Session Number	Track	Session Title	Learning Objective 1	Learning Objective 2	Learning Objective 3	Knowledge Level	Session Description	Field of Study	Prerequisites	Advance preparation	Hours
5712	Cloud	The Hunchback of Reporting: Don't let anything discourage you from being enchanted!	Describe the value of real time reporting from Oracle Financials Clouds and how the University of Kansas has leveraged Oracle Transactional Business Intelligence (OTBI) reporting to meet business requirements.	Identify the key elements and steps to create an OTBI Dashboard report. Understand how to combine two subject areas for more robust reporting.	Understand the delivered reports in Oracle Cloud ERP, specifically the power of the Account Analysis Report. See samples of how they have been enhanced to meet end user needs.	Intermediate	Kansas will demo how to create a subject area analysis within Oracle Transactional Business Intelligence (OTBI). Add a prompt, such as fund, to allow the end-user to narrow down the results. Create a user-friendly Dashboard to combine the analysis and prompt in one location. Learn how to combine two subject areas for even more robust reporting. General Ledger and Payable invoice reports will be built from scratch. With the transition to the cloud, the University of Wyoming and Boise State have re-envisioned their financial reporting. Reconciling and managing accounts are a key priority for campus accounts and business managers. Both institutions use the delivered Account Analysis Report as the key financial reconciliation report. Additionally, these institutions have developed additional enhancements and tools around these reports such as macros and training sessions that have increased the usage and success rate of the report.	Computer Software & Applications	None.	No Advance Preparation Required	2
5731	Cloud	Grants Management in Oracle Cloud: The Beauty and the Beast of It!	How to create Award including Project Setup and Contract Activation. How to Bill projects using the Contract Module. How to run the Burden process and F&A distribution using GL Allocations. Learn the role of post award office versus the campus roles in the Oracle PPM module.	Learn the available tools such as BI reporting and sub ledger accounting configuration, which enable payroll data to flow to PPM. Understand lessons learned from VU's implementation and payroll integration with PPM.	Learn how we decentralized our payables activities by using Paygroups, who the likely candidates were and why. Learn how dependent PPM is on "normal" integrations from P2P systems and how we accommodated corrections to invoice distributions. Learn how we handled internal payments, pcard transactions and other 3rd party transactions within payables to create a seamless integration to PPM.	Intermediate	Award Creation will be detailed including Project Setup, Project Budget Setup, Award Submission, and Contract activation. Project Billing using the Contracts Module will be detailed including all processes associated with the Billing process. The F&A process will be detailed including Burden Generation, Burden Journal Creation, and F&A distribution using GL Allocations. Luckily for all of us, Vanderbilt ventured beyond delivered integrations to account payroll costs directly to grants and projects, limiting the risk of reconciling items while keeping Payroll, PPM, and the GL in sync. Learn Vanderbilt's approach and lessons learned for integrating Payroll data into PPM and the GL! Since Boise State University's early adoption we have encountered several issues and learned many lessons and best practices. Integration between Procure to Pay (P2P), Project Portfolio Management (PPM) and 3rd Party systems has been a challenging journey but we have made it and will share what we've learned. Topics include: Using Paygroups to decentralize Payables processing, Correcting Invoices at the source rather than relying on journal entry reclasses, Expensed Asset integraton from PPM to Fixed Assets, Internal Charges and 3rd party integrations via Payables processing.	Computer Software & Applications	None	No Advance Preparation Required	2
5853	Cloud	A Tale of Three schools P2P on Oracles ERP Cloud	Show users how easy it is for them to submit expenses and receipts for reimbursement, in the office or while traveling. Illustrate to users and institutional administrators how catalogs can help their end-users save money while spending money. Show how some purchases require a non-PO invoice, instead of a purchasing process	OSN/Oracle procurement connectivity and setting up catalog supplier. Requisition creation with workflow configuration and processing to create a PO. PO dispatch methods and encumbrances. eInvoice configuration with AP invoice matching and payment processing. Establishing catalogs.	Transforming the procurement journey with business process improvement and best practice.	Basic	Wyoming will demo three different ways end-users can save time processing monies through the ERP module: Expense Reports, Procurement Catalogs and Non-PO Invoices. Kansas shows end to end presentation and description of catalog setup, requisitions including workflow, PO creation and electronic invoice processing - tips, tricks and lessons learned included. And come see how the University of Kansas is using Oracle Supplier Network for e-Procurement processing in the Cloud. Finally, The University of Derby have also transformed their Procurement function by moving from PeopleSoft Finance to the Oracle ERP Cloud.	Computer Software & Applications	None	No Advanced Preparation Required	1
6219	Cloud	Structuring Invoice Workflow to Your Business Process, or HI HO, HI HO, It's Off to Workflow We Go!	Understanding the business requirements for invoice workflow processing and how to configure workflow to meet those needs. Discuss the importance of testing as part of the process when designing rules and troubleshooting when issues arise.	Creation and maintenance of approval workflow rules in the cloud.	How workflow can be used to assist in transaction validation and the differences in workflow between procurement and financials modules.	Basic	Wyoming's payable processing in PeopleSoft was handled entirely within Accounts Payable after an extensive paper process. The new UW requirements in Cloud called for Purchase Order invoices to be processed within Accounts Payable, but non-PO invoices are entered by users throughout campus. In addition, high dollar approval thresholds and XML imported invoices were brought into the mix, all with different approval requirements. This session will discuss the various needs on campus, policy decisions impacting the process, as well as walk through workflow setups to demonstrate how the various needs can be met through workflow. Kansas found that approval rules in the Cloud can range from extremely simple to very complex. In this session, we will review the fundamentals of approvals in the Cloud, lessons learned during KU's first year, and how KU uses workflow rules to identify potential errors that will impact downstream systems and processes.	Computer Software & Applications	None	No Advanced Preparation Required	1
6282	Cloud	How did we make it work? Cross validation rules, Descriptive Flex Fields and Volume processing	Understand the importance of controlling COA combinations. Identify the key elements of a cross validation rule and how to create one. Understand the difference between cross validation rules and related value set sand when each might be utilized.	Learn the pros and cons of configuring, maintaining and using the Asset Key Flexfields vs. Descriptive Flexfields (DFF). How to configure DFF's and limit user input on these fields by value sets including COA set values and customized lookup tables. How to import data into customized lookup tables.	Participants will learn how to consolidate multi-line invoices from the AP_INVOICES_LINES_INTERFACE tab to the AP-INVOICES_INTERFACE tab in the File-Based Data Import (FBDI) template.Participants will learn how to leverage Excel tables and VBA Macros to import and format data to the File-Based Data Import (FBDI) template.	Basic	How to control your Chart of Account string combinations with CROSS VALIDATION RULES or RELATED VALUE SETS within Oracle Cloud Financials. Learn the type of CVR's used by the Unviersity of Kansas including tips and tricks on common errors. Also learn why the University of Kansas choose to configure Descriptive Flexfields rather than Asset Key Flexfields, and how you can too. The presentation will cover analysis used to configure and use Descriptive Flexfields rather than Asset Key Flexfields. Instructions will be included on how to configure the Descriptive Flexfields, and how to import custom values into lookup tables to ensure valid user input into these fields. Finally, learn how Boise State University utilizes Excel tables and VBA macros to streamline data entry to File-Based Data Import (FBDI) templates. Campus submits various Excel reports to Administrative Accounting which can result in thousands of journal entries. Our process imports and formats the data from those reports into the FBDI template with the click of a few buttons. The process eliminated human error (who isn't going to make a mistake when looking at 8,000 rows of data?) and saved hours of busy work for several stakeholders.	Select a Value	None	No Advance Preparation Required	1
5649	EBS	Upgrading to Oracle EBS 12.2.6 or 12.2.7	Utilize MyOracle tools to assist in the identification of changes and planning of upgrades.	Identify steps to assist with testing and go live preparation including those needed to preform the upgrade, recording issues and responding to unforeseen changes that may occur during the upgrade process	Apply strategies to ensure the proper closure and archiving of upgrade documentation	Intermediate	Embry-Riddle Aeronautical University upgraded to EBS 12.2.6 in December 2017. Upgrading from 12.2.4, this 4 month effort was performed by our managed services provider and our internal Oracle EBS support team. This presentation discusses our process for planning, executing and managing change. Additionally, this presentation will highlight resources available on My Oracle Support for planning upgrades regardless of the e-Business Suite version you plan on upgrading from and to.	Information Technology	None	No Advance Preparation Required	1
5705	EBS	Oracle E-Business Suite Modern User Interface with Rich Personalizations	Learn how to personalize and extend your Oracle E-Business Suite applications.	Learn about some of the new OAF features and components used in the latest releases of Oracle E-Business Suite.	See the latest personalization capabilities in Oracle Application Framework	Overview	This Oracle Development session describes how to personalize and extend your Oracle E-Business Suite applications. See the latest personalization capabilities in Oracle Application Framework.	Computer Software & Applications	none	No Advance Preparation Required	1
5747	EBS	Streamlining the entry of funded grant proposals into EBS	Learn how data can be interfaced into the Grants Management System to reduce manual data entry.	What data is transferred from Oracle EBS to the Research Management System.	Understand what data from a research management system is needed to set up an Award, Project and Task.	Intermediate	The research office at MCW uses a research management application (Huron Research Suite) to manage the research proposal process. In order to reduce manual entry of funded proposals into the grants management system an interface between the two systems was created. This eliminates the need for manual data entry into the EBS grants management system. This presentation will show what data we transfer between the two systems and how we set up Awards, Projects, and Tasks from the information.	Computer Software & Applications	None	No Advance Perpetration Required	1

5749	EBS	Using WebADI to Pull data from Oracle EBS - Application of invoice receipts	Identify reasons to use WebADI to query Oracle.	Experience new ways to use Web ADI.	Identify a process that would be made more efficient by using a WebADI list of values query.	Intermediate	Applying receipts to invoices in EBS required certain information including the customer ID. The Medical College of Wisconsin (MCW) was looking up all of our customer numbers manually in order to apply the receipts; this was a very cumbersome process and wasted resources. To streamline the entry process, we developed a Web Applications Development Integrator to query the customer ID for an invoice in Oracle and present it in a list of values within the Web ADI. We then used the Web ADI template to interface the receipts into Oracle AR.	Information Technology	None	No Advance Preparation Required	1
5793	EBS	Oracle E-Business Suite Procurement: 5 Initiatives that Improve Operations	Find out about the key features in the EBS Procurement applications that help reduce cycle times	Find out about the key features in the EBS Procurement applications that help eliminate routine administrative work	Find out about the key features in the EBS Procurement applications that help ensure compliance to corporate purchasing policies	Overview	Automation tools, such as standard agreements, tolerances and supplier preferences, enable large volumes of sourcing and purchasing decisions to be handled without the need for buyer input. This frees them to focus on strategic activities such as category management, supplier development, and stakeholder interaction. And effective exception management capabilities ensure that buyer focus can be applied to specific transactions when it is required. Join this session to hear about 5 key features that can maximize operational efficiency for your organization.	Computer Software & Applications	None	No Advance Preparation Required	1
5855	EBS	Uncommon knowledge of SQL*Loader	Outline the basics of SQL*Loader, and provide in-depth instruction to the ways to launch it and how it works	Demonstrate using it to load to the GL_Interface table and how to make a journal entry out of it	Provide some tips and somethings to look out for the next time you clone/patch or upgrade	Basic	There are dozens of existing interfaces in your system and chances are some of them use SQL*Loader, a database utility. We'll go over the basics and even what you need to do if you were asked to create a new inbound interface in a month. If you are using SQL*Loader now, do you know how to troubleshoot it, or what might happen the next time you patch or upgrade? I'll share what I learned the hard way, demonstrating all of the parts needed to go from a flat file to a new journal entry. Even though this presentation focuses on EBS Finance examples, the concepts can be applied to HR as well.	Information Technology	None	No Advance Preparation Required	1
6047	EBS	Handling Data in eBusiness Suite Using APIs	Define an API at a high level	Identify where APIs can be utilized to load new and update existing data	Recognize potential issues that may occur when coding and API and the impacts	Intermediate	This presentation will discuss eBusiness Suite APIs, with a focus on Human Resources. It will include API considerations within larger packages for loading new and updating data as well as specific API packages and stand alone scripts.	Computer Software & Applications	SQL, PL/SQL	No Advance Preparation Required	1
5784	FIN: Budget and Planning	Oracle Planning & Budgeting Cloud for Higher Education	Understand features in EPM Cloud that support Budgeting and Planning	Understand best practices in Budgeting supported by the software	Understand how to automate Budget Books	Intermediate	This presentation will provide a detailed walk-through of key Planning and Budgeting capabilities available in the Oracle EPM Cloud. It will focus on budgeting processes for the Workforce, Capital Assets, IT Projects, Long Range Plans, etc. It will also discuss the best practice features for allocations in support of profit analysis (e.g. by School, Department, Program, Degree, Course, & Student), as well as technology that enables more efficient preparation of Budget Books. This presentation is suitable for practitioners in finance as well as IT resources that support the finance function at your institute of higher education.	Computer Software & Applications	None	No Advance Preparation Required	1
5880	FIN: Budget and Planning	Closing the Cloud: a view of month-end and fiscal year close in Oracle Cloud	Learn how subledgers close in Oracle Cloud	Understand the dependencies of subledgers in the closing process	Hear how to resolve issues during close	Intermediate	Vanderbilt University successfully implemented Release 12 of Oracle Cloud applications for Finance, Research Administration, HR, Budgeting/Planning, and BI Reporting in January 2018 and carried out their first successful fiscal year end close in record time in July 2018! Come hear their thoughts on how closing in the cloud is all new with the highly integrated landscape of Procure-to-Pay, PPM, HCM, etc. in Oracle Cloud!	Computer Software & Applications	None	No Advance Preparation Required	1
5908	FIN: Budget and Planning	Bridging the Gap: Moving from on premises budgeting to the cloud	Employ strategies to assist in the development successful project teams comprised of internal and external resources.	Identify strategies for transitioning from Peoplesoft Budget application to Oracle's Enterprise Planning and Budgeting cloud service.	Determine when to incorporate training into their plan to assist users with the transition to Oracle Enterprise Planning and Budgeting Cloud service.	Basic	Moving from on premises PeopleSoft budgeting applications to Oracle Enterprise Planning and Budgeting Cloud Service (EPBCS) takes time, an effective team, and a process. For the University of Wyoming the time was a nine month window in the summer and fall of 2017. The team was a collaboration of a dynamic team of five consultants from Huron Consulting Group and the UW Budget Office. The process included a redesign of the UW chart of accounts, crosswalks (existing accounts, organizations, historical data and fund types), one year of Excel budgets to bridge the gap between the two systems, and the team effort to roll out Oracle EPBCS. Learn how the University of Wyoming successfully implement Oracle's Enterprise Planning and Budgeting Cloud Service. In this session we will discuss: •Bridging the gap between systems •Identifying and committing project resources •Resource time commitment and involvement throughout the life cycle of the project •Creating and fostering an environment for co-development and knowledge transfer •Lessons learned	Management Services	None	No Advance Preparation Required	1
5972	FIN: Budget and Planning	How Rutgers Transformed Finance with Oracle EPM Cloud (ARCS, FCCS, PCMCS, EPBCS, EPRCS)	Cite core concepts of Enterprise Performance Management and how they relate to transforming a Finance department.	Describe the potential benefits of Oracle EPM Cloud solution	Identify opportunities to incorporate EPM concepts and benefits at their institutions	Overview	Learn how Rutgers transformed Finance using the Oracle EPM (Hyperion) Cloud solutions in the following areas: 1. Account Reconciliation: Moved from a manual, disconnected process with no account reconciliation to a more transparent automated process using ARCS for their Chart of Accounts (COA) 2. Consolidation and Close: Progressed from a manual, Excel-based close and consolidation to a streamlined process producing financial reports for auditors and the Controller's Office using FCCS 3. Expense allocations: Moved RCM cost pool process to PCMCS, which eliminated manual errors and provided transparency to, and traceability of, allocations 4. Budgeting, Forecasting and Planning: Converted on-premise Oracle Hyperion Planning solution to EPBCS, while adding Workforce for position-based modeling to gain better insight into labor costs 5. Performance Reporting: Replaced the labor-intensive production of the annual audit report with a streamlined, automated, production-style-report requiring minimal training in EPRCS This was accomplished partnering with Performance Architects.	Computer Software & Applications	None	No Advance Preparation Required	1
5565	FIN: General Ledger	PeopleSoft and Concur: The Magic Behind the Scenes	How to seemlessly integrate Concur and PeopleSoft.	How to reconcile between Concur and PeopleSoft.	How to make sure all data is correct between Concur and PeopleSoft.	Basic	Let OUHSC show you how we magicly integrated PeopleSoft Financials and SAP Concur. We will provide tips and tricks on the employee load files, reports, as well as the integration with Accounts Payable. We will show you how we do our reconciliation between the concur system, our financials systems, and the credit card statements.	Computer Software & Applications	None	No Advance Preparation Required	1
5848	FIN: General Ledger	The Power of a Tree	Identify the key components of Peoplesoft tree design	Apply concepts learned in the creation of layout and design tree structures	Identify how Peoplesoft trees with PeopleSoft applications, queries, security	Basic	PeopleSoft Trees should be a part of any PeopleSoft users vocabulary. Trees are far reaching and powerful if properly laid out and designed. We want to show you the basics of designing a tree and how to get the most bang for your buck. Trees not only reach across your Financial applications, they can be used in other PeopleSoft applications, queries, security and many other places throughout your PeopleSoft applications. We'll help you get off on the right foot by properly laying out and designing your trees up front. If designed properly you'll reap the benefits and save yourself countless hours. We'll show you the various place trees can be used and how you can harness "The Power Of A Tree".	Computer Software & Applications	None	No Advance Preparation Required	2

5981	FIN: General Ledger	Chart of Accounts Redesign and Transformation for UTSW Medical Center	Understand the considerations and guiding principles for successful implementation of a Chart of Account redesign and the methodology deployed at UT Southwestern	Outline the benefits of removing customized ChartFields and the elimination of customizations that were developed based on legacy ChartField segments	Provide Change Management and Training considerations implemented to support the adoption of a new Chart of Account structure across the institution	Intermediate	UT Southwestern embarked on a significant Chart of Account redesign during the reimplementation from PeopleSoft 9.1 to 9.2. This involved removing several custom ChartField segments and moving to a standardized ChartField segment structure based on Chart of Accounts leading practices. The presentation will focus on the following: -Providing an overview of the design approach and leading practices for the eliminating custom ChartField segments and establishing a multidimensional structure -Highlighting the framework including the Chart of Account governance structure for establishing consensus across the institution – including moving from 2 Business Unit (e.g. Entities) for Hospital and Academic Research to 1 Business Unit for UTSW -Outline the approach for establishing a crosswalk mapping to move from 9.1 to 9.2 ChartField definitions and adhering to the principle of single definition/single purpose usage -Removing significant customizations that were dependent on the 9.1 structure and adopting delivered business processes based on the new Chart of Account design -Providing overview of the Training strategy and Change Management approach for enabling end user adoption and understanding of the new structure across the institution	Computer Software & Applications	None	No advance preparation required	1
6131	FIN: General Ledger	Asset Management - The acquisition table - critical data for managing property	Learn how acquisition table in the Asset Management module is populated from interface tables	Learn how to update information on the acquisition table in the Asset Management module directly from the basic add pages	Overview of data available to query and some potential data issues.	Basic	This session will go over the information on the Acquisition table in the Asset Management module. How information is populated, updated and can be used. Also will look at potential data issues when running queries on acquisition table and the information is populated using the Accounts Payable interface.	Computer Software & Applications	None	No Advance Preparation Required	1
5833	FIN: Grants, Contracts and Billing	Grant Reporting: Leverage BI Publisher and Connected Query to Increase Research Expenditures	Leverage Connected Query to aggregate data from multiple individual queries.	Design BI Publisher reports for Grants Management in Microsoft Word, which can then be run in PeopleSoft.	Learn tips and tracks to fully understand the power of BI Publisher reports, including business process suggestions and the use of basic programming code.	Basic	This deep dive will take users step-by-step through all of the details required to build BI Publisher reports in PeopleSoft from scratch, with real-world examples in the area of Grants Management. The structure of the deep dive presentation will begin with some brief background information on what inspired Cleveland State University's (CSU) financials department to start using BI Publisher as a reporting solution, followed by these topics and live demonstrations: (1) Showing the final version of each report covered in the deep dive so the audience can see the result, and then later understand how each report was developed (2) The concept of parent/child queries (3) Relating these queries to each other in Connected Query (4) Using the XML output from the Connected Query as sample data when designing the report template (5) Designing the report template in Microsoft Word, including inserting individual fields, handling fields with multiple rows, formatting the template, etc. (6) Defining and running the BI Publisher report in PeopleSoft (7) Basic programming that can be used for things like storing variables, performing calculations on variables, and using if-then-else logic (8) Additional tips and tricks based on frequently asked questions users have inquired about in the past The reports presented include: (1) Notice of Award – Provided to principal investigators (PI) when they first receive their award, including their project's chartfields, award information, start and end dates, and first-year budget data. (2) PI Summary Sheet – Aggregates summary budget and expense data on one sheet for every grant that a faculty member is a principal investigator on. If a PI has 3 grants, the budget and expense data for each of them will be shown on one summary page. (3) Custom Invoice – Customize invoices in ways that make sense for your institution. (4) Bulk Reports – These help internal staff / accountants manage and communicate overspent accounts, among other things. Attendees are encouraged to bring a laptop so they may work hands-on with one or more of the demonstrations. However, attendees can also choose to just follow the presenters' live demonstrations. CSU's PeopleSoft Financials team began using BI Publisher in 2015 as a result of the Information Systems & Technology (IS&T) Department seeking a reporting tool that was powerful, but simpler to assemble and easier to format than SQRs and Crystal Reports. The Office of Sponsored Programs and Research Services (SPRS) had a project request for a custom invoice in PeopleSoft that needed to be completed in a very short period of time. Despite having no training, the research into Connected Query and BI Publisher, and then the	Computer Software & Applications	It is advised that attendees already have a basic understanding of regular queries and how to construct them in Query Manager. No other experience or programming knowledge is required.	No Advance Preparation Required, but we will provide information on how to install the BI Publisher Toolbar Plugin for Word for users who are able to work with their laptop during the deep dive.	2
5913	FIN: Grants, Contracts and Billing	AWARD MILESTONE NOTIFICATION - USING DELIVERED PS CONFIGURATION TO MANAGE DELIVERABLES EFFICIENTLY	To ensure compliance during the award management lifecycle.	To effectively communicate deadlines, deliverables, and reporting requirements to the appropriate stakeholders	To properly monitor all processes and their corresponding requirements in the different facets to become compliant to increase and guarantee future funding (potentially).	Advanced	This session will describe and provide the Delivered PeopleSoft Grants Milestone Notification Configuration/Functionality and Workflow processing. The session will also provide the various Milestone Notification steps, processes and functionalities to tracks Grants events or milestones in the life cycle of an award. Because Milestones Notification represents important assessments to ensure compliance during the award management lifecycle, it is necessary to effectively communicate deadlines, deliverables, and reporting requirements to the appropriate stakeholders. Especially, since PeopleSoft Grants Suite encompasses multiple modules to function as intended (i.e. Grants, Customer Contracts, Billing, Project Costing, Accounts Receivables, and Product). It is vital to properly monitor all processes and their corresponding requirements in the different facets to become compliant to increase and guarantee future funding (potentially). Mismanaging Award Milestone Requirements can impact the Institution's Financial Statements, responsibilities to Sponsors etc…., which ensures that the institution is well suited to attract new sponsors and researchers to "break new grounds". In addition, the presentation will also provide examples of: •Milestone Notification Process Summary •Milestone Notification Matrix •Delivered Pages Used to Establish Milestone Notifications and Processing •Processing Ad-Hoc Award Milestone Notification •Processing Multiple Award Milestone Notification and Workflow •Processing Batch Award Milestone Notification Workflow •Additional and Related Information	Computer Software & Applications	None	No Advance Preparation Required	1
5945	FIN: Grants, Contracts and Billing	Configuration Instead of Customization - Page and Field Configurator Tips and Tricks	Learn how to configure the new Page and Field Configurator funcitonality	Learn gotcha's, tips and tricks to use with Page and Field Configurator	Learn how to use the functionality to reduce customizations	Intermediate	In this session learn how to change labels; hide, disable, or default field values; and enforce edits without generating a customization. See the user-friendly setup and configuration by role or user feature that can customize what users see and how the applications are presented to them. Discover how this ensures a delighted user community and more rapid adoption of new features, and removes the burden of customizations from the IT team.	Computer Software & Applications	None	No Advance Preparation Required	1
6119	FIN: Grants, Contracts and Billing	Tag Team: Returning Funds to a Sponsor with Accounts Receivable to Accounts Payable Refund and Forms	Identify ways to increase efficiencies returning funds to sponsors using account receivable to account payable functionality	Outline steps to integrate forms functionality to return unspent funds to a sponsor	Identify key configuration steps to ensure minimal implementation issues	Basic	End users can submit a form to initiate the process of returning unspent funds to a sponsor. Upon approval of the form and the appropriate entry in the accounts receivable module, the remaining steps to issue a refund to the sponsor are seamless.	Computer Software & Applications	None	No Advance Preparation Required	1
6134	FIN: Grants, Contracts and Billing	Understanding the PeopleSoft 9.2 Delivered Billing Work Center	How to Customize and Design Delivered Billing Work Center	How to use Billing Work Center as an End User	How to maintain Billing Work Center as a Functional Administrator	Basic	This session will discuss how University of North Texas designed, implemented, and maintains the delivered PeopleSoft 9.2 Billing Work Center. We'll discuss our implementation, how to customize and design the delivered Billing Work Center, how to use the Work Center from an end-user perspective, and how to maintain the Billing Work Center as a functional administrator.	Computer Software & Applications	None	No Advance Preparation Required	1

6198	FIN: Grants, Contracts and Billing	Using Separate Fixed Billing and Revenue to meet new Revenue Recognition Guidance	Learn how leveraging contract configuration and processing options can diminish or eliminate the need for manual processes for putting revenue into the correct buckets at the right times.	Learn about configuration and processing options you can leverage in Contracts and General Ledger to automate new revenue recognition methods.	Understand the accounting basics behind the new FASB guidance, and how they can be translated into PeopleSoft.	Intermediate	Since implementing PeopleSoft 8.9 in 2008, Northwestern University had separated contracts into two separate billing and revenue recognition categories: Cost Reimbursable, where we recognized revenue as we incurred expenses, and Fixed Price, where we recognized revenue as we invoiced. After the Financial Accounting Standards Board issued updated guidance on recognizing revenue in 2014, our Controller realized we needed to adopt processes to comply with the recommendations. In Northwestern's case, the impact of the change was on Fixed Price Contracts other than Clinical Trials, about 10-15% of our contract volume. This presentation will describe how Northwestern developed a new business and system process using existing configuration and processing options in PeopleSoft 9.2. Specifically, it will demonstrate how to use Products, Contract options to separate billing and revenue and set Deferred Revenue, Accounting Distribution settings, and Revenue Recognition methods to meet audit and compliance requirements. Some knowledge of accounting is helpful but not necessary.	Computer Software & Applications	None	No Advance Preparation Required	1
5591	FIN: Procurement to Pay	Improve End to End Supplier Relationships with PeopleSoft Fluid Supplier Solutions	Learn about existing functionality and new features being added to PeopleSoft's Fluid Supplier Portal	Understand how your Suppliers can better interact with your organization	Learn how to monitor Supplier Performance	Intermediate	Organizations need to continually improve supplier relationships and manage strategic spend planning while reducing costs. Come to this session and learn how to take supplier relationships to the next level from onboarding to purchase order dispatch and invoice settlement and payment. Eliminate time-consuming errors, overpayments, and missed discounts via PeopleSoft eSettlements's electronic invoice presentment and payment solution. Monitor supplier performance, and prevent incorrect and late deliveries via PeopleSoft eSupplier Connection's PO acknowledgements, overdue schedule alerts, and advanced shipping notices. Empower suppliers to self-register, bid on sourcing events, redline and electronically sign documents, monitor performance, and engage with your organization by leveraging the breadth of PeopleSoft's supplier portal solutions. This session provides a comprehensive overview of the new delivered PeopleSoft Fluid Supplier Portal, as well as features planned for the upcoming roadmap.	Computer Software & Applications	None	No Advance Preparation Required	1
5734	FIN: Procurement to Pay	The Fluid Experience: Deciphering Fact from Fiction	Share lessons learned on adopting and implementing Fluid technologies. Discuss challenges and opportunities with deploying navigational and transactional pages along with your mobile enablement.	Attendees will have greater awareness of what features / options associated with Fluid are worth the effort as well as those that leave a lot to be desired. Additionally, where are there hidden gems that should be utilized to lower technical debt and provide greater value to the organization.	Help attendees understand the fundamental differences between Fluid options and associated deployment models. Users will understand the difference between Fluid, Classic, and Classic Plus as well as which options are at their disposal for implementation - incremental, big-bang, and hybrid.	Intermediate	Peoplesoft continues to embrace the Fluid concept. The panel will discuss how they have adopted Fluid, both as part of navigation and the introduction of transactional pages. Additionally, subject matter experts will share tips and tricks as they have rolled out Fluid to their users, pit falls to be aware of, and lessons learned the hard way. Time will also be spent identifying where users can fully leverage Fluid within their organization and which aspects should be left on the shelf until it matures. Attendees will leave with a better understanding of what Fluid is and how it can be deployed, where there is real value for their users and the organization as a whole, as well as hidden gems that have been discovered along the way.	Computer Software & Applications	None	No Advance Preparation Required	1
6081	FIN: Procurement to Pay	With-Hold Up! Don't throw your hands in the air!	Associate University of North Carolina's lessons learned to their own institutional tax reporting requirements.	Recall business processes the University of North Carolina assessed to determine how to capture and record payments to non -resident aliens	Apply delivered Peoplesoft functionality such as AWE and query to assist in the resolution of tax reporting requirements	Intermediate	Oracle provides 1099 withholding configuration for Vendors. What if your organization needs to withhold for other reasons, such as State or Nonresident Alien? UNC at Chapel Hill uses PeopleSoft delivered withholding functionality to record and process withholding payments for both North Carolina Department of Revenue NC-1099PS and United States IRS Form 1042. Using AWE workflow, vouchers are reviewed before posting to reduce end of the year corrections. The presentation includes step-by-step configuration setup, lessons learned, and details of helpful queries.	Computer Software & Applications	None	No Advance Preparation Required	1
5523	HCM	Worflow Made Easy With AWE	Learn how to configure approval rules in AWE.	Learn how to setup seamless business processes.	Learn how to setup multi-level approval process with minimum to none customization.	Advanced	Following topics will be covered in this session. 1)Transaction registry 2)Transaction configuration 3)Create user list/Role 4)Approval/Process setup 5)Sample workflow setup with real-time examples: a) Setup workflow for Hire transactions through template b) Setup workflow for position data approval	Computer Software & Applications	None	No Advance Preparation Required	1
5541	HCM	Seamlessly Integrating Absence Management on the Punch Timesheet	Recall University of Wisconsin's approach to needs analysis and prioritization when integrating time and labor and absence management on the punch timesheet for employee and manager self-service	Identify how University of Wisconsin aligned the needs with the delivered functionality	Understand how delivered Absence Management and Time and Labor functionality was integrated	Overview	The University of Wisconsin System designed a punch timesheet with seamless integration of Absence Management functionality creating a one-stop shop for time and absence reporting for both employee and manager self-service. The enhanced layout optimizes real estate and creates a simplified and efficient user experience. The seamless integration allows users to easily and intuitively submit and cancel absence requests without modal windows or additional navigation. Join the session to hear why customers have had such an overwhelming positive response! This session will cover: • Analysis and prioritization of user needs • Alignment with PeopleSoft delivered functions • Mockup/Functional Design phase • Spotlight Absence Integration • Walkthrough of improvement features and functionality • Implementation process	Computer Software & Applications	None	No Advance Preparation Required	1
5559	HCM	Working with Commitment Accounting Funding Retro's	Discern the appropriate use of budget and direct retros	Examine and utilize the various table data elements resulting from the processing of direct and budget retros.	How to setup the Department Budget Table	Intermediate	Ever wonder how budget and direct retros work? What happens behind the scene in the database? This presentation will not only show how to enter a budget and direct retro but how to read and understand the tables that are created when processing retro's. Users will also be shown examples on how to update data if if there is an issue.	Computer Software & Applications	None	No Advance Preparation Required	1
5766	HCM	Using the New PeopeSoft Fluid WorkCenter for Payroll	Learn about the Benefits of using the new PeopleSoft Fluid Workcenter for Payroll	Learn how to configure the new PeopleSoft Fluid Workcenter for Payroll	Learn how to bring over changes you have already made to the Classic version of the PeopleSoft Payroll Workcenter	Intermediate	The new Fluid Workcenter Framework is an Enterprise Component feature that allows system administrators to create workcenters that can be configured for specific roles and tasks within the Payroll department. Your Payroll Administrators now have a central area to access key components within the Payroll application, without leaving the workcenter. You will learn how to deploy and modify these workcenters, how user-specific personalization works, and how to define 'scopes' for your workspace.	Computer Software & Applications	Basic understanding of Payroll processing at your organization	Review the Fluid Workcenter for Payroll video available here --> https://www.youtube.com/user/PSFTOracle	1
5767	HCM	Learning to Love Commitment Accounting Processing in PeopleSoft	Learn how the commitment accounting process works in PeopleSoft from an HCM perspective	Learn where there may be gaps that need to be addressed through product development, changes in business practices, or customization/configuration	Learn best practices to make the most of the functionality that already exists in PeopleSoft today	Basic	Do you dread budget season? Are encumbrances and retro funding adjustments driving you crazy? Come to this session to turn that frown upside down and learn to love Commitment Accounting all over again. In the session we will review the process of Commitment Accounting and examine the flow and data structure of tables used in PeopleSoft. We will also review basic Integration Broker setup between HRMS and FMS required to share data between the applications.	Information Technology	Basic understanding of your organization's policies and processes around commitment accounting	None	1
5774	HCM	Data Privacy and Managing Sensitive Information in PeopleSoft	Learn about what features are available in PeopleSoft today to help manage personally identifiable data in PeopleSoft	Learn about what new features are planned on the roadmap for data privacy	Learn how to identify, mask, hide, delete data and capture consent from employees to use their data	Intermediate	The General Data Protection Regulations (GDPR) and California's Data Privacy Law have begun to ask questions of organizations that store employee or applicant data for European & U.S.A. citizens. Come to this session to learn about the recently delivered and planned features in PeopleSoft including: Tracking and Managing of Personal and Sensitive data, field level security, employee/applicant deletes, and employee consent requirements.	Computer Software & Applications	None	None	1

6082	HCM	Transforming the Payroll Process using the PeopleSoft Workcenter and Delivered Retro Pay Process	How to configure and use the Payroll Workcenter	Understand how to use the delivered retro pay functionality and work with its limitations	Understand how the retro pay functionality impacts the payroll business process.	Intermediate	Learn how the use of the delivered Payroll WorkCenter and Retro Pay functionality transformed the payroll business process at UT Southwestern. Business improvements that will be discussed include: 1)Payroll Analytics: •Comparative checks, earnings, and deductions 2)Common Exceptions with drill down capability •Active Employees without payline •Inactive employees with payline •Total Gross exceeding threshold •Total Hours exceeding threshold 3) Standardized set of 234 delivered processing steps •Single point of entry •Online and configurable set of steps •Scalable and adaptable as requirements change 4)Scope and limitations of the delivered Retro Pay Process 5)Retro Pay Calculation and reconciliation is done daily resulting in a reduction of overall pay run processing time by 40 hours (1 hour per calculation) 6) Mitigates the risk of manual calculation errors, failure to identify retro pay triggers, and manual pay line entry 7)Retro Pay is recorded as retro pay earnings codes (as opposed to regular pay) for accurate FTE reporting	Computer Software & Applications	None	No Advance Preparation Required	1
6141	HCM	Custom Communications Generator and the Department Security Tree	List benefits of using delivered communication generator's functionality.	Understand how to use communication generator to create communications	Recall how communication generator is used with the HR department security tree	Basic	Is your institution manually sending out emails? With several attachments or reports that need to be worked? Come learn what our custom communications generator can do for you and how to use and run the Comm Generator. We invite you to watch a real live demo of the Comm Generator with our monthly HR Department Security Tree. This is customizable, and can create a unique job stream to automatically run processes and then generate SQL reports and send out via email to designated parties.	Computer Software & Applications	None	None	1
6153	HCM	BI Publisher or Bu(r)st!	After this session, attendees will be familiar with the PeopleSoft pages used for setting up and running BI Publisher Reports.	Additionally, attendees will have simple RTF formatting explained during this session, including inserting fields, modifying fields, inserting simple repeating tables, etc.	Also, attendees will receive an overview of and see an example of BI Publisher bursting functionality.	Basic	The University of North Carolina at Chapel Hill HR Business Analysts utilize PeopleSoft BI Publisher to meet a variety of HCM reporting needs. In this session, we will provide an overview of how we are currently using BI Publisher, show the setup of example reports (including bursting options) and demo a simple BI Publisher report. Discussion will include tips, tricks, lessons learned as well as ideas for future uses.	Computer Software & Applications	None	No Advance Preparation Required	1
5508	Innovations/New Technology	Elastic Search for PeopleSoft : The Only Search Engine supported going forward	Apply steps learned to install and configure elastic search	Identify steps needed to deploy and crawl indexes and fluid components	Outline the basic concepts in the use of the Search Admin Activity guide and Designer guide	Basic	Elastic Search is going to be the only Search Engine supported by Oracle PeopleSoft going forward. SES support has ended in April 2018. Verity Search is no longer an option available from PT 8.56 onwards. Knowing & implementing Elastic is no longer a choice but a necessity.The session targets 360 degree view of Elastic Seacrh from Installation and configuration to indexing the Fluid Components. Extensive tour of Search Admin activity guide is included. As a Bonus to the learners Search Admin Designer Guide is also covered	Information Technology	None	No Advance Preparation Required	1
5552	Innovations/New Technology	Reduce your customizations with Page & Field Configurator - Hennepin County	Learn what the Page & Field Configurator tool is, the benefits of the tool, and how to use it.	Learn how Hennepin County used the tool through a live demo of their configuration changes, with before and after visualizations.	Learn the limitations of the tool, tips and tricks, and best practices.	Intermediate	Hennepin County will demonstrate how they used the Page & Field Configurator tool to reduce customizations and improve the user experience. Areas of improvement include General Ledger Journal Entry, Employee Expense Reports, Project Costing, and eProcurement. This presentation will include a live demonstration of how to use Page & Field Configurator along with tips and tricks discovered during our implementation of the tool.	Computer Software & Applications	None	No Advance Preparation Required.	1
5790	Innovations/New Technology	New User Interface (NUI) – End to End Design | Tips and Tricks	Apply different navigation collections, content references, dynamic ties and detail components techniques in the creation of homepages , content structures and tile builds within the HCM9.2 environment.	Replicate steps to migrate homepages with the Data Migration Workbench (DMV) and PHIRE taking into account security requirements and considerations.	Identify common problems applying Fluid and the associated methods that can be used to resolve them in the 9.2 environment.	Basic	Florida State University (FSU) has implemented the New User Interface (NUI) and Fluid in several applications such as HCM 9.2, CS 9.2 and CRM 9.2 (FSCM 9.2 in progress). This presentation will use HCM 9.2 as an example to introduce: - Homepage Creation and Planning - Portal Structure and Content (Folders, CREFs, etc.) organization - Tile Design with different types of navigation collections, CREF based, dynamic tiles, etc. - Security configuration and special considerations - Migration with data migration workbench (DMW) and PHIRE - Tips and tricks	Computer Software & Applications	None	No Advance Preparation Required	1
5818	Innovations/New Technology	Digital Assistant and ChatBot for Higher Education	Understand differences between ChatBots and Digital Assistant	Understand how Digital Assistant can transform Student Engagement	Discuss how Digital Assistant can help faculty and administrators in daily tasks.	Basic	Digital Assistants are starting to emerging as the next generation of ChatBots that are proactive and multi-skilled. Digital Assistants can help student find resources, making recommendations, and notify students of critical deadlines through a conversational user interface. It can also help faculty and administrators to automate many tasks. In this session, we will present how Digital Assistants can transform the way higher education institutions can engage students, as well as assist faculty and administrators with daily tasks.	Information Technology	None	No Advance Preparation Required	1
5949	Innovations/New Technology	Dashboards – From Pagelets to Tiles	List benefits of fluid dashboards have over classic dashboards	Apply new fluid dashboard feature and functionality when creating their dashboards.	Understand the steps involved to properly configure a fluid dashboard	Basic	During the 2018 calendar year, Lone Star College implemented FLUX, which moved the organization from Classic Homepages/Dashboards to FLUID and Classic plus Homepages/Dashboards. While all dashboards have many similar characteristics, there are some pivotal differences between FLUID Homepages and Dashboards and their Classic counterparts. During the presentation, we will show the similarities and differences between the Classic Manager's dashboard and Fluid Manager's dashboard, focusing primarily on the Manager's Dashboard.	Computer Software & Applications	None	No Advance Preparation Required	1
5562	Project and Change Management	Building Project Plans - Embracing the Project Manager Within	Learn how to clarify the scope and deliverables of any project or initiative.	Find out the 6 critical questions to ask and answer to help you execute your next project.	Gain skills in breaking your project down into manageable pieces (formally known as work breakdown structures). Build your first project plan, on 1 page!	Basic	At some point in our careers we are asked to participate in a project, lead a project or serve on a committee or workgroup tasked with taking charge from concept to execution. Come find out the key elements to project planning and leave this session with your very own project plan.	Management Services	None	None	2
5697	Project and Change Management	Agile Project Management - A Win for UNC Chapel Hill	Attendees will gain a general understanding of Agile project management methodologies and how they compare to traditional waterfall methods.	Attendees will gain an understanding of 3 possible Agile approaches and potential uses in their own organizations.	Attendees will be able to adopt at least one standalone Agile tool or technique within they're own organization.	Overview	UNC Chapel Hill's ConnectCarolina team has had great success in leveraging some Agile-based project management methodologies and tools to improve its solution delivery. This session will provide a very brief history lesson of the Agile Methodology then move into specific uses within UNC-Chapel Hill ConnectCarolina project teams. Topics covered in this session include: •Agile Methodology and Key Principles – A Very Brief History Lesson •Three Approaches – Strengths, Gains, and Customer Satisfaction •Fun Interactive Demonstration - Effort Estimation and Some Unintended Positive Side Effects! •Questions and feedback	Management Services	None	Need overview of Live Polling technology usage.	2
5828	Project and Change Management	Keys to Success - A Strong Governance Process and Structure	Understand what is a governance process	Understand the importance for the need of a strong governance to be put in place before commencing on any implementation or upgrade of a application or system.	Understand the structure and attributes for creating a successful governance process at your institution.	Overview	David Nisbet has been working with the PeopleSoft product line since 1994. During his career in both consulting and working for two major university systems he has implemented or upgraded well over 20 different applications. David earned his Project Management Professional (PMP) certificate in 2001. In this session you will learn why it is important to define a governance process before any new implementation or upgrade project is started. You will also learn about the pros and cons of using a well defined and structured governance process. This session will primarily use as a case study on the governance process and structure that has been put in place for the University System of Georgia, although David will use other examples of a governance process that he has utilized throughout his career.	Management Services	None	none	1

5864	Project and Change Management	The Hidden Magic – Accessibility in the Trainer's Toolbox	Learn how to make an inclusive learning environment.	Learn how to make training documents accessible.	Learn how to make a PowerPoint presentation accessible.	Basic	With globalization and diversity so prevalent on our campuses today, it is ever more important to be able to teach all of our learners – be it in our training workshops or in the college classroom. Much effort is being devoted to having our websites accessible, but what happens when you have someone with a disability or someone whose native language is not the language that you speak in your training session? As the trainer, are you prepared? Are your training materials accessible? Is your PowerPoint presentation accessible? In this workshop you will learn how to create an inclusive learning environment, provide learning materials that are accessible, and experience how free tools like Microsoft Translator, Office Lens and Immersive Reader can be added to your Trainer's Toolbox. Explore some solutions you can use when working with someone with dyslexia, visual impairments, language barriers, deaf/hard of hearing. Don't put away your electronic device in this session! See how this presentation can be seamlessly translated from English to the language of your choice. Microsoft's accessibility options are now built-in to its core products. They are amazing and truly "magical!" Engage every learner by making your content accessible. The tools are there now. Let's learn how to use them!	Communications and Marketing	None	No Advance Preparation Required	1
5952	Project and Change Management	A Panel on 9.2 Upgrades	Identify Critical Success Factors for an upgrade to 9.2.	Learn about best practices in scoping and managing a 9.2 upgrade.	Identify effective change management practices for preparing a user community for a 9.2 upgrade.	Basic	This panel will discuss how they approached their upgrade to 9.2 at their respective institutions . How was it scoped and how was it staffed? How was it governed and what sort of outreach and training was needed to prepare users for this change? We will look for commonalities across the different upgrades to synthesize critical success factors and lessons learned that can be applied to other upgrades to 9.2.	Management Services	None	No Advance Preparation Required	1
5979	Project and Change Management	Engage Early and Often: Managing Change Management Across the Campus Community	Participants will learn about the iterative campus engagement cycle.	Participants will be able to identify strategies to engage campus units with varying business needs.	Participants will be able to understand the steps involved in collaboration between end-users and central administration.	Basic	The Office of Continuous Improvement at Boise State University has a unique approach to projects and Oracle Cloud functionality implementation that engages both central administration and the campus community. Our project structure takes into account each group and how they intersect to ensure that the best decisions are made for the entire community. The campus community engages in discovery to learn about upcoming changes and share feedback, process redesign to reengineer business processes, best practice sharing, and proactive implementation. Additionally, central administration engages in a similar process that involves focus groups to ensure that decisions made in the back office do not negatively impact campus business processes.	Management Services	None	No Advance Preparation Required	1
5995	Project and Change Management	Change Management for System Upgrades	Participants will discover why we failed at change management and lessons learned.	Participants will identify four critical change management pillars that we used to finally get change management right.	Participants will assess a current change in your organization and apply the change management strategy that we used. Participants will identify why people really have a hard time with change and how to move them forward	Overview	By all definitions for change management, we sucked. It was 2009 and my organization implemented a new Enterprise Resource Planning system that was supposed to be the end all be all. We over promised, under delivered and on top of that, the people were NOT ready for the system change. Fast forward to 2014. We had a chance to do it all over again with the same system; this time it was a big upgrade and sucking again, was NOT an option. In this session, participants will discover the four change management pillars that we used to finally get it right. By the end of the session, participants will be able to apply this strategy to an existing change in their organization. And finally, I'll demonstrate the real reasons why people resist change and practical ways to help move them forward.	Management Services	None.	No Advance Preparation Required.	1
6176	Project and Change Management	Communication Breakdown: How to change your Communication Strategy	Participants will learn how to objectively gauge the success of a communication campaign.	Participants will learn how to adapt communication methods to match the needs of different target audiences.	Participants will learn how to implement strategies back at their institution.	Basic	What do you do when your well thought out communication plan proves to be ineffective? Change it up! When Lone Star College was implementing the Fluid Interface for FSCM, HCM, and CS, we realized our tactic for communicating changes was not as effective as we had hoped. After analyzing who our messages were reaching and how well-informed those people were, we reassessed and re-strategized for the final leg of our implementation. By changing our methods of communication, we were able to reach more stakeholders, and most importantly, more people on the front lines utilizing Campus Solutions in positions with high contact with our students. Come learn how we identified that a changed needed to take place, what we did to make the changes, and how you can leverage these strategies in your institution as well.	Communications and Marketing	None.	No advance preparation required.	1
5588	Public Sector	Frankenstein's Document: Using the Configurator to Build Better Documents	To learn the basic purpose and benefits of using the configurator to create consistent, standardized documents.	To learn the clockwork-like functionality of the Document Configurator and how all the component pieces fit together, and where.	To learn how existing documents can be easily updated with new legalese, with interchangeable modular components.	Advanced	The State of Tennessee is using the Document Configurator to build modular documents with that allow users to create Solicitation and Ts&Cs customized to individual procurements, but adhering to a singular style, format and language. Tailoring the configurator for different users has allowed State Agency Procurement personnel and our Statewide Contract Administrators to maintain consistent legal documentation and minimize the need for copy-paste-editing of the documents that are generated from PeopleSoft.	Computer Software & Applications	None	No advance preparation required	1
5607	Public Sector	Have it Your Way! – Turn Customization to Configuration for PeopleSoft Financials	Identify key uses of PeopleSoft's configurable tools such as page composer, page and field configurator.	Apply knowledge acquired on page and field configurator to modify Financial pages	Understand how related content can be added to capture new information	Basic	PeopleSoft has a long history of delivering transformative frameworks in the area of collaborative tools, reporting and analytics as well as the power of configuration. PeopleSoft continues to deliver innovation in frameworks that are extremely powerful in creating value and savings for our customers in business functions. Customers can eliminate customizations and deliver pages their way with Page and Field Configurator, modernize the approver experience with Page Composer for Fluid Approvals, and gain business insights with Simplified Analytic. Attend this session to understand how Related Content, Simplified Analytics and Pivot grids allow you to get the specific information you need, where you need it, when you need it. Come and see live demos of you can leverage these powerful capabilities in PeopleSoft Financials.	Computer Software & Applications	None	No Advance Preparation Required	1

5875	Public Sector	Deep Dive on Query Manager: From Basics to Brilliance	Basics of query writing within PS Query with a tab-by-tab review and an understanding of creating accurate joins.	Explore some topics like creating expressions, sub queries, smart prompts, understand composite query and administering queries.	Discuss some advanced topics and provide some tips and tricks to design a smarter and efficient query in PS Query.	Basic	If you're a technical or functional user that is looking to learn the ins and outs of Query Manager, this session is for you. If you are confident in your ability to write queries to determine how many students are ready to matriculate, or have their financial aid packaged; and are looking for ways to be more sophisticated in your data retrieval, then this is the session is also for you! We will begin with some basic tips and tricks for query writing, and then move to some more complicated topics, like creating smart prompts, or using expressions wisely. Finally, we discuss some advanced topics such as using query manager on 4-tier vs using query builder tool within Application Designer for PeopleTools 8.56. We will end on some tips and tricks to make sure that anything you do with the system keeps your information safe and secure, and keeps your database from spinning out of control. Topics Covered will include: 1. Introduction – What is a relational database? | Why Do We Query? 2. Queries – The Basics – A Most Basic Query | Query Tools 3. A Tab-by-Tab Explanation of Query Manager 4. Understanding Joins 5. Manipulating Data with Expressions 6. Aggregating Data 7. Sub Queries 8. Unions in Query 9. Drilling URLs 10. A Brief Introduction to BI Publisher 11. Related Content to access queries 12. Query Administration 13. Tips and Tricks 14. Things to Remember	Computer Software & Applications	Nice to have: Query Manager access security on participant's home portal to get a hands-on experience of the session.	No Advance Preparation Required	2
5661	Student Financials	Understanding Transaction Tables in Student Financials	Understand what data is stored in which tables for each SF transaction	Understand how SF transaction tables relate to each other	Understand common misunderstandings and problem solving tips	Basic	We will review, explain and analyze the core transactional tables in Student Financials: ITEM_SF, ITEM_LINE_SF, ITEM_DUE_SF, PAYMENT_TBL, and ITEM_XREF. Participants should understand what data is contained in each table, how each table relates to the others, and where each table is used on corresponding admin pages. Additionally, we'll cover basics of querying these tables, note common misunderstandings and difficulties, and highlight useful problem solving techniques.	Computer Software & Applications	None	No Advanced Preparation Required	1
5745	Student Financials	Archive and Restore Data in Peoplesoft	how to use the Data Archiving Manager	how to archive/restore with no coding required.	how to manage a rapidly growing of any tables in your institution.	Overview	Student Financials accounts tables can grow big very quickly and impact performance. For auditing purposes, it is required that we never delete any of the student data from the tables. I want to demonstrate on how Stanford uses a simple yet powerful tool to manage a rapidly growing of student accounts tables.	Computer Software & Applications	Knowledge how to create a PeopleSoft Query.	No Advance Preparation Required	1
5515	TECH: Reporting and Business Intelligence	PeopleSoft Row-level security design for Tableau	Identify how you can use Oracle PeopleSoft to implement row level security in Tableau.	Identify how the combination of PeopleSoft trees, data and users roles can help accommodate your row level security needs	Identify how Peoplesoft page can be used to interface with external systems	Advanced	A simple PS page provides a powerful and flexible tool to facilitate row-level security in Tableau. The functionality can extend beyond College or Department to any reporting field by using a flex field that users can manually type in. The next thing they need to specify is which values a user is allowed to see, thus satisfying row-level security requirement.	Computer Software & Applications	None	We will prepare for a live demo	1
5674	TECH: Reporting and Business Intelligence	PS Query - Create More Dynamic Queries Using Drilling URLs	Recall the steps used to create a drilling Url	Recognize and distinguish when to utilize the three types of drilling URL expressions (query URL, component URL and external URL)	Identify techniques to better utilize query results	Intermediate	Learn how to maximize your query results by adding Drilling URL expressions. This presentation will review the steps to adding three types of Drilling URLs: query URL, component URL, and external URL (external webpage). This presentation focuses on student academic/demographic data, but the concepts can be applied to SF, FA, etc.	Computer Software & Applications	None	No Advance Preparation Required	1
5681	TECH: Reporting and Business Intelligence	Excel Based Reporting - Who Knew it could be this easy	How to create reports without the assistance from the IT department	Analyze the data by drilling into the details and comparing budget to actuals	What other capabilities the tool has outside of Peoplesoft	Intermediate	In this presentation we will look at what our struggles were and how the new tool overcame these hurdles and made automation of the reports and drilling into the details behind the number possible. We will also discuss the expansion possibilities we see. With a simple excel based tool that connects directly to Peoplesoft the numbers were real time and with a click of a button you can refresh all the data in your reports. Need to make a change to a report? No problem. Since the reports are all in Excel and easily modified there is no need to involve IT. Need to see what makes up a number? Simply right click and drill down to the journal or if needed all the way to the voucher or deposit. You can even see the attachments in the system. It's a one stop shop where the end user doesn't need to run any queries or even get into the system to find the information they need to make decisions.	Computer Software & Applications	None	No Advance Preparation Required	1
5691	TECH: Reporting and Business Intelligence	Aggregate reporting in multiple dimensions using PS Query	Attendees will learn how to design and develop full analytical queries	Attendees will learn how to use the CUBE and ROLLUP advanced analytical functions in a PS Query	Attendees will learn how to extend the regular use of PS query for data driven decision making	Intermediate	This session will explain and showcase the use of PS query for advanced analytical statistics available from your Oracle database, without a need to develop custom SQR, AE, or other means to obtain the needed data for operational decision making. Campus Solution data will be used for the demo and examples. However, the method is applicable to any application supporting the ability to query data.	Computer Software & Applications	Basic understanding of PS query and institutional reporting	No Advance Preparation Required	1
5876	TECH: Reporting and Business Intelligence	Query Manager 101	Develop basic understanding on relational databases work	Develop a basic understanding of how the query manager interface functions to create queries	Review and discuss real-world uses and issues using query manager.	Basic	The session will cover relational database basics including primary keys/foreign keys, basic query design (fields, tables and criteria) and navigation through different query manager tabs. We will also provide some practical tips and tricks to ensure queries are efficient and do not consume a lot of system resources.	Computer Software & Applications	None	No Advance Preparation Required	1
6076	TECH: Reporting and Business Intelligence	Understanding Subqueries for People Who Don't Code	Describe the three main types of subqueries.	Explain the difference in how the top level query uses "in list" or single value subqueries and "exists/does not exist"	Explain how Joins and Subqueries are alternate methods of retrieving data from multiple tables.	Overview	PS Query is an amazing tool to give people who don't code the ability to develop queries. Subqueries can be scary for people who don't have a background in coding and development. This presentation will help take the fear out of subqueries by not just explaining step by step how to develop a subquery but by going further to explain why and when to use them.	Computer Software & Applications	None	No Advance Preparation Required	1
6085	TECH: Reporting and Business Intelligence	Express Yourself! Using Conditional Expressions in SQL or PSQuery	Using Oracle CASE statements to create expressions that obey conditional logic	Using conditional expressions with aggregate functions to show different aggregations of the same column without multiple joins	Using CASE logic with user prompts to control run-time behavior of queries	Intermediate	This session is aimed at SQL and PSQuery query writers with Oracle-based systems, who know the basics of how expressions work, and want to move to the next level. Learn how to use conditional logic within expressions, and the benefits that this type of logic has for making your queries simpler and more flexible. The University of California, Berkeley uses PSQuery as its main operational reporting platform for Campus Solutions data. With hundreds of users and complex demands for on-the-spot data, simplicity and flexibility are key requirements, and using conditional logic within query expressions can greatly increase both. We'll cover the use of Oracle CASE statements; how to combine CASE logic with aggregate functions to show multiple different aggregations of the same column; and how to control query behavior based on user-entered prompt input using conditional expressions. Come and learn how Berkeley has conquered thorny problems by leveraging conditional logic in PSQuery expressions!	Computer Software & Applications	Familiarity with SQL or basic PSQuery functionality, including using aggregate functions and prompts	No advance preparation required	1
6317	TECH: Technical	Enhance Student success with AI-Powered Chatbot	Overview of Chatbot	How Chatbot leverages AI	How Chatbots can be used to enhance student engagement and success	Basic	Chatbots are one of the first widespread uses of artificial intelligence and natural language processing. They enable end users to interact with data or a service in the most natural way possible: through natural languages and a conversational UI. In this we will explore this new technology that is set to enhance the way we engage with students and facility. In this session we will talk about our AI-Powered Chatbot and how they can enhance student success.	Information Technology	None	No Advance Preparation Required	1
5539	Workshops	Effective Change Management Strategies – Top 6 Questions to Ask & Answer	1. Learn effective strategies for communicating up, down and across an organization.	2. Determine who needs to know, when they need to know it and how to package and time communications.	3. Learn how to visually represent complex information and processes on 1 page. 4. Obtain easy to implement templates to help you improve your communications technique.	Intermediate	Do you want to improve your effectiveness at managing people, processes and/or projects? Learn tips and strategies to apply high level thinking and reflection to enhance your communications approach. Discover the six most important questions to answer when developing a communications strategy to solve a problem, get the insight you need to carry out your next project or apply to a current dilemma/opportunity.	Communications and Marketing	None	None	3

5676	Workshops	PS Query - Building More Dynamic Queries Using Expressions, Drilling URLs, and Subqueries	Learn the ins and outs of the PeopleSoft query tool.	Understand how to join records, what to do in the case of left outer joins, etc.	Learn new ways to make queries more dynamic using different expression types, drilling URLs, and subqueries.	Intermediate	This workshop will provide the opportunity for hands-on query building. A pre-conference webinar will be scheduled to create the base queries onto which we will build during the workshop. Different types of expressions, drilling URLs, and subqueries will be integrated into the queries, using student academic and demographic data. Attendees who wish to participate in the "hands-on" learning will be responsible for getting access to the appropriate tools and tables.	Computer Software & Applications	Pre-conference webinar to build 'base' queries. This will save a lot of time and allow us to delve deeper into the "meat" of the workshop.	Have the base queries written. If unable to attend the webinar, follow the instructions that will be available to create the queries.	3
5941	Workshops	File Parser: The How, The Why, And what problems it will solve for you.	Understand the basic principles behind the File Parser functionality and how it can be a benefit to your institution.	Gain additional knowledge on how app classes can be used to help overcome system limitations and the need to have some forethought when creating them.	Learn how to load everything from Applications and Advisers to equation variables and test scores.	Basic	Washington State University uses File Parser/PDL for everyday activities across multiple modules of Campus Solutions. This workshop will go over fundamental File Parser setup (Context Definition, File Mapping, and Field Conversions), discuss the use of App Classes along with the importance of long term planning with them, also the use of multiple row option, and lastly how to effectively use File Parser in all aspects of work. WSU will also give a list of tips and tricks, common pitfalls, and lessons learned before going into an in-depth look at what WSU has done. WSU will also leave time to help out with problems that are brought forward.	Information Technology	NONE	No Advance Preparation Required	3
6147	Workshops	Agile/Scrum Training	Gain a basic understanding of Agile/Scrum from both a definition and practical standpoint or in concept and in experience	Understand the key benefits of Agile/Scrum	Identify the pillars of Scrum through workshop experience and handout materials/and understand their advantages	Basic	Given pervasive budget constraints, Higher Education IT is increasingly pressed to deliver value more quickly. Agile development is all about frequent delivery of products. More and more UW-Madison IT projects are “going agile” and using a Scrum framework to deliver fast, deliver often and manage risks through frequent feedback and iteration. Agile and Scrum are based on frequent communication between IT and their customers to keep the project moving and delivering the highest value features first. Through regular detailed planning (every two to four weeks), continual sharing of work in progress with customers and frequent opportunities for obtaining feedback, Agile/Scrum teams can respond to change and hit a moving target. Come and experience what it’s like to be on a Scrum team in this high-participation, hands-on workshop that’s been successfully presented (multiple times and to over 130 people) at the University of Wisconsin. You’ll learn about Scrum team roles, artifacts, techniques and ceremonies and experience them first hand.	Management Services	None	No Advance Preparation Required	5