Module Enhancement Reviews

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Agenda

- Purpose of Module Enhancement Review Sessions
- Change Management process
- Upcoming sessions
- Overview of Session
- Outcome of ePro and Purchasing Session
- Coming Soon: AP & AM Sessions
Purpose of Module Enhancement Reviews

- Oracle images include new features or functionality.
- These sessions allow sharing with institution process experts to obtain customer feedback and priority for implementing.
- Depending on the implementation complexity (High, Medium, Low), USO Leader Team and/or USG Advisory Team approval required.
Change Management Process

1. Customer Submits HD Ticket
2. New Feature Included in Annual Oracle Maintenance Release
   - Analyst evaluates if candidate for MCR or Enhancement
   - ITS Completes Initial Impact Analysis
   - Add to agenda for Module Review Session
   - Module Review Recommendation & Priority Obtained
     - No → Enhancement is Denied
     - Yes → Next Step
Change Management Process
Module Enhancement Review Schedule

– Goal is each module to have annual review.
– ePro and Purchasing module session conducted April, 2016.
– Asset Management November 1, 2016
– Accounts Payable November 11, 2016
– General Ledger/Commitment Control and Expense module reviews planned for February or March, 2017.
Overview of Session
Overview of Session

Agenda

• Purpose of Module Enhancement Review session
• Where we are today
• GeorgiaFIRST Financials Roadmap
• Production Support Update
• Enhancement requests submitted to Oracle
• Review of enhancements delivered as part of the v9.2 upgrade
Overview of Session

Agenda

• Review of enhancements delivered since the v9.2 upgrade
• Demo/Discussion of available Oracle enhancements for ePro & Purchasing modules
• Other enhancements requested?
• Discuss Prioritization of possible Oracle enhancements and other requested enhancements
Outcome of ePro & Purchasing Session
Outcome of ePro & Purchasing Session

• 24 GeorgiaFIRST Institutions attended
  • UGA & Augusta University also in attendance

• 8 enhancements discussed
  • Pre-Check Budget
  • Procurement Contracts
  • Supplier 360
  • Supplier Onboarding
  • FLUID / Mobile Functionality
  • Electronic Signature – PO
  • Training & Documentation
Outcome of ePro & Purchasing Session

• Top 3 enhancements identified:
  • Procurement Contracts / Contract & Sourcing Workbench (High)
  • Supplier 360 (Medium)
  • Electronic Signature on Purchase Order (Medium)
Outcome of ePro and Purchasing Session

Roadmap & Implementation Plan

• Fall 2016 (Rel 5.20): Supplier 360
• Spring/Summer 2017:
  • Procurement Contracts/Sourcing Workbench
  • Electronic Signature on PO

Attend “eProcurement and Purchasing Module Review Update” session Friday @ 10:30 am
Coming Soon!
Asset Management &
Accounts Payable Sessions
Asset Management Module Review

• Tentatively Scheduled for November 1, 2016

• AM Workcenter
  • Currently in Production

• Transaction Reversal
  • New functionality to be discussed
Accounts Payable Module Review

• Tentatively Scheduled for November 11, 2016

• Payment Request Functionality
  – With a simple understanding of PeopleSoft, professionals outside Accounts Payable departments can now initiate and submit their non-purchase order expenses using Payment Request.
    1. Payment Summary Information
    2. Supplier Information
    3. Line Details
    4. Review and Submit
Accounts Payable Module Review

Payment Request

Summary Information

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Notes/Comments: Phone not working.
Accounts Payable Module Review

– Fluid

• Mobile voucher approval
• Can also be used for approving payment requests
• You can use any mobile device (e.g. smartphone, tablet, and so on.) with an OS platform that supports HTML 5.
Accounts Payable Module Review

– Mass Payment Cancellation

• Currently, users have to cancel one payment at a time

• The Mass Payment Cancellation component enables you to search for multiple payments and then cancel, escheat or stale-date, or undo those actions
Accounts Payable Module Review

- Mass Payment Cancellation

![Image of Accounts Payable Module Review with a screenshot of the Mass Payment Cancellation feature.]

- **Action**
  - Reopen Voucher/Reissue
  - 2. Payment Post
  - Run

- **Search Results**
  - Payment Information
  - Payee

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