



UNIVERSITY OF
SOUTH CAROLINA

PeopleSoft Team Card Pre Go-Live Webinar

Mike Staton

April 2018



PeopleSoft Team Card

- Today's Agenda
 - What is PeopleSoft Team Card?
 - Why are we implementing it?
 - What are the key changes?
 - More about My Wallet and Expense Reports
 - Demonstration
 - Next Steps

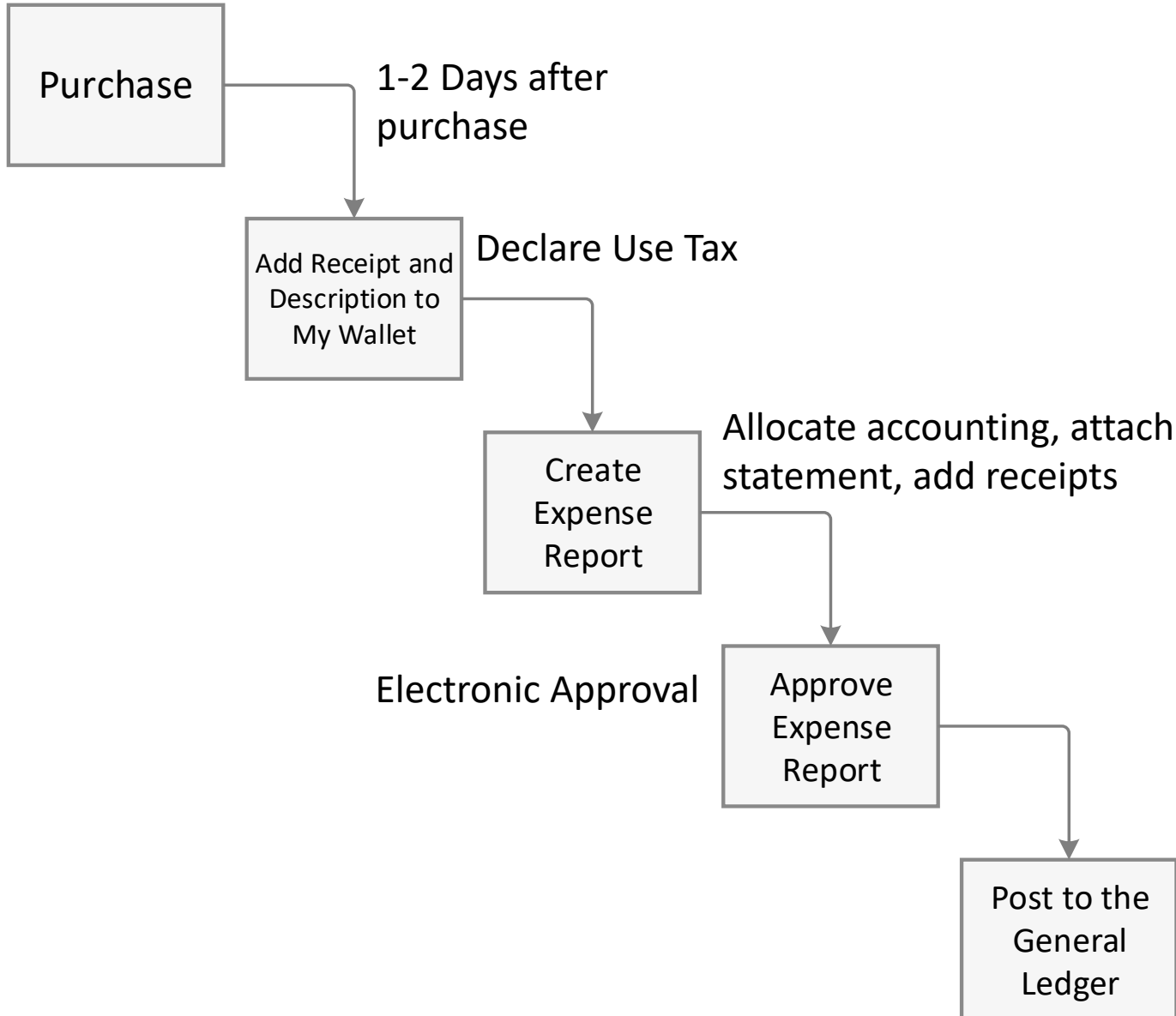


PeopleSoft Team Card

- What is it?
 - A new process for automatically interfacing all Team card transactions directly into PeopleSoft, allocating these transactions to the appropriate accounting, reconciling the transactions to receipts, and electronically approving the transactions in the PeopleSoft Expenses module.



PeopleSoft Team Card





PeopleSoft Team Card

- My Wallet
 - The page where all Team card transactions are initially loaded and where one can review the level 3 enhanced data
 - Use tax is recorded here
- Expense Report
 - The PeopleSoft page where all Team card transactions will be copied
 - Will typically represent the month end statement
 - Will be where accounting distributions are allocated



PeopleSoft Team Card

- Why are we implementing it?
 - All transaction detail will be available in PeopleSoft to meet financial reporting requirements
 - Facilitates electronic approval and online receipt review
 - For many of us, PeopleSoft Team Card leverages the training and experience of the PeopleSoft Travel Implementation
 - Reduces complexity



PeopleSoft Team Card

- What are the key changes?
 - Scanned receipts shall be attached to the Expense Report
 - These can be batched into one or more image documents if necessary
 - Electronic approval by the “department head” shall be required and can replace the statement signature
 - Departments shall be granted 1 month past the statement date to accurately complete and approve each Team card expense report



PeopleSoft Team Card

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My Wallet

Review My Wallet Receipts

MIKE STATON

Search Criteria ?

From Date Through

*Receipt Data Source

*Transaction Status

Details ? Personalize | Find | View All | | First 1-12 of 12 Last

Mark for Delete	Date	Expense Type	Merchant	Additional Details	Attachments	Enhanced Data	Amount	ID
<input type="checkbox"/>	02/24/2018	OTHER SUPPLIES	WM SUPERCENTER #4183			Enhanced Data	21.37 USD	
<input type="checkbox"/>	02/24/2018	OTHER SUPPLIES	SHELL OIL 54218850094			Enhanced Data	31.69 USD	
<input type="checkbox"/>	02/24/2018	OTHER SUPPLIES	ZOES - 00319			Enhanced Data	664.68 USD	
<input type="checkbox"/>	02/26/2018	OTHER SUPPLIES	CHEVRON 0376590			Enhanced Data	14.40 USD	
<input type="checkbox"/>	02/26/2018	OTHER SUPPLIES	CHEVRON 0376590			Enhanced Data	16.24 USD	
<input type="checkbox"/>	02/25/2018	OTHER SUPPLIES	JASON'S DELI BCS #			Enhanced Data	770.02 USD	
<input type="checkbox"/>	02/24/2018	OTHER SUPPLIES	WAL-MART #4183			Enhanced Data	215.16 USD	
<input type="checkbox"/>	02/25/2018	OTHER SUPPLIES	WAL-MART #4183			Enhanced Data	24.74 USD	

Add Expense ?

Expense Type

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Save for Later | Summary and Submit

Modify Expense Report

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Actions

*Business Purpose Report 3000000142 Pending

*Report Description Default Location

Reference

Expenses ?

Expand All | Collapse All Add: Total 18,527.37 USD

*Date	*Expense Type	*Description	*Payment Type	*Amount	*Currency
02/24/2018	59520 ATH TEAM TRAVEL	*Water for regionals 235 characters remaining	Prepaid Payments	21.37	USD
02/23/2018	59521 ATH TEAM LODGING	*Lodging for regionals 233 characters remaining	Prepaid Payments	18,506.00	USD

*Billing Type *Location

*Number of Nights *Merchant Preferred Non-Preferred

Default Rate *Exchange Rate

Non-Reimbursable Base Currency Amount 18,506.00 USD

No Receipt

Receipt Split Itemize Hotel Bill

Accounting Details ?

Chartfields

Amount	*GL Unit	Monetary Amount	Currency Code	Exchange Rate	Oper Unit	Dept	Fund	Account	Class	PC Bus Unit
18506.00	USC01	18506.00	USD	1.00000000	CL003	600209	CA200	59521	805	

Expand All | Collapse All Total 18,527.37 USD



PeopleSoft Team Card

- Next Steps
 - Training in April
 - Hands-on training for all Liaisons
 - Webinars for all approvers
 - Targeted go live is end of April
 - This may change based on testing results in March



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