table of data. A context menu is open over the "Actions" column, showing the option "Review Expense Report".

Empl ID	Actions	Name	Business Unit	Department	Report ID	Rep
KU0042	⌵		US001	41000-Engineering	0000000049	Paic
KU0042	⌵		US001	41000-Engineering	0000000051	Paic
KU0042	⌵	Kenneth Schumacher	US001	41000-Engineering	0000000052	Paic
KU0042	⌵	Kenneth Schumacher	US001	41000-Engineering	0000000055	Paic
KU0042	⌵	Kenneth Schumacher	US001	41000-Engineering	0000000064	Paic
KU0042	⌵	Kenneth Schumacher	US001	41000-Engineering	0000000052	Paid
KU0042	⌵	Kenneth Schumacher	US001	41000-Engineering	0000000055	Paid

Dashboard / Workforce Composition

Workforce Insight

Payables Operations

Voucher Source across Date/Time Entered

Vouchers by Currency and Voucher Source

Voucher Detail

Date/Time Entered	Business Unit
> Mar 6, 2020 @ 03:53	US002
> Mar 6, 2020 @ 02:53	US002
> Mar 6, 2020 @ 01:53	US001

Kibana Visualizer

Finance & Accounting

Filters Search

Exclude Closing Journals x Department Tree Name: No Tree Selected x Base Currency: USD x Ledger: LOCAL x Account Tree Name: ACCTROLLUP 1900-01-01 x Fiscal Year is one of 2018, 2019, 2020 x + Add filter

Base Currency: USD Ledger: LOCAL

Business Unit: Select... Fiscal Year: 2018 x 2019 x 2020 x

Accounting Period: Select... Account Tree Name: ACCTROLLUP 1900-01-01

Level 2 Account Node: Select... Level 3 Account Node: Select...

Level 4 Account Node: Select... Level 5 Account Node: Select...

Department Tree Name: No Tree Selected Level 2 Department Node: Select...

Level 3 Department Node: Select...

Apply changes Cancel changes Clear form

YOY Comparison

Top 5 Expense Accounts

Top 5 Revenue Accounts

Ledger Details

Business Unit	Ledger	Account	Department	Base Currency	Amount
US005	LOCAL	USBNK - Treasury Account	Human Resources	USD	0
US005	LOCAL	Sales Tax	No Value	USD	49,200
US005	LOCAL	Salaries & Wages	No Value	USD	-600
US005	LOCAL	Petty Cash	No Value	USD	-50,000
US005	LOCAL	Petty Cash	Human Resources	USD	-20,000

Refresh

Show dates

Refresh

Amount

Vouchers

Supplier Name

Voucher Source

Intermediaires Associes	Online
Bike Shopper	Online
Tanden Computers	Online

Questions?

Thank you!

CAMERON MCCLURG

Vice President

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Appendix

- Objectives:
 - Utilize Extra Fields for Data Entry

< My Homepage
Page and Field Configurator

Page Configuration
User List
Map to Portal Registry

Component Name

*Description

< Records Supplier

Summary
Identifying Information
Address
Contacts
Location
Custom

SetID **SHARE**

Supplier ID **0000000089**

Short Supplier Name **3R TECHNOL-001**

Supplier **3R Technology LLC**

Supplier Field C30 B

Supplier Field C30 C

Supplier Field C30 D

Supplier Field C30 E

UBI

Supplier Field C30 F

Supplier Field C30 G

Supplier Field C30 H

Supplier Field C30 I

Supplier Field C30 J

Save
Return to Search
Notify

Add
Update/Display
Include History

Correct History

Criteria ?

Sequence Number

Criteria

No Criteria Defined.

[Define Criteria](#)
[Copy Criteria](#)

[User List](#)

Configure Field Properties ?

Select	Field Name	Label	Required	Visible	Editable	Field	Searchable			
1	VNDR_FIELD_C30_A	UBI	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="text"/>	+	-

[Copy Field Properties From](#)

- Objectives:
 - Streamline pages
 - Help Users with Key information
 - Protect Sensitive Data
 - Avoid bugs

Page and Field Configurator

General | Page Configuration | User List | Map to Portal Registry

Component Name: VNDR_ID | Market: Global | Configuration Type: Standard

*Description: Supplier Changes | *Status: Active

Validate Configuration

Review Sequence Processing

Criteria

Sequence Number: 1 | Description: All Employee

Criteria: No Criteria Defined.

Define Criteria | Copy Criteria From | Apply Additively

User List

Select Fields

Configure Field Properties

Field Name	Label Text	Modify Label
1 ATTACHADD	Add Attachment	<input type="checkbox"/>
2 ATTACHMENTS_PB	Attachments	<input type="checkbox"/>
3 IBAN_PAPER	IBAN Paper	<input type="checkbox"/>
4 STD_ID_NUM	ID Number	<input type="checkbox"/>
5 GFAP_EFT_BBK_NAME	Beneficiary Bank Name	<input type="checkbox"/>
6 GFAP_EFT_BBK_REM	Beneficiary Bank Remarks	<input type="checkbox"/>
7 BANK_ACCOUNT_NUM	Bank Account #	<input type="checkbox"/>

My Preferences

Summary | Identifying Information | Address | Contacts | Location | Custom

SetID: MODEL | *Supplier Name: Verizon

Supplier ID: 0000027557 | Additional Name:

*Supplier Short Name: VERIZON | VERIZON-002

*Classification: Outside Party | Check for Duplicate

HCM Class: |

*Persistence: Regular

Supplier Status: Approved

Withholding

Open For Ordering

VAT Registration

*Supplier Audit: Default

Supplier Audit

Approval History

Expand All | Collapse All

Supplier Relationships

Corporate Supplier

Corporate SetID: MODEL

Corporate Supplier ID: 0000027557

Verizon

InterUnit Supplier

InterUnit Supplier ID:

Supplier Hierarchy | Supplier 360

Page Configuration | **User List** | **Map to Portal Registry**

Component Name: VNDR_ID Market: Global
Level: Sequence Level Configuration Type: Standard

Criteria 1 of 2 [View All](#)

Sequence Number: 1 Description: All Employee
Applies To: All With Excluded Roles/Users

Excluded Roles 1-2 of 2 [View 1](#)

	Role Name	Description		
1	AP Vendor Add	Vulcan AP Vendor Add	+	-
2	AP Vendor Approval	Vulcan AP Vendor Approval	+	-

Excluded Users 1-1 of 1 [View All](#)

	User ID	Description		
1			+	-

Save | **Return to Search** | **Previous in List** | **Next in List** | **Add** | **Update/Display**

Page Configuration
User List
Map to Portal Registry

Component Name **PV_MOB_855_CMP** Market

*Description *Status

Validate Configuration

[Review Sequence Processing](#)

Criteria ?

Sequence Number Description

Criteria

No Criteria Defined.

[Define Criteria](#) [Copy Criteria From](#) Apply Additively

[User List](#)

▶ **Device Form Factor**

Select Fields

Configure Field Properties ?

Field Name	Label Text	Modify L
1 PV_SUG_VNDR_PB	Suggest New Supplier	<input type="checkbox"/>
2 VNDR_LOC	<input type="text" value="Supplier Location"/>	<input checked="" type="checkbox"/>
3 PV_VIEW_APPROVALS	Preview Approvals	<input type="checkbox"/>

[Copy Field Properties From](#)

[Browse Catalogs](#)

[Item History](#)

[Favorites](#)

[Templates](#)

[Special Requests](#)

[Fixed Cost Service](#)

[Variable Cost Service](#)

[Time and Materials](#)

Special Requests

*Item Description

*Price

*Quantity

*Category Q

Supplier ID Q

Supplier Location Q

Supplier Item ID

Manufacturer ID Q

Manufacturer's Item ID

Additional Information

Send to Supplier No Yes

Shown at Receipt No Yes

Shown at Voucher No Yes

Add

< General
Page and Field Configurator

Page Configuration
User List
Map to Portal Registry

Component Name **PR_WIZARD_FL**

*Description

Market **Global**

*Status **Active**

[Review Sequence Processing](#)

Criteria ?

Sequence Number Description Status

Criteria

[Define Criteria](#) [Copy Criteria From](#) [Apply Additively](#)

[User List](#)

Device Form Factor

Configure Field Properties ?

Field Name	Label Text	Modify Label	Hide Field	Disable Entry
1 INVOICE_ID	<input type="text" value="Invoice Number"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2 ADD_VNDR_PB	Request New Supplier	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

[Copy Field Properties From](#)

Step 1 of 4: Summary

Total Amount 0.00

*Business Unit

Vulcan Inc

*Invoice Number

*Invoice Date

*Cost Sub-Total

1
Summary

2
Supplier

Step 2 of 4: Supplier

Country

Supplier Name

Supplier ID

✕ Exit **Payment Request**

1 Summary 2 **Supplier** 3 Invoice Details

Step 2 of 4: Supplier

Enter New Supplier Supplier Search

Supplier Address

Supplier ID 000000015
Supplier AT&T
Payment Center
Sacramento, CA 95887-0001

Payment Address Payment Center
Sacramento, CA 95887-0001

Payment Information

Payment Method ACH

- Objectives:
 - Reduce tickets related to difficult setup pages.

Employee Self Service Page and Field Configurator

Page Configuration | User List | Map to Portal Registry

Component Name: TL_DYNAM_GRP
 *Description: Agency Dyn group setup
 Market: Global
 *Status: Active

Validate Configuration

Review Sequence Processing

Criteria

Sequence Number: 1
 Description:
 Status: Active

Criteria: No Criteria Defined.

Define Criteria | Copy Criteria From | Apply Additively

User List

Select Fields

Configure Field Properties

Field Name	Label Text	Modify Label	Hide Field	Disable Entry	Required Field	Default Value
1 KC_GROUP_CATEGORY	Group Category	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	A
2 FIELDNAME	Field Name	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	TIME_RPTG_STATUS
3 GROUP_OPERATOR	Operator	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	=
4 GROUP_VALUE	Field Value	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	A
5 RECNAME	Record	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	TL_EMPL_DATA

- Results:
 - 63% reduction in tickets related to Time and Labor Dynamic Group entry

< General
Dynamic Group

Selection Criteria
Potential Group Members
Security by Group
Current Group Members

Group ID 01BDG

Dynamic Group Details

*Description

Taskgroup for Time Reporting

Last Refresh Date/Time 01/21/2021 7:00PM

Short Description

*Group Category

TL Approval Group

Select Parameters

*Operand	*{	*Record	*Field Name	Set ID	*Operator	Field Value	*)		
	(TL_EMPL_DATA	WORKGROUP		=	DAJDE)	+	-
OR		TL_EMPL_DATA	WORKGROUP		=	DAJDN)	+	-

Where Clause

Where Clause

```
FROM %SQL(TL_GRP_FROM_BASE)%SQL(TL_GRP_FROM_TL) WHERE
%SQL(TL_GRP_BATCH_WHERE_BASE,%P(1))AND %SQL(TL_GRP_BATCH_WHERE_TL,%P(1))
AND ( (TL_EMPL_DATA.WORKGROUP = 'DAJDE' OR TL_EMPL_DATA.WORKGROUP = 'DAJDN'))
```

Selection Criteria | Potential Group Members | Security by Group | Current Group Members