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

- Create Expense Report
- My Expense Reports
  - # of Reports
  - Pending: 8
  - Unapproved: 2
- Travel Authorizations
- Cash Advances
- Expense Report History
- My Travel Authorizations
- GeorgiaFirst Financial Website
- GeorgiaFirst MarketPlace
Tiles

GeorgiaFirst Financial Website

GeorgiaFirst MarketPlace
ElasticSearch
View Search Results

974 results for keyword: "CAT0000010"

<table>
<thead>
<tr>
<th>Receipt</th>
<th>Amount</th>
<th>Date</th>
<th>Status</th>
<th>Supplier</th>
<th>Bill of Lading</th>
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<td></td>
<td></td>
<td>Staples</td>
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<td>Purchase Order</td>
<td>Supplier</td>
<td>Date</td>
<td>Status</td>
<td>Amount (USD)</td>
<td>Buyer</td>
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<table>
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<tr>
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<th>Staples</th>
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</thead>
<tbody>
<tr>
<td>Document Date</td>
<td>12: December (5) 11: November (2) 10: October (1) 09: September (5)</td>
</tr>
<tr>
<td>Business Unit</td>
<td>53000 (32)</td>
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<tr>
<td>Purchase Order Date</td>
<td>2016 (32)</td>
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<tr>
<td>Buyer Name</td>
<td>Alday, Jennifer (15) Default Buyer (14) Jonas, Bonnie (2) Webber, Donna L (1)</td>
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<tr>
<td>Status</td>
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</tr>
</tbody>
</table>
Actions

- Review Activity Summary
- Approve POs
- Buyer's Workbench
- Maintain Distributions
- Review Document Status
# Purchase Order Inquiry

## Purchase Order

- **Business Unit**: 53000
- **PO ID**: 0000512320
- **PO Status**: Compl
- **Budget Status**: Valid

### Header

- **PO Date**: 09/28/2016
- **Supplier Name**: STAPLE-CAT-001
- **Supplier ID**: CAT0000010
- **Buyer**: Alday, Jennifer
- **PO Reference**: 99999-001-SPD0000010-0001

### Supplier Details

- **PO Date**: 09/28/2016
- **Supplier Name**: STAPLE-CAT-001
- **Supplier ID**: CAT0000010
- **Buyer**: Alday, Jennifer
- **PO Reference**: 99999-001-SPD0000010-0001

### Amount Summary

- **Merchandise**: $0.00 USD
- **Freight/Tax/Misc.**: $0.00 USD
- **Total**: $0.00 USD
- **Encumbrance Balance**: $0.00 USD

## Lines

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<th>Line</th>
<th>Item ID</th>
<th>Item Description</th>
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<th>PO Qty</th>
<th>UOM</th>
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### Actions

- **Return to Search**
- **Notify**

## Related Links

[Georgia Summit](georgiasummit.com)
Hamburger
NavBar

- Recent Places
- My Favorites
- Navigator
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.

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
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 = 39000
Supplier ID begins with
Short Supplier Name begins with
Our Customer Number begins with
Supplier Name begins with

Include History, Correct History, Case Sensitive

Search, Clear, Basic Search, Save Search Criteria
**Identifying Information**

- **SetID**: 39000
- **Supplier ID**: 0000418019
- **Supplier Short Name**: TERESATEST
- **Classification**: Federal
- **HCM Class**: 
- **Persistence**: Regular
- **Supplier Status**: Unapproved

**Supplier Approval**

- **Supplier Name**: Teresa Tester
- **Additional Name**: TERESATEST-001
- **Withholding**: 
- **Open For Ordering**: 
- **Supplier Audit**: Default

**Approval**

- **Comments**: 254 characters remaining
- **Approve**
- **Deny**

**Supplier Relationships**

- **Corporate Supplier**: 
- **InterUnit Supplier**: 
- **Corporate SetID**: 39000
- **InterUnit Supplier ID**: 
- **Supplier Hierarchy**: 
- **Supplier 360**: 

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**Georgia Summit**

[Logo]
Supplier Workflow

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

The following Supplier has been "Approved":

Setid: 39000
Supplier ID: 0000418019
Short Name: TERESATEST-001
Supplier Name: Teresa Tester

Entered By: Edwards, Addie Callaway
Updated By: Theresa A Mason
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

• 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