eProcurement and Purchasing Module Review Update

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Agenda

• What is a Module Enhancement Review?
• Change Management Process
• Agenda Items for MER session
• Enhancements delivered at v9.2 Upgrade
• Enhancements delivered since v9.2 Upgrade
• Enhancements available for implementation
• Results of ePro & Purchasing Module Enhancement Review Session
• What’s Next?
What is a Module Enhancement Review?

• An opportunity to meet with Institution process experts to introduce and discuss area of/for enhancements within each module of the application.
  • Oracle delivered functionality
  • Desired enhancements (ways to make the system work better for all)

• These sessions focus on three main areas:
  • Introduce new functionality that is currently available for use
  • Introduce unimplemented functionality that may be of interest to our customers
  • Configuration options
What is a Module Enhancement Review?

• An opportunity for Institutional process experts to:
  • Discuss and provide feedback
  • Assist in prioritization for implementation of enhancements

• Resulting end deliverables consist of:
  • Implementation complexity score of each enhancement
  • Priority for Implementation
  • Roadmap and implementation plan
Change Management Process

• Depending on the implementation complexity (High, Medium, Low), USO Leader Team and/or USG Advisory Team approval required.
9.2 PeopleSoft Financials Model Change/Enhancement Request Process

Enhancement Intake

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: Evaluate Implementation Complexity
    - Low: Add to Module Enhancement Roadmap
    - Medium: USG Advisory Council Approval
    - High: USG Leader Team Approval
      - Denied
      - Approved

Advisory Council Approval

- Bug Fix, State or Regulatory Requirement
- Analyst evaluates request and completes impact analysis
- ITS/QFA Review and Prioritization
- Move into Release Process

Mandatory/Bug
Change Management Process

9.2 PeopleSoft Financials Model Change/Enhancement Request Process

Enhancement Intake

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- Add to agenda for Module Review Session
- Module Review Recommendation & Priority Obtained

No → Enhancement is Denied
Yes → Next Step
Change Management Process

1. USO Leader Team Approval
2. Evaluate Implementation Complexity
   - High: Approved
   - Low: Add to Module Enhancement Roadmap
3. USG Advisory Council Approval
   - Yes: Proceed
   - No: Reject

Advisory Council Approval
Change Management Process

1. Bug Fix, State or Regulatory Requirement
2. Analyst evaluates request and completes Impact Analysis
3. ITS/OFA Review and Prioritization
4. Move into Release Process
Module Enhancement Review Agenda Items
Module Enhancement Review
Agenda Items

• What’s going right? What’s going wrong?
• Production Support Update
• Enhancements:
  • Delivered at v9.2 Upgrade
  • Delivered since v 9.2 Upgrade
  • Available for implementation now
• Demo/Discussion of enhancements
• Prioritization of available enhancements
Enhancements
Enhancements Delivered at Upgrade

eProcurement

• New Requisition entry layout
• Amount Only option added to requisition line
• Speedchart now delivered on Mass Change page
• Pre-Encumbrance balance can be viewed on Requisition
• Copy Requisition functionality now available
• Reopen Requisition functionality enhanced
Enhancements Delivered at Upgrade

Purchase Orders

• PO Approval Workflow
  ▪ Asset Approval workflow
  ▪ Budget Reference Approval workflow
  ▪ Buyer Approval workflow

• Search Lines functionality enhanced

• View Encumbrance Balance from maintain POs page

• View Printable Version of PO – option to view ChartField information

• Reopen PO functionality enhanced

• Buyer Mass Change
Enhancements Delivered Since Upgrade

• eProcurement
  ▪ Floating Cart
  ▪ Ship Via & Freight Terms now editable fields

• Purchasing
  ▪ Approval tab – Buyer’s and Requester’s Workbench
  ▪ Document Status layout change (similar to Manage Requisitions Lifecycle)
  ▪ Buyer WorkCenter
## Enhancements Available for Implementation

<table>
<thead>
<tr>
<th>Topic</th>
<th>Implementation Complexity Score</th>
<th>Prioritization Score</th>
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</thead>
<tbody>
<tr>
<td>Pre-Check Budget</td>
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<tr>
<td>Procurement Contracts</td>
<td>High</td>
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<tr>
<td>Contract / Sourcing WorkCenter</td>
<td>Med</td>
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<tr>
<td>Procurement Cards</td>
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<tr>
<td>Supplier 360</td>
<td>Med</td>
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<tr>
<td>Supplier Onboarding</td>
<td>High</td>
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<td>Supplier Administration Center (WorkCenter)</td>
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<tr>
<td>FLUID / Mobile functionality</td>
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<tr>
<td>Electronic Signature - PO</td>
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<tr>
<td>Training &amp; Documentation</td>
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Results from ePro & Purchasing Module Enhancement Review session
Where we are today

• ePro and Purchasing module session conducted April, 2016.

• 24 GeorgiaFIRST Institutions attended
  • UGA & Augusta University also in attendance (non-voting)
Results of ePro & Purchasing Session

• Prioritization sheet of available enhancements collected from each Institution

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

• Remaining enhancements will remain on Prioritization sheet, for future review
Results of ePro & Purchasing Session

• Follow up communication to all attendees
  • Roadmap & Implementation Plan
  • Request for additional information/feedback

• Development & System Testing of selected enhancements begin
Results of ePro & Purchasing Session

- Fall 2016 (Annual Release): Supplier 360

- Spring/Summer 2017:
  - Procurement Contracts/Sourcing Workbench
  - Electronic Signature on PO
What’s Next?

• Procurement Contract team
  • Volunteers to help guide the implementation of Procurement Contract functionality

• Module Enhancement Review Sessions annually

• ITS review of Oracle Images as they are available
What’s Next?

• Rel 5.20 – November 2016
  • Images 14 – 19: Bug Fixes and New Features

• Resolved Known Issues:
  • KI9.2-39_PO – Cancelling PO with Budget Error Does Not Change Budget Status to Valid
  • KI9.2-38_PO – Approved POs Reverting to Pending Approval after Adding Comments
  • KI9.2-23_PO&ePro – Closed PO and Requisition Lines Remain on Buyer’s or Requester’s Workbench
What’s Next?

• New Features
  • Fluid
  • Procurement Contracts – Contract Process Options
  • PO Distribution Worksheet