

# 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](http://core.fprod.gafirst.usg.edu)
  - Self Service: [selfservice.fprod.gafirst.usg.edu](http://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

Employee Self Service

Home Search Menu

### Create Expense Report



### My Expense Reports



Category	# of Reports	Amount
Pending	8	120
Unapproved	2	30

11 Active Expense Reports

### Travel Authorizations



### Cash Advances



### Expense Report History



### My Travel Authorizations



### GeorgiaFirst Financial Website

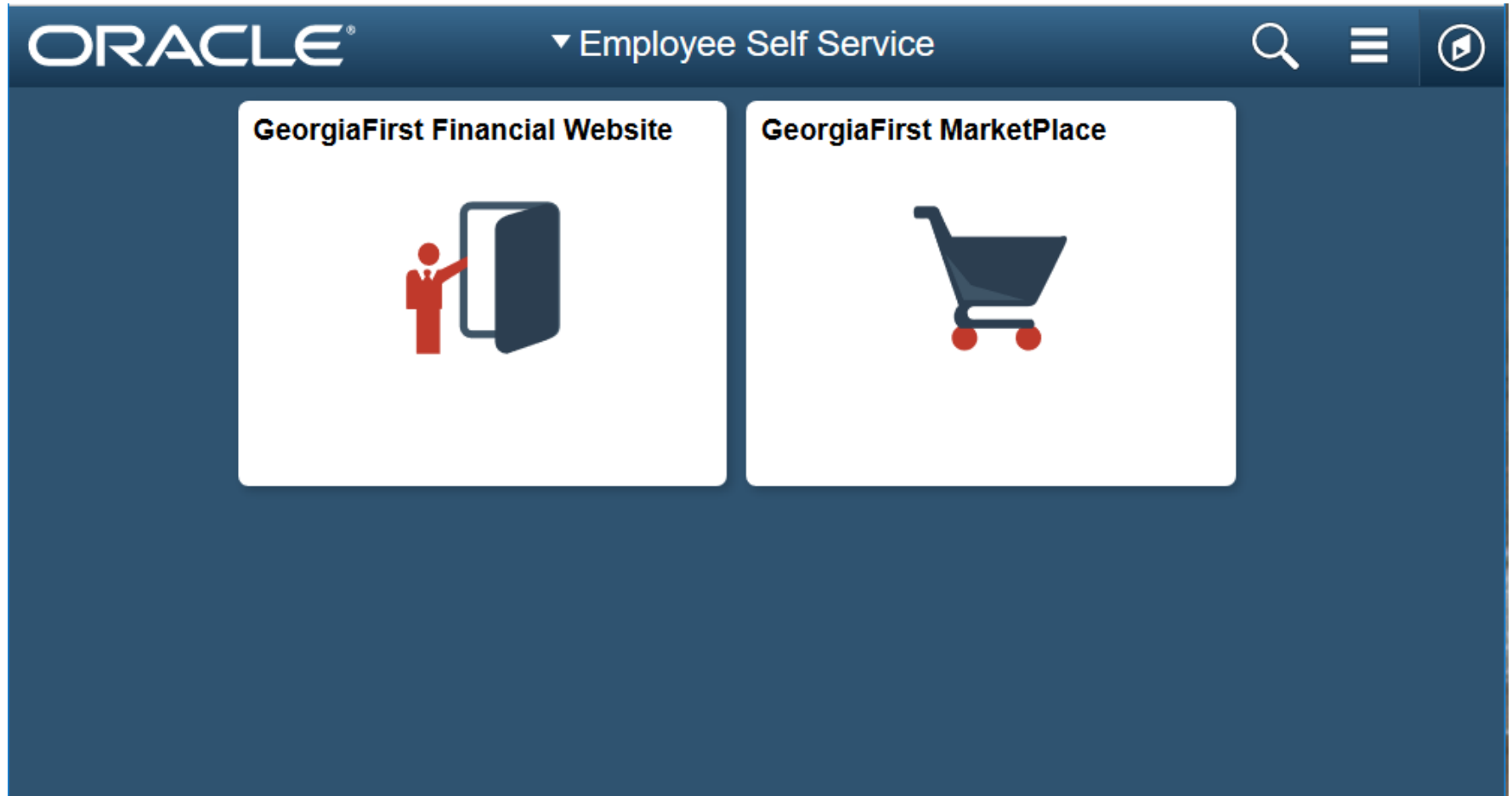


### GeorgiaFirst MarketPlace

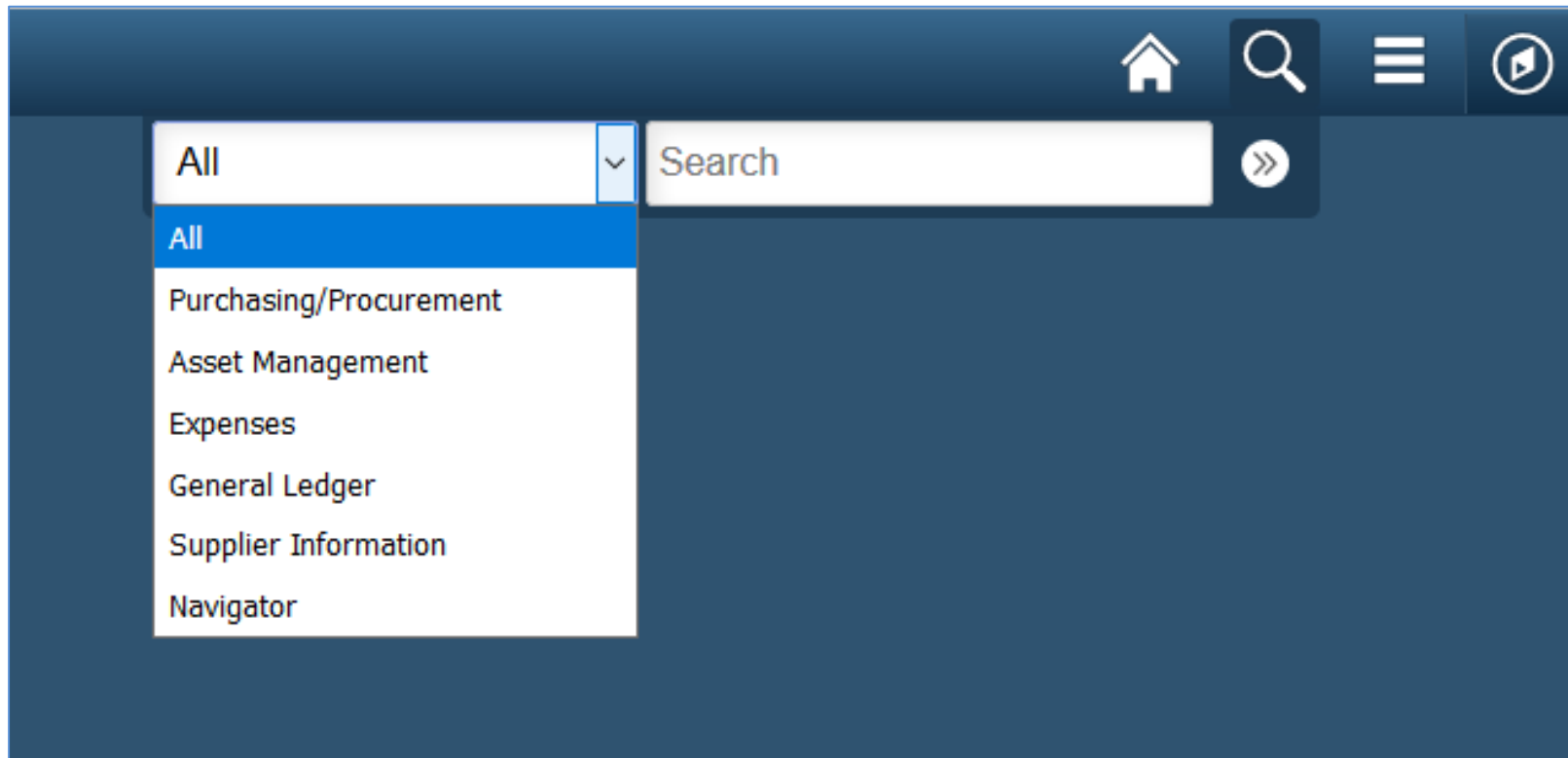




# Tiles



# 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: "CAT000010"

Purchase Orders 2016 Clear All

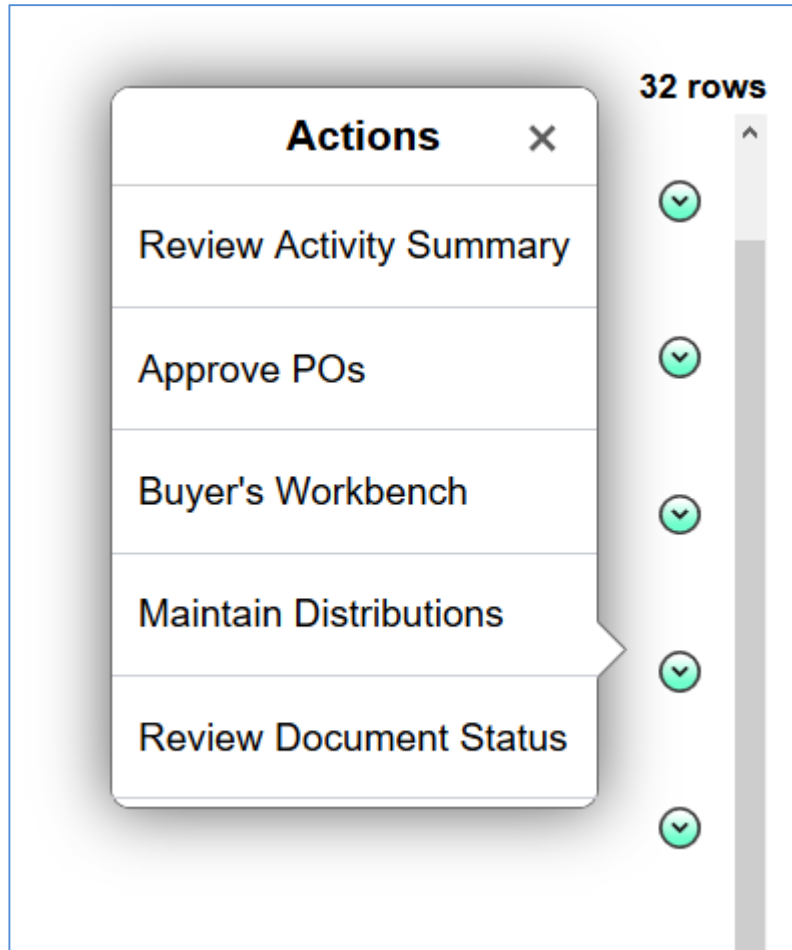
Purchase Order - 53000   0000513562 Supplier: Staples   Date: 2016-09-23   Status: Complete   Amount: 12.05 USD   Buyer: Default Buyer   PO Reference: 99999-001-SPD0000103-0001   Hold From Processing: N	✓
Purchase Order - 53000   0000512214 Supplier: Staples   Date: 2016-03-29   Status: Complete   Amount: 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

32 rows

### Actions

- Review Activity Summary
- Approve POs
- Buyer's Workbench
- Maintain Distributions
- Review Document Status

A screenshot of a software interface. At the top right, it says "32 rows". Below this is a scrollable list of actions. The list is titled "Actions" with a close button (X) in the top right corner. The list contains five items: "Review Activity Summary", "Approve POs", "Buyer's Workbench", "Maintain Distributions", and "Review Document Status". To the right of each item is a green circular icon with a white downward-pointing arrow. A vertical scrollbar is visible on the right side of the list, with an upward-pointing arrow at the top.

[← Search Results](#)

Purchase Order Inquiry

Purchase Order

**Business Unit** 53000  
**PO ID** 0000510500

**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**

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

[Header Details](#)  
[All RTV](#)  
[Matching](#)  
[Activity Summary](#)  
[Header Comments](#)  
[Document Status](#)  
 ▼ [Actions](#)

**Lines**

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

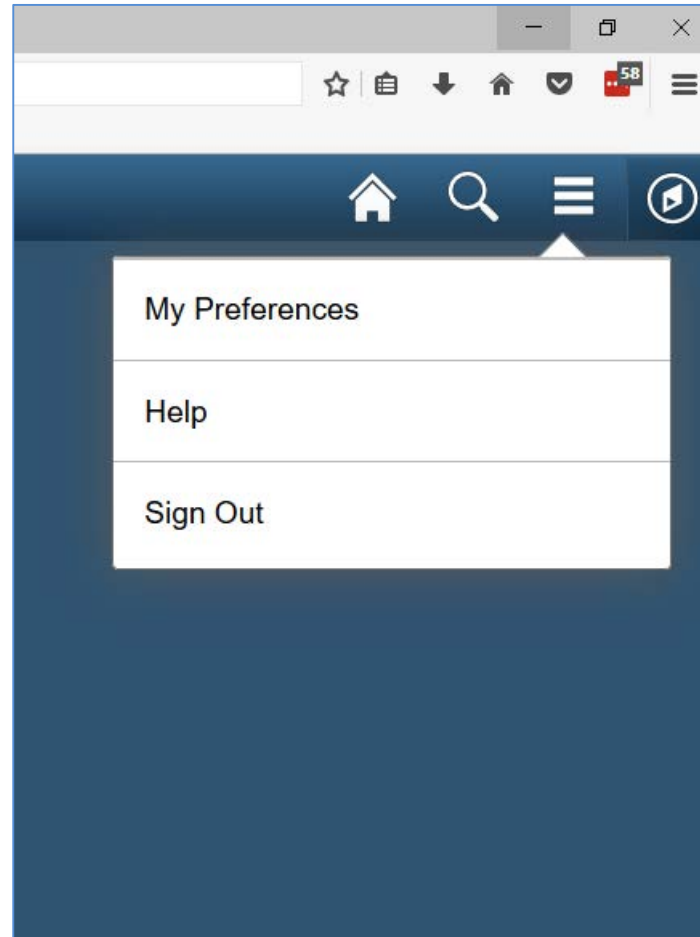
Line	Item ID	Item Description	Category	PO Qty	UOM	Merchandise Amount	Status
1		STAPLE-CAT-001 SPD0000103-0001	20435	3.0000	EA	11.51 USD	Closed

[Return to Search](#) [Notify](#)

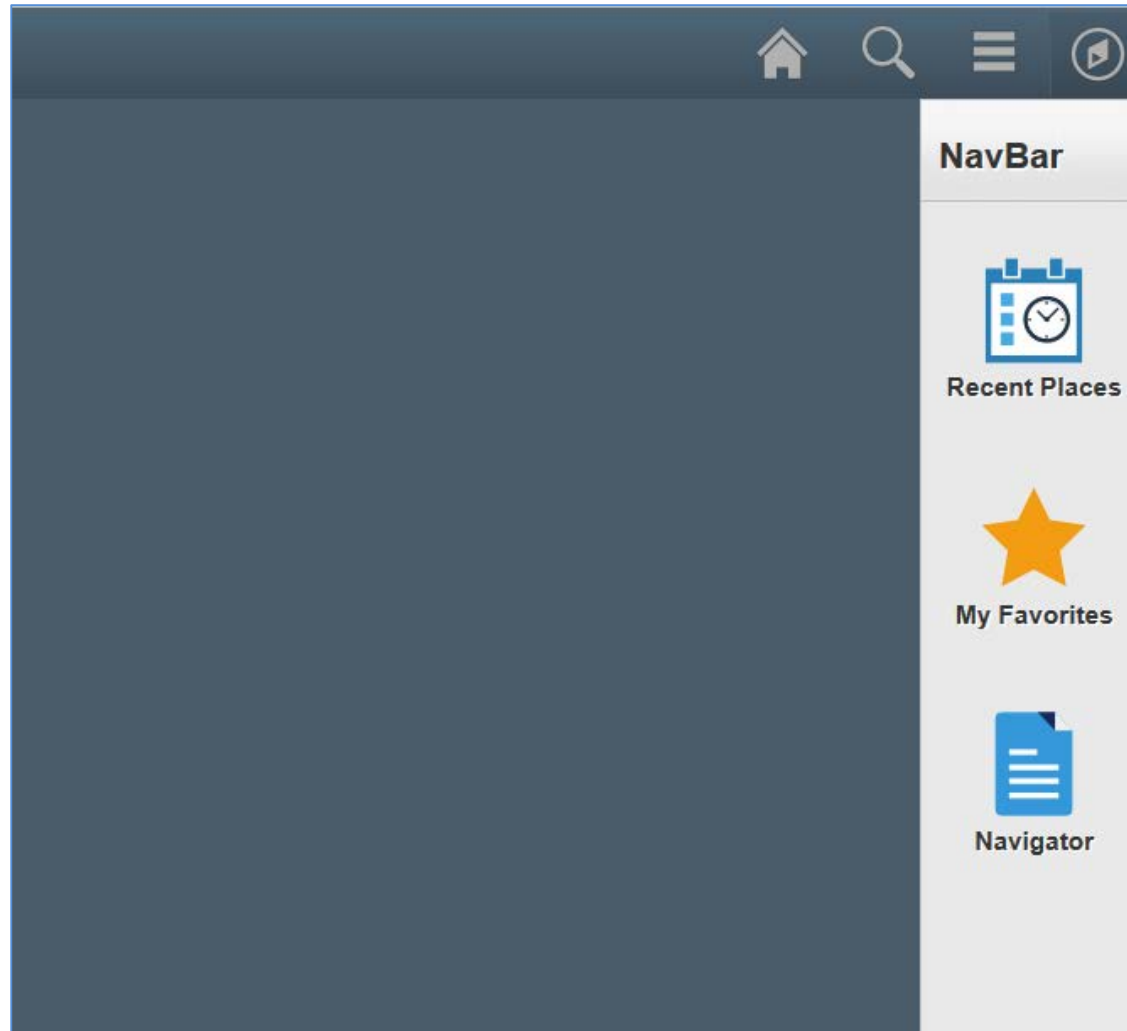
[Related Links](#)



# Hamburger



# NavBar



GeorgiaFirst Financial Website



GeorgiaFirst MarketPlace



NavBar: Navigator



Recent Places

Employee Self-Service >

Manager Self-Service >



My Favorites

Order Management >

Suppliers >



Navigator

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\\_VENDORS.APPROVE\\_VENDOR.GBL?Page=VNDR\\_ID1&Action=U&SETID=39000&VENDOR\\_ID=0000418019](https://core.ftest2.gafirst.usg.edu/psp/ftest2/EMPLOYEE/ERP/c/MAINTAIN_VENDORS.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



### Worklist

Worklist for TBickerton59: Theresa A Mason

Detail View

Worklist Filters

Feed ▼

#### Worklist Items

From	Date From	Work Item	Worked By Activity	Priority	Link
Edwards, Addie Callaway	09/26/2017	Approval Routing	Approval Workflow	3-Low <span>▼</span>	<a href="#">VendorApproval. 126. 39000. 1901-01-01. N. 0. SETID:39000 VENDOR_ID:0000418019 RDC:RA.0.A.</a>

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**

[Approval History](#)

[Attachments \(0\)](#)

#### Approval

Comments

254 characters remaining

#### 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 = 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



# 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

TERESATEST-001

**Supplier Name** Teresa Tester  
**Additional Name**

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

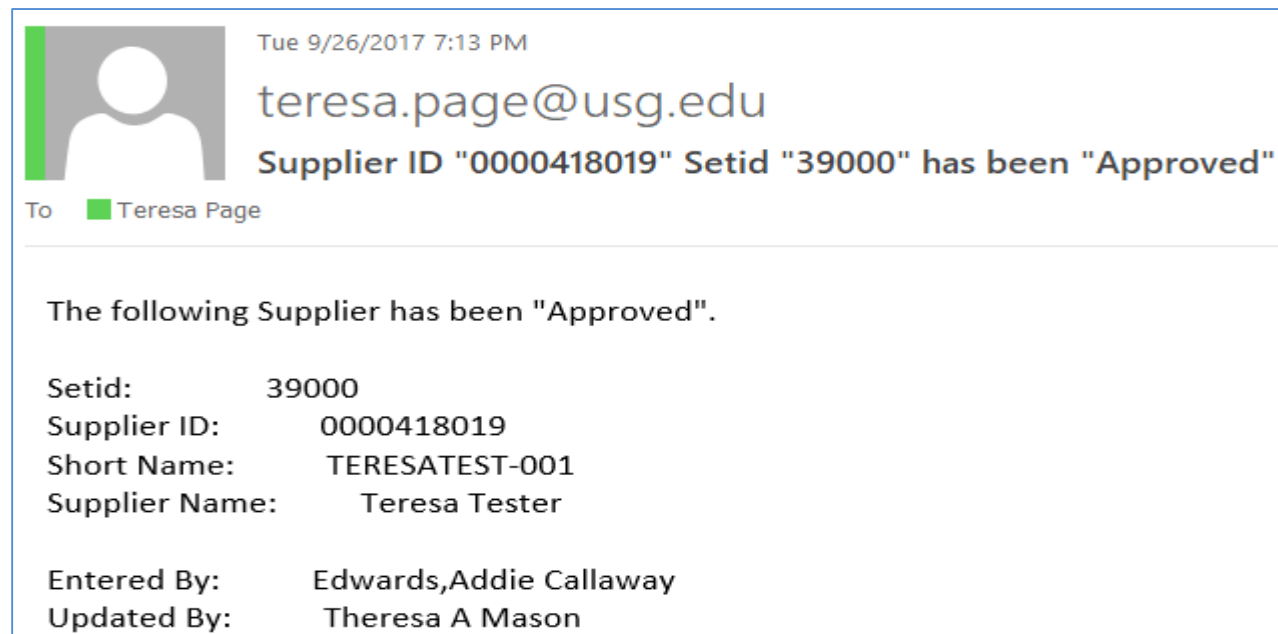
Corporate Supplier  
**Corporate SetID** 39000  
**Corporate Supplier ID** 0000418019  
Teresa Tester

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

- Identifying Information
- Address
- Contacts
- Location
- Custom

**SetID** 36000  
**Supplier ID** 0000006444  
**Supplier Short Name** NEFFRENT NEFFRENT-001  
**Classification** Federal  
**HCM Class**  
**Persistence** Regular

**Supplier Name** Neff Rental Inc.  
**Additional Name**  
 **Withholding**  
 **Open For Ordering**

**\*Supplier Status** Unapproved

- Unapproved
- Approved
- Denied
- Unapproved

[Check for Duplicate](#)  
[Expand All](#) [Collapse All](#)

**Supplier Audit** Default  
 **Supplier Audit** Template ID

[Attachments \(0\)](#)

**Supplier Relationships**

**Corporate Supplier**  **InterUnit Supplier**

**Corporate SetID** 36000 **InterUnit Supplier ID**

**Corporate Supplier ID** 0000006444 **Supplier Hierarchy** Supplier 360

Neff Rental Inc.



# 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

