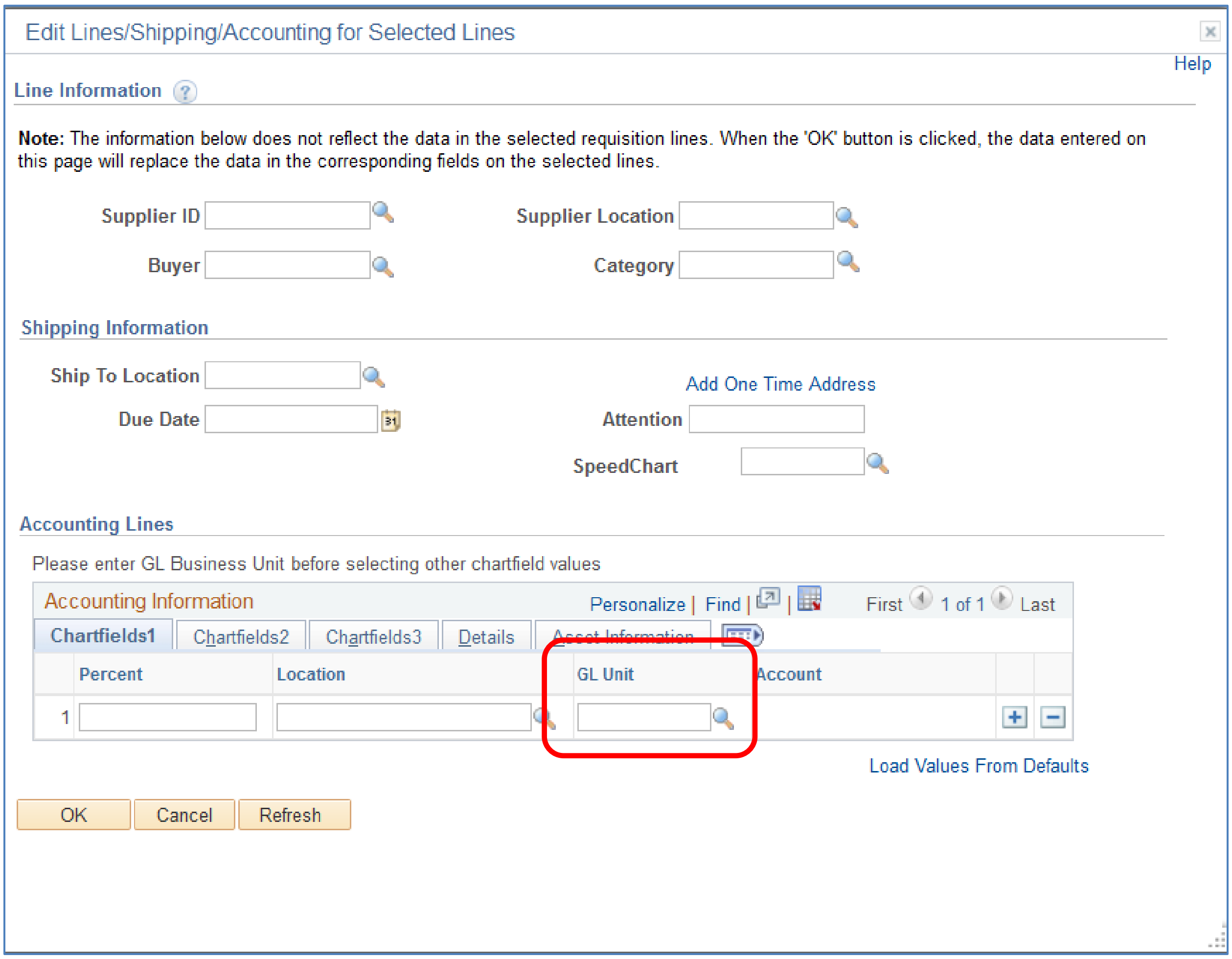
PeopleSoft 9.2 Upgrade ePro/Purchasing FAQ

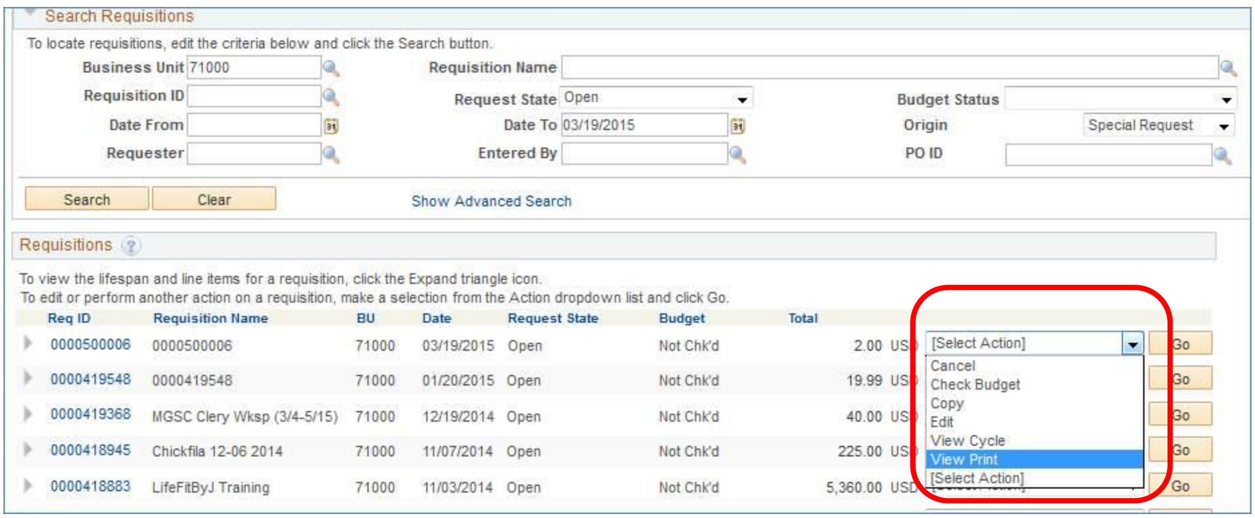
Q: When using Mass Change in eProcurement, I am not able to enter a fund code in the chartstring. It appears that there are no acceptable or allowed values in this field. Why can't I add a fund?

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.



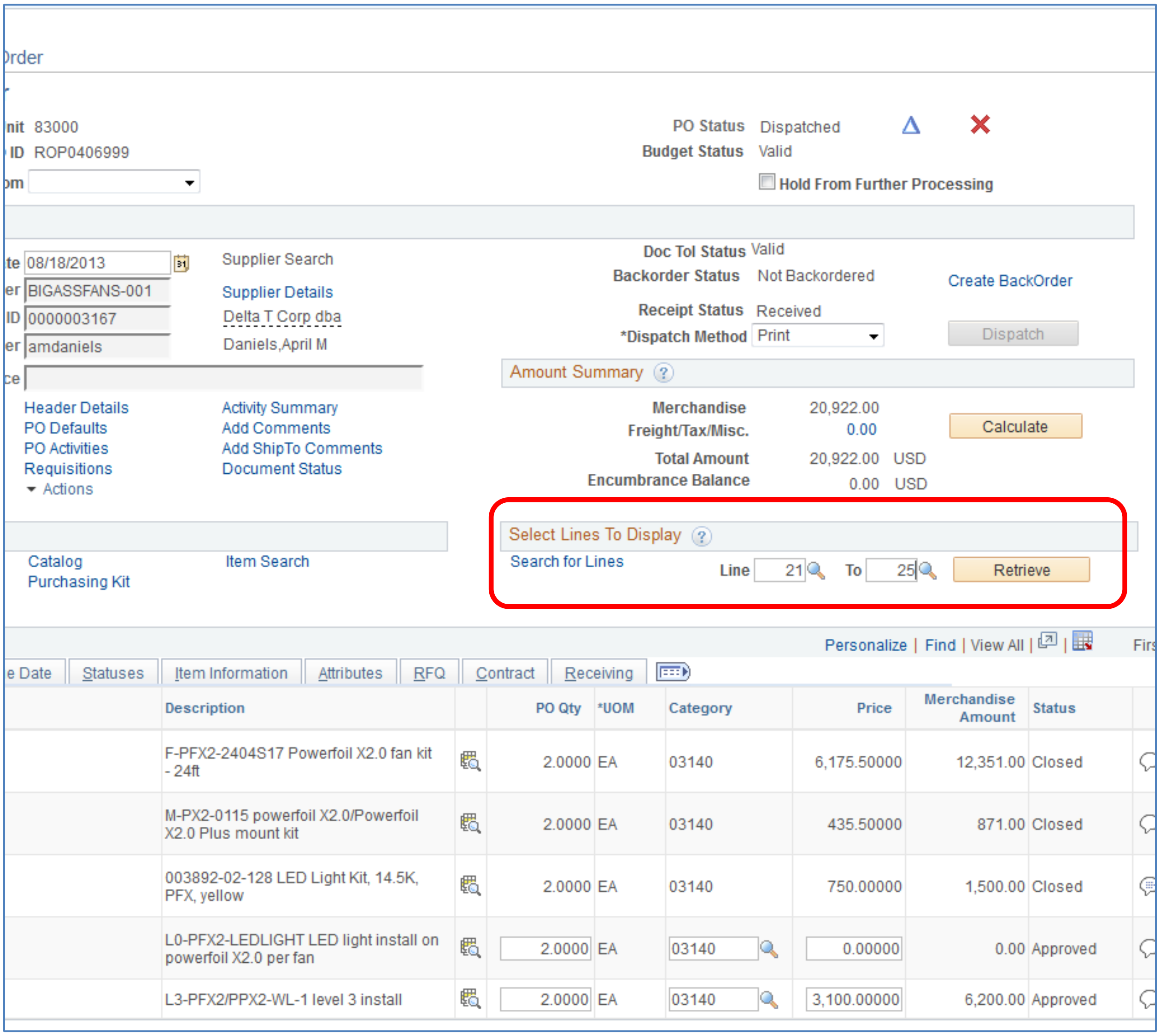
Q: Is there a way to view a printable version of a requisition before I click Save and Submit? Some of my users like to view a printed version to check the chartstring before submitting.

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.



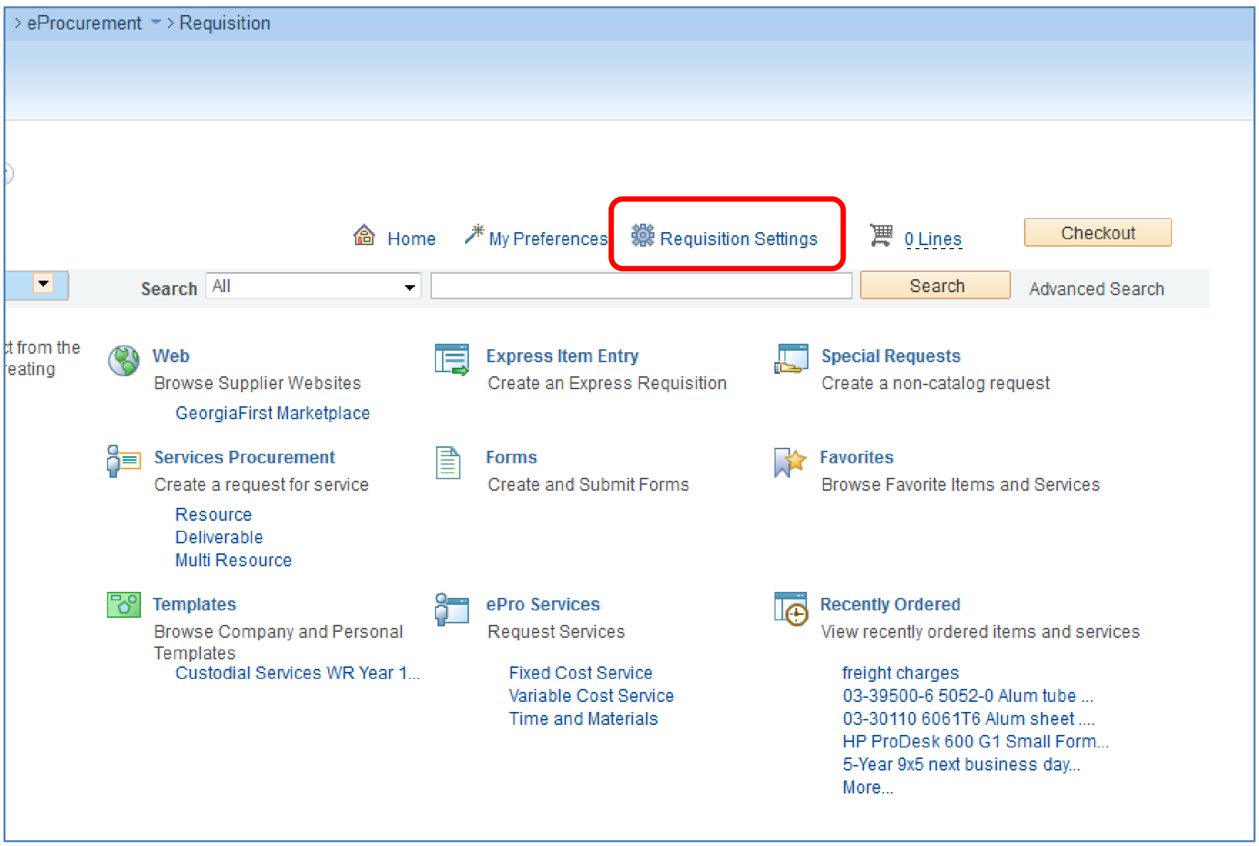
Q: I clicked the "Search for Lines" link on the main PO page, and nothing happens. Is this working?

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.



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.

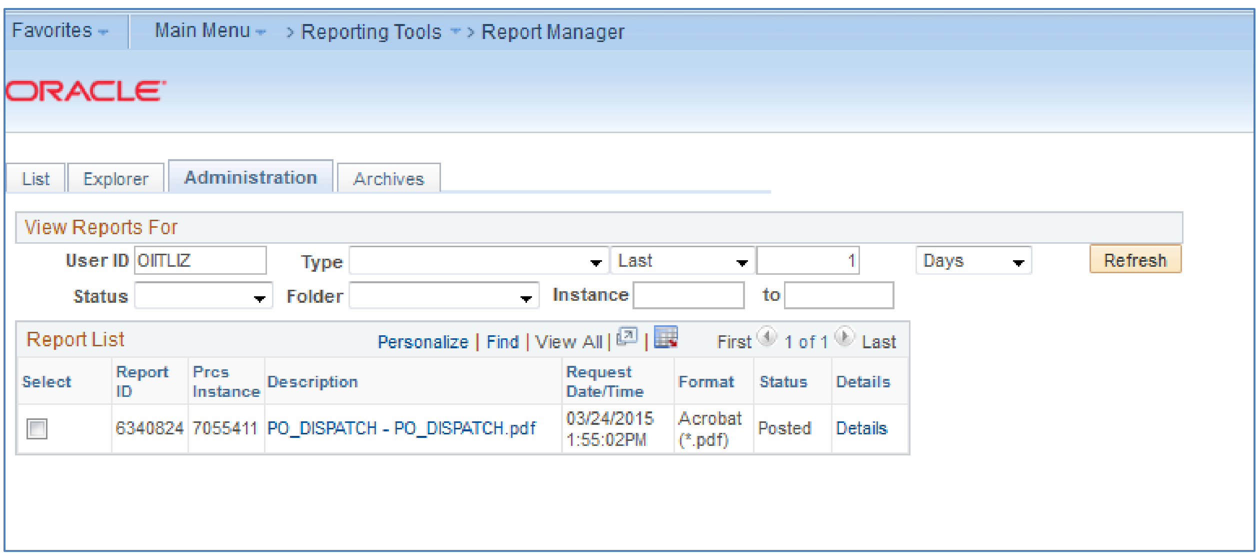


Q: My account code is not being updated when the category (NIGP) is changed via the Requisition Settings option in eProcurement. I thought the account code was linked to the NIGP?

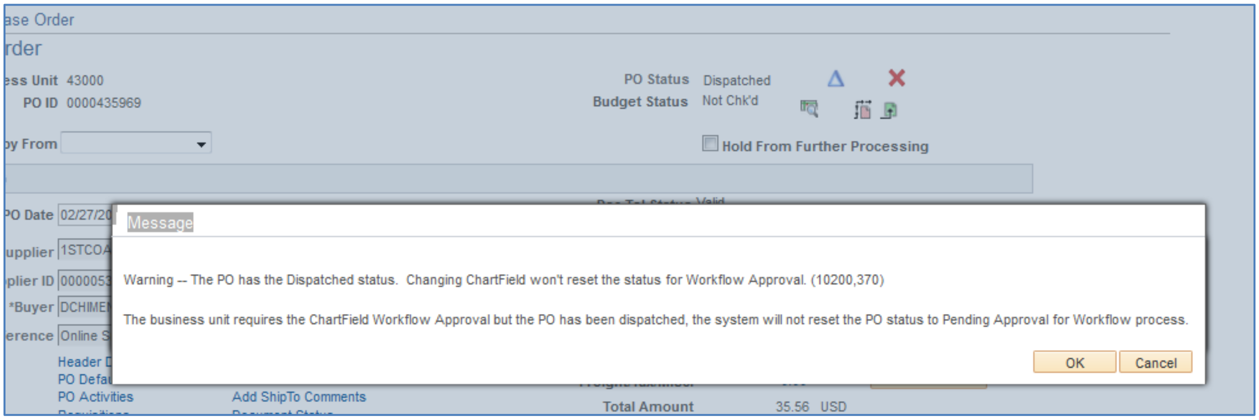
A: The account code is still linked to the category code – this has not changed. This is an Oracle known issue and they will deliver a fix in a future release.

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.



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?



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.

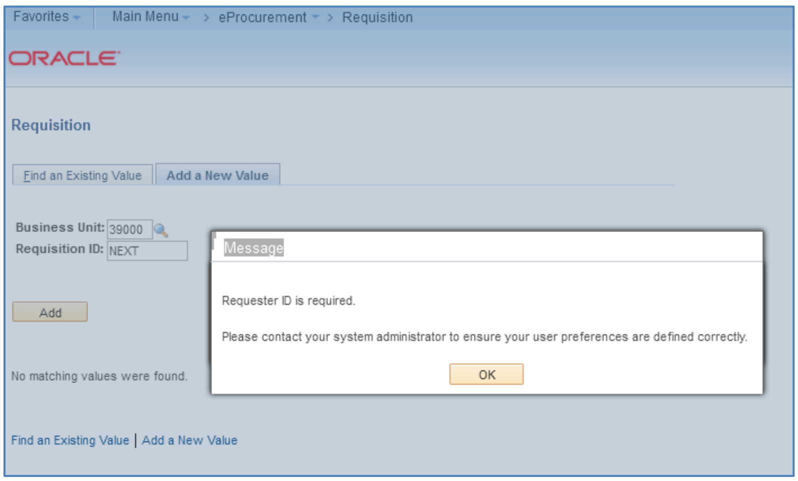
Q: The BOR Minority Supplier Report is not showing accurate dollar amounts, or amounts are inflated on the report. Why aren't the amounts on the report accurate to my actual numbers?

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.

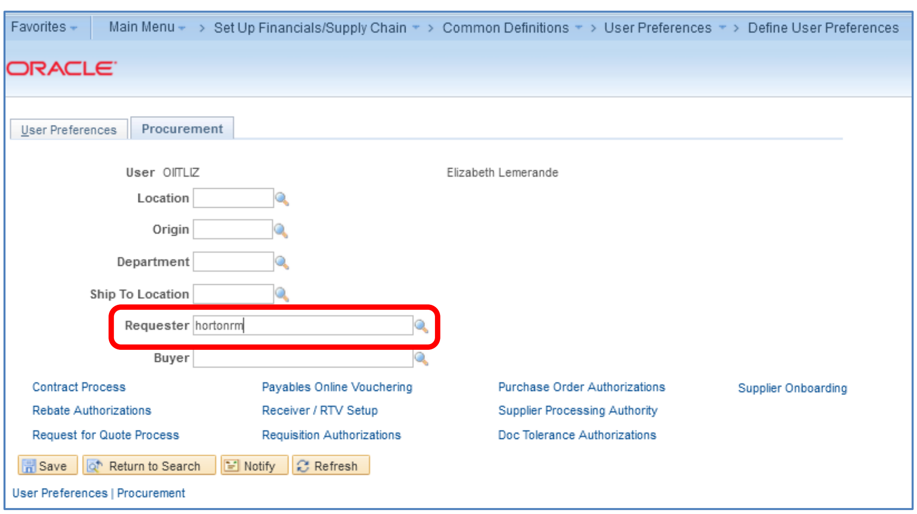
Q: When I click the PO Approvals link, my PO is showing “No Approvals Required” but I know it needs approval and it is in a Pending Appr status. Why is this showing incorrect information?

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.

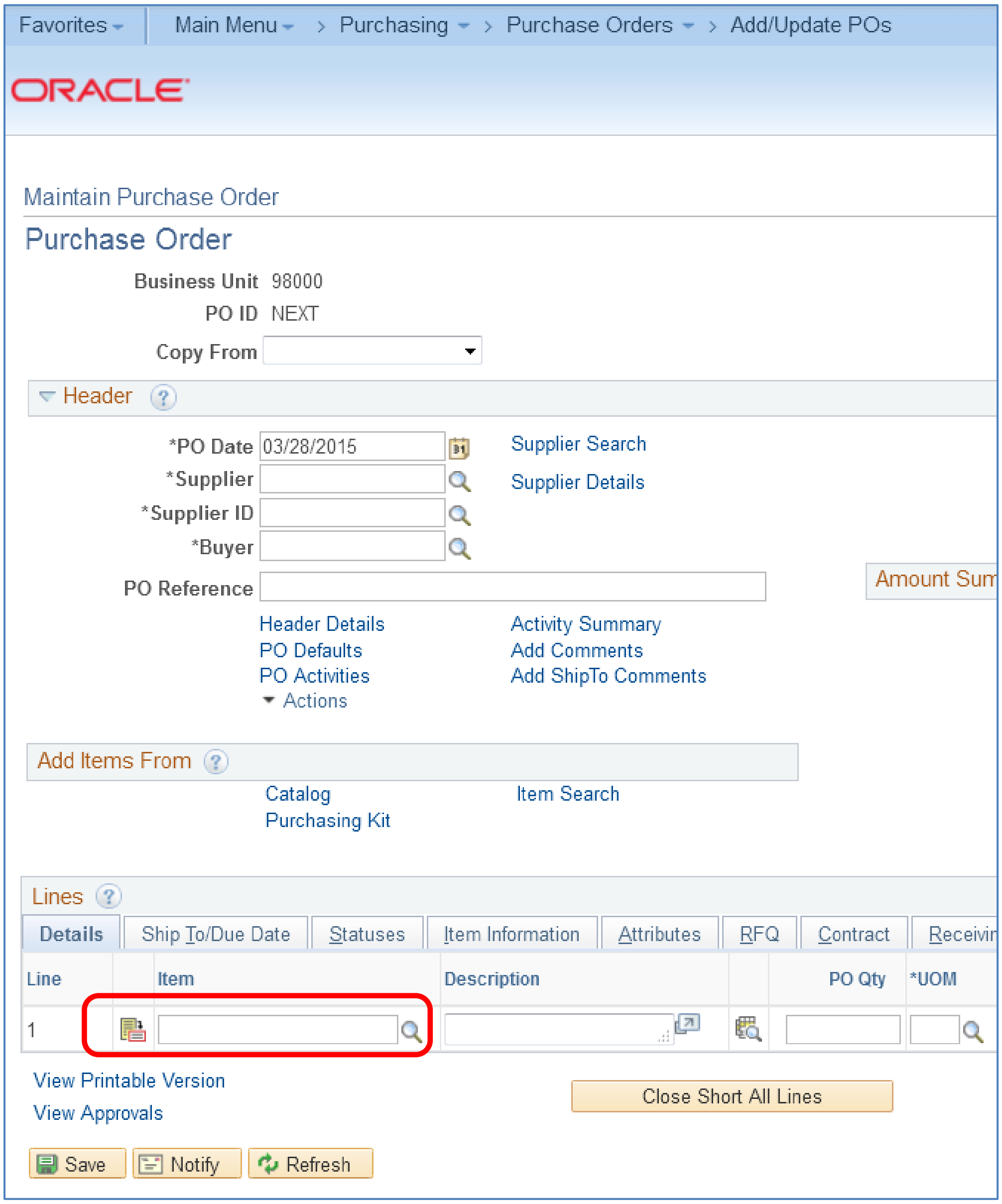
Q: I am trying to create a requisition in eProcurement, but I keep receiving this message. I am a Requester, so what am I doing wrong?



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.



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



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.