Agenda

• Demo
  – Budget Overview
  – Travel Authorization
  – Expense Reports
  – Non-PO Vouchers
  – Time Sheets & Leave Requests

• Things to know
PeopleSoft Overview

How will the upgrade impact UTEP?

• The system navigation, functionality and processing will not change

• Same overall look and feel

• Some fields & action buttons may have moved to a different area or renamed
Budget Overview

What is different?

• Six additional columns

• You can personalize the Budget Overview page
## Six Additional Columns

You can personalize the Budget Overview page by selecting the Personalize link.

### Column Details

1. **Account Description** = ‘Budget Account’ name
2. **Fund Code Description** = ‘Fund’ name
3. **Department Description** = ‘Department’ name
4. **Chart field 1 Description** = ‘Cost Center’ name
5. **Class Description** = ‘Function’ name
6. **Project Description** = ‘Project’ name

### Budget Overview Results

<table>
<thead>
<tr>
<th>Account</th>
<th>Account Description</th>
<th>Fund Code</th>
<th>Fund Code Description</th>
<th>Dept</th>
<th>Department Description</th>
<th>Cost Center</th>
<th>ChartField1 Description</th>
<th>Function</th>
<th>Class Description</th>
<th>Project</th>
<th>Project Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>A1000</td>
<td>Staff Salaries</td>
<td>2100</td>
<td>E&amp;G General Funds</td>
<td>301500</td>
<td>PeopleSoft</td>
<td>14021600</td>
<td>PEOPLESOFT</td>
<td>700</td>
<td>Institutional Support</td>
<td></td>
<td></td>
</tr>
<tr>
<td>A1200</td>
<td>Wages</td>
<td>2100</td>
<td>E&amp;G General Funds</td>
<td>301500</td>
<td>PeopleSoft</td>
<td>14021600</td>
<td>PEOPLESOFT</td>
<td>700</td>
<td>Institutional Support</td>
<td></td>
<td></td>
</tr>
<tr>
<td>A3000</td>
<td>Payroll Related Costs</td>
<td>2100</td>
<td>E&amp;G General Funds</td>
<td>301500</td>
<td>PeopleSoft</td>
<td>14021600</td>
<td>PEOPLESOFT</td>
<td>700</td>
<td>Institutional Support</td>
<td></td>
<td></td>
</tr>
<tr>
<td>A4000</td>
<td>Operating Expenses</td>
<td>2100</td>
<td>E&amp;G General Funds</td>
<td>301500</td>
<td>PeopleSoft</td>
<td>14021600</td>
<td>PEOPLESOFT</td>
<td>700</td>
<td>Institutional Support</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Budget Overview Demo

• New columns
• Review how to personalize the Budget Overview page

  – For the Budget Overview quick guide, click here.
Travel Authorizations

What is different?

• Single page entry
• **Attachments** link appears in middle of the page
• **Speed Chart** field moved below Expense line
• Funding information loads below the Speed Chart
• **Budget Options** link moved to the top of the page
• **Save** button renamed **Save for Later** and moved to the top right corner of the page
• **Submit** button renamed **Summary and Submit** and also moved to the top right corner of page
Create Travel Authorization

Single Page Entry

Projected Expenses

Attachments

Funding Section

Key
- Green: Fields did not change
- Yellow: Fields changed or moved
Expense Reports

What is different?

• Single page entry

• Similar to Travel Authorizations, the following sections changed:
  – Save for Later
  – Submit and Summary
  – Budget Options
  – Attachments
  – Funding Section

• **Expense Detail** page is now under the Expense line

• Linking Travel Authorization process changed to **Associate Travel Authorization**; the “linking” occurs after expense lines have been entered

• You can undo the Travel Authorization link by clicking **Detach TA**
Approve Travel & Expense

What is different?

• The Approve, Terminate, More (Sendback) buttons moved to the top of the page.
• Select the More button to Sendback
• New Confirmation pop-up window appears
• Approver needs to press Submit to complete
Travel & Expense Approval

Approver Action Buttons

Sendback

Submit

Confirmation Pop-up Window

Cancel

Approve

Submit

You are about to approve this request.

Approver Comments

Cancel

Approve

Submit

Amount

75.00 USD

Approval Chain
Travel Authorization & Expense Report Demo

• Review Travel Authorization field updates
• Review Expense Report field updates
• Review Approval buttons for Travel & Expense documents
  – For the Travel Authorization quick guide, click here.
  – For the Travel Expense Report quick guide, click here.
  – For the Non-Travel Expense Report quick guide, click here.
Non-PO Vouchers

What is different?

• Links relocated for Comments, Attachments, and Basis Date Calculation moved to the corner of the page

• New Preview Approval link which shows preview of workflow

• The Save button moved to the middle of the page.

• The Budget Checking action drop down moved to the middle of the page along with the Run, Calculate, Print, and Submit for Approval buttons
Approve Non-PO Voucher

What is different?

• The Approve and Send Back buttons moved to the top of the page.
• New Confirmation pop-up window appears
• Approver needs to press Submit to complete
Non-PO Voucher Approval

Approver Action Buttons

Submit

Confirmation Pop-up Window
Non-PO Voucher Demo

• Review Voucher field updates and action buttons.

• Review Voucher Approval buttons
  
  – For the Non-PO Voucher quick guide, [click here](#).
# Common Budget Checking Errors

<table>
<thead>
<tr>
<th>Error Message</th>
<th>Error Description</th>
<th>Solutions/Actions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Exceeds Budget Tolerance</td>
<td>Transaction exceeds available budget</td>
<td>• Verify available funds in Budget Overview</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Use another Speedchart &amp; re-budget check</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Submit a Help Desk ticket</td>
</tr>
<tr>
<td>No Budget Exists</td>
<td>Chartfield combination does not exist for budget row.</td>
<td>• Re-enter the Speedchart</td>
</tr>
<tr>
<td></td>
<td>One of the chart fields does not match the valid string.</td>
<td>• Verify Chartfields (Fund, Function, Dept.) match to Budget Overview</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Submit a Help Desk ticket</td>
</tr>
</tbody>
</table>

For a list of all budget check errors and solutions, [click here](#).
Timesheet & Leave Requests

What is different?

• New **Print Timesheet** option which populates a print screen for time entered
• **Submit** button is in the middle of the page
• New multi-tab section located under the Submit button
• To enter an absence event select **Absence** tab
# Leave Requests

## Timesheet

- **Employee ID**: 6001142777
- **Earliest Change Date**: 06/01/2019

### Select Another Timesheet

- **View By**: Week
- **Date**: 04/01/2019

### Print Timesheet

- **Total**
- **Time Reporting Code**
- **Taskgroup**

### Absence Events

- **Start Date**: 04/01/2019
- **End Date**: 04/01/2019
- **Absence Name**: Vacation Leave
- **Duration**: Hours
- **Unit Type**: Details
- **Status**: New
- **Approval Monitor**: Approver Monitor

## Multi-tab Section

### Absence

- **Select**
- **Start Date**: 04/01/2019
- **End Date**: 04/01/2019
- **Absence Name**: Vacation Leave
- **Duration**: Hours
- **Unit Type**: Details
- **Status**: New
- **Approval Monitor**: Approver Monitor
- **Source**: Manager Timesheet

### Summary

- **Reported Time Status**

### Leave / Compensatory Time

- **Leave/Compensatory Time**

### Exceptions

- **Exceptions**

### Payable Time

- **Payable Time**
Timesheet & Leave Request Demo

• Review Timesheet and Leave Request field updates and action buttons.

  – For the Hourly Timesheet quick guide, click here.
  – For the Vacation Leave Request quick guide, click here.
  – For the Sick Leave Request quick guide, click here.
Things to Know

• Ability to create transactions will be disabled Wed June 5th
  – Travel Authorizations, Expense Reports, Non-PO Vouchers
• Upgrade is expected to start on Fri June 7th
• System is expected to be up by Mon June 10th
• Submit Help Desk tickets for any issues
• New training materials posted on the PeopleSoft website
• Hands-on sessions will be available and posted on the PeopleSoft Training Calendar
Thank You