

Just Web It!  
*Taking the paper out of  
Purchasing, AP and Accounting*

Presented by:  
San José State University



2005 HEUG Conference - Las Vegas  
Session 10063  
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# Today's Presenter

- San José State University
  - Shawn Bibb





# SJSU Facts and Figures

- Silicon Valley's Metropolitan University
- Approximately 30,000 students
- Oldest institution of higher education on west coast
- One of 23 campuses in the California State University (all universities implementing PeopleSoft)





# SJSU PeopleSoft Facts

- HRSA 8.0 (upgrade to HCM 8.9 in progress)
  - Position Management, Administer & Recruit Workforce, Time & Labor, Base Benefits, Administer Training
  - Admissions, Records, Financial Aid, Student Financials, Academic Advising
  - Employee Faculty and Student Self-Service
  - Users
    - 400+ staff users
    - 2,000+ faculty users
    - 30,000 student users + 25,000+ applicants





# SJSU PeopleSoft Facts

- Financials 8.4
  - General Ledger, Accounts Payable, Procurement, Custom Web Component
  - Users
    - 400+ staff users
- PeopleSoft Portal 8.8
  - Employee, Faculty and Student Self-Service
  - Users
    - 400+ staff users
    - 2,000+ faculty users
    - 30,000 student users + 25,000+ applicants



- Finance Web Component
  - Why we developed it
  - What's in it
  - How it interfaces with PeopleSoft
  - Rollout and Training
  - Future plans

# Why we developed it

- Security
  - Finance 7.5 had no row level security
  - Need to restrict access to ChartFields
  - Need for electronic approvals
- Ease of Navigation

# What's in it?

- Procurement Functions
  - Requisitions
  - Direct Pay Vouchers

# What's in it?

- Accounting Functions
  - Expense Transfer
  - Hospitality Expense Transfer
  - Budget Transfer
  - HR Expense Adjustment

# What's in it?

- User Preferences
  - Any data element fed from PeopleSoft
  - Eliminate repetitive data entry



# Demonstration

- Live demonstration

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- PS Finance to Web Component
  - ChartFields
  - Vendors
  - Location
  - Reason code

- Web Component to PS Finance
  - Requisitions
  - Vouchers
  - Journals
  - Budget Journals
  - Hospitality Expense Transfers
  - Interdepartmental Expense Transfers

- Web Component to PS HRSA
  - ChartFields
  - Amount
  - Percent



# Rollout and Training

- Start with Requisitions
  - Hands-on, instructor-led training
- Direct Pay Vouchers Added
  - Functionality added to Requisition training
- Training now online



# Rollout and Training

- Budget and Expense Transfers Added
  - Separate hands-on, instructor-led class
- Hospitality Expense Transfer Added
  - No training required
- Will transition all functionality to online training class

# Rollout and Training

- HR Expense Adjustment
  - Separate hands-on, instructor-led class
  - Participation restricted
  - Transition to online training

# Future Plans

- Travel Expense Claim
- Procurement Card Expense Journal
- Expansion to include HR Functionality



# Questions

- Questions?



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