MD AOC Project

Introduction to PeopleSoft

PeopleSoft Fundamentals Session

MARYLAND JUDICIARY

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Agenda

- Introduction
- Session Objectives
- PeopleSoft Overview
- Key Features & Concepts
- A Look at PeopleSoft 9.1
- Next Steps
- Questions

Introduction

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A little bit about me… Q*uynh (Quin) Nguyen (Win)*

- Over 21 years of business and IT experience in which the past 15 years have been focused on PeopleSoft Financials & Supply Chain Applications

- Experience with public sector and private sector clients across various industries which include Healthcare, Retail, Oil & Gas, Transportation, Education, Energy, and Business Services

- Worked on various PeopleSoft ERP projects which include New Implementation, Upgrade, Enhancement, Security, and Integration projects

- Role on AOC Project is Financials/Supply Chain Functional Team Architect

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Session Objectives

- Introduce you to PeopleSoft 9.1 Financials/Supply Chain
- How we achieve this:
  - Provide a general overview of the PeopleSoft ERP system
  - Outline modules to be implemented at MD AOC
  - Walkthrough high-level PeopleSoft Overview Process Flow of the Integrations Between Finance/Supply Chain/HR
  - Discuss Key Features & Concepts of PeopleSoft 9.1
  - DEMO => A Quick Look Online at the Application

PeopleSoft Overview

What is an ERP?

•An “Enterprise Resource Planning” system is used to manage and coordinate all the resources, information, and functions of a business.

•Functions can include Finance/Accounting, HR, Manufacturing, Supply Chain Management, Grants Management, etc.

PeopleSoft Overview

What is PeopleSoft?

•Oracle Corporation’s ERP Solution that is used by thousands of public & private sector clients across industries

•Oracle is a top leader in the software and hardware market especially in the ERP area so have vast resources to ensure their ERP software meets their customers’ needs.

•PeopleSoft ERP solution has special product features for accommodating public sector clients’ business requirements

•Facilitates end-to-end business processes within a organization

•Integrated application, real time, access via the web

•Consistent look and feel throughout each module

•Common database, supports all modules

PeopleSoft Overview

Modules to be implemented on *Phase I* at MD AOC

• eProcurement	• Accounts Payable
• Purchasing	• Inventory
• Billing	• Asset Management
• Accounts Receivable	• Project Costing
• Cash Management	• Contracts
• General Ledger	• Grants
• Commitment Control	

PeopleSoft Overview – RTR Business Stream

Record to Report

- Chart of Accounts
- General Ledger
- Commitment Control

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Order to Cash

- Cash Management
- Billing
- Accounts Receivable

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Procure to Pay

- eProcurement
- Purchasing
- Accounts Payable

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Supply Chain Management

- Inventory
- Asset Management

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Enterprise Service Automation

- Project Costing
- Contracts
- Grants

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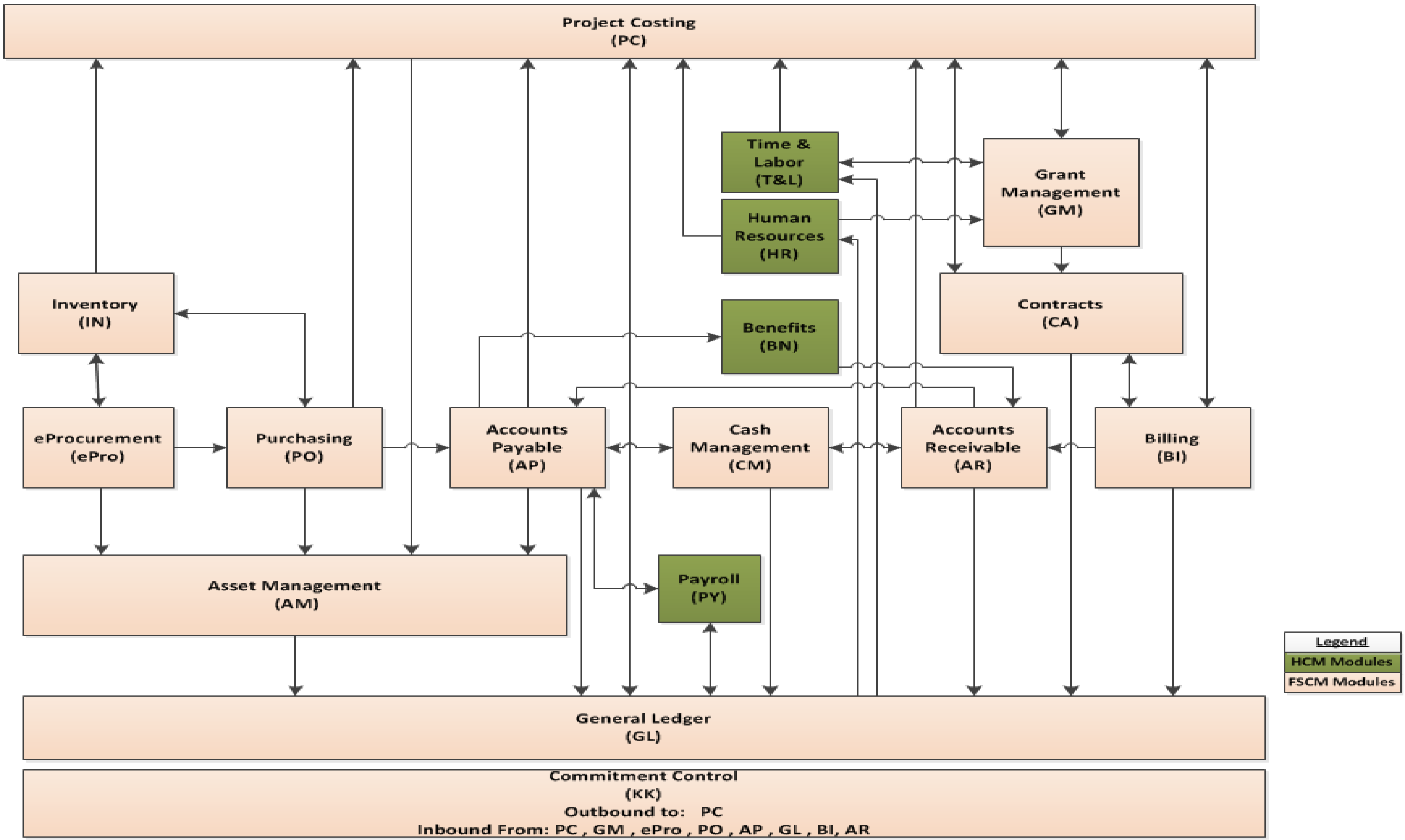
PeopleSoft Overview – Integrations Between Finance/Supply Chain/HR



PeopleSoft Overview – Integrations Between Finance/Supply Chain/HR

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Record to Report (RTR)

General Ledger (GL)
- Subsystem Journals
- Monetary Journals

Commitment Control (KK)
- Pre-Encumbrance (Commitments)
- Encumbrance (Obligations)
- Expenses
- Recognized Revenue
- Budgetary Journals

Procure to Pay (PTP)

eProcurement (ePro)
- Self Service Requisitions
- Self Service Receipts

Purchasing (PO)
- Requisitions
- Purchase Orders
- Receipts
- Items
- Change Orders
- PCards

Accounts Payable (AP)
- Vendors
- Vouchers/Invoices
- Payments

Supply Chain Management (SCM)

Inventory (IN)
- Putaway
- Order Fulfillment
- Inventory Counts

Asset Lifecycle Management (ALM)

Asset Management (AM)
- Assets
- Depreciation
- Retirement

Enterprise Service Automation (ESA)

Grants Management (GM)
- Pre-Award (Proposal, Proposal Project, Budget Activity)
- Post-Award (Contract/Award, Project/Grant Activity)

Contracts (CA)
- Contracts
- Billing Plans
- Prepaids/Advances
- Revenue Plans

Project Costing (PC)
- Projects
- Assets

Order to Cash (OTC)

Billing (BI)
- Billing Data
- Invoicing

Accounts Receivable (AR)
- Customers
- Receivables
- Collections
- Payments
- Aging

Cash Management (CM)
- Banking Relationships
- Treasury Accounting
- Reconciliation

Human Capital Management (HCM)

Time and Labor (T&L)
- Time Entered
- Costs
- Team Members
- Status of Grants
- Chart of Accounts

Payroll (PY)
- Garnishment Invoices
- Tax Invoices
- Vendors
- Chart of Accounts
- Benefits Invoices

Human Resources (HR)
- Personal Information

Benefits (BN)
- Vendors
- Accounts Receivables

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Key Features & Concepts – General & Benefits

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Key Features of PeopleSoft 9.1

•Access via web browser

AOC Benefits => Web based application allows for anywhere/anytime computing with only a web browser required.

•Extensive integrations between business transactions across PeopleSoft Financials/Supply Chain/HR Modules

AOC Benefits => Visibility to business transactions across AOC business organizations so facilitating better collaborations among users. Delivered integration processes allow for more real-time/timely access of data.

•Comprehensive chart of accounts “chartfield” structure

AOC Benefits => Delivered PeopleSoft chartfields allow for flexibility in mapping to AOC’s current chart of accounts to meet State mandated requirements as well as leverage new PeopleSoft chartfields for additional internal AOC detail reporting

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Key Features & Concepts – General & Benefits

- Online inquiries & drills on business transactions

  AOC Benefits => Easy access to summary and detail information on business transactions from different business streams (requisition/PO/receipt/invoice/journal/proposal/award/contract etc.). No more tracking of requisitions and purchase orders on log spreadsheet files.

- Advanced searching capabilities

  AOC Benefits => Oracle relational database platform allows for efficient storage and retrieval of data through indexes which facilitates effective searching (basic & advance) on PeopleSoft data.

- Workflow approvals & notifications on business transactions

  AOC Benefits => Flexible methods of workflow notifications via email & worklist (in PeopleSoft application). Facilitates better collaborations between users creating transactions, reviewers, and approvers.

Key Features & Concepts – General & Benefits

- Security administration

  AOC Benefits => Supports role based security model which grants security access to users based on their functional role in the AOC organization. System/security administrators, auditors, and AOC business organization leadership have a number of options to inquire and report on security information in the system.

- Integration tools to support PeopleSoft & non-PeopleSoft integrations

  AOC Benefits => Robust PeopleSoft integration tools/technologies that support both real-time and batch integrations between PeopleSoft modules as well as non-PeopleSoft systems integrations - R*STARS, ADPICS, RCS, Magic, 3rd party vendor systems (i.e. - Pcard bank data). Integration tools support multiple file formats (i.e. – XML, flat files – fixed/variable, EDI).

- Robust adhoc & batch reporting tools

  AOC Benefits => Delivered reports across Finance/Supply Chain modules allow AOC users easy access to business transactions with many report output options depending type of report (i.e. – XLS, TXT, RTF, RPT, PDF, DOC, HTM). Reports could be sent to email, file, printer, or web.

Key Features & Concepts – General & Benefits

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- Flexible batch process scheduling of processes & reports

  AOC Benefits => Batch process scheduling tool allows for batch running of both processes and reports. AOC users can submit an adhoc process or report request to run immediately or at a scheduled time. Along with their process/report request, they create a run control definition containing the parameters that will be used for processing their process/report. Run controls can be saved and re-run on future submissions of the process/report. AOC users can view status of their process/report using Process Monitor. Report Manager is a very user friendly tool for AOC users to access & organized their report outputs.

- PeopleBooks online help

  AOC Benefits => AOC users can access real-time online help when working in the application. When clicking on the Help within a PeopleSoft application page, the Help takes them to the exact page in PeopleBooks for the topic/subject that they are working on in that application page.

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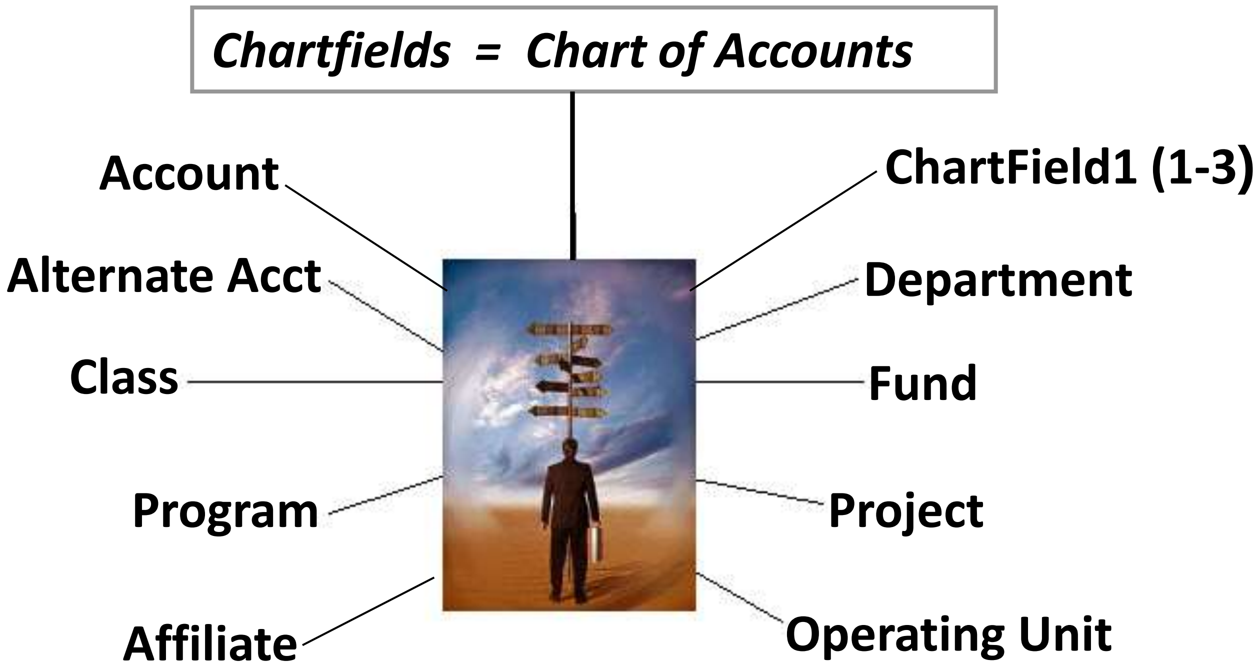
Key Features & Concepts – COA/Chartfields

Chart of Accounts => Represents how an organization records & reports on their Financials transactions

Chartfields => Fields that makeup overall structure of Chart of Accounts



Key Features & Concepts – Effective Dating

Effective Dating – enables you to maintain an accurate history of information in the application

- Allows for storing of historical data
- Allows for viewing of changes to data over time
- Allows for entering future data

Current Row =>	The data row with effective date ***closest to but not greater than*** the system date. *Only one row can be the current row.*
History Row => data	Data rows with effective dates ***earlier than*** the current row.
Future Row =>	Data rows with effective dates ***later than*** the current data row.

Effective Dating Example for Department Chartfield

Assume system date is 02/01/2012

- Current Row – 01/01/2012 (Department row currently in use)
- Future Row – 07/04/2012 (Department row to be used on 07/04/2012)
- History Row – 09/01/2004 (Department row no longer in use)

SetID	DeptID	Eff. Date	Status	Description	Mgr. Name
SHARE	10000	01/01/2012	Active	Finance	Jones, James
SHARE	10000	09/01/2004	Active	Finance	Brown, Mary
SHARE	10000	07/04/2012	Active	Finance	Evans, Robert

Key Features & Concepts – Business Unit/SetID

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Business unit design is the core configuration of the PeopleSoft ERP system which drives how business transactions are recorded, tracked, and reported on.

SetID design is the core configuration for the sharing of control information that is used to create business transactions.

What is a Business Unit?

- A Business Unit is an organization that is independent with regards to one or more accounting or operational functions.
- The Business Unit "owns" application transactions (i.e. – requisitions, purchase orders, invoices).

What is a SetID?

- SetIDs are simply the labels used to identify groups of control data/master data/setup tables (i.e. – vendors, customers, locations, banks).
- SetIDs determine which control data values a business unit can use when entering application transactions.

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Key Features & Concepts – Control Vs. Transaction Tables

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What is a Control (Master Data/Setup) Table?

- Stores information that defines the accounting structure and processing rules that are used when a business transaction is recorded
- Example of such tables include:
  - Customers
  - Banks
  - Chart of Accounts
  - Items
  - Vendors
- Contain static information
- Primarily keyed by SetID

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Key Features & Concepts – Control Vs. Transaction Tables

What is a Transaction Table?

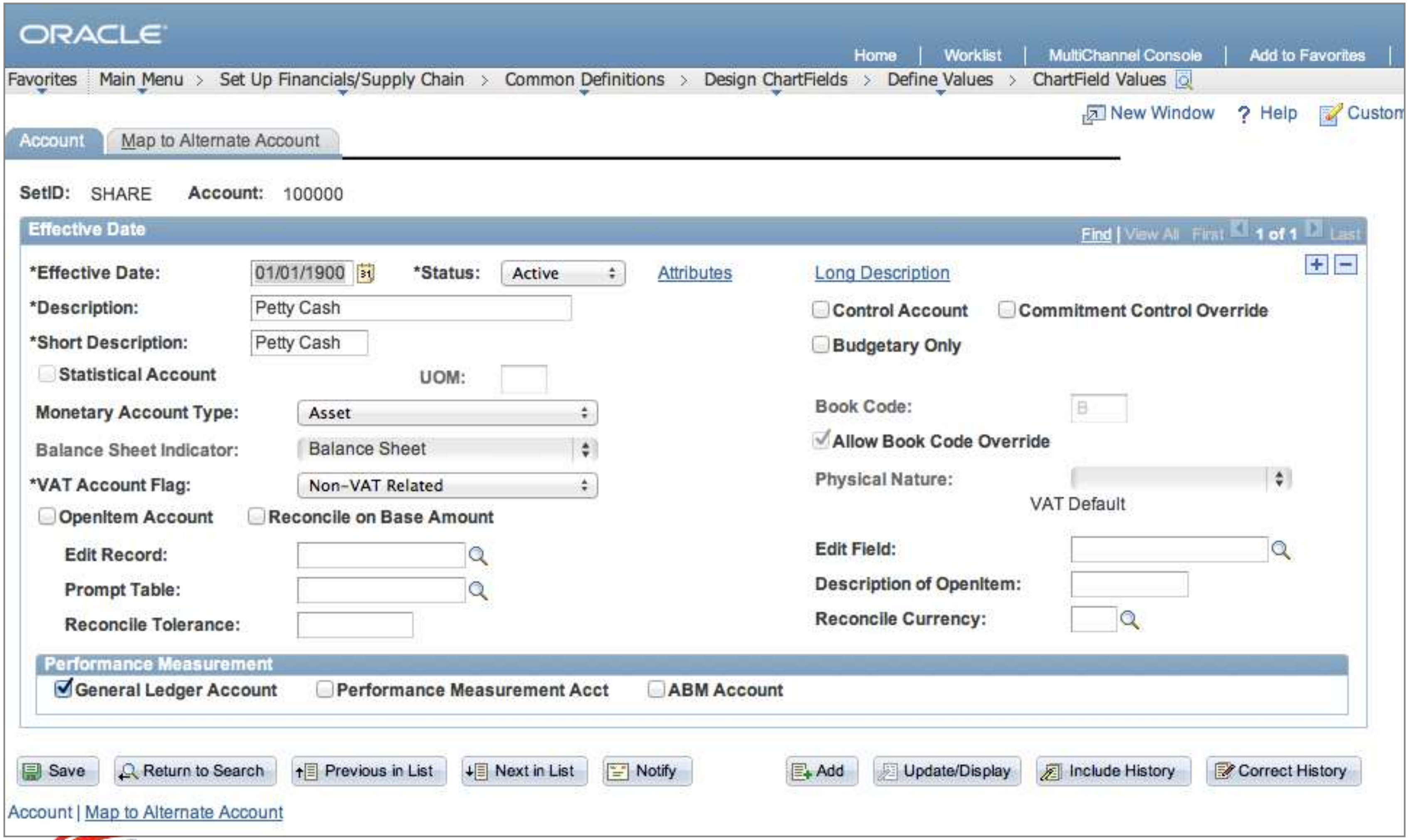
- Stores information (or data) about day-to-day business activities
- Examples of such tables include:
    - Journal Entries
    - Customer Payments
    - AP Vouchers/Invoices
    - Requisitions
    - Purchase Orders
- Transactions tables contain dynamic information
- Transaction tables are keyed by <u>Business Unit</u>

Control Tables Vs. Transaction Tables

Control Tables	Transaction Tables
Stores "master lists" or information used to build day-to-day business activity	Stores day-to-day business activity
Keyed by TableSet ID	Keyed by Business Unit
Static	Dynamic

Key Features & Concepts – Control Vs. Transaction Tables

Control Table Example



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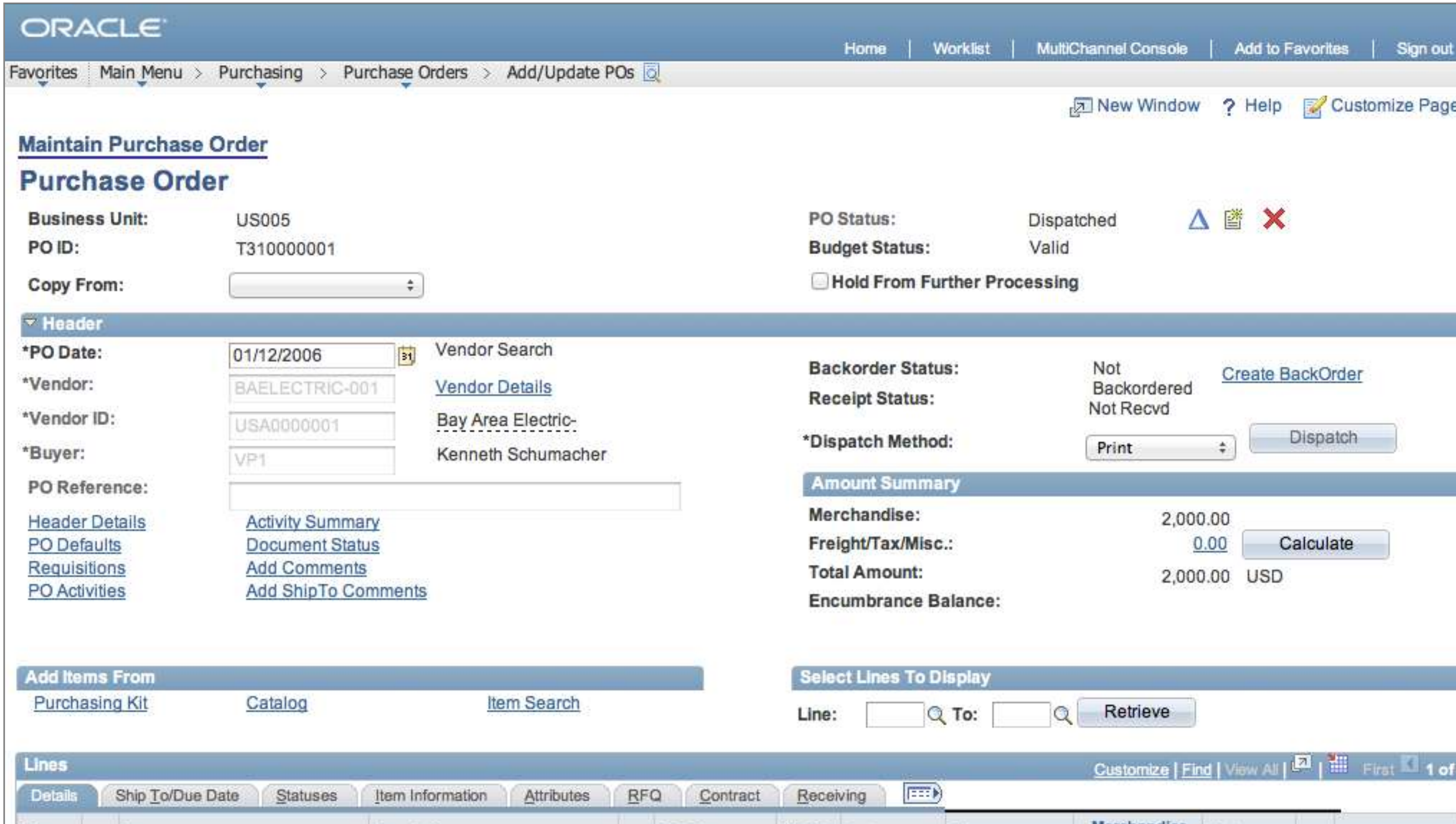
Transaction Table Example


ORACLE

Home | Worklist | MultiChannel Console | Add to Favorites | Sign out

Favorites | Main Menu > Purchasing > Purchase Orders > Add/Update POs

New Window ? Help Customize Page

Maintain Purchase Order

Purchase Order

Business Unit:	US005	PO Status:	Dispatched
PO ID:	T310000001	Budget Status:	Valid
Copy From:		Hold From Further Processing	

Header

*PO Date:	01/12/2006	Vendor Search	Backorder Status:	Not Backordered
*Vendor:	BAELECTRIC-001	Vendor Details	Receipt Status:	Not Recvd
*Vendor ID:	USA0000001	Bay Area Electric-	*Dispatch Method:	Print
*Buyer:	VP1	Kenneth Schumacher		
PO Reference:				

Create BackOrder

Dispatch

Header Details | Activity Summary
PO Defaults | Document Status
Requisitions | Add Comments
PO Activities | Add ShipTo Comments

Amount Summary

Merchandise:	2,000.00	
Freight/Tax/Misc.:	0.00	Calculate
Total Amount:	2,000.00	USD
Encumbrance Balance:		

Add Items From

Purchasing Kit | Catalog | Item Search

Select Lines To Display

Line: To: Retrieve

Lines

Customize | Find | View All | First 1 of 1

Details | Ship To/Due Date | Statuses | Item Information | Attributes | RFQ | Contract | Receiving

Merchandise

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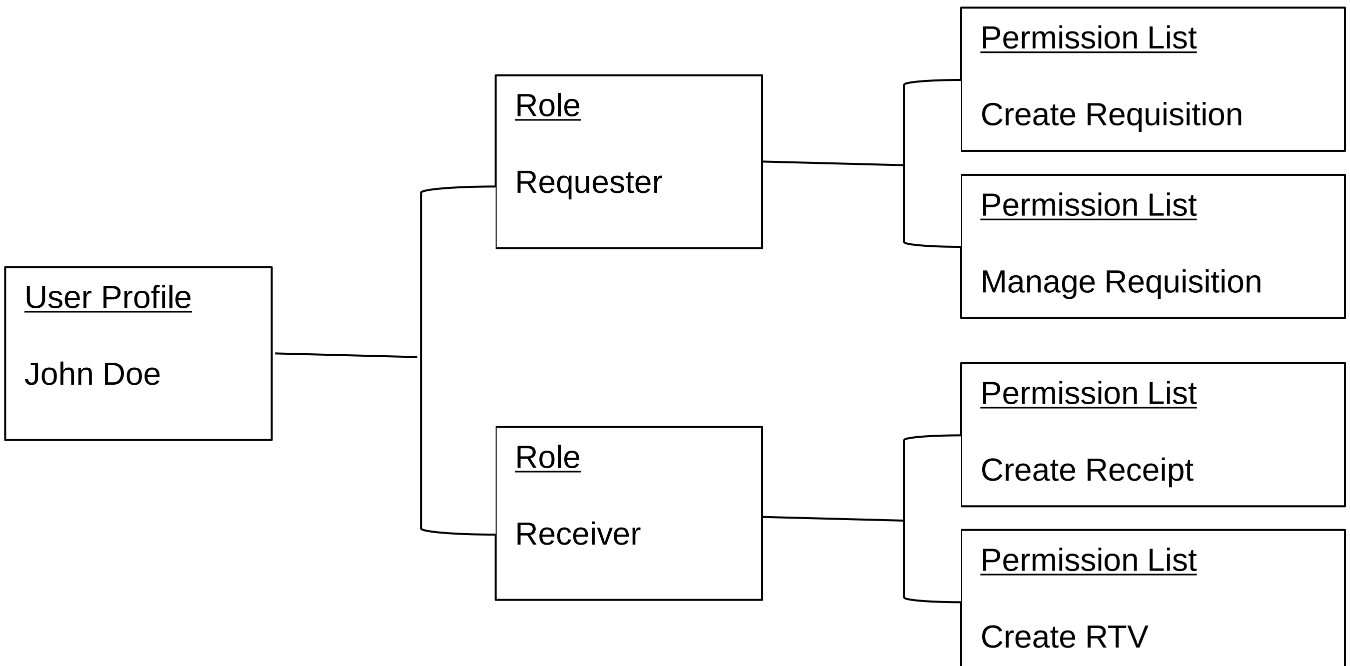
Key Features & Concepts - Security

Role Based Security Model

- Permission List – Group menu pages based on job functions
- Role – Grouping of job functions based on a job role
- User Profile – Individual user with assigned roles



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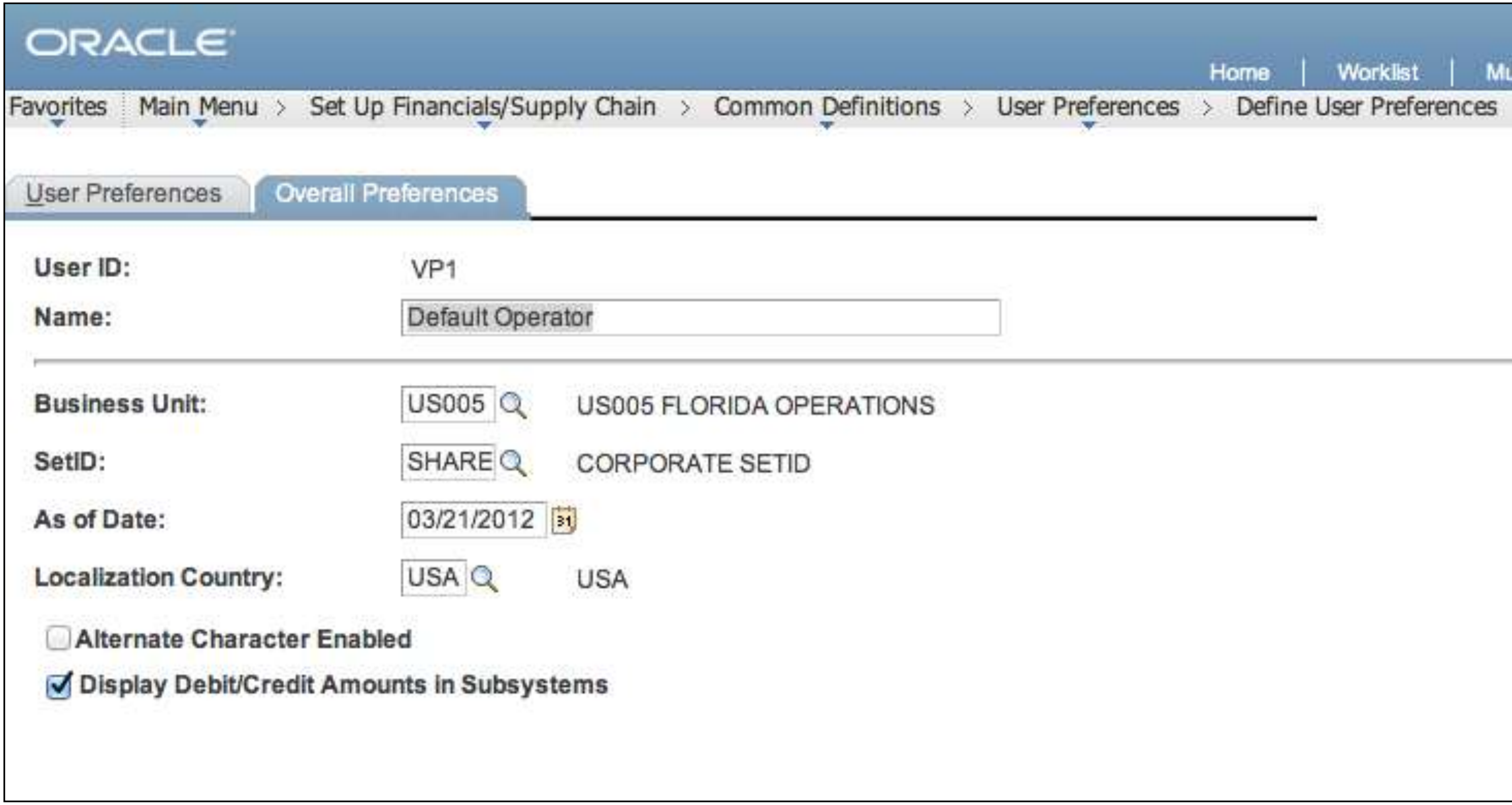
User Preferences

•Assigns user defaults, process groups, & grant additional security access to do work in modules (i.e. – approve PO, cancel PO, delete PO)

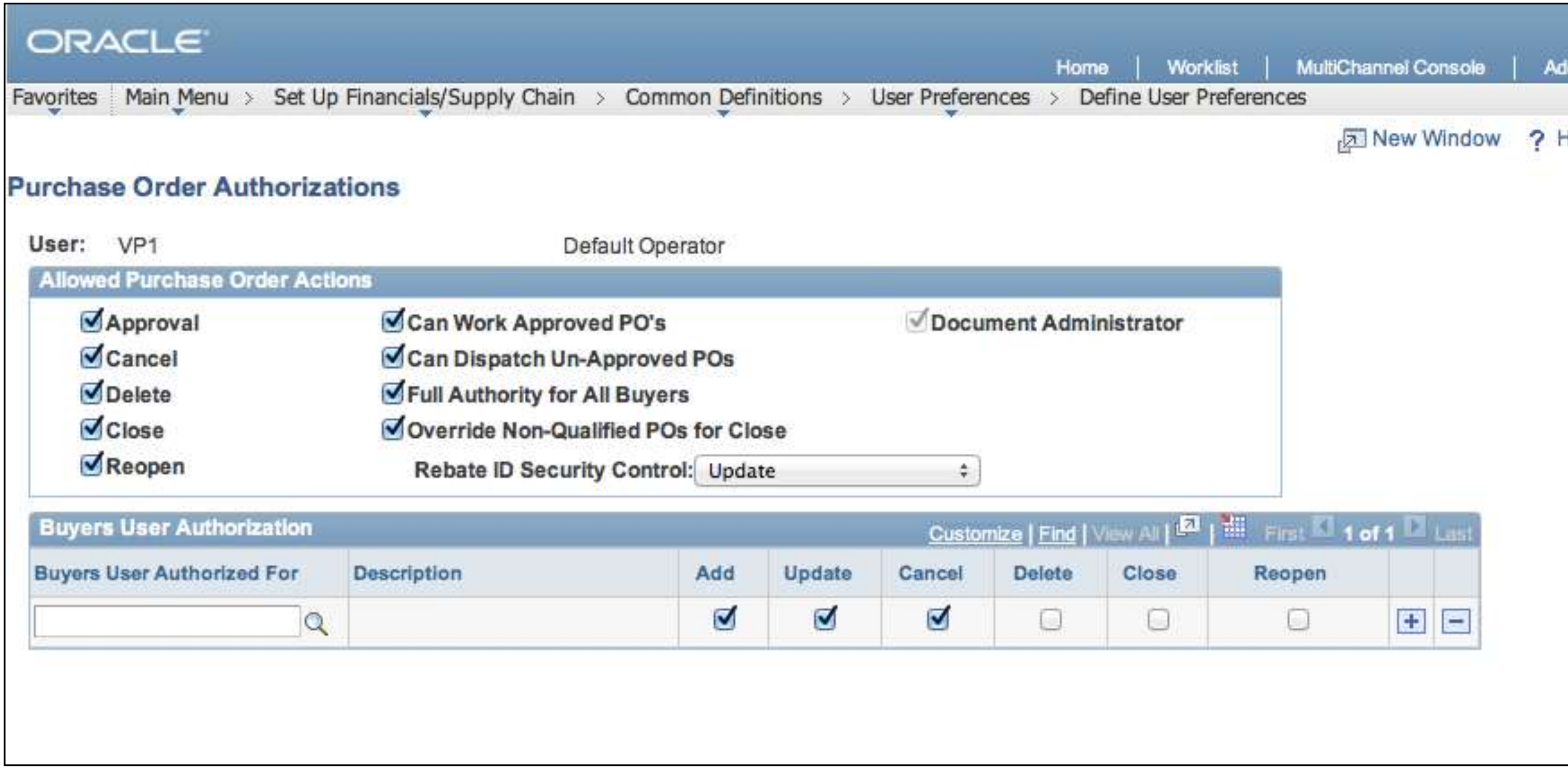
Key Features & Concepts – User Preferences

User Preferences – Overall Preferences



Key Features & Concepts – User Preferences

User Preferences – Product Preferences



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Key Features & Concepts - Workflow

Workflow

- Collaborations between users creating transactions, reviewers, and approvers
- Two types of workflow notifications – email , worklist (within the application)
- Workflow routings based on dollar, commodity, and/or GL coding approval
- Worklist item actions – approve, deny, recycle/pushback to previous approval, re-assign, add ahoy approvers/reviewers, review transaction details before approving it, adding comments
- Workflow business rules - auto approval/self approval, alternate approver, escalation, delegation

Key Features & Concepts - Workflow

Worklist – Inbox for Workflow Notifications of Actions & Tasks

- Personal or group worklists
- Mark tasks as “worked” or “reassign”

Worklist for VP1: Kenneth Schumacher

Detail View   Work List Filters: Feed

Worklist   Customize | Find | View 100 | First 1-25 of 1257 Last

From	Date From	Work Item	Worked By Activity	Priority	Link		
Theresa Monroe	06/07/2005	Task Owner	Sourcing Plan Predecessor		US001, PLN0000001, 1, 1	Mark Worked	Reassign
Kenneth Schumacher	11/18/2009	Transaction Approved	Approval Workflow	3-Low	VendorApproval, 12, ApproveVendors, 2007-01-01, N, 0, SETID:SHARE VENDOR_ID:0000000048 RDC:A,0,R	Mark Worked	Reassign
Kenneth Schumacher	11/24/2009	Transaction Approved	Approval Workflow	3-Low	VendorApproval, 22, ApproveVendors, 2007-01-01, N, 0, SETID:SHARE VENDOR_ID:0000000049 RDC:A,0,R	Mark Worked	Reassign
Kenneth Schumacher	11/30/2009	Transaction Approved	Approval Workflow	3-Low	VendorApproval, 33, ApproveVendors, 2007-01-01, N, 0, SETID:SHARE VENDOR_ID:0000000046 RDC:A,0,R	Mark Worked	Reassign
Kenneth Schumacher	01/15/2010	Transaction Approved	Approval Workflow	3-Low	VendorApproval, 42, ApproveVendors, 2007-01-01, N, 0, SETID:SHARE VENDOR_ID:USA0000003 RDC:A,0,R	Mark Worked	Reassign
Kenneth Schumacher	01/15/2010	Transaction Approved	Approval Workflow	3-Low	VendorApproval, 43, ApproveVendors, 2007-01-01, N, 0, SETID:SHARE VENDOR_ID:USA0000002 RDC:A,0,R	Mark Worked	Reassign
Kenneth Schumacher	01/19/2010	Transaction Approved	Approval Workflow	3-Low	VendorApproval, 52, ApproveVendors, 2007-01-01, N, 0, SETID:SHARE VENDOR_ID:AA RDC:A,0,R	Mark Worked	Reassign
Kenneth Schumacher	01/21/2010	Transaction Approved	Approval Workflow	3-Low	VendorApproval, 62, ApproveVendors, 2007-01-01, N, 0, SETID:SHARE VENDOR_ID:0000000050 RDC:A,0,R	Mark Worked	Reassign

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Workflow Approval

•Amount Approval – ***Requisition Amount Approval example***

Requisition Amount Approval

Unit: US001 Req: 0000000013 Requester: Kenneth Schumacher

*Approval Action: Approve Approval Status: Initial View Printable Req

Comment

Amount Details

Requisition Date: 01/15/2003

Total Amount: 20.000 Dollar

Total Base Amount: 20.000 Dollar

Line Details Customize | Find | | First 1 of 1 Last

Amounts/Qty | Details

Line	Sched	Status	Merchandise Amt	Currency	Merch Amt Base	Base Currency	Req Qty	UOM	Revision
1	1	Active	20.00	USD	20.00	USD	1.0000	EA	

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Workflow Approval

•Chartfield Approval *– Requisition Chartfield Approval example*

Requisition ChartField Approval

Unit: US001 **Req:** 0000000013 **Requester:** Kenneth Schumacher

***Appr Act:** Approve **Approval Status:** Initial [View Printable Req]

Comment

Distributions/ChartFields Customize | Find | View All | First 1 of 1 Last

Distribution

Line	Sched	Distrib	Status	GL Unit	Account	Alt Acct	Oper Unit	Fund	Dept	Program	Clas
1	1	1	Open	US005	600020			F900	11000	P7000	

Line Details Customize | Find | First 1 of 1 Last

Amounts/Qty | Details

Line	Sched	Status	Merchandise Amt	Currency	Merch Amt Base	Base Currency	Req Qty	UOM	Revision
1	1	Active	20.00	USD	20.00	USD	1.0000	EA	

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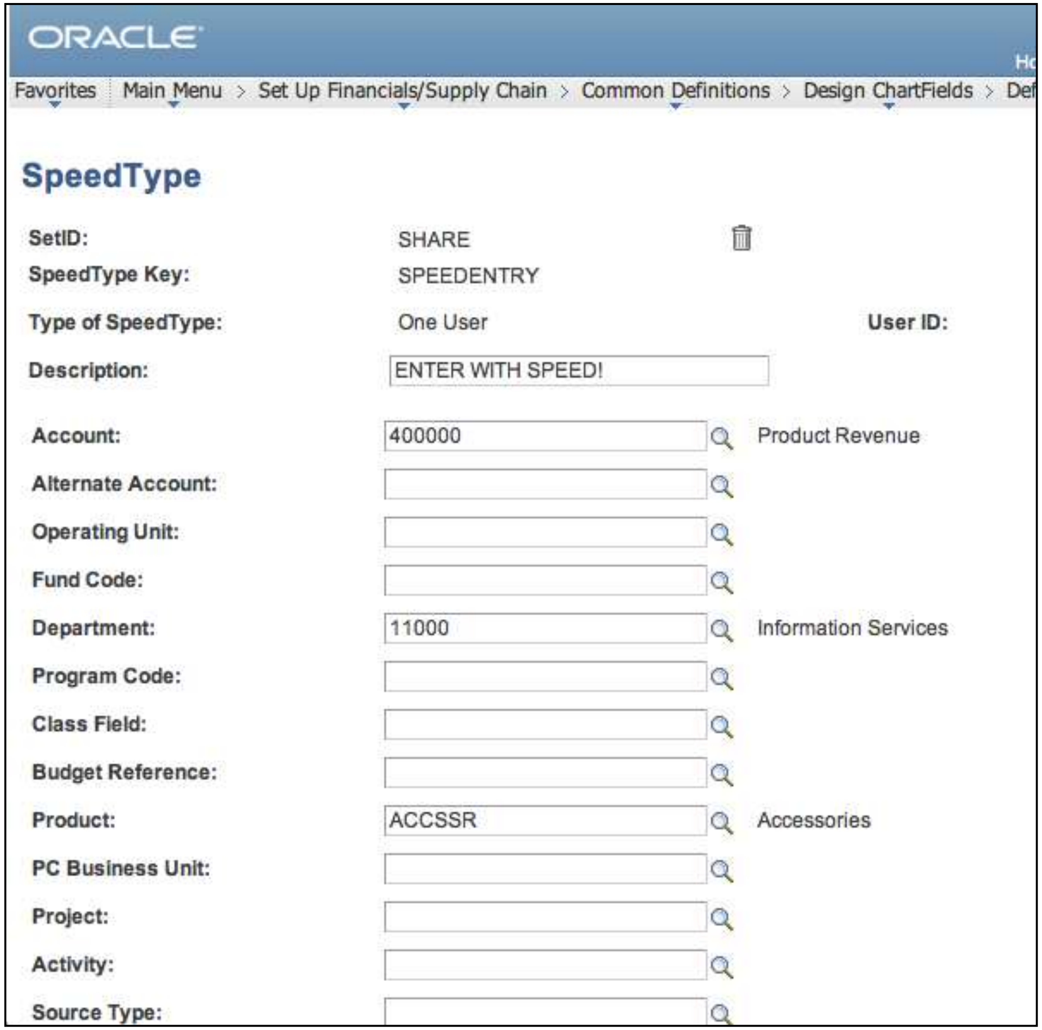
Speedtypes

- Shortcut keys for frequently used combinations of chartfields



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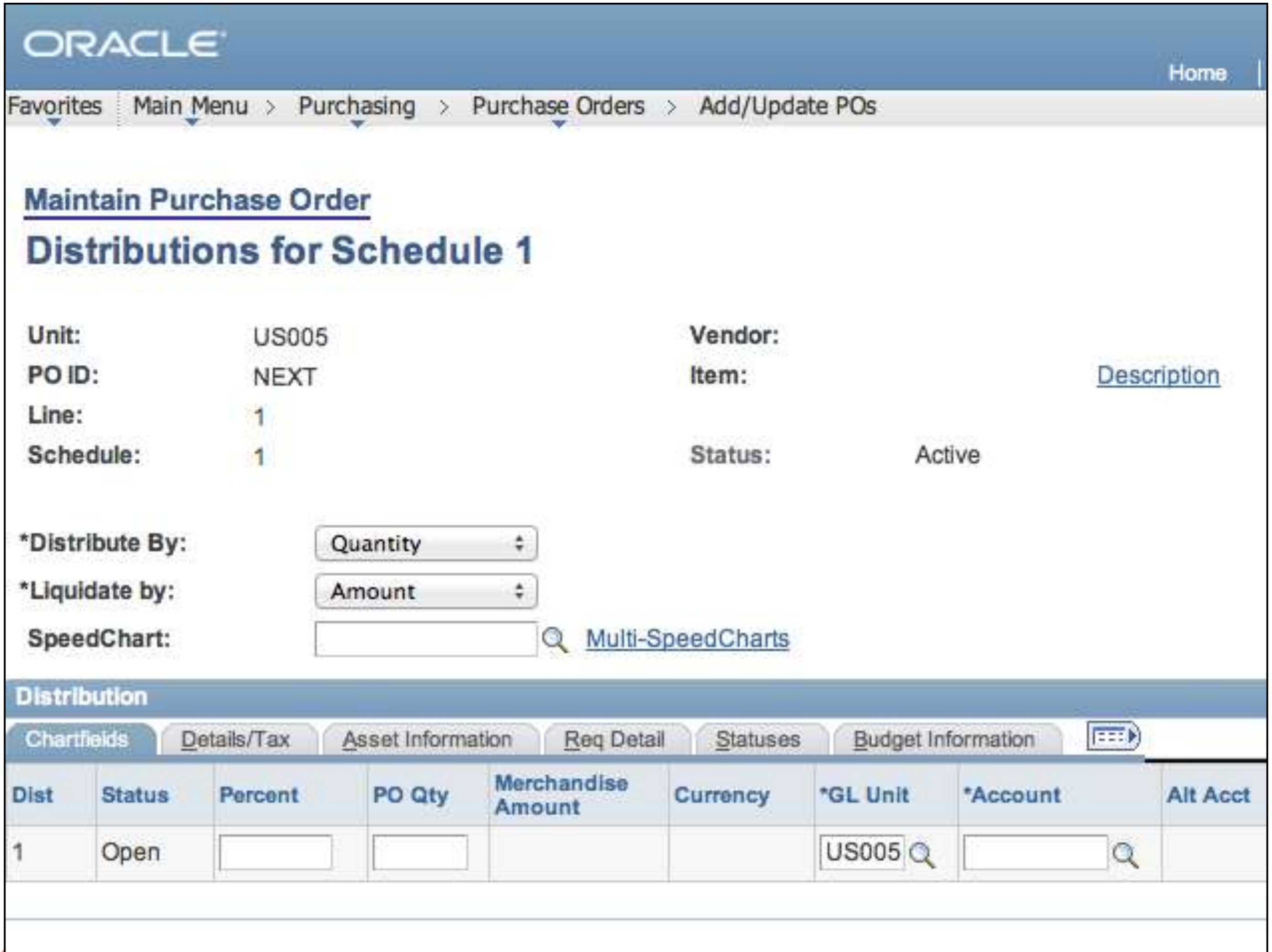
Key Features & Concepts - Speedtypes

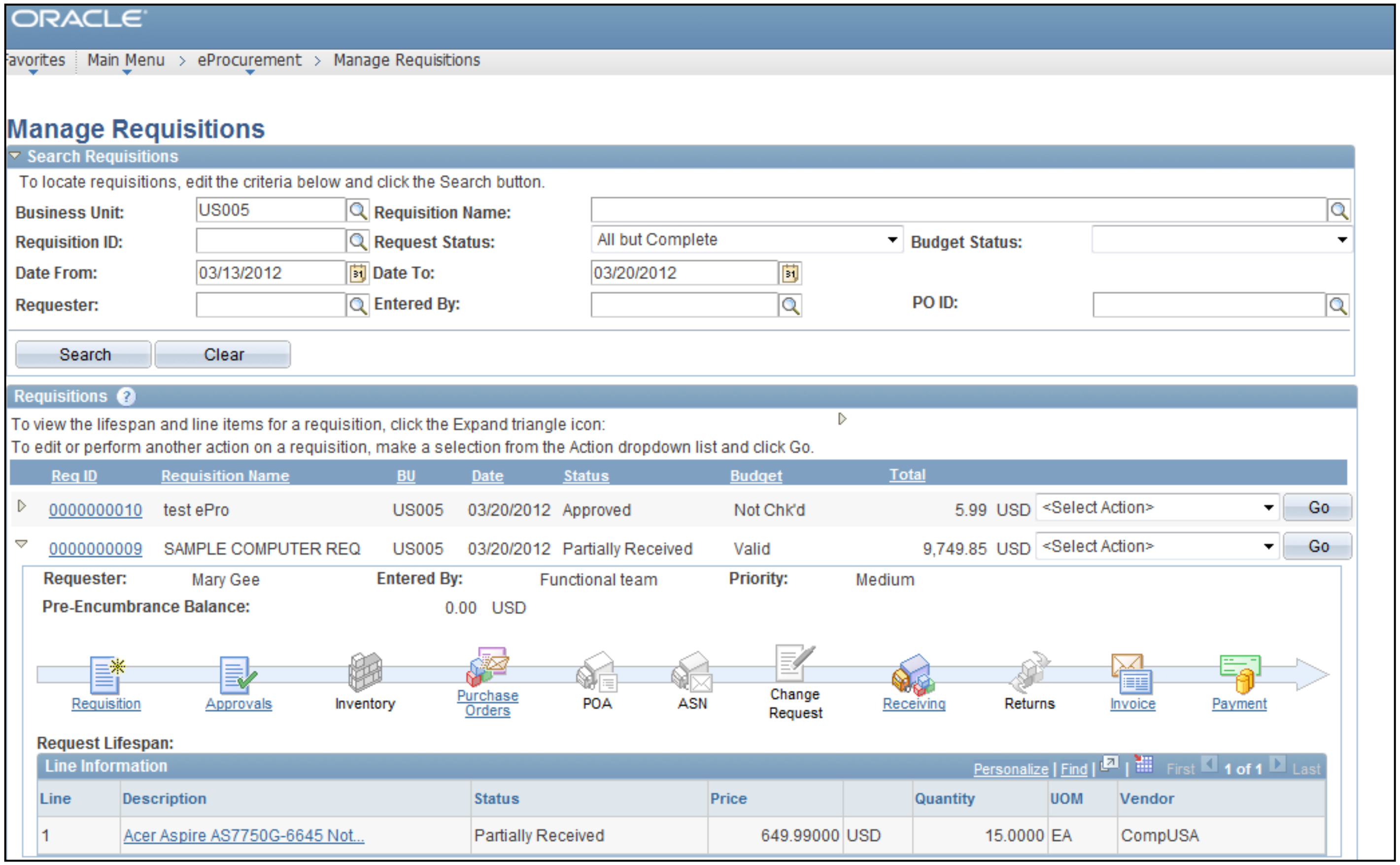
Speedtypes



Key Features & Concepts – Online Inquiry/Drills

Online Inquiries & Drills

•Online inquiries across business transactions between Financials & Supply Chain modules – ***Requisition Lifespan example***



Online Inquiries & Drills

•Online inquiries across business transactions between Financials & Supply Chain modules *– PO Activity Summary example*

ORACLE

Favorites | Main Menu > Purchasing > Purchase Orders > Review PO Information > Activity Summary

Activity Summary

Business Unit:	US005	**PO Status:**	Dispatched
Purchase Order:	0000000008	**Vendor:**	CompUSA
Merchandise Amount:	10,000.00 USD		
Merchandise Receipt:	6,499.90 USD		
Merchandise Returned:	0.00 USD		
Merchandise Invoice:	6,625.00 USD		
Merchandise Matched:	6,625.00 USD		

Lines Personalize | Find | View All | First 1-2 of 2 Last

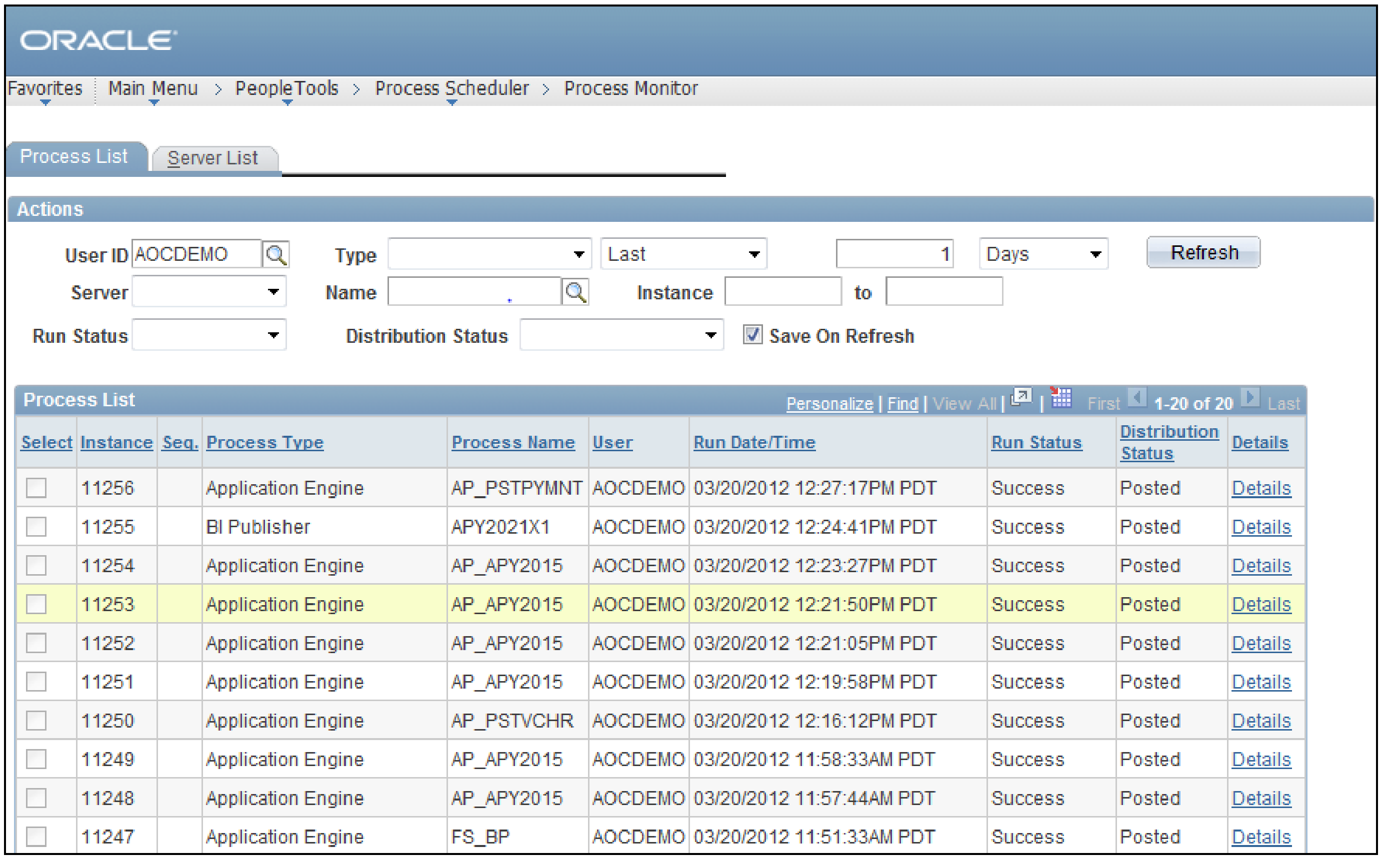
Details | Receipt | Invoice | Matched | RTV

Line		Item	Item Description	UOM	Order Qty	Amount Ordered	Currency	Amount Only
1			Acer Aspire AS7750G-6645 NX.RV	EA	15.0000	9,749.850	USD	☐
2			Shipping & Delivery Charges	EA	1.0000	250.150	USD	☑

Key Features & Concepts – Batch Scheduling

Process Scheduler/Process Monitor

- Schedules & runs processes/reports in background
- Monitors status of process requests



Select	Instance	Seq.	Process Type	Process Name	User	Run Date/Time	Run Status	Distribution Status	Details
	11256		Application Engine	AP_PSTPYMNT	AOCDEMO	03/20/2012 12:27:17PM PDT	Success	Posted	Details
	11255		BI Publisher	APY2021X1	AOCDEMO	03/20/2012 12:24:41PM PDT	Success	Posted	Details
	11254		Application Engine	AP_APY2015	AOCDEMO	03/20/2012 12:23:27PM PDT	Success	Posted	Details
	11253		Application Engine	AP_APY2015	AOCDEMO	03/20/2012 12:21:50PM PDT	Success	Posted	Details
	11252		Application Engine	AP_APY2015	AOCDEMO	03/20/2012 12:21:05PM PDT	Success	Posted	Details
	11251		Application Engine	AP_APY2015	AOCDEMO	03/20/2012 12:19:58PM PDT	Success	Posted	Details
	11250		Application Engine	AP_PSTVCHR	AOCDEMO	03/20/2012 12:16:12PM PDT	Success	Posted	Details
	11249		Application Engine	AP_APY2015	AOCDEMO	03/20/2012 11:58:33AM PDT	Success	Posted	Details
	11248		Application Engine	AP_APY2015	AOCDEMO	03/20/2012 11:57:44AM PDT	Success	Posted	Details
	11247		Application Engine	FS_BP	AOCDEMO	03/20/2012 11:51:33AM PDT	Success	Posted	Details

Key Features & Concepts – Batch Reporting

Report Manager

- View report content and messages

List | Explorer | Administration | Archives

View Reports For

Folder: | Instance: | to: | Refresh

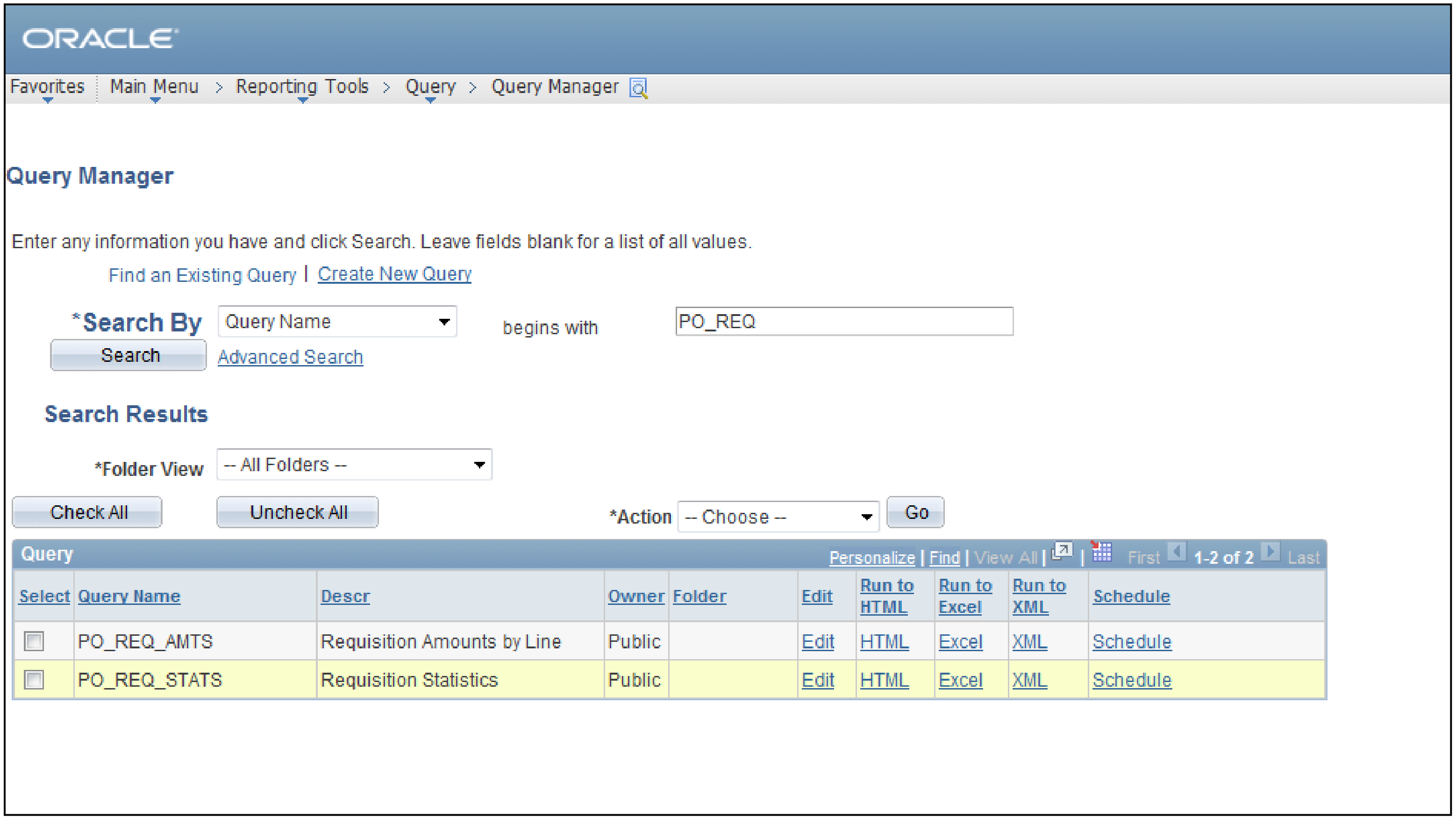
Name: | Created On: | Last | 1 | Days

Reports Customize | Find | View 100 | | First 1-50 of 101 Last

	Report	Report Description	Folder Name	Completion Date/Time	Report ID	Process Instance
1	MSGSET - MSGSET.htm	MSGSET - MSGSET.HTM	General	07/01/10 2:05PM	148	67
2	DDDAUDIT	DATA DESIGNER/DATABASE AUDIT	TEST	07/01/10 2:03PM	146	66
3	XRFRCFL	CROSS REFERENCE - RECORDS AND	General	07/01/10 1:51PM	142	63
4	XRFMENU	MENU LISTING REPORT	General	07/01/10 1:50PM	141	62
5	XRFIELDS	CROSS REFERENCE FIELD LISTING	General	07/01/10 1:50PM	140	61
6	AEMINITEST	SIMPLE AE TEST PROGRAM	General	07/01/10 1:49PM	143	64

PeopleSoft Query

- Adhoc reporting tool to access PeopleSoft data
- Query output can be exported to HTML, Excel, XML



Key Features & Concepts – Adhoc Reporting

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PeopleSoft Query

PO_REQ_AMTS- Requisition Amounts by Line

Download results in : Excel SpreadSheet CSV Text File XML File (3 kb)

View All

First 1-23 of 23 Last

	Unit	Req ID	Entered	Line	Sched Num	Merchandise Amt	Currency
1	US001	0000000132	04/06/2006	1	1	5000.000	USD
2	US001	0000000132	04/06/2006	2	1	4000.000	USD
3	US001	0000000132	04/06/2006	3	1	8000.000	USD
4	US001	0000000132	04/06/2006	4	1	2500.000	USD
5	US001	0000000132	04/06/2006	10	1	240000.000	USD
6	US001	0000000132	04/06/2006	6	1	340.000	USD
7	US001	0000000132	04/06/2006	7	1	1700.000	USD
8	US001	0000000132	04/06/2006	8	1	2550.000	USD
9	US001	0000000132	04/06/2006	9	1	440.000	USD
10	US001	0000000132	04/06/2006	5	1	18000.000	USD
11	US001	0000000133	04/07/2006	1	1	170.000	USD
12	US001	0000000133	04/07/2006	2	1	425.000	USD
13	US001	0000000133	04/07/2006	4	1	400.000	USD
14	US001	0000000133	04/07/2006	3	1	0.000	USD

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PeopleSoft Query

A1 Requisition Amounts by Line

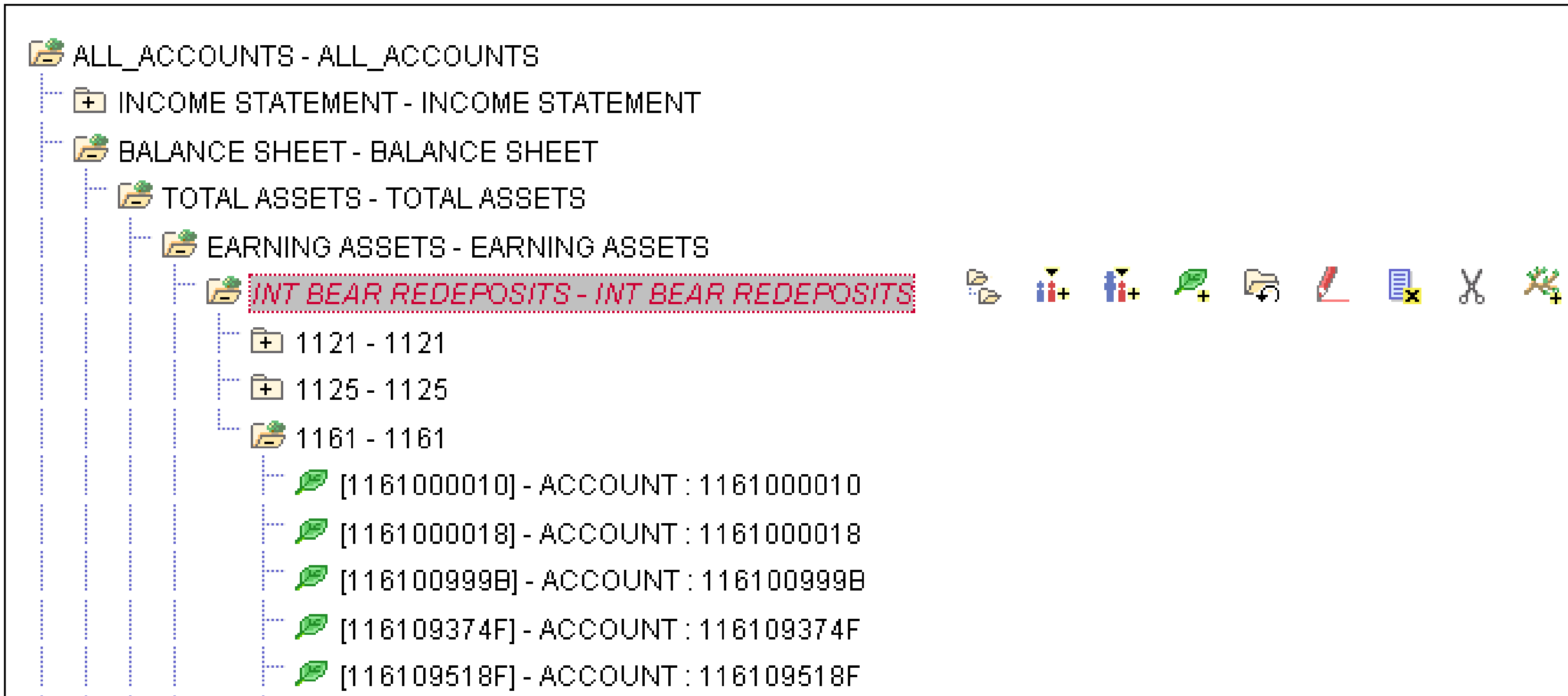
	A	B	C	D	E	F	G
1	Requisit	23					
2	Unit	Req ID	Entered	Line	Sched Num	Merchandise Amt	Currency
3	US001	0000000132	4/6/06	1	1	5000.000	USD
4	US001	0000000132	4/6/06	2	1	4000.000	USD
5	US001	0000000132	4/6/06	3	1	8000.000	USD
6	US001	0000000132	4/6/06	4	1	2500.000	USD
7	US001	0000000132	4/6/06	10	1	240000.000	USD
8	US001	0000000132	4/6/06	6	1	340.000	USD
9	US001	0000000132	4/6/06	7	1	1700.000	USD
10	US001	0000000132	4/6/06	8	1	2550.000	USD
11	US001	0000000132	4/6/06	9	1	440.000	USD
12	US001	0000000132	4/6/06	5	1	18000.000	USD
13	US001	0000000133	4/7/06	1	1	170.000	USD
14	US001	0000000133	4/7/06	2	1	425.000	USD
15	US001	0000000133	4/7/06	4	1	400.000	USD
16	US001	0000000133	4/7/06	3	1	0.000	USD
17	US001	0000000134	4/7/06	1	1	74.250	USD
18	US001	0000000134	4/7/06	2	1	12360.000	USD
19	US001	0000000134	4/7/06	3	1	1025200.000	USD
20	US001	0000000135	1/17/07	1	1	10000.000	USD
21	US001	0000000135	1/17/07	3	1	24000.000	USD
22	US001	0000000135	1/17/07	2	1	11000.000	USD
23	US001	0000000136	1/17/07	1	1	21000.000	USD
24	US005	KKUPG-1	2/24/06	1	1	1000.000	USD
25	US100	0000000043	6/1/06	1	1	260.000	USD

Key Features & Concepts – Tree Manager

Tree Manager

•Allows data to be represented graphically to show a hierarchy – can be used in rollup reporting, batch processing, and workflow routings

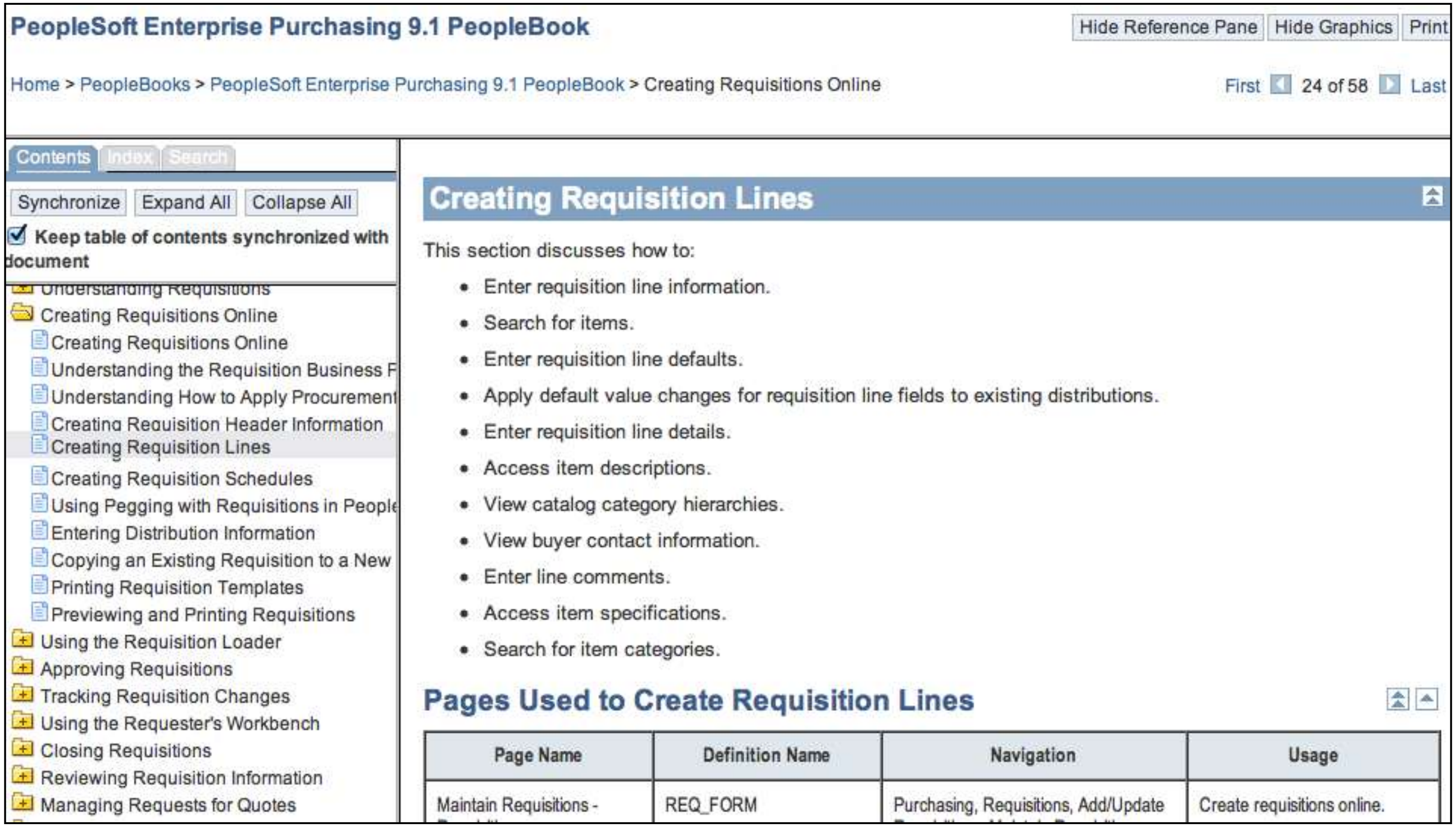
•PeopleSoft tree structure has a trunk with branches & leaves. A PeopleSoft tree is similar to a family tree with parent, child, and sibling relationships



MARYLAND JUDICIARY

PeopleBooks – Context Sensitive Online Help

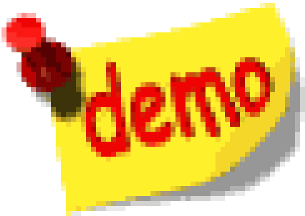
•Access help information by navigating through books/chapters using table of contents, index, and search functionalities



metaformers
Enterprise Solution Architects

A Look at the PeopleSoft 9.1 – Online Demo

MARYLAND JUDICIARY



PeopleSoft 9.1 Fundamentals

- Sign-on, Home Page, Menus
- Navigations
  - Add a New Value, Find an Existing Value, Searching
  - Actions Buttons & Links
  - Navigating Through Menu Item, Page, Grids
- Online Inquiry
  - Requisition Lifespan
  - PO Activity Summary
- Query Viewer
- Run Control/Report Manager
- Tree Manager
- Workflow/Worklist

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A Look at the PeopleSoft 9.1 – Online Demo

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✪Refer to file below for screenshots of online demo✪

Microsoft Word Document

✪Click to open file✪

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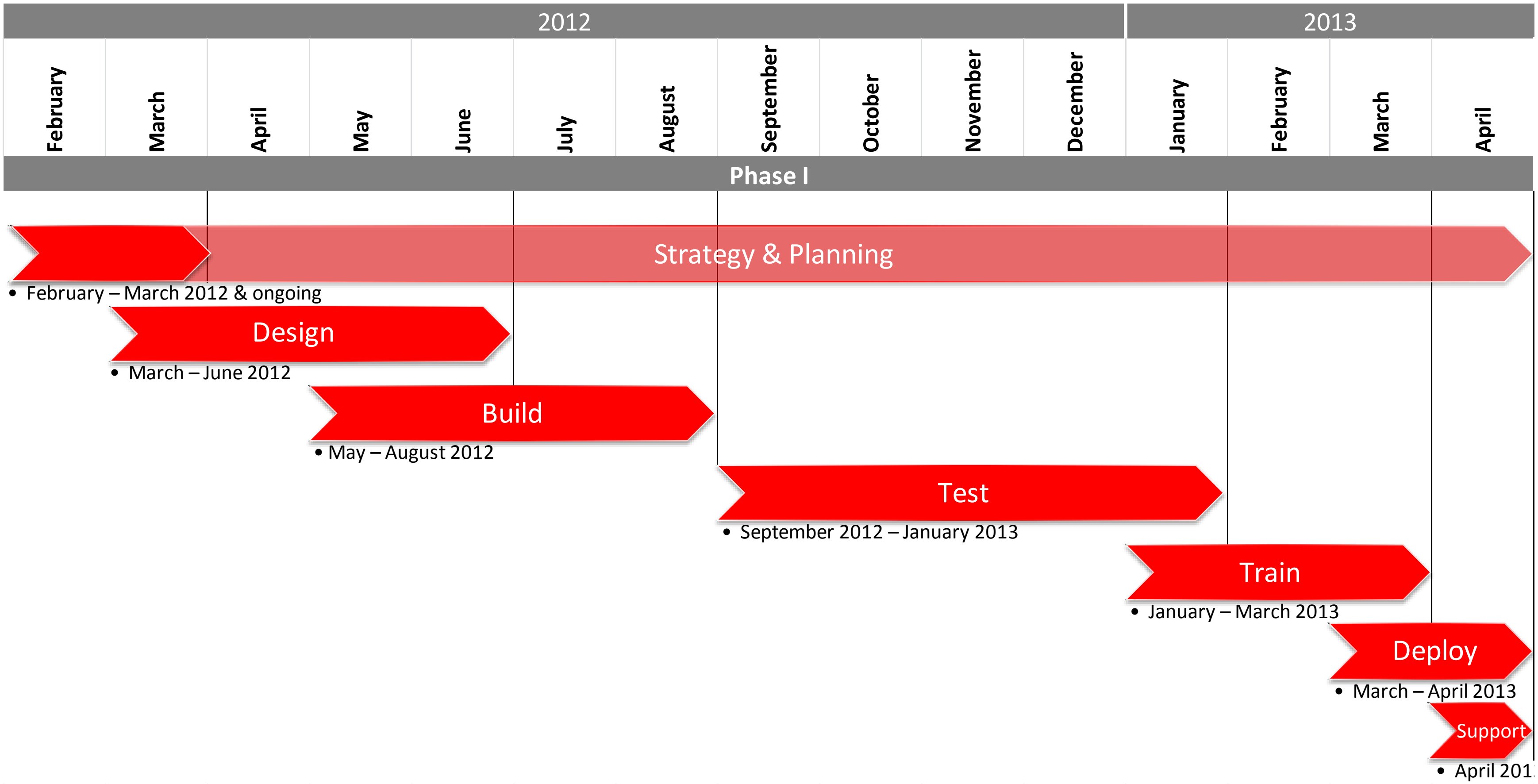
Next Steps



2012
2013
February
March
April
May
June
July
August
September
October
November
December
January
February
March
April
Phase I
Strategy & Planning
• February – March 2012 & ongoing
Design
• March – June 2012
Build
• May – August 2012
Test
• September 2012 – January 2013
Train
• January – March 2013
Deploy
• March – April 2013
Support
• April 201

Next Steps (continued)

Function-Specific Intro To PS Sessions:

• eProcurement/Purchasing	• Accounts Payable
• Billing	• Inventory
• Accounts Receivable	• Asset Management
• Cash Management	• Project Costing
• COA/General Ledger	• Contracts
• Commitment Control	• Grants
• Vendor Management	

Questions