

ePro & Purchasing Upcoming Enhancements

Teresa Page

11:30 am 9/28/17



Agenda

- Module Enhancement Review Recap
- Where We Are Today
- Upcoming Enhancements
- Known Issues – REL 5.30



Module Enhancement Review

- Last met April 2016
- 24 GeorgiaFIRST Institutions attended
- Prioritization sheet of available enhancement collected from each institution



Module Enhancement Review

- Top 3 enhancements identified:
 - Procurement Contracts / Contract & Sourcing Workbench (High)
 - Supplier 360 (Medium)
 - Electronic Signature on Purchase Order (Medium)



Where we are today

- Supplier 360: Unable to implement, due to Oracle bug which would not allow for configuration.
- Electronic Signature on Purchase Order: Development started



Where we are today

- Procurement Contracts

Analysis In Process:

- New shared SetID to be used for Contract Entry
- Proposed design:
 - All Institutions will add their agency contract information into the new SetID
 - BOR & Statewide contracts would be added/maintained by the system office in the new SetID



Where we are today

- Procurement Contracts
 - Proposed Design, cont:
 - Each Institution will need a Contract Administrator to enter and maintain Agency contract information
 - Contract Inquiry role for those who should have access to view, but not update
 - Institutions will be able to view and edit other Institutions contract information



Where we are today

- Procurement Contracts
 - Workflow design to be determined
 - SOG has ePro workflow level to determine if a contract exists if the requisition is over \$2,000.
 - Notification options
 - Prior to expiration
 - Contract amount
 - Plan to discuss with institutional representatives once the configuration decisions have been finalized.



Upcoming Enhancements



2017 Annual Maintenance Release

- Timing of Annual Release:
 - Tentatively Scheduled for Friday, December 1 to Sunday, December 3.
 - PeopleSoft Financials production database will be back up and available for use at 7:00am Monday, December 4.



2017 Annual Maintenance Release

- URL change:
 - Practitioner: core.fprod.gafirst.usg.edu
 - Self Service: selfservice.fprod.gafirst.usg.edu

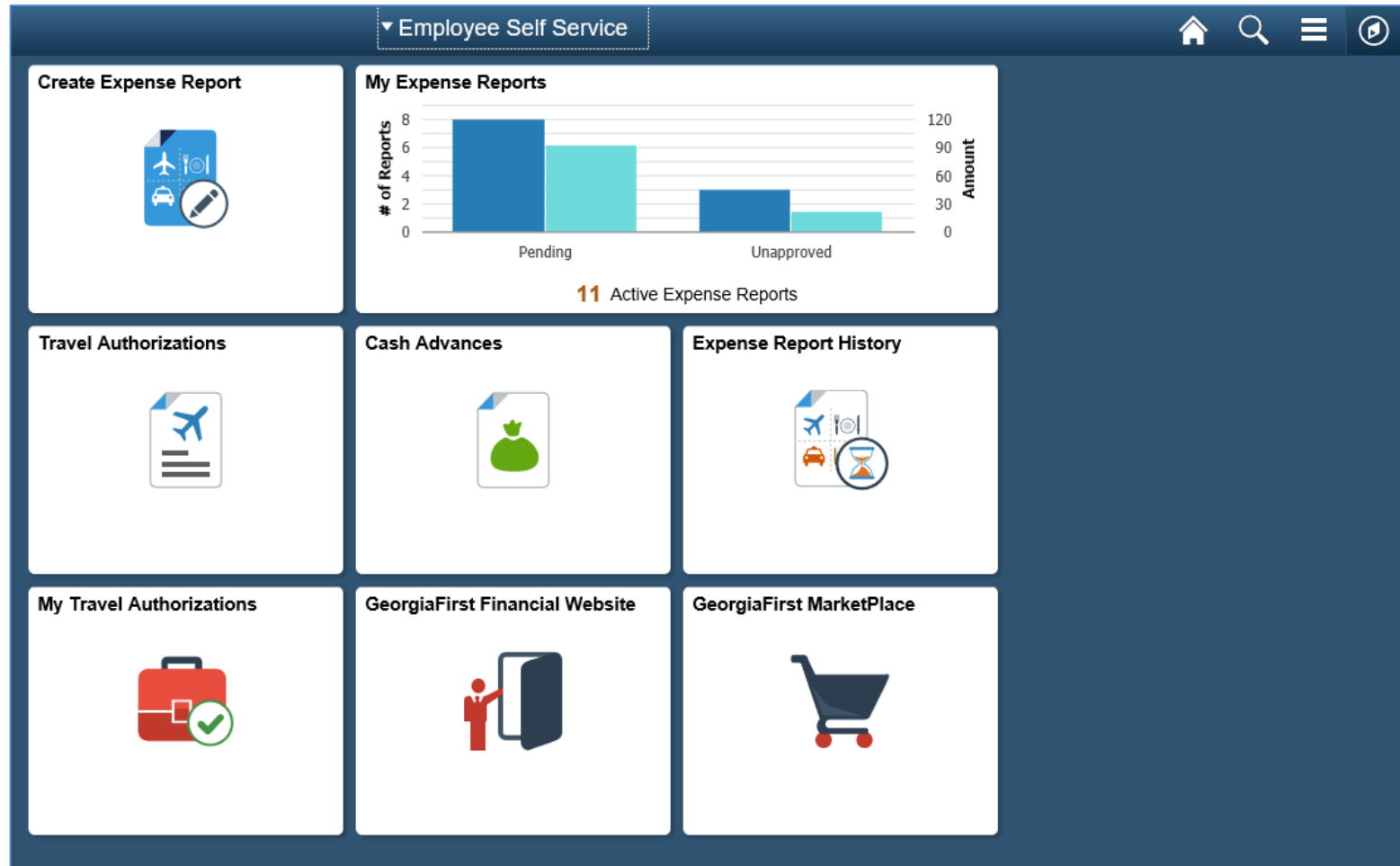


User Interface

- PeopleSoft Fluid User Interface
 - Modern UI for all devices including tablets, smartphones and desktop.
 - Initial scope: Self-Service functionality.
- Fluid Homepage and Header
 - Tiles
 - Search - ElasticSearch
 - Hamburger
 - NavBar



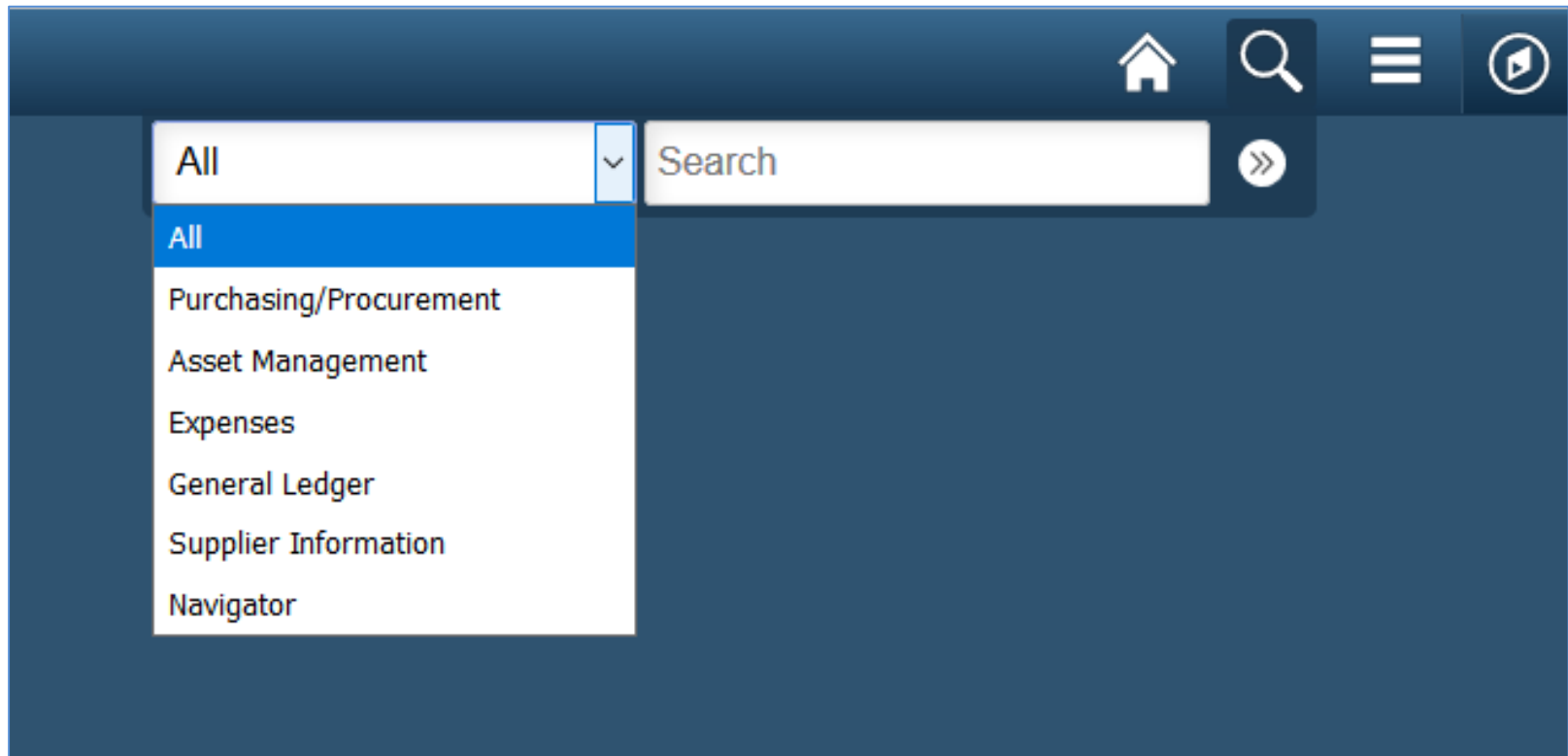
New Fluid Homepage



Tiles



ElasticSearch



New Search

Category

Requisitions (359)

Purchase Orders (322)

Receipts (293)

Document Date

2017 (829)

2016 (91)

2015 (29)

2014 (16)

[More](#)

Supplier Name

Staples (974)

Grainger, Inc. (2)

HP, Inc. (2)

Southern Computer Warehouse (2)


[More](#)

View Search Results


974 results for keyword: "CAT0000010"

50 rows


Receipt - 53000 | 0000522587

Supplier: Staples | Date: 2017-04-05 | Status: Fully Received | Amount: 270.2 USD | Entered By: CMASON | Bill of Lading: 


Receipt - 53000 | 0000470284

Supplier: Staples | Date: 2013-09-17 | Status: Fully Received | Amount: 1022 USD | Entered By: CMASON | Bill of Lading: 


Receipt - 53000 | 0000522683

Supplier: Staples | Date: 2017-04-18 | Status: Fully Received | Amount: 118.8 USD | Entered By: CMASON | Bill of Lading: 


Receipt - 53000 | 0000471422

Supplier: Staples | Date: 2014-10-03 | Status: Fully Received | Amount: 232.5 USD | Entered By: CMASON | Bill of Lading: 


Receipt - 53000 | 0000470078

Supplier: Staples | Date: 2013-07-30 | Status: Fully Received | Amount: 7426.3 USD | Entered By: CMASON | Bill of Lading: 


Receipt - 53000 | 0000470680

Supplier: Staples | Date: 2014-03-14 | Status: Fully Received | Amount: 1181.2 USD | Entered By: CMASON | Bill of Lading: 

Receipt - 53000 | 0000522779

Supplier: Staples | Date: 2017-04-25 | Status: Fully Received | Amount: 270.2 USD | Entered By: CMASON | Bill of Lading: 

Receipt - 53000 | 0000470672

Supplier: Staples | Date: 2014-03-11 | Status: Canceled | Amount: 0 USD | Entered By: CMASON | Bill of Lading: 

Receipt - 53000 | 0000471421

Purchase Orders (32)

▼ Document Date

12: December (3)

11: November (2)

10: October (1)

09: September (5)

[More](#)

▼ Supplier Name

Staples (32)

▼ Business Unit

53000 (32)

▼ Purchase Order Date

2016 (32)

▼ Buyer Name

Alday, Jennifer (15)

Default Buyer (14)

Jones, Bonnie (2)

Webber, Donna L (1)

▼ PO Status

Complete (32)

▼ Budget Checking Header Status

Valid (32)

View Search Results

32 results for keyword: "CAT0000010"

Purchase Orders (x)

2016 (x)

[Clear All](#)

Purchase Order - 53000 | 0000513562

Supplier: Staples | Date: 2016-09-23 | Status: Complete | Amount: 12.05 USD | Buyer: Default Buyer | PO Reference: 99999-001-SPD0000103-0001 | Hold From Processing: N

Purchase Order - 53000 | 0000512214

Supplier: Staples | Date: 2016-03-29 | Status: Complete | Amount: 7.87 USD | Buyer: Default Buyer | PO Reference: 99999-001-SPD0000103-0001 | Hold From Processing: N

Purchase Order - 53000 | 0000512768

Supplier: Staples | Date: 2016-05-24 | Status: Complete | Amount: 285.3 USD | Buyer: Default Buyer | PO Reference: 99999-001-SPD0000103-0001 | Hold From Processing: N

Purchase Order - 53000 | 0000513540

Supplier: Staples | Date: 2016-09-19 | Status: Complete | Amount: 28.53 USD | Buyer: Default Buyer | PO Reference: 99999-001-SPD0000103-0001 | Hold From Processing: N

Purchase Order - 53000 | 0000513592

Supplier: Staples | Date: 2016-09-28 | Status: Complete | Amount: 14.52 USD | Buyer: Alday, Jennifer | PO Reference: 99999-001-SPD0000103-0001 | Hold From Processing: N

Purchase Order - 53000 | 0000513856

Supplier: Staples | Date: 2016-12-12 | Status: Complete | Amount: 56.7 USD | Buyer: Default Buyer | PO Reference: 99999-001-SPD0000103-0001 | Hold From Processing: N

Purchase Order - 53000 | 0000512175

Supplier: Staples | Date: 2016-03-22 | Status: Complete | Amount: 57.06 USD | Buyer: Alday, Jennifer | PO Reference: 99999-001-SPD0000103-0001 | Hold From Processing: N

Purchase Order - 53000 | 0000512982

Supplier: Staples | Date: 2016-06-23 | Status: Complete | Amount: 268.77 USD | Buyer: Default Buyer | PO Reference: 99999-001-SPD0000103-0001 | Hold From Processing: N

Purchase Order - 53000 | 0000512398

Supplier: Staples | Date: 2016-04-29 | Status: Complete | Amount: 29.34 USD | Buyer: Alday, Jennifer | PO Reference: 99999-001-SPD0000103-0001 | Hold From Processing: N

Purchase Order - 53000 | 0000513692

Supplier: Staples | Date: 2016-10-25 | Status: Complete | Amount: 109.8 USD | Buyer: Default Buyer | PO Reference: 99999-001-SPD0000103-0001 | Hold From Processing: N

Purchase Order - 53000 | 0000513738

Supplier: Staples | Date: 2016-11-08 | Status: Complete | Amount: 310.53 USD | Buyer: Alday, Jennifer | PO Reference: 99999-001-SPD0000103-0001 | Hold From Processing: N

Purchase Order - 53000 | 0000512090

Supplier: Staples | Date: 2016-02-29 | Status: Complete | Amount: 35.32 USD | Buyer: Alday, Jennifer | PO Reference: 99999-001-SPD0000103-0001 | Hold From Processing: N

Purchase Order - 53000 | 0000512760

Supplier: Staples | Date: 2016-05-23 | Status: Complete | Amount: 53.13 USD | Buyer: Default Buyer | PO Reference: 99999-001-SPD0000103-0001 | Hold From Processing: N

32 rows



Actions

Review Activity Summary

Approve POs

Buyer's Workbench

Maintain Distributions

Review Document Status

32 rows

< Search Results

Purchase Order Inquiry

Purchase Order

Business Unit 53000
PO ID 0000010500

PO Status Compl
Budget Status Valid

▼ Header

PO Date 09/28/2016
Supplier Name STAPLE-CAT-001
Supplier ID CAT0000010 [Supplier Details](#)
Buyer Alday, Jennifer
PO Reference 99999-001-SPD0000103-0001

Doc Tol Status Valid
Backorder Status Not Backordered
Receipt Status Received
☐ **Hold From Further Processing**

Amount Summary

[Header Details](#)
[All RTV](#)
[Matching](#)

[Activity Summary](#)
[Header Comments](#)
[Document Status](#)
▼ [Actions](#)

Merchandise -
Freight/Tax/Misc. 0.00
Total 41.51 USD
Encumbrance Balance 0.00 USD

Lines

[Personalize](#) | [Find](#) | [View All](#) | | | [First](#) 1 of 1 [Last](#)

Line	Item ID	Item Description	Category	PO Qty	UOM	Merchandise Amount	Status		
1		STAPLE-CAT-001 SPD0000103-0001	20435	3.0000	EA	41.51 USD	Closed		

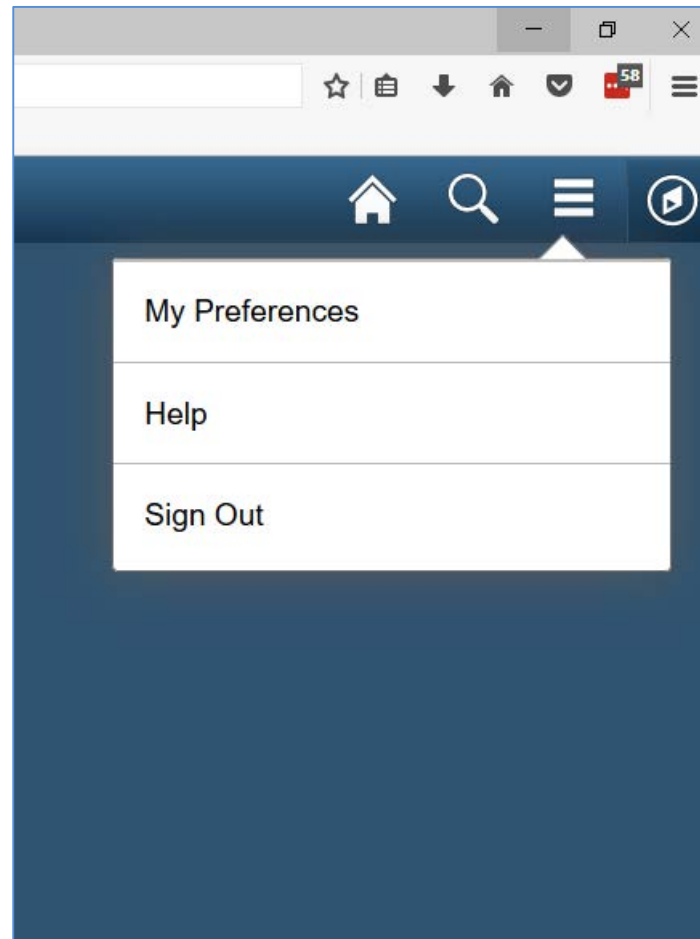
[Return to Search](#)

[Notify](#)

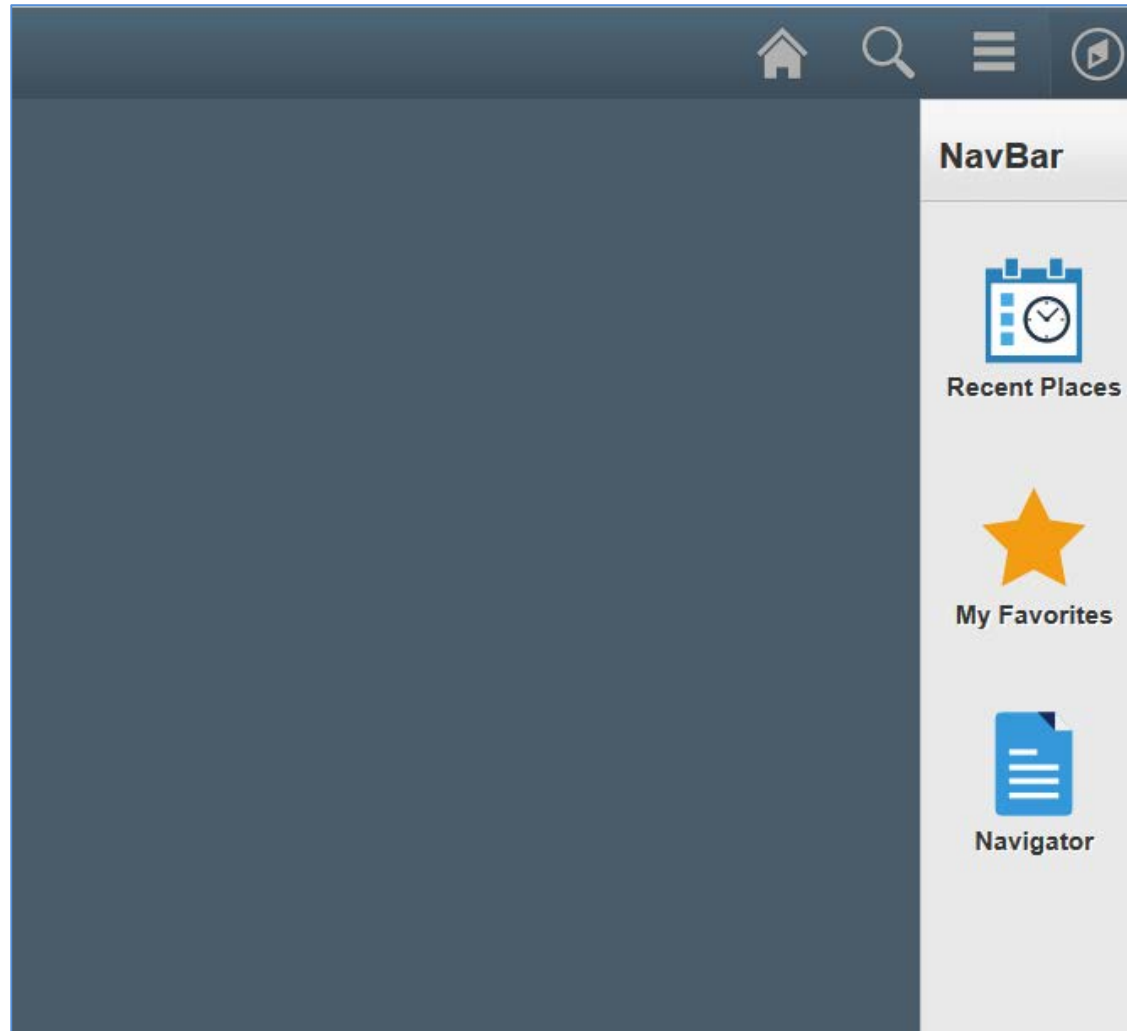
[Related Links](#)



Hamburger



NavBar



GeorgiaFirst Financial Website



GeorgiaFirst MarketPlace



NavBar: Navigator



Recent Places



My Favorites



Navigator

Employee Self-Service >

Manager Self-Service >

Order Management >

Suppliers >

Procurement Contracts >

Purchasing >

eProcurement >

Lease Administration >

Travel and Expenses >

Billing >

Accounts Receivable >

Accounts Payable >

BOR Menus >

eSettlements >

Cash Management >



Supplier Workflow

- Supplier Workflow will be implemented with Rel 5.30
- Supplier Entry will remain the same as it is today
 - Users having the BOR_PO_VENDORS_MAINT role will enter new Suppliers and when saved the status will be Unapproved



Supplier Workflow

- Users with the BOR_PO_VENDORS_APPROVE role will receive an e-mail notification when a supplier is added as Unapproved
 - E-mail address and Workflow options must be specified on User ID profile
 - This is a ‘pooled’ approval, meaning all users with the role will receive notification, but only one approver will need to take action



Supplier Workflow



Tue 9/26/2017 6:44 PM

teresa.page@usg.edu

Approval is requested for Supplier ID "0000418019" Setid "39000"

To  Teresa Page

A supplier has been entered that requires your attention.

Setid: 39000

Supplier ID: 0000418019

Short Name: TERESATEST-001

Supplier Name: Teresa Tester

Entered By: Edwards,Addie Callaway

Updated By: Edwards,Addie Callaway

You can navigate directly to the Supplier Approval page by clicking the link below.

https://core.ftest2.gafirst.usg.edu/psp/ftest2/EMPLOYEE/ERP/c/MAINTAIN_VENDOR.APPROVE_VENDOR.GBL?Page=VNDR_ID1&Action=U&SETID=39000&VENDOR_ID=0000418019

Supplier Workflow

- Approval action can be taken in the following ways:
 - Accessing the Worklist page, via the NavBar
 - Clicking the link in the notification e-mail to access the Approve Supplier page
 - Navigating to the Approve Supplier page



< Identifying Information

Worklist

Worklist

Worklist for TBickerton59: Theresa A Mason

[Detail View](#)

Worklist Filters

 [Feed](#) ▼

Worklist Items

Person

From	Date From	Work Item	Worked By Activity	Priority	Link
Edwards, Addie Callaway	09/26/2017	Approval Routing	Approval Workflow	3-Low ▼	VendorApproval_126_39000_1901-01-01_N_0_SETID:39000_VENDOR_ID:0000418019_RDC:RA.0.A.

< Worklist

Worklist

Identifying Information

[Address](#)

[Contacts](#)

[Location](#)

[Custom](#)

SetID 39000

Supplier ID 0000418019

Supplier Short Name TERESATEST

Classification Federal

HCM Class

Persistence Regular

Supplier Status Unapproved

Supplier Name Teresa Tester

Additional Name

TERESATEST-001

☐ Withholding

☒ Open For Ordering

Supplier Audit Default

☐ Supplier Audit

[Check for Duplicate](#)

[Expand All](#)

[Collapse All](#)

[Approval History](#)

[Attachments \(0\)](#)

Approval

Comments

254 characters remaining

[Approve](#)

[Deny](#)

Supplier Relationships

☐ Corporate Supplier

☐ InterUnit Supplier

Supplier Approval

Supplier Approval

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

▼ Search Criteria

SetID =  

Supplier ID

Short Supplier Name

Our Customer Number

Supplier Name

☐ Include History ☐ Correct History ☐ Case Sensitive

Search

Clear

Basic Search



Save Search Criteria



Supplier Approval

Identifying Information

[Address](#)[Contacts](#)[Location](#)[Custom](#)**SetID** 39000**Supplier ID** 0000418019**Supplier Short Name** TERESATEST**Classification** Federal**HCM Class****Persistence** Regular**Supplier Status** Unapproved**Supplier Name** Teresa Tester**Additional Name**

TERESATEST-001

[Check for Duplicate](#)☐ **Withholding**☒ **Open For Ordering****Supplier Audit** Default☐ **Supplier Audit**[Expand All](#)[Collapse All](#)[Approval History](#)[Attachments \(0\)](#)

Approval

Comments

254 characters remaining

[Approve](#)[Deny](#)

Supplier Relationships

☐ **Corporate Supplier****Corporate SetID** 39000**Corporate Supplier ID** 0000418019

Teresa Tester

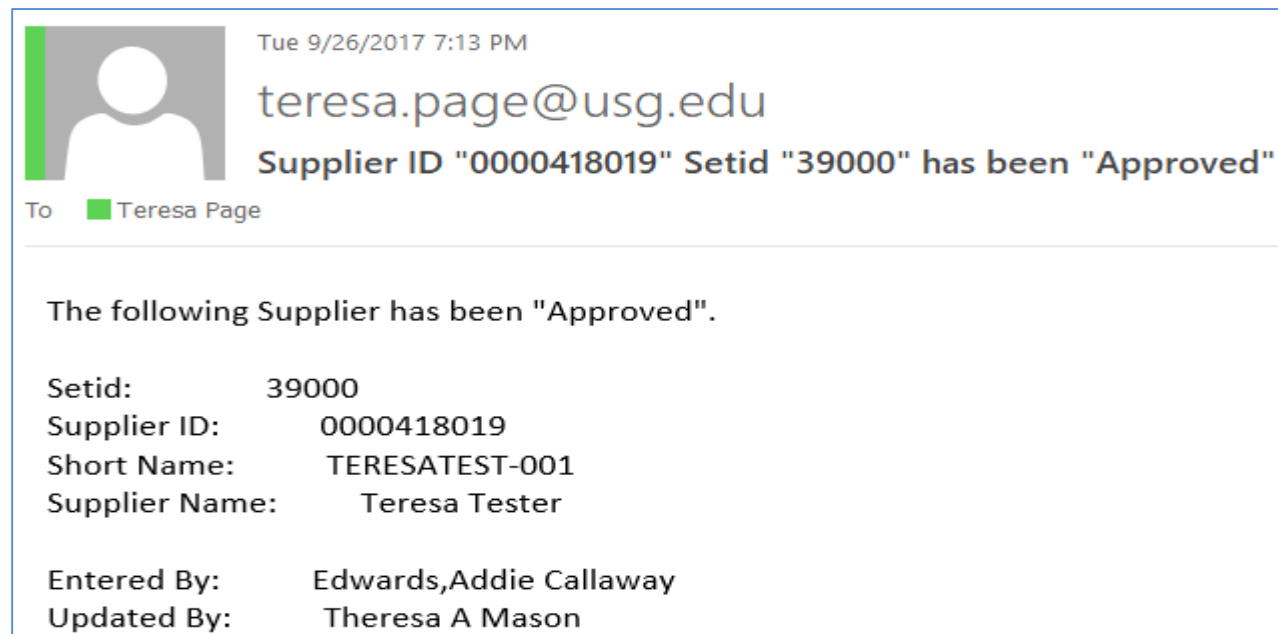
☐ **InterUnit Supplier****InterUnit Supplier ID****Supplier Hierarchy**

Supplier 360



Supplier Workflow

- Once the Supplier is Approved or Denied, the user who entered the supplier will receive an e-mail notification



Supplier Workflow

- Denied Suppliers:
 - If Denied, the notification e-mail will contain a link to the Add/Update Supplier page

Once a Denied Supplier has been corrected and saved, the status does NOT update to Unapproved and workflow is NOT restarted, as one would expect. The status is updated to Approved.

ITS is researching this to determine if this is an Oracle bug or 'working as designed'



Supplier Workflow

- Prior to Rel 5.30 being applied, ITS recommends that all Unapproved suppliers be updated to Approved or Inactive
- If a supplier is not updated prior to the release, users *should* be able to Approve the supplier from the Approve Supplier page, using the drop down option. The Approve/Deny buttons will not be available.



Supplier Workflow

[Employee Self Service](#)

Supplier Approval

[New Window](#) | [Help](#) | [Personalize Page](#)

Identifying Information | Address | Contacts | Location | Custom

SetID 36000

Supplier ID 0000006444

Supplier Short Name NEFFRENT

Classification Federal

HCM Class

Persistence Regular

*Supplier Status

Supplier Name Neff Rental Inc.

Additional Name

NEFFRENT-001

☐ Withholding

☒ Open For Ordering

Supplier Audit Default

☐ Supplier Audit

Template ID

Check for Duplicate

Expand All

Collapse All

Attachments (0)

Supplier Relationships

☐ Corporate Supplier

Corporate SetID 36000

Corporate Supplier ID 0000006444

Neff Rental Inc.

☐ InterUnit Supplier

InterUnit Supplier ID

Supplier Hierarchy

Supplier 360

Unapproved

Approved

Denied



Supplier Workflow

- Updates made to suppliers that were entered prior to REL 5.30
 - Supplier status will be changed to Unapproved
 - Supplier workflow will be started and the supplier will be routed to an Approver
- Supplier Approval escalation will not be implemented with REL 5.30 – this will be evaluated for a future release



Amazon Punchout - GFM

- Amazon Punchout testing has been completed
- Waiting on e-Invoicing Terms and Conditions to be finalized
- Available in FPLAY for institutions to use
 - E-mail address must be set up on User Profile in PeopleSoft
 - Amazon business account must exist in order to test (not recommended to use personal account)
 - User Guide available



Known Issues Resolved by REL 5.30

- KI9.2-46_PO: Supplier Status Menu Not Available on Approve Supplier page
- KI9.2-59_PO: Purchase Orders Closed with a Budget Error or Not Chk'd Status
- KI9.2-61_PO: Pre-encumbrances Not Liquidated for Requisitions Closed in Requester's Workbench

New Known Issues after REL 5.30

- So far, only 1!
 - Unable to add an 'Amount Only' PO via the Express PO's page. Oracle Bug exists

Questions

