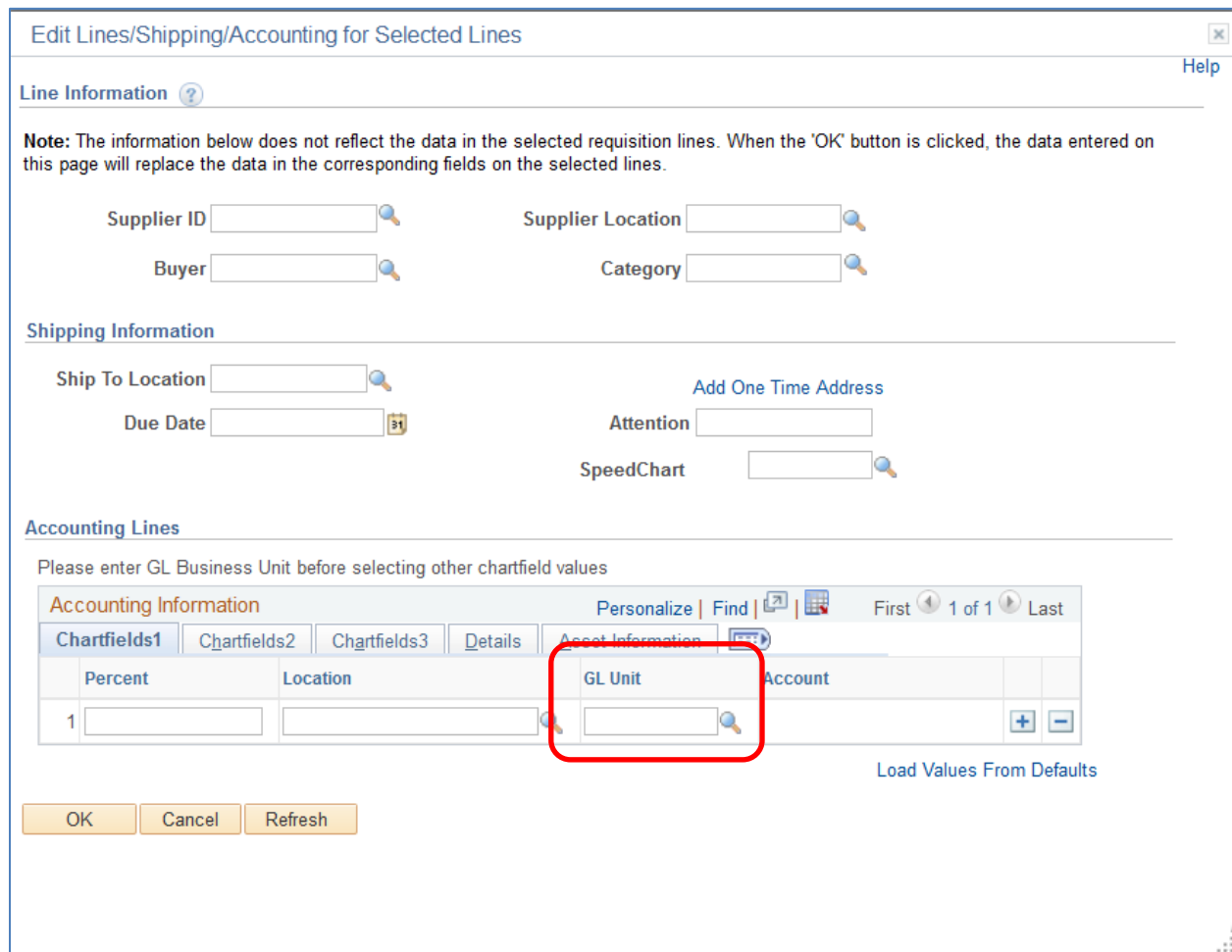


# PeopleSoft 9.2 Upgrade ePro/Purchasing FAQ

**Q: When using Mass Change in eProcurement, I am not able to enter a fund code in the chartstring. It appears that there are no acceptable or allowed values in this field. Why can't I add a fund?**

**A:** The reason that the fund cannot be populated is that the GL Business Unit field is not populated on the Edit Lines screen. In 8.9, this field was automatically populated; however, in 9.2 users will need to manually populate this field. Once the GL Unit is populated, your fund and other chartfield values are able to be entered.



**Edit Lines/Shipping/Accounting for Selected Lines** [X] Help

**Line Information** ?

**Note:** The information below does not reflect the data in the selected requisition lines. When the 'OK' button is clicked, the data entered on this page will replace the data in the corresponding fields on the selected lines.

Supplier ID [ ] [ ] Supplier Location [ ] [ ]  
 Buyer [ ] [ ] Category [ ] [ ]

**Shipping Information**

Ship To Location [ ] [ ] Add One Time Address  
 Due Date [ ] [ ] Attention [ ] [ ]  
 SpeedChart [ ] [ ]

**Accounting Lines**

Please enter GL Business Unit before selecting other chartfield values

**Accounting Information** Personalize Find [ ] [ ] First 1 of 1 Last

| Chartfields1 | Chartfields2 | Chartfields3 | Details | Account Information |
|--------------|--------------|--------------|---------|---------------------|
| Percent      | Location     | GL Unit      | Account |                     |
| 1            | [ ] [ ]      | [ ] [ ]      |         | [ ] [ ]             |

Load Values From Defaults

OK Cancel Refresh

**Q: Is there a way to view a printable version of a requisition before I click Save and Submit? Some of my users like to view a printed version to check the chartstring before submitting.**

A: Users can select the “Save for Later” option on the ePro requisition, which will save the req in an Open status. Once saved, the user can go into Manage Requisitions and search for the Req ID that was just created. The drop-down ‘Action’ box has a “View Print” option. Clicking Go after selecting that option will prompt a question, “Do you want to print the requisition with distribution details?” The user can select Yes. This will give them a printed copy with the chartfield information. If everything looks okay, they can submit the requisition by selecting Edit in the drop down Action box, then selecting Save & Submit on the Edit Requisition – Review and Submit page.

**Search Requisitions**

To locate requisitions, edit the criteria below and click the Search button.

Business Unit: 71000 Requisition Name: Request State: Open Budget Status: Origin: Special Request PO ID: Entered By: Date From: Date To: 03/19/2015

Search Clear Show Advanced Search

**Requisitions**

To view the lifespan and line items for a requisition, click the Expand triangle icon.  
To edit or perform another action on a requisition, make a selection from the Action dropdown list and click Go.

| Req ID     | Requisition Name           | BU    | Date       | Request State | Budget    | Total        |                    |
|------------|----------------------------|-------|------------|---------------|-----------|--------------|--------------------|
| 0000500006 | 0000500006                 | 71000 | 03/19/2015 | Open          | Not Chk'd | 2.00 US      | [Select Action] Go |
| 0000419548 | 0000419548                 | 71000 | 01/20/2015 | Open          | Not Chk'd | 19.99 US     | Cancel Go          |
| 0000419368 | MGSC Clery Wksp (3/4-5/15) | 71000 | 12/19/2014 | Open          | Not Chk'd | 40.00 US     | Check Budget Go    |
| 0000418945 | Chickfila 12-06 2014       | 71000 | 11/07/2014 | Open          | Not Chk'd | 225.00 US    | Copy Go            |
| 0000418883 | LifeFitByJ Training        | 71000 | 11/03/2014 | Open          | Not Chk'd | 5,360.00 USD | Edit Go            |
|            |                            |       |            |               |           |              | View Cycle Go      |
|            |                            |       |            |               |           |              | View Print Go      |
|            |                            |       |            |               |           |              | [Select Action] Go |

**Q: I clicked the “Search for Lines” link on the main PO page, and nothing happens. Is this working?**

**A:** The GeorgiaFIRST Financials Development team is currently researching this issue. We hope to determine the cause of this issue and have a fix in the near future. In the meantime, users can still search for lines by using the Line fields and the Retrieve button on the main PO page. This will only show the line numbers you search for.

Order

Unit 83000 PO Status Dispatched

ID ROP0406999 Budget Status Valid

om  ☐ Hold From Further Processing

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te 08/18/2013 Supplier Search Doc Tol Status Valid

er BIGASSFANS-001 Supplier Details Backorder Status Not Backordered [Create BackOrder](#)

ID 0000003167 Delta T Corp dba Receipt Status Received

er amDaniels Daniels, April M \*Dispatch Method Print

ce

[Header Details](#) [Activity Summary](#)

[PO Defaults](#) [Add Comments](#)

[PO Activities](#) [Add ShipTo Comments](#)

[Requisitions](#) [Document Status](#)

▼ Actions

**Amount Summary**

|                            |           |  |
|----------------------------|-----------|--|
| Merchandise                | 20,922.00 |  |
| Freight/Tax/Misc.          | 0.00      | <input type="button" value="Calculate"/> |
| <b>Total Amount</b>        | 20,922.00 | USD                                      |
| <b>Encumbrance Balance</b> | 0.00      | USD                                      |

**Select Lines To Display**

Search for Lines Line  To

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Catalog Item Search

Purchasing Kit

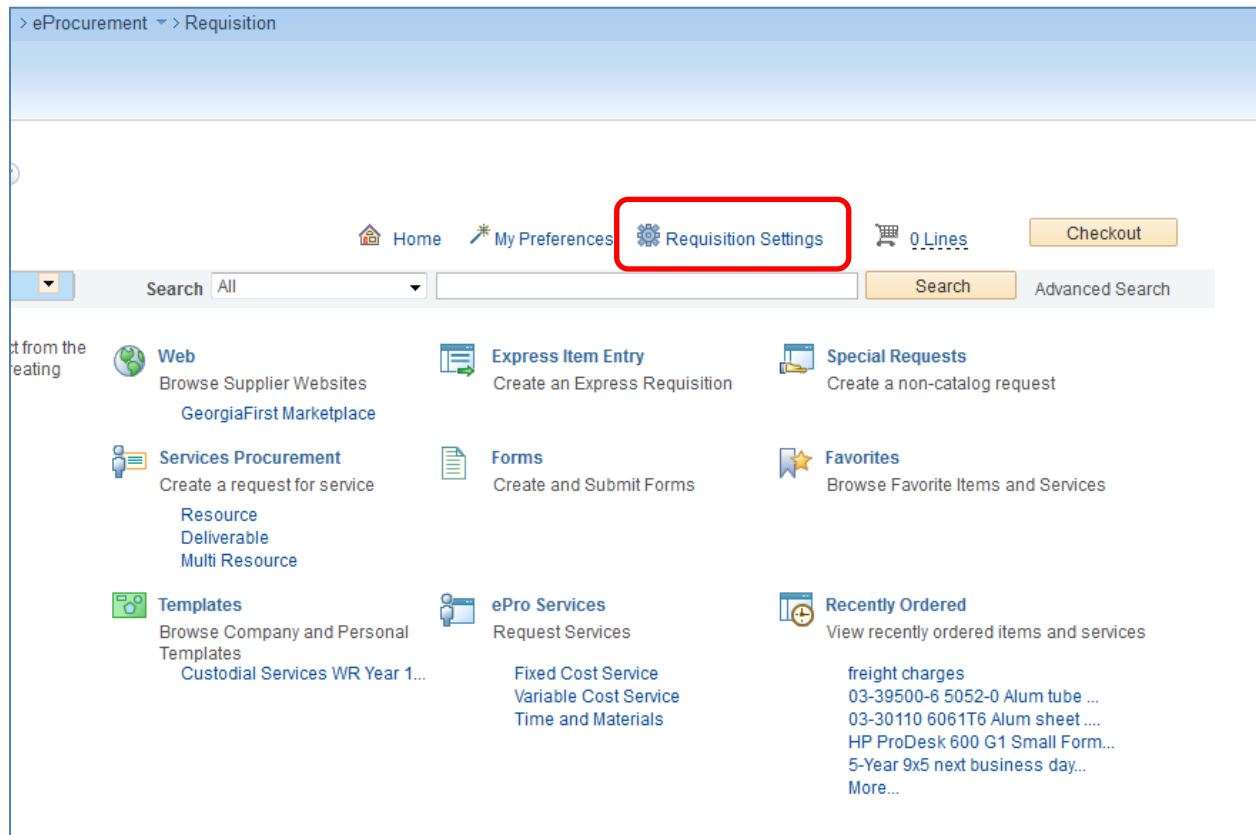
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Personalize | Find | View All |

| Date | Statuses | Item Information   | Attributes | RFQ | Contract | Receiving |                                     |      |                                    |  |                    |          |
|------|----------|--|------------|-----|----------|-----------|-------------------------------------|------|------------------------------------|--|--------------------|----------|
|      |          | Description  |            |     |          |           | PO Qty                              | *UOM | Category                           | Price                                    | Merchandise Amount | Status   |
|      |          | F-PFX2-2404S17 Powerfoil X2.0 fan kit - 24ft                 |            |     |          |           | 2.0000                              | EA   | 03140                              | 6,175.50000                              | 12,351.00          | Closed   |
|      |          | M-PX2-0115 powerfoil X2.0/Powerfoil X2.0 Plus mount kit      |            |     |          |           | 2.0000                              | EA   | 03140                              | 435.50000                                | 871.00             | Closed   |
|      |          | 003892-02-128 LED Light Kit, 14.5K, PFX, yellow              |            |     |          |           | 2.0000                              | EA   | 03140                              | 750.00000                                | 1,500.00           | Closed   |
|      |          | L0-PFX2-LEDLIGHT LED light install on powerfoil X2.0 per fan |            |     |          |           | <input type="text" value="2.0000"/> | EA   | <input type="text" value="03140"/> | <input type="text" value="0.00000"/>     | 0.00               | Approved |
|      |          | L3-PFX2/PPX2-WL-1 level 3 install                            |            |     |          |           | <input type="text" value="2.0000"/> | EA   | <input type="text" value="03140"/> | <input type="text" value="3,100.00000"/> | 6,200.00           | Approved |

**Q: When using requisition settings to establish a default category code and supplier ID, how do you get this information to then load on the first line item you are creating? It doesn't populate automatically until the second line.**

A: In testing, we have found that if your requisition defaults are set prior to selecting Special Request from the Create Requisition menu/main page, your first line item on the requisition will be populated with the correct default option selected (category code, supplier, etc.). However, if you are already creating a line item and THEN set your defaults, they will not populate on to the current line. Your Requesters will want to set their Requisition Settings prior to selecting the Special Requests link.

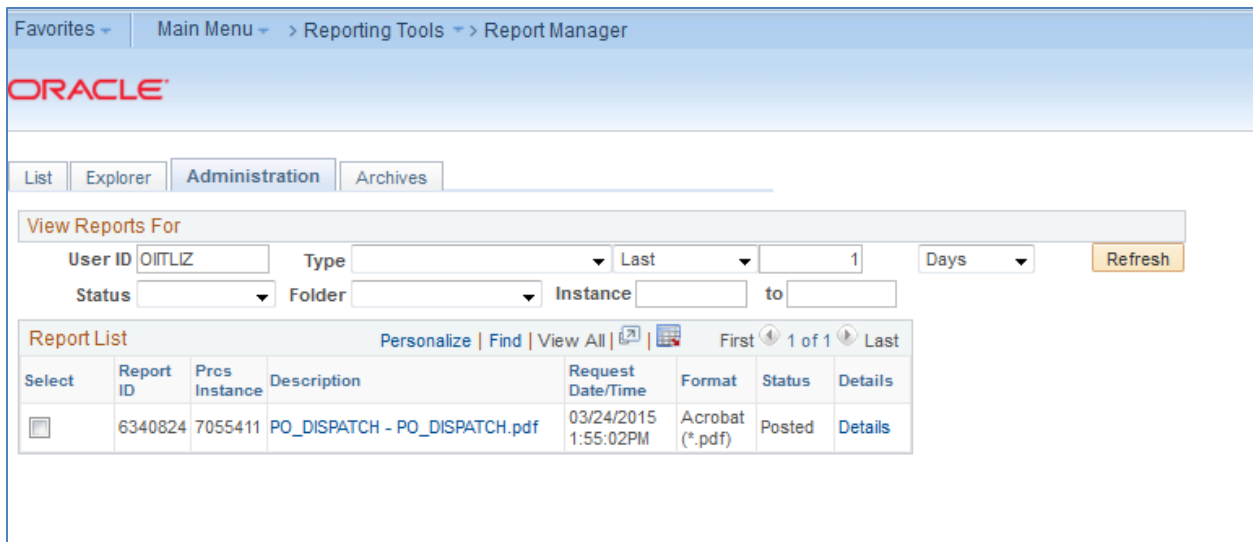


**Q: My account code is not being updated when the category (NIGP) is changed via the Requisition Settings option in eProcurement. I thought the account code was linked to the NIGP?**

A: The account code is still linked to the category code – this has not changed. This is an Oracle known issue and they will deliver a fix in a future release.

**Q: I dispatched/printed a PO but it's not in the Process Monitor. Where can I find the PO I printed?**

A: The new process type for PO printing is a BI Publisher process. All BI Publisher processes print in the Report Manager, which is under Reporting Tools on your main menu. Once in the Report Manager, click the Administration tab and you will see your printed PO as a pdf there.



The screenshot shows the Oracle Report Manager interface. The breadcrumb trail is: Favorites > Main Menu > Reporting Tools > Report Manager. The 'Administration' tab is selected. Below the 'View Reports For' section, there are filters for User ID (OITLIZ), Type, Last (1), Days, Status, Folder, and Instance. A 'Refresh' button is present. The 'Report List' table shows one report:

| Select                   | Report ID | Prce Instance | Description                   | Request Date/Time    | Format          | Status | Details                 |
|--------------------------|-----------|---------------|-------------------------------|----------------------|-----------------|--------|-------------------------|
| <input type="checkbox"/> | 6340824   | 7055411       | PO_DISPATCH - PO_DISPATCH.pdf | 03/24/2015 1:55:02PM | Acrobat (*.pdf) | Posted | <a href="#">Details</a> |

**Q: I changed the chartfield information on a PO that is Dispatched and received a warning message (below) that says the PO status will not be reset; however the PO status is reset to Pending Approval. Why am I receiving this message?**



PO Date: 02/27/2011  
 Supplier: 1STCOA  
 Supplier ID: 0000053  
 Buyer: DCHIME  
 Reference: Online S  
 Header D  
 PO Defa  
 PO Activi  
 Add ShipTo Comments  
 Total Amount: 35.56 USD

PO Status: Dispatched  
 Budget Status: Not Chkd  
☐ Hold From Further Processing

Message:  
 Warning -- The PO has the Dispatched status. Changing ChartField won't reset the status for Workflow Approval. (10200,370)  
 The business unit requires the ChartField Workflow Approval but the PO has been dispatched, the system will not reset the PO status to Pending Approval for Workflow process.  
 OK Cancel

**A:** Oracle is aware of this issue and is currently developing a fix to be included in a future release. The message is erroneous and the system is routing approvals as it should.

**Q: My PO dispatch type was set to Email and an email address is set up on my supplier's profile, but my supplier received a blank email after I dispatched the PO. Why wasn't the PO sent?**

**A:** The GeorgiaFIRST Financials Development team is currently researching this issue. We hope to determine the cause of this issue and have a fix in the near future. In the meantime, please do not set your dispatch method to Email. You may fax, print, or (in the case of CAT vendors) send EDX, but please do not email as we research the issue.

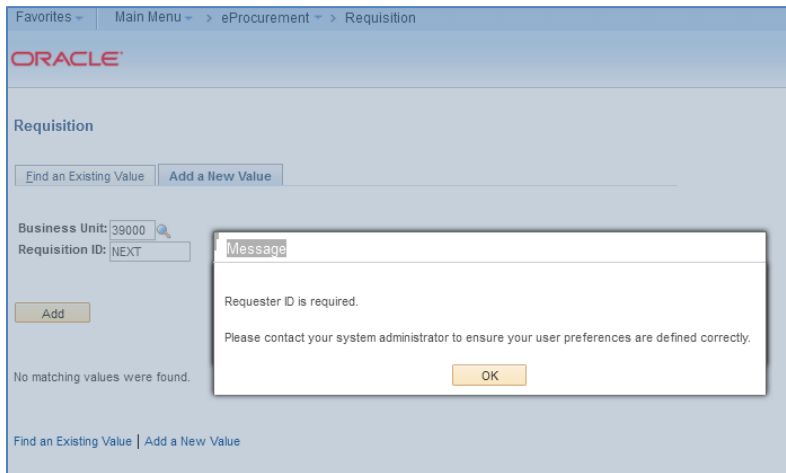
**Q: The BOR Minority Supplier Report is not showing accurate dollar amounts, or amounts are inflated on the report. Why aren't the amounts on the report accurate to my actual numbers?**

**A:** The GeorgiaFIRST Financials Development team is currently researching this issue. We hope to determine the cause of this issue and have a fix in the near future.

**Q: When I click the PO Approvals link, my PO is showing “No Approvals Required” but I know it needs approval and it is in a Pending Appr status. Why is this showing incorrect information?**

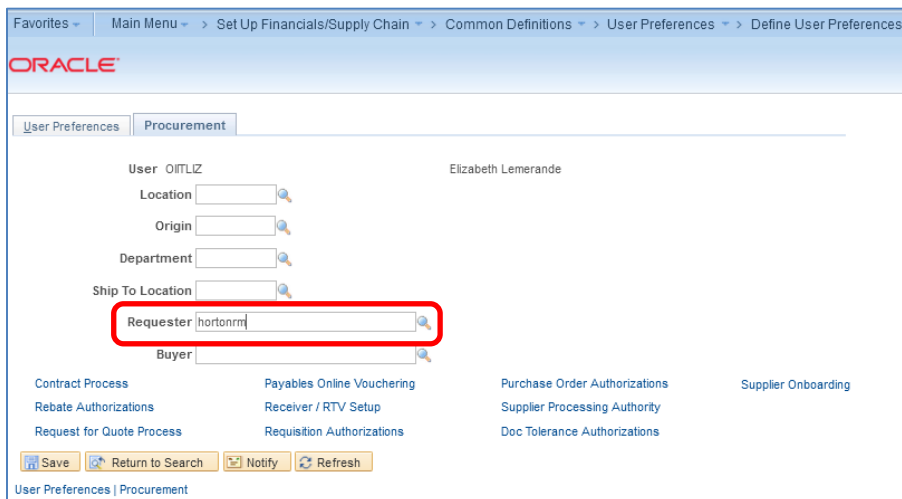
A: The GeorgiaFIRST Financials team has submitted a helpdesk ticket to Oracle for this issue, and they are investigating. However, the emails are still sent to the correct approvers, and the PO still shows up in the approver’s worklist to take action.

**Q: I am trying to create a requisition in eProcurement, but I keep receiving this message. I am a Requester, so what am I doing wrong?**



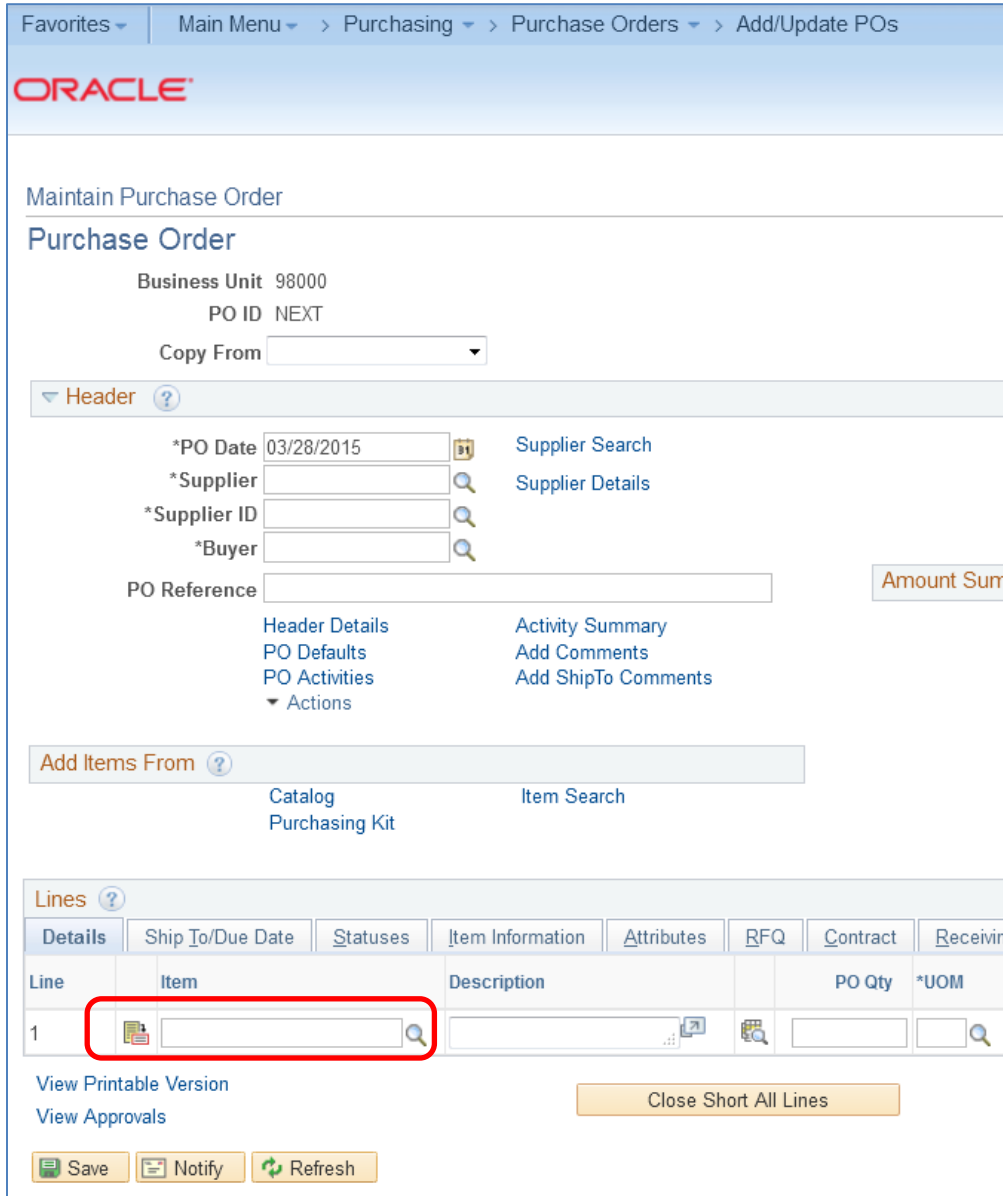
The screenshot shows the Oracle eProcurement Requisition screen. The breadcrumb trail is: Favorites > Main Menu > eProcurement > Requisition. The page title is "Requisition". There are two buttons: "Find an Existing Value" and "Add a New Value". Below these, the "Business Unit" is set to "39000" and the "Requisition ID" is "NEXT". An "Add" button is present. A message box is displayed in the center with the text: "Requester ID is required. Please contact your system administrator to ensure your user preferences are defined correctly." The message box has an "OK" button. At the bottom of the screen, it says "No matching values were found." and "Find an Existing Value | Add a New Value".

A: In 9.2, a Requester must be defined on your User Preferences in order to add an ePro requisition. Your local security administrator can add this for you in User Preferences.



The screenshot shows the Oracle eProcurement User Preferences screen. The breadcrumb trail is: Favorites > Main Menu > Set Up Financials/Supply Chain > Common Definitions > User Preferences > Define User Preferences. The page title is "User Preferences". There are two tabs: "User Preferences" and "Procurement". The "User" field is set to "OITLIZ" and the "Location" field is set to "Elizabeth Lemerande". Below these, there are fields for "Origin", "Department", and "Ship To Location". The "Requester" field is highlighted with a red box and contains the text "hortonrm". Below the "Requester" field is a "Buyer" field. At the bottom of the screen, there are several buttons: "Save", "Return to Search", "Notify", and "Refresh". Below the buttons, it says "User Preferences | Procurement".

**Q: What is this new Item field on my PO? I have never seen this before.**



[Favorites](#) | [Main Menu](#) > [Purchasing](#) > [Purchase Orders](#) > [Add/Update POs](#)





**ORACLE**

Maintain Purchase Order

**Purchase Order**

Business Unit 98000  
 PO ID NEXT  
 Copy From

**Header** ?

\*PO Date   [Supplier Search](#)  
 \*Supplier   [Supplier Details](#)  
 \*Supplier ID    
 \*Buyer    
 PO Reference  [Amount Summary](#)






[Header Details](#) [Activity Summary](#)  
[PO Defaults](#) [Add Comments](#)  
[PO Activities](#) [Add ShipTo Comments](#)  
[Actions](#)

**Add Items From** ?

[Catalog](#) [Item Search](#)  
[Purchasing Kit](#)

**Lines** ?

[Details](#) | [Ship To/Due Date](#) | [Statuses](#) | [Item Information](#) | [Attributes](#) | [RFQ](#) | [Contract](#) | [Receiving](#)

| Line | Item   | Description  | PO Qty               | *UOM   |
|------|--|--|----------------------|--|
| 1    |  <input type="text"/>  |  <input type="text"/>  | <input type="text"/> | <input type="text"/>  |

[View Printable Version](#)  
[View Approvals](#) [Close Short All Lines](#)

[Save](#) [Notify](#) [Refresh](#)

A: This field is actually not new – it had been previously hidden by a modification in 8.9. No items may be entered here, and there are no options in the lookup. You will continue to use the Description field as you always have.