SPEED THROUGH YOUR DAILY TASKS IN MOSAIC!

Financial Forum
November 14th, 2019
SPEED THROUGH YOUR DAILY TASKS IN MOSAIC!

Financial Forum
November 14th, 2019
Stacey Farkas
Senior Manager, Financial Systems Support
farkas@mcmaster.ca

Mark Rumbles
Manager of IT (Mosaic) HR, Finance, Research & Facilities
rumblema@mcmaster.ca
AGENDA

- Mosaic Improvements Overview
- What’s been **implemented** so far based on feedback /recommendations
- Review of usability features currently **in progress**
- Other features **coming** next
  - Help us to help you:
    - to increase your 'speed', remove 'roadblocks' and choose the BEST 'route'!
MOSAIC IMPROVEMENTS (USABILITY) OVERVIEW

- Goal is always to improve and *speed up* the end user’s interaction with Mosaic system
- Feedback received about system from users via several different avenues
- Continuous improvement journey
  - PeopleSoft releases new features, bug fixes and security patches every 3 months
  - Our goal is to apply these releases or portion of the releases in order to take advantage of new features and ensure our systems are secure
  - Aiming for more regular releases of features (Rapid Release)
- PeopleSoft Usability Group (PUGs)
  - All streams represented to ensure consistency
Usability Features IMPLEMENTED

- Usability features implemented and already in use:
  - ADMINISTRATIVE HOME (Navigation Collections)
  - Fluid T&E
  - Fluid WorkCentres for MacBill
  - Push Notifications
  - Related Content
NAVIGATION COLLECTIONS
ADMINISTRATIVE HOME
PUSH NOTIFICATIONS

• Easy to see location for receiving and acting on system approvals

Actions
• Items that are meant to be actioned on such as workflow approvals
• Actions generally mirror worklist items

Alerts
• Confirmation that approvals have been actioned
Related Content Example – in ‘classic’ page
Related Content Example – in ‘FLUID’ page

Expense Report

Actions
- Change Employee
- T&E How-To
- T&E Guidelines
- Other T&E Support
- AP-01 Policy
- AP-01 Guide
- Other AP Policies

Expense Details
No expenses have been entered.

Add Expense

Attach Receipt

Accounting Defaults

Creation Date: 09/29/2019
Stacey
Updated on: 09/29/2019
Related Content Example – on a *FIELD* (not yet in use)

EXAMPLE FROM WESTERN

Page Related Content added to the Project Field with a link to another Component
Related Content - HELP US TO HELP YOU!

• OTHER PAGES? What do you want to have at your fingertips?
• FIELDS WITHIN PAGES?

5 MIN TO DISCUSS IN YOUR TABLES AND RECORD ANY IDEAS
Usability Features IN PROGRESS

• FLUID APPROVALS (WITH PUSH NOTIFICATIONS & ALERTS)
  – DATE: November/December 2019

• ELASTIC SEARCH
  – DATE: December 2019

• Travel & Expense BUDGET CHECKING MOVE
  - DATE: December 2019

• FLUID FORMS
  – that will route through workflow AND update the applicable component page within Mosaic
    • e.g: supplier form, customer form, chartfield request form, campus forms, *HR event form*
  – DATE: March 2020
Fluid Approvals WITH Push Notifications & Alerts

Key Features / Improvements:
• Introduces a touch screen interface for doing approvals via phone / tablet.
• Provides an improved work list where transactions can be organized/filtered by type, date and/or requestor.
• Allows batch approvals (multiple transactions at once)
• TRUE worklist replacement that can combine Finance and HR items
### Worklist Comparison - CLASSIC

#### Worklist
Worklist for TAVARD: TAVARES, DENNIS

<table>
<thead>
<tr>
<th>Worklist Items</th>
<th>Priority</th>
<th>Link</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>KADIC, MEDIHA</strong></td>
<td>1-High</td>
<td><a href="#">GL Journal Approval 437531</a>, <a href="#">Journal Unit Approval 2001-03-07 N.O. BUSINESS UNIT UNMAC01</a>, <a href="#">JOURNAL ID 0080147750</a>, <a href="#">DATE 2017-05-02 BUSINESS UNIT UNMAC01 RDCRACA</a></td>
</tr>
<tr>
<td><strong>BISTA, POPI</strong></td>
<td>1-High</td>
<td><a href="#">GL Journal Approval 581652</a>, <a href="#">Journal Unit Approval 2001-03-07 N.O. BUSINESS UNIT UNMAC01</a>, <a href="#">JOURNAL ID 0080262972</a>, <a href="#">DATE 2017-05-06 BUSINESS UNIT UNMAC01 RDCRACA</a></td>
</tr>
<tr>
<td><strong>Brenda Woodhouse</strong></td>
<td>1-High</td>
<td><a href="#">GL Journal Approval 563319</a>, <a href="#">Journal Unit Approval 2001-03-07 N.O. BUSINESS UNIT UNMAC01</a>, <a href="#">JOURNAL ID 0080257096</a>, <a href="#">DATE 2017-04-29 BUSINESS UNIT UNMAC01 RDCRACA</a></td>
</tr>
<tr>
<td><strong>Sean Patrick Duncan</strong></td>
<td>1-High</td>
<td><a href="#">GL Journal Approval 585601</a>, <a href="#">Journal Unit Approval 2001-03-07 N.O. BUSINESS UNIT UNMAC01</a>, <a href="#">JOURNAL ID 0080075949</a>, <a href="#">DATE 2017-06-08 BUSINESS UNIT UNMAC01 RDCRACA</a></td>
</tr>
</tbody>
</table>
### Worklist Comparison (FLUID)

#### Fluid Worklist (with filter sub-screen)

<table>
<thead>
<tr>
<th>View By</th>
<th>Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>All</td>
<td>4</td>
</tr>
<tr>
<td>Expense Report</td>
<td>3</td>
</tr>
<tr>
<td>Journal Entry</td>
<td>1</td>
</tr>
</tbody>
</table>

**Pending Approvals**

- **Journal Entry**
  - Amount: 77.98 CAD
  - Description: UNDERGROUND 16210 - MAC01 / 0000117822 / 2015-11-11 / MAC01 Sean Patrick Duncan
  - Status: Routed
  - Date: 11/11/2015

- **Expense Report**
  - Amount: 691.17 CAD
  - Description: Pamela Baxter - 0000095288 / CASN Exp Pampil Nov2017
  - Status: Routed
  - Date: 04/12/2017

- **Expense Report**
  - Amount: 409.85 CAD
  - Description: Tracie McDonald - 0000095064 / T. McDonald Dining - Nov '17
  - Status: Routed
  - Date: 04/12/2017

- **Expense Report**
  - Amount: 50.00 CAD
  - Description: Paul Smith - 0000095555 / Test
  - Status: Routed
  - Date: 25/01/2018

**Filters**

- **Type**
- **Requester**
- **From**
- **Date Period**

**Cancel**  **Filter**
ELASTIC SEARCH

• **Navigator Search**

  ![Navigator Search Image]

• **Page Search**

  ![Page Search Image]
Travel & Expense Budget Checking MOVE

First approver will no longer have to budget check – this will happen automatically overnight!!

Also bringing back ability to DELETE expense reports
Usability Features COMING NEXT

- PAGE & FIELD CONFIGURATOR
- ACTIVITY GUIDES
PAGE & FIELD CONFIGURATOR

- Def’n: gives us the flexibility to configure fields and pages in any component without having to customize delivered pages or fields.
  - Allows you to:
    - Update a field label
    - Hide a field that isn’t necessary
    - Make a field mandatory
    - Restrict update to a field
    - Set a default value
    - Hide an entire page

- Examples:
  - T&E “Business Purpose” label—change to “Category of Travel”
  - Pre-award (grants/contracts) as well as Post-award (project costing)—remove unused fields/pages
Page & Field Configurator

HR Direct Deposit Page EXAMPLE

Delivered Request Direct Deposit Page

- Several fields always manually populated with the same values
- One field is not in use

- Page and Field Configurator and Event Mapping applied
- User entry simplified to only value-added fields
Page & Field Configurator- HELP US TO HELP YOU!

• WHAT ARE YOUR BIGGEST PAIN POINTS?
• BUSY PAGES?
• REDUNDANT FIELDS? DEFAULT VALUES?

10 MIN TO DISCUSS IN YOUR TABLES AND RECORD ANY IDEAS
Activity Guides (Guided Processes)

Definition:
• Activity guides allow you to define guided procedures for a user or group of users to complete. Users are presented with a list of actions, or tasks, that need to be completed to finish the procedure.

Key Features/Improvements/Issues addressed:
• provide a hierarchical organization of sequential or non-sequential tasks.
• tasks can be linked to specific local or remote transactions or external URLs.
• Eliminates need to navigate to several different pages to complete as task.
• Could potentially eliminate some training guides.
• An activity guide can also support multiple users and can be used across components.
Examples of Types of Activity Guides

- Guided mode banner

- Vertical Guided Sequential Activity – HR onboarding
Examples of Types of Activity Guides cont.

Horizontal Guided Sequential Activity

[Diagram of Payment Request form with steps 1 to 4.
- Summary:
  - Business Unit: US001 NEW YORK OPERATIONS
  - Invoice Number:
  - Invoice Date: 05/13/2016
  - Cost Sub-Total:
  - Other Cost:
  - Total Amount: $0.00
  - Currency: USD
  - Description:
  - Notes/Comments:

Entered Datetime: 05/13/16 2:49PM
Request ID:
Activity Guides - HELP US TO HELP YOU!

• Multi-step/complex processes that would be a good fit for this feature?
• Tasks that require you to navigate to several different pages?

10 MIN TO DISCUSS IN YOUR TABLES AND RECORD ANY IDEAS
Questions?

Thank you for your Ideas!