

Implementation Guide for ePro and GFM

	Institution Task	Target Date	Assigned To	Complete Date
1	Identify project lead, security/workflow lead, and training lead			
2	KICKOFF CONFERENCE CALL			
3	Identify eProcurement administrator			
4	Determine implementation/campus rollout approach			
5	Review workflow approval stages and options			
6	CHECKPOINT CALL 1			
7	Identify Shoppers & Requesters for the pilot group and AP contact			
8	Discuss ePro batch processing and options			
9	Determine receiving preference			
10	CHECKPOINT CALL 2			
11	Setup in FPLAY			
12	Attend ePro and GFM Training			
13	Test in FPLAY			
14	Accounts Payable WebEx			
15	CHECKPOINT CALL 3			
16	Review ship-to codes and format to GFM standards			
17	Identify institution-specific content for suppliers			
18	Provide school logo and front page colors			
19	CHECKPOINT CALL 4			
20	GO-LIVE			
21	Deactivate redundant suppliers where a CAT supplier exists			

1. Identify project lead, security/workflow lead, and training lead from the institution

Identify this core group of team leads for this project.

The **project lead** will be the main manager of this project for your institution. He/she will need to keep all aspects of the project moving and ensure that all parties involved with the project know their roles. This person will be the main point of contact for the ITS team.

The **security and workflow lead** will be involved in all aspects of setting up users for testing and training in the test environment (FPLAY), as well as setting up users in the Production environment when it is time for go-live. This person will set up shoppers, requesters, buyers, and approvers, as well as user preferences related to these users. The security and workflow lead will also need to know the workflow options as they pertain to requisition routing, as well as how they work.

Finally, the **training lead** plays a significant role in the implementation of the GFM and ePro. Once the application is rolled out to campus, this person will be the main trainer of these systems. The training lead must know the system and be comfortable enough in the application to teach it to users across campus.

Once main users are identified, the implementation process can begin. At this point, please contact ITS to schedule a conference call.

2. KICKOFF CALL

The ITS team will set up a KICKOFF call when an institution has expressed interest in implementing ePro and the GeorgiaFIRST Marketplace (GFM) and has identified core team leads mentioned in Step 1. One purpose of this meeting is to introduce the core project team from both the institution and ITS. The project, security/workflow, and training leads from the institution must be on this call. Another purpose is to identify the institution's core users.

Core users should have experience with current PeopleSoft Purchasing and/or ePro modules, as well as a basic understanding of approval requirements and processes. The expectation is that core users, along with the ePro Admin, will be the first level of support for an institution's users after going live with the GFM.

The main purpose of this meeting will be to discuss the items on the task list (page 1 of this document), as well as the expectations associated with each. This meeting will also allow all parties to determine a workable, realistic timeline in which to complete tasks and move the project forward in a timely manner.

3. Identify eProcurement Administrator

The eProcurement administrator has a vital role in the everyday use of ePro and the GFM. The ePro administrator is primarily responsible for monitoring ePro workflow and reassigning requisitions as needed. In addition, this person must occasionally work with his/her local security administrator to perform maintenance for ePro users. Since workflow is such a critical piece of eProcurement, resolving requisition workflow issues is crucial.

This person, typically a user working within the institution's purchasing department, should have a good understanding of ePro, GFM, and the approval workflow options the institution has opted to use.

The ePro Administrator's User Guide can be found on the GeorgiaFIRST Financials website here:

http://www.usg.edu/gafirst-fin/training_docs/Users_Guide_for_ePro_Administrators.pdf

4. Determining implementation and campus rollout approach

Most institutions opt to give permissions to a small group of users at the point of ePro/GFM go-live. This group of users should be willing to learn and understand the new system and be prepared to embrace this change. They should also be familiar with Peoplesoft and have a decent understanding of the application.

While this pilot group is placing orders in the live system, they are also taking notes and asking questions. Lessons learned and tips and tricks while using the system will assist your campus as the broader rollout begins. They will also help your institution's ePro/GFM trainer prepare and conduct training and will help define your institution's business processes.

5. Review workflow approval stages and options

You will undoubtedly have approval questions, such as whether certain purchase amounts should go to a higher approver than normal requisitions or whether IT equipment needs to be signed off on before the purchase is made. Many workflow options are available for your ePro and GFM requisitions.

The answers to these questions are in Chapter 2, eProcurement Approvals (p.8), of the User's Guide for eProcurement Administrators, which can be found here:

http://www.usg.edu/gafirst-fin/training_docs/Users_Guide_for_ePro_Administrators.pdf

This document has all of the information needed to make decisions about options you elect to use for your institution.

6. CHECKPOINT CALL 1

At this point in the process, you should be prepared to give the project team at ITS the following information:

- Who your eProcurement administrator will be;
- What your campus implementation approach will be; and
- Which approval stages and workflow options you wish to implement.

Everyone involved at this point in the implementation should be on this call. We will answer any questions that you have and discuss the next steps of the implementation process, as well as decide on a timeline for those next steps.

7. Identify Shoppers, Requesters, and Accounts Payables contact(s)

Will your institution implement Shoppers and Requesters, or just Requesters? Whether you decide to utilize a pilot group of users or roll out ePro to all departments from the start, the usernames of all Shoppers and Requesters will need to be identified.

- **Shoppers** are users who can shop, create a cart, and assign to a Requester.
- **Requesters** are users who can shop, create a cart, and complete the process of creating a requisition in ePro. Requesters are also able to access a cart that has been assigned to them and return that cart to ePro to complete the process of creating a requisition.

You will also need to provide your Accounts Payable contact to the ITS project team. Although your Accounts Payable department is not greatly affected by this change, they still have a role in the implementation and will need to know about upcoming changes that affect them.

8. Discuss ePro batch processing

With the implementation of the GeorgiaFIRST Marketplace into the eProcurement module, there are two types of requisitions: GeorgiaFIRST Marketplace requisitions and Special Request Requisitions.

- **GeorgiaFIRST Marketplace Requisition (CAT Origin requisition):** Shoppers build a requisition from items in the GeorgiaFIRST marketplace.
- **Special Request Requisition (ONL Origin requisition):** Requesters build this type of requisition by manually entering items directly into the requisition. This type of requisition is not built from the contractually-approved items in the Marketplace.

You also have to decide how you want your Special Request Requisitions to be handled. Please review the document here:

http://www.usg.edu/gafirst-fin/documents/Automated_Processing_of_Special_Request_Requisitions.pdf

9. Determine receiving approach

Your institution already has a business process for receiving items. Once eProcurement is implemented, you have the option to use central receiving (which is probably your current receiving approach) and/or implementing Desktop Receiving in ePro.

Desktop Receiving is a setting through which casual users receive items delivered directly to their desk or area without being routed through the central receiving department. For example, if a Federal Express shipment is delivered directly to you or an assistant, to enter the receipt, you open the original requisition and link to the requisition's PO. You then record the receipt on a simplified form. **Desktop Receiving cannot be used to receive assets.**

Choosing to implement Desktop Receiving does not imply that central receiving is no longer an option for your campus. In fact, if you do choose to implement Desktop Receiving, you must still use the central receiving method, since assets must be received that way.

10. CHECKPOINT CALL 2

This call will be fairly in-depth, so it is critical for the entire project team to attend. For this checkpoint call, we will:

- Review steps 7-9 and discuss the decisions made for each;
- Schedule WebEx to conduct Accounts Payable training for your AP department (*It is imperative that representatives from your AP department are on this call.*);
- Discuss setup in FPLAY; and
- Schedule the ePro and GFM training session in Athens.

11. Setup in test environment (FPLAY)

In FPLAY, the ITS project team will set up the workflow and approval options that you have decided to implement. Your security administrator will set up the pilot user group's roles, user preferences, and permissions in FPLAY so that testing and training may begin.

12. Attend eProcurement & GFM training at ITS in Athens

This session, a train-the-trainer format, will consist of a one-day Shopper/Requester course, followed by a one-day Buyer course. ITS recommends that the Training Lead and key procurement staff attend both sessions.

- **Shopper/Requester:** This course introduces users to the GFM, as well as teaches them how to efficiently use the eProcurement system to create requisitions.
- **Buyer:** This course demonstrates how to work with requisitions after they are created (editing, updating, etc), as well as how to approve requisitions.

It is not necessary for your AP representatives to attend this session, as a separate WebEx will be scheduled to discuss their responsibilities.

13. Accounts Payables WebEx

Your school's AP representatives must be on this conference call. The ITS project team will lead a one-hour training session for your AP employees. Again, the change with implementing ePro/GFM is minimal for this department, so the training will be brief. The ITS project team will stage invoice data and demonstrate the voucher process in FPLAY.

The agenda for this call is as follows:

- High-level explanation of the source-to-settle process;
- Review responsibilities of AP personnel;
- Identify suppliers that send e-invoices through the GFM;
- Review essential AP PeopleSoft queries related to this process;
- Explanation of pay groups;
- Demonstration of the Voucher Build process and explanation of potential build errors.

14. FPLAY testing

It is important to test that all of the approval and workflow options are set up correctly. We want to make sure that your requisitions route to the correct people for approval. Also, when testing in the FPLAY environment, you can ensure your pilot group of users are set up correctly, with the right roles, permissions, and user preferences.

FPLAY testing is also a great time to get into the system and play around in it. This is the time to ask questions since you are using the system exactly as you will in Production.

15. CHECKPOINT CALL 3

On this call, we will make sure everyone is comfortable in the system and answer any questions you may have. At this point, go-live is very close, so now is the time to ask questions and tackle uncertainties. We will review everything that has been completed up to this point and go over the next implementation steps.

16. Review ship-to codes and format to GFM standards

To integrate properly with the technical specifications of the GFM, your ship-to locations must be formatted in a specific style. The ITS project team will send you a list of your current ship-to locations and identify areas that need to be changed. You must make these changes in PeopleSoft prior to go-live.

17. Identify institution-specific content for suppliers

A few decisions need to be made at this step:

- *Does your school participate in E&I cooperative services contracts?*

The Educational & Institutional Cooperative Services organization is a not-for-profit purchasing cooperative serving the needs of education by way of offering goods and services contracts for higher education use. Your purchasing department has probably used these contracts and would know if your institution participates in this consortium.

Only E&I-participating institutions have access to some content within the GFM. In order for your institution to have access, you must let the ITS project team know if you are a member of E&I.

- *Your Dell contract override dollar amount preference*

The GeorgiaFIRST Marketplace is limited in the way in which statewide contracts integrate with PeopleSoft and eProcurement. Specifically, a supplier with more than one statewide contract may encounter problems since only one statewide contract number can be linked to a requisition. To overcome this obstacle, you must place a dollar threshold on your institutional Dell purchases.

Two Dell contracts exist in the GeorgiaFIRST Marketplace. One is the contract for everyday PC equipment, such as desktop computers and laptops. The other is for servers, which are much higher dollar-amount items. When a user places an order to Dell, PeopleSoft has to decide which contract number to place on your purchase order. You can ensure that your purchase order has the correct contract number by setting a dollar amount threshold for your institutional purchases to Dell.

For example, if you set your amount threshold at \$5,000.00 and your purchase to Dell is \$900.00, your PO will have the everyday Dell PC contract number linked to it. If it is over the \$5,000.00 mark, the system will link the Dell server contract to it.

- *Review HP punchout configuration options and identify your preference.*

Please see the following document:

http://www.usg.edu/gafirst-fin/documents/HP_Cart_Config_Options.pdf

18. Provide school logo and front page colors

Each institution may have a custom look and feel on their GeorgiaFIRST Marketplace login page, including institution logo and color scheme. Please follow the parameters below when providing this information to the ITS project team:

- a. Logo must be in .jpg/jpeg, .gif, or .png format;
- b. Logo should be 50 px H x 115 px W, although some variation is acceptable;
- c. School colors should be in hexadecimal format if possible.

19. CHECKPOINT CALL 4

The most important part of this call will be to schedule the go-live date. We will go over lingering questions/concerns you and your team may have and finalize steps or setup not yet complete.

20. GO-LIVE

Begin live orders in Production! The ITS team will review and carefully track the first several requisitions and purchase orders to ensure they are processing correctly. Careful review of the following will also confirm that:

- Batch processes are working as desired;
- PO format and distribution is working correctly; and
- The processing of e-invoices is working properly.

21. Deactivate redundant suppliers where a CAT supplier exists

Once all institution departments are using the GFM, the ITS team recommends turning off ordering for the institution version of the suppliers where a CAT supplier exists. Doing so will reduce duplicate suppliers in the system. Reducing duplicates will help your institution more accurately report spend data.