



PeopleSoft Financials 9.2

PUM 38 Upgrade

Delta Guide

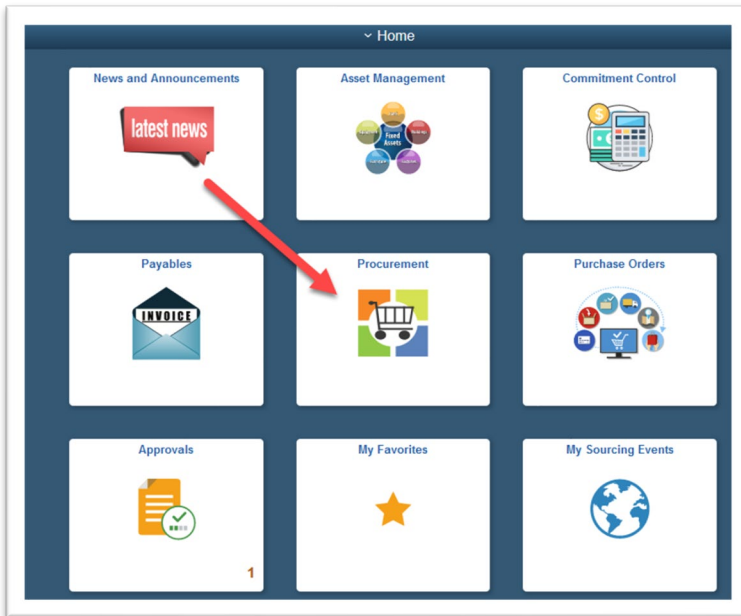
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1. eProcurement Changes

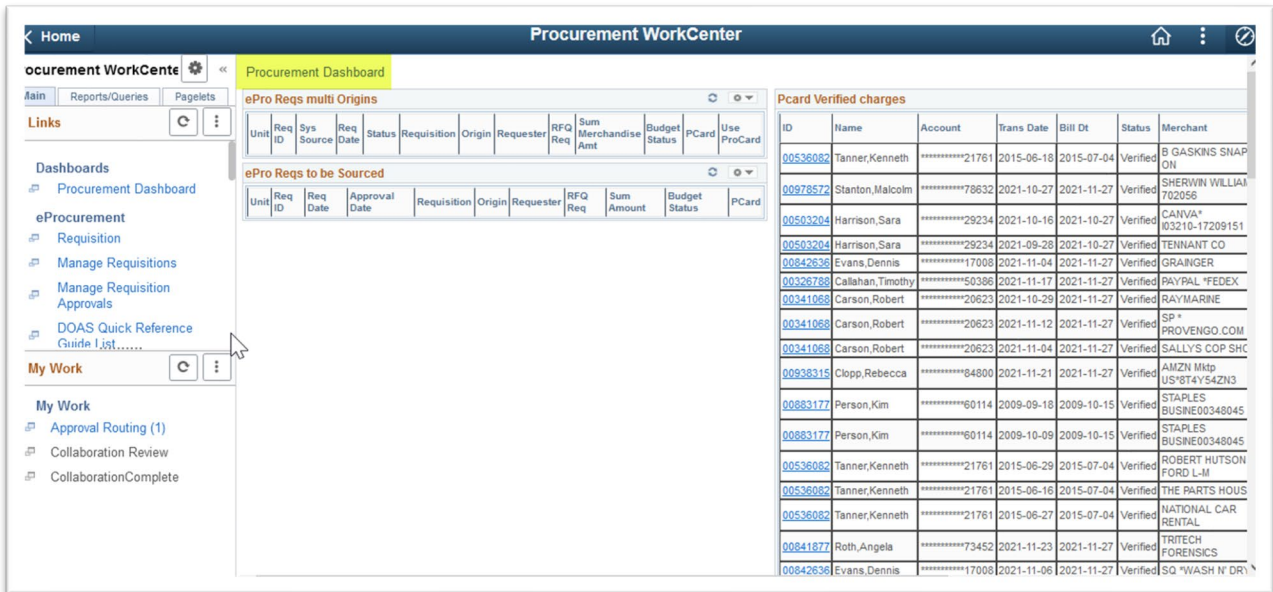
All your Procurement options are still available on the Procurement WorkCenter.

To access the WorkCenter, log on and click on the Procurement tile



1.1. Procurement WorkCenter

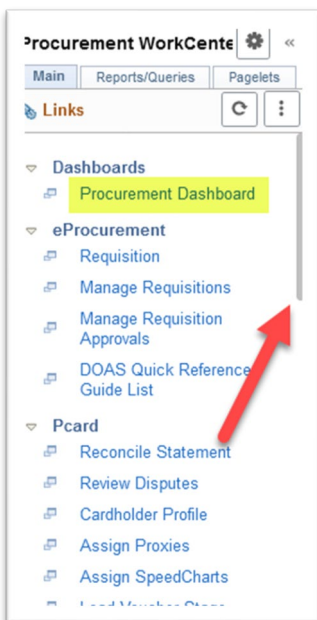
When you click on the Procurement tile, the default page has been changed to display the pagelets for the user that is logged on. The pagelets can still be seen under the Pagelets tab. In the upgraded environment the Pagelet information will display automatically on the Procurement WorkCenter landing page.



The next thing that you will notice is that the layout of the menu has changed. The colors are blue and white and there is more space between options. The menu options available are still based on a user's security.

1.2. Procurement Dashboard

A new menu option labeled Procurement Dashboard will be displayed. When you click on this option, the pagelets will display/refresh. The gray bar on the right of the menu options can be used to move up and down through the Workcenter options.



The bottom of the Dashboard page has a bar that allows the user to scroll left and right to look at the pagelet data. At the right of the screen is a bar that allows the user to scroll up and down through the pagelet data.

Procurement WorkCenter

Procurement Dashboard

iPro Reqs multi Origins

Unit	Req ID	Sys Source	Req Date	Status	Requisition	Origin	Requester	RFQ Req	Sum Merchandise Amt	Budget Status	PCard	Use ProCard

iPro Reqs to be Sourced

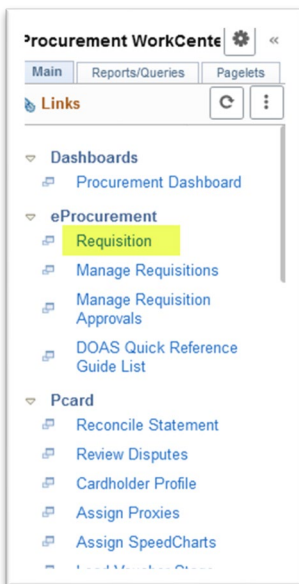
Unit	Req ID	Req Date	Approval Date	Requisition	Origin	Requester	RFQ Req	Sum Amount	Budget Status	PCard

Pcard Verified charges

ID	Name	Account	Trans Date	Bill Dt	Status	Merchant
00536062	Tanner,Kenneth	*****21761	2015-06-18	2015-07-04	Verified	B GASKINS SNAP ON
00976572	Stanton,Malcolm	*****78632	2021-10-27	2021-11-27	Verified	SHERWIN WILLIAMS 702056
00503204	Harrison,Sara	*****29234	2021-10-16	2021-10-27	Verified	CAINVA* 03210-17209151
00503204	Harrison,Sara	*****29234	2021-09-28	2021-10-27	Verified	TENNANT CO
00542636	Evans,Dennis	*****17008	2021-11-04	2021-11-27	Verified	GRAINGER
00326788	Callahan,Timothy	*****50386	2021-11-17	2021-11-27	Verified	PAYPAL *FEDEX
00341068	Carson,Robert	*****20623	2021-10-29	2021-11-27	Verified	RAYMARNE
00341068	Carson,Robert	*****20623	2021-11-12	2021-11-27	Verified	SP * PROVENGO.COM
00341068	Carson,Robert	*****20623	2021-11-04	2021-11-27	Verified	SALLY'S COP SHC
00536315	Clopp,Rebecca	*****84600	2021-11-21	2021-11-27	Verified	AMZN Mktp US*8T4Y54Zn3
00883177	Person,Kim	*****60114	2009-09-18	2009-10-15	Verified	STAPLES BUSINE00348045
00883177	Person,Kim	*****60114	2009-10-09	2009-10-15	Verified	STAPLES BUSINE00348045
00536062	Tanner,Kenneth	*****21761	2015-06-29	2015-07-04	Verified	ROBERT HUTSON FORD L-M
00536062	Tanner,Kenneth	*****21761	2015-06-16	2015-07-04	Verified	THE PARTS HOUS
00536062	Tanner,Kenneth	*****21761	2015-06-27	2015-07-04	Verified	NATIONAL CAR RENTAL
00841877	Roth,Angela	*****73452	2021-11-23	2021-11-27	Verified	TRITECH FORENSICS
00642636	Evans,Dennis	*****17008	2021-11-06	2021-11-27	Verified	SO *WASH N' DRY

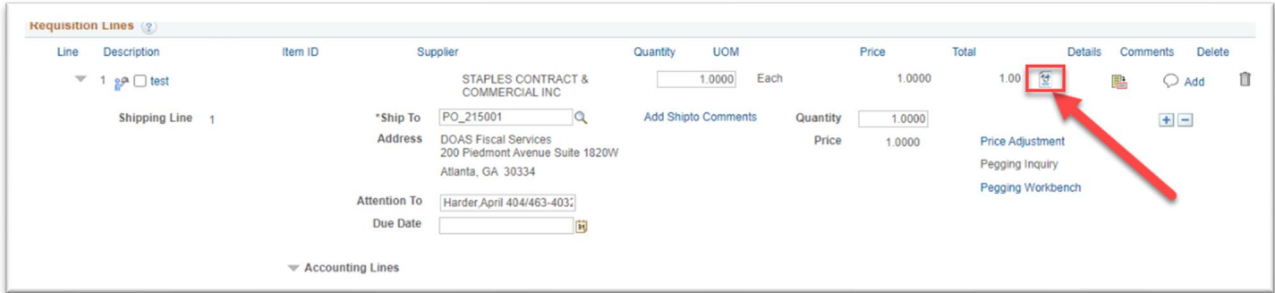
1.3. Requisition

Under the eProcurement menu, the Requisition option opens allows user to access the requisition page to create a requisition.

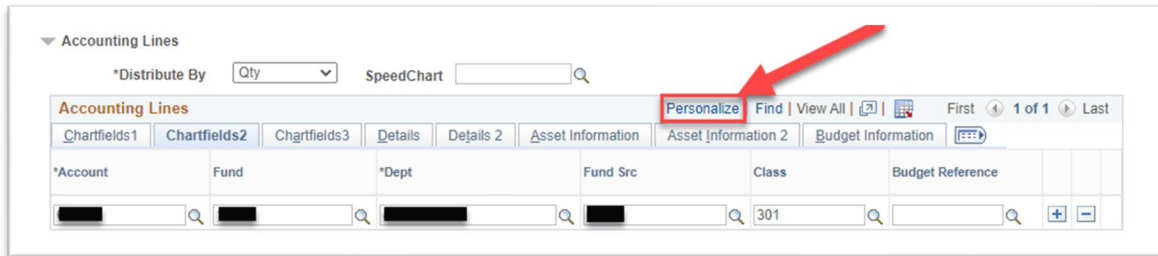


The pages used to create a Requisition have not changed. **All fields are still the same and will use the same page layout. NO new fields or functionality have been introduced**

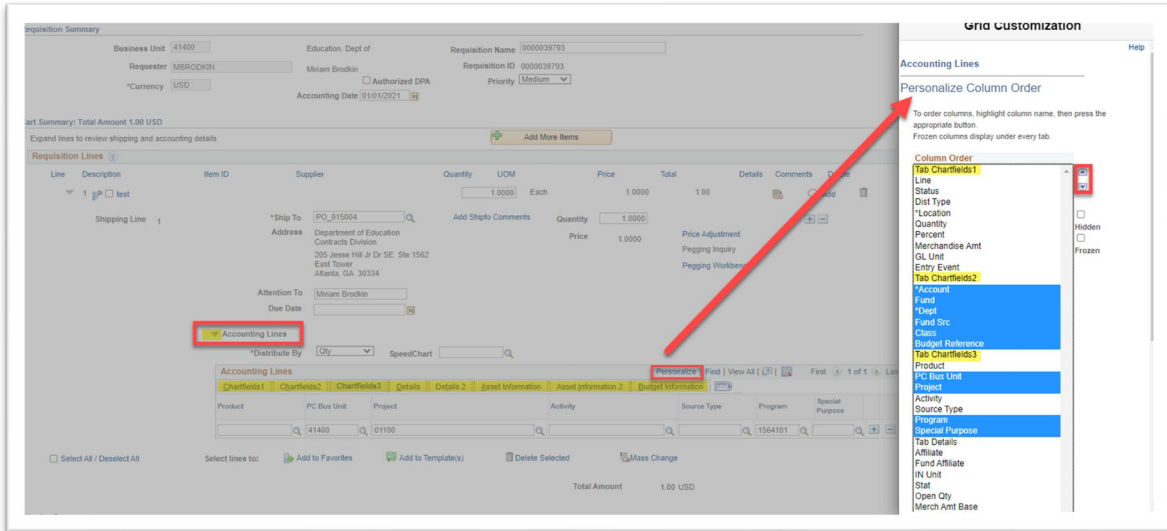
Users will see a **NEW** 'Contract in Use' icon that shows on the requisition lines that have a contract linked. This link allows the user requestor or buyer to see if there is a contract linked on all requisition lines without having to view the Requisition Line Details



Chartfields layout may change depending on the screen each user is on. If this change is noted on a page, the 'Personalize' option on the accounting lines section allows the user to to arrange chartfields defining the tab each value is visible on.

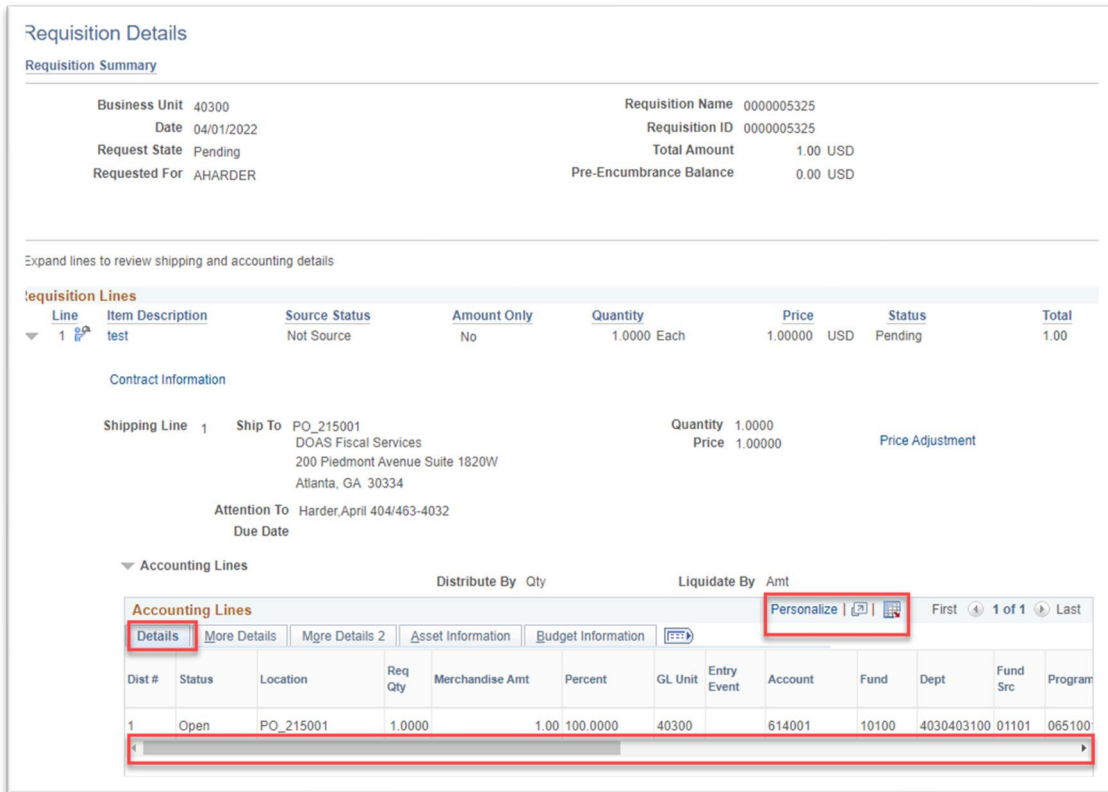


When changes are complete, users will need to scroll down and click 'OK' to save the new arrangement.



OK Cancel Preview Copy Settings

Current: The majority of all chartfields exist and can be scrolled through on the 'Details' tab. Also, options exist for Personalize, Zoom, and Export



Upgraded: There is no scroll bar appearing on the Details tab due to a change in the chartfields displayed. The majority of chartfield values now appears on the 'More Details' tab. There is also

only an Export option appearing on this page, this is a change from current production. Users will need to click the 'Show All Columns' icon to scroll through all values appearing on all tabs.

Requisition Details
 Requisition Summary

Business Unit	41400	Requisition Name	0000039793
Date	04/01/2022	Requisition ID	0000039793
Request State	Pending	Total Amount	1.00 USD
Requested For	MBRODKIN	Pre-Encumbrance Balance	0.00 USD

Expand lines to review shipping and accounting details

Requisition Lines

Line	Item Description	Source Status	Amount Only	Quantity	Price	Status	Total
1	test	Not Source	No	1.0000 Each	1.00000	USD Pending	1.00

Shipping Line 1 Ship To PO_015004
 Department of Education
 Contracts Division
 205 Jesse Hill Jr Dr SE Ste 1562 East Tower
 Atlanta, GA 30334
 Attention To Miriam Brodtkin
 Due Date

Accounting Lines

Distribute By Qty Liquidate By Amt

Accounting Lines

Details More Details Mgre Details 2 Asset Information Budget Information

Dist #	Status	Location	Quantity	Merchandise Amt	Percent	GL Unit	Entry Event	Account
1	Open	PO_015004	1.0000	1.00	100.0000	41400		626001

1.4. Mass Change

The Accounting Information section has changed. It appears more like the Accounting Lines view on the Req Line and no longer has the scroll bar. Instead, users will view the sections by selecting individual tabs or use the 'Show all Columns' option which will produce a scroll bar for scrolling through ALL chartfield values on ALL tabs.

Current:

Business Unit: 40300 Administrative Services, Dept Requisition Name: 0000005325
 Requisition ID: 0000005325 Priority: Medium
 Requester: AHARDER, April Harder
 *Currency: USD Accounting Date: 03/01/2022
 Card Number: [blank] Expiration Date: [blank] Use Procurement Card: [checked]

Part Summary: Total Amount 1.00 USD

Line	Description	Item ID	Supplier	Quantity	UOM	Price	Total
1	test		STAPLES CONTRACT & COMMERCIAL INC	1.0000	Each	1.0000	1.00

Shipping Summary: Ship To Location PO_215001, Address DOAS Fiscal Services, 200 Piedmont Avenue Suite 1820W, Atlanta, GA 30334, Attention To Harder, April 404483-4932

Upgraded:

Business Unit: 41400 Education, Dept of Requisition Name: 0000039793
 Requisition ID: 0000039793 Priority: Medium
 Requester: MBRODKN, Miriam Brodtkin
 *Currency: USD Accounting Date: 01/01/2021
 Card Number: [blank] Expiration Date: [blank] Use Procurement Card: [checked]

Part Summary: Total Amount 1.00 USD

Line	Description	Item ID	Supplier	Quantity	UOM	Price	Total
1	test			1.0000	Each	1.0000	1.00

Shipping Summary: Ship To Location PO_015004, Address Department of Education, Contracts Division, 205 Jesse Hill Jr Dr SE Ste 1562 East Tower, Atlanta, GA 30334, Attention To Miriam Brodtkin

The Priority marked on an ePro requisition will translate into the Priority on POs sourced from the requisition. There is now a 'Priority' status on the PO Header. The priority assignment will transfer onto PO Requisitions sourced through the auto sourcing process or manually copied.

Edit Requisition - Review and Submit
 Review the item information and submit the req for approval.

My Preferences Requisition Settings

Requisition Summary

Business Unit: 40300 Administrative Services, Dept
 Requirer: [Redacted] April Harder
 Currency: USD Authorized DPA
 Card Number: [Redacted] Accounting Date: 02/01/2022
 Expiration Date: [Redacted] Use Procurement Card

Requisition Name: 0000005164
 Requisition ID: 0000005164
 Priority: Low

Maintain Purchase Order

Purchase Order

Business Unit: 40300 PO Status: Approved
 PO ID: [Redacted] Budget Status: Not Chk'd
 Copy From: [Redacted] Hold From Further Processin

Header

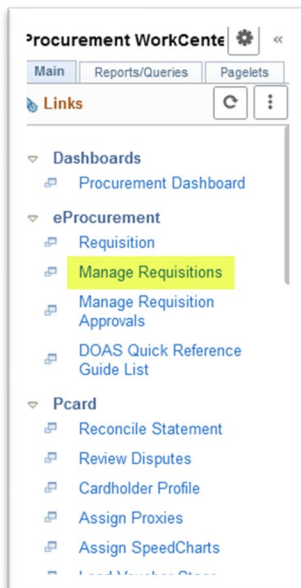
*PO Date: 04/01/2022 Supplier Search
 *Supplier: STAPLESCON-001 Supplier Details
 *Supplier ID: 0000426763 STAPLES CONTRACT & COMMERCIAL INC
 *Buyer: [Redacted]

PO Reference: Online Src From Req 0000005164

Receipt Status: Not Recvd
 PO Type: SWCC SWC-Convenier
 Priority: Low
 *Dispatch Method: Print

1.5. Manage Requisitions

The Manage Requisitions option opens the Manage Requisitions page.



The information display on the manage requisition page, how it's used, and the layout of the page have not changed.

Manage Requisitions

Search Requisitions

To locate requisitions, edit the criteria below and click the Search button.

Business Unit: [Redacted] Requisition Name: []
 Requisition ID: [] Request State: All but Complete Budget Status: []
 Date From: [] Date To: 03/23/2022
 Requester: [Redacted] Entered By: [] PO ID: []

Search Clear Show Advanced Search

Requisitions

To view the lifespan and line items for a requisition, click the Expand triangle icon.
 To edit or perform another action on a requisition, make a selection from the Action dropdown list and click Go.

Req ID	Requisition Name	BU	Date	Request State	Budget	Total	
▶ 0000005162	[Redacted]	40300	03/03/2022	Pending	Not Chk'd	102.60 USD	[Select Action] Go
▶ 0000005161	[Redacted]	40300	03/03/2022	Pending	Not Chk'd	102.60 USD	[Select Action] Go
▶ 0000005160	[Redacted]	40300	02/21/2022	Pending	Not Chk'd	102.60 USD	[Select Action] Go
▶ 0000005159	[Redacted]	40300	02/18/2022	Open	Not Chk'd	100,000.00 USD	[Select Action] Go
▶ 0000005158	[Redacted]	40300	02/18/2022	Open	Not Chk'd	249,000.00 USD	[Select Action] Go
▶ 0000005157	[Redacted]	40300	02/18/2022	Open	Not Chk'd	1,000,001.00 USD	[Select Action] Go
▶ 0000005156	[Redacted]	40300	02/18/2022	Pending	Not Chk'd	1,000,001.00 USD	[Select Action] Go

The dropdown menu is still available and has the same options. Click on the dropdown arrow, select the desired option, and click Go. This will allow you to see the selected option.

Requisitions

To view the lifespan and line items for a requisition, click the Expand triangle icon.
 To edit or perform another action on a requisition, make a selection from the Action dropdown list and click Go.

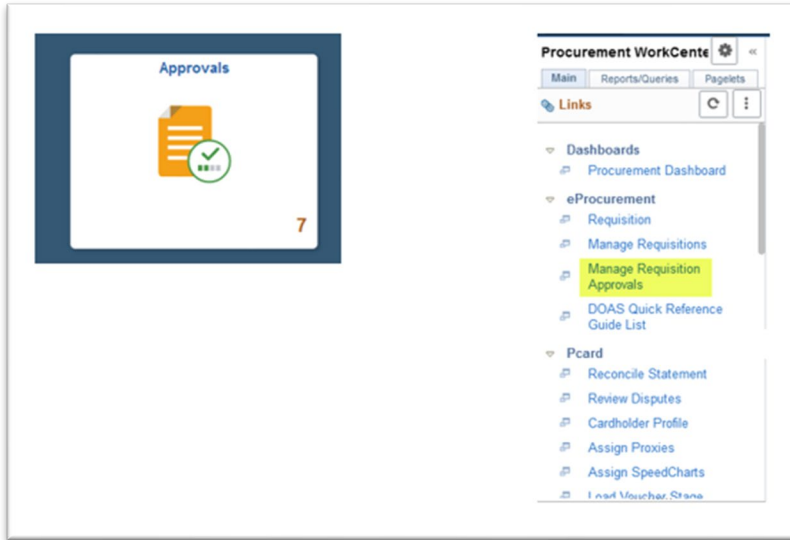
Req ID	Requisition Name	BU	Date	Request State	Budget	Total	
▶ 0000005162	[Redacted]	40300	03/03/2022	Pending	Not Chk'd	102.60 USD	[Select Action] Go
▶ 0000005161	[Redacted]	40300	03/03/2022	Pending	Not Chk'd	102.60 USD	[Select Action] Go
▶ 0000005160	[Redacted]	40300	02/21/2022	Pending	Not Chk'd	102.60 USD	[Select Action] Go
▶ 0000005159	[Redacted]	40300	02/18/2022	Open	Not Chk'd	100,000.00 USD	[Select Action] Go
▶ 0000005158	[Redacted]	40300	02/18/2022	Open	Not Chk'd	249,000.00 USD	[Select Action] Go
▶ 0000005157	[Redacted]	40300	02/18/2022	Open	Not Chk'd	1,000,001.00 USD	[Select Action] Go
▶ 0000005156	[Redacted]	40300	02/18/2022	Pending	Not Chk'd	1,000,001.00 USD	[Select Action] Go

[Select Action] dropdown menu options: Approvals, Cancel, Check Budget, Copy, Edit, View Cycle, View Print, [Select Action]

1.6. Approving Requisitions and Edit Requisitions

There are two ways to approve requisitions. Click on the Approvals tile on the Home Page or click on the Manage Requisition Approvals menu option on the Procurement WorkCenter.

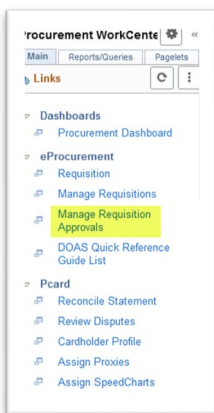
Approvals tile on the Home Page or Manage Requisition Approvals on the Procurement WorkCenter



When you click on the Approvals tile, the Pending Approvals page will display showing all the Requisitions that are waiting for your approval. To approve a Requisition, click on the Requisition in the list. The process of approving a requisition from the tile has not changed. The layout and information on the Approval page has not changed, except for the Edit Requisition link. The Edit Requisition link, which was located under the Budget Header Status, is no longer available.



To edit a requisition, click on the Procurement tile from the Home Page and then select the menu option Manage Requisition Approvals.



The Manage Requisition Approvals page will display all the Requisitions that are pending approval. Click on the Req ID.

Manage Requisition Approvals

Search Requisitions

To locate requisitions that require your approval (or requisitions that previously required your approval), edit the criteria below and click the Search button.

Requisition ID Requisition Name

Business Unit * Status

Date From Date To

Requester Entered by

[Show Advanced Search](#)

Requisitions

To view the complete details and approve a Requisition, click the requisition ID link.

Action/Status	Req ID	Requisition Name	Bus. Unit	Date	Requester	Entered By	Total
<input type="checkbox"/> Pending	000004644	000004644	40300	10/01/2021	[REDACTED]	[REDACTED]	1000.00 USD
<input type="checkbox"/> Pending	000001192	000001192	40700	12/13/2021	[REDACTED]	[REDACTED]	159.99 USD
<input type="checkbox"/> Pending	000004649	[REDACTED]	40300	12/13/2021	[REDACTED]	[REDACTED]	1000.00 USD

Clicking on the Req ID will display the requisition approval page. A requisition can be edited by clicking the Edit Requisition button. The requisition can be approved by clicking on the Approve button at the bottom of the page.

requisition approval

Business Unit 40300
 Requisition ID 000004644
 Requisition Name 000004644 Origin 224
 Requester [REDACTED]
 Entered on 10/01/2021
 Status Pending
 Priority Medium
 Budget Status Not Checked

Total Amount 1,000.00 USD
 Card Number [REDACTED]
 Card Holder Name [REDACTED]

Requester's Justification
 No justification entered by requester.

[View printable version](#)

Line Information

Line Information

Line	Item Description	Supplier Name	Quantity	UOM	Price	Category	Category Description	Co
1	ITEM 1		10.0000	EA	100.00 USD	45015	Camping and Outdoor Equipment: Camp Stoves, Cots, Lanterns (See 450-32 for Battery Types), Mantles,	

Select All / Deselect All

Review/Edit Approvers

Origin Stage

Requisition 000004644:Pending

Origin

Pending Margaret Robert [REDACTED] Inherited Approver

Not Routed Multiple Approvers BU Origin - A

Not Routed Multiple Approvers BU Origin - B

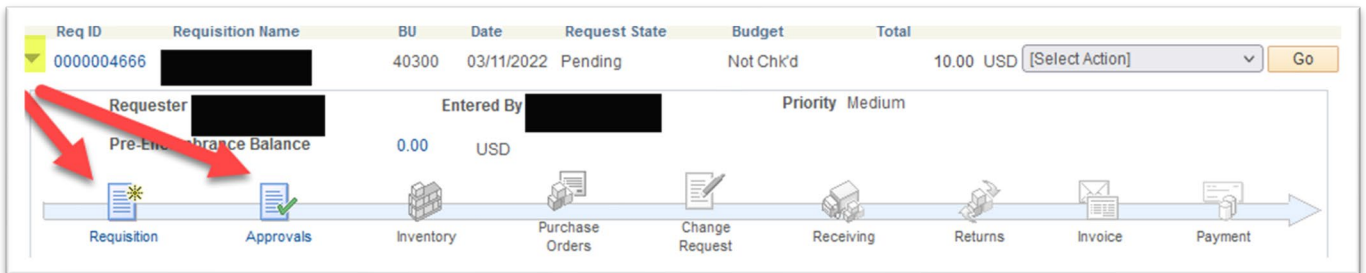
Not Routed Phoenix Famutimi 404/685-2661 PCard User List

Enter Approver Comments

Manage Requisition page allows the user to edit a requisition. This menu option can be accessed by selecting Manage Requisitions from Procurement Workcenter, selecting Edit from the dropdown and then clicking Go.

NoteAs of 03/28/2022, there is a known bug on the Manage Requisitions page.**

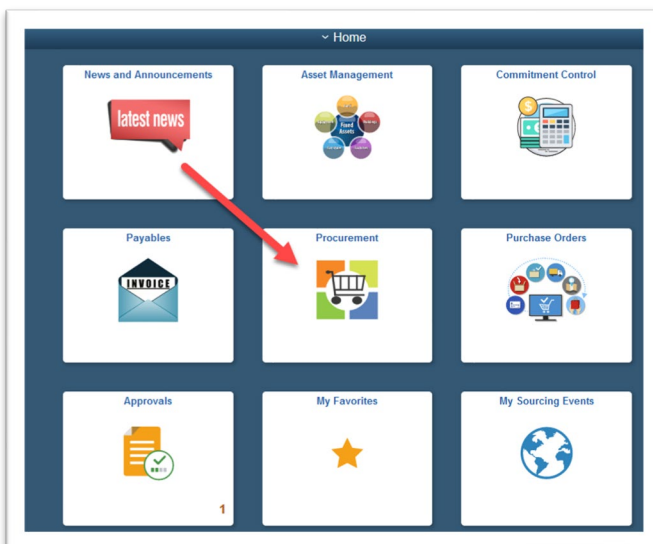
To the left of each requisition, there is a chevron ▶ clicking the chevron displays the lifecycle of the requisition. As the requisition goes through the cycle the stages are completed and then become accessible links.



The current issue occurs when the Approvals link is selected. It does not take you to the correct page or displays an error message. The issue is expected to be resolved after the go-live date of 4.22.22

2. Supplier Contract Changes

Supplier Contracts options are still on the Procurement WorkCenter menu. To access the WorkCenter, log on and click on the Procurement Tile.



2.1. Procurement WorkCenter

When you click on the Procurement tile, the default page has been changed to display the pagelets for the user that is logged on. The pagelets can still be seen under the Pagelets tab.

In the upgraded environment the Pagelet information will display automatically on the Procurement WorkCenter landing page.

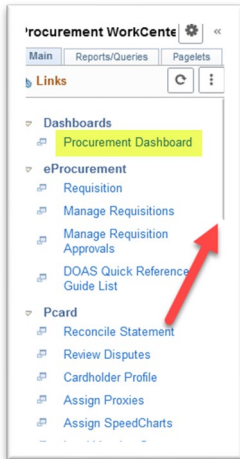
The screenshot displays the Procurement WorkCenter interface. The top navigation bar includes 'Home', 'Procurement WorkCenter', and utility icons. The main content area is divided into several sections:

- Procurement Dashboard**: A central area with three data tables:
 - ePro Reqs multi Origins**: A table with columns: Unit, Req ID, Sys Source, Req Date, Status, Requisition, Origin, Requester, RFQ Req, Sum Merchandise Amt, Budget Status, PCard, Use ProCard.
 - ePro Reqs to be Sourced**: A table with columns: Unit, Req ID, Req Date, Approval Date, Requisition, Origin, Requester, RFQ Req, Sum Amount, Budget Status, PCard.
 - Pcard Verified charges**: A table with columns: ID, Name, Account, Trans Date, Bill Dt, Status, Merchant.
- Left Navigation Menu**: Contains sections for 'Links', 'Dashboards' (with 'Procurement Dashboard' selected), 'eProcurement' (with options like 'Requisition', 'Manage Requisitions', 'Manage Requisition Approvals', 'DOAS Quick Reference Guide List...'), and 'My Work' (with options like 'Approval Routing (1)', 'Collaboration Review', 'CollaborationComplete').

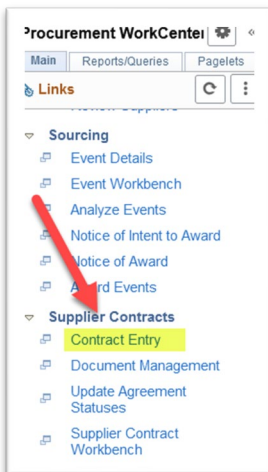
The layout of the menu will have changed. The colors are blue and white and there is more space between the options. All menu options continue to be based on individual security.

2.2. Procurement Dashboard

There is a new menu option called Procurement Dashboard. Clicking this option displays pagelets based on the individual security. The gray bar on the right of the menu option can be used to move up and down through the options.



Using the gray bar allow you to scroll down the menu and access the Contract Entry page. All options displayed are based on Security.



2.3. Supplier Contracts

The Add a New Value and Find an Existing Value options on the contract page have not changed. The font is blue and white, and the fields are spaced farther apart.

Contract Entry

Find an Existing Value | Add a New Value

*SetID STATE Q

Contract ID NEXT

Style ID Q

Contract Process Option General Contract

Add

Contract Entry

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

Find an Existing Value | Add a New Value

▼ Search Criteria

*SetID = STATE Q

Contract ID begins with

Contract Version =

Version Status =

Contract Process Option =

Supplier ID begins with Q

Short Supplier Name begins with Q

Supplier Name begins with Q

Contract Status =

Master Contract ID begins with Q

Description begins with

Supplier Contract Ref begins with

Corporate Contract =

Contract Style begins with Q

Correct History Case Sensitive

Search Clear Basic Search Save Search Criteria

To edit an existing contract, always change the status to Open.

Contract Entry

Contract

SetID STATE Contract Ver

Contract ID 40300-401-DAS0000116-0003

*Status Open Approved Approved

Administrator/Buyer Canceled Approved

▼ Authored Document Closed Approved

Authored Status On-Hold Approved

Open Approved

Williams 404/657-9443

No new functionality was introduced for supplier contracts during this upgrade. All options, checkboxes, and fields are the same Any changes presented are cosmetic but do not affect the use of the pages.

The pages and options under Add a Document and Maintain Document have not changed. Some of the links have been moved to the right of the Supplier information. **There are no new links and no links have been removed.**

Contract Entry

Contract

SetID	STATE	Contract Version	Version	1	Status	Current
Contract ID	40300-401-DAS0000116-0003	Approved Date	06/30/2017			
*Status	Open	Administrator/Buyer	DESIREEW	Desiree Williams 404/657-9443		

▼ **Authored Document**

Authored Status	Executed	Sponsor	
Document Version	1.00	Department	
Description	Fixed Winged Air Charter Servi	Created Date/time	06/30/2017 12:00AM
Amendment	0	Last modified date	07/21/2021 1:46PM
Document Administrator	CASTEELE1		

▼ **Header** ⓘ

*Contract Style	GN	
Process Option	General Contract	
*Supplier	EPPSAVIATI-001	Supplier Search
*Supplier ID	0000017333	EPPS AIR SERVICE, INC.
Primary Contact	2	DLANE
Supplier Contract Ref		
Description	Fixed Winged Air Charter Servi	
Master Contract ID		
*Begin Date	07/01/2017	
Expire Date	06/30/2022	
Renewal Date		

Maintain Document

- Edit Comments
- Contract Activities
- Primary Contact Info
- Contract Header Agreement
- Contract Releases

- Retention
- Activity Log
- Document Status
- Thresholds & Notifications
- Price Adjustment Template
- View Changes
- Current Change Reason
- Purchase Order BU Defaults

No checkboxes have been added or removed.

Tax Exempt Tax Exempt ID: STATE OF GA
 Auto Default Fiscal Year: 2018
 Lock Chartfields
 Group:
 Type:

Corporate Contract
 Currency: USD
 Rate Date: 06/28/2017 CRRNT
 Must Use Contract Rate Date
 Allow Multicurrency PO
 Multi-Agreement
 Initial Period
 Non-Profit Renewals

Invoice Options
 Invoice Number:
 AP Business Unit:
 Accounting Template:
 Payment Terms ID: N30
 Basis Date Type:

Amount Summary
 Maximum Amount: 2,500,000.00 USD
 Line Item Released Amount: 0.00
 Category Released Amount: 0.00
 Open Item Released Amount: 1,512,819.31
 Total Released Amount: 1,512,819.31
 Remaining Amount: 987,180.69
 Remaining Percent: 39.49

Contract Open Item Reference
 Allow Open Item Reference
 Adjust Supplier Pricing First
 Price Can Be Changed on Order
[Add Open Item Price Adjustments](#)

Gross Amount: 0.00 USD
 Freight Amount: 0.00
 Misc Charge Amount: 0.00 Miscellaneous Charges
 Sales Tax Amount: 0.00
 VAT Amount: 0.00

The contract line section also introduced no new changes to the functionality.

Lines

1-1 of 1 View All

[Details](#) [Order By Amount](#) [Item Information](#) [Default Schedule](#) [Release Amounts](#) [Release Quantities](#) [Line Groupings](#) [Spend Threshold](#)

Line	Item	Description	UOM	Category	Merchandise Amt	Include for Release	Status
1	<input type="text"/>	Aircraft Charter Services	UNT	96113	<input type="text"/>	<input checked="" type="checkbox"/>	Active

[View Category Hierarchy](#) [Category Search](#)

Document Management has not changed. New fonts and color schemas have been introduced but the layout remains the same.

3. Pcard Changes

3.1. Updates/Changes in Cardholder Setup or Maintenance

Cardholder Profile

A couple changes are presented when a Procurement Card is being added to a Cardholder Profile or edited. The changes include the addition of an Inactive radio box, and a field that shows Status and Status Date.

The screenshot shows the 'Procurement WorkCenter' interface. The 'Card Data' tab is active. Below the 'Card Data' section, there is a table with columns: *Business Unit, *Card Issuer, *Card Number, *Expiry Date, Inactive, Card Type, Date Issued, Status, and Status Date. The 'Inactive' column contains a radio button. The 'Status' and 'Status Date' columns are highlighted with red boxes. Below the table, there are buttons for 'Save', 'Return to Search', 'Previous in List', 'Next in List', and 'Notify'.

Inactive box: The Inactive selection has been added to allow P-Card Administrator to deactivate Procurement Cards that have not expired, but the Procurement Card should not be used on requisitions or purchase orders.

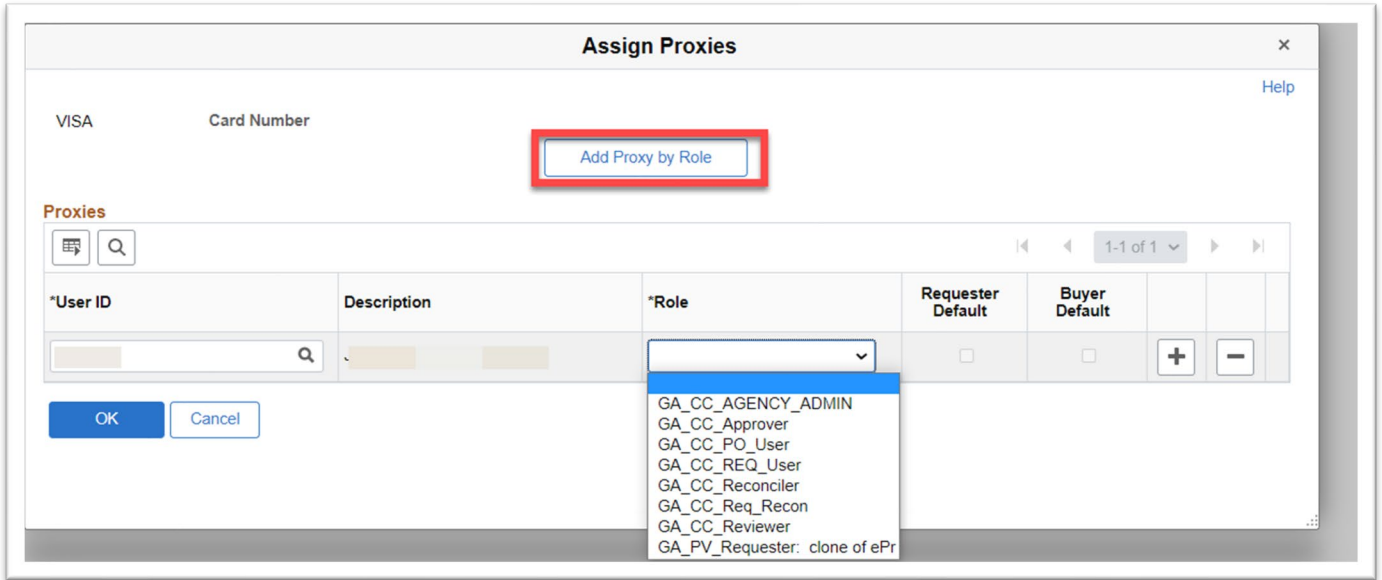
Status: New field that displays whether the Procurement Card is Active or Inactive. The Status field cannot be manually edited, the status is updated when the card is added, the Inactive box is checked/unchecked, or the expiration date has passed.

Status Date: Displays the date the status of the Procurement Card was updated. This field is not edited. The date will update as the status of the Procurement Card changes.

3.2. Mass Adding Proxy Users to Cardholder Profile

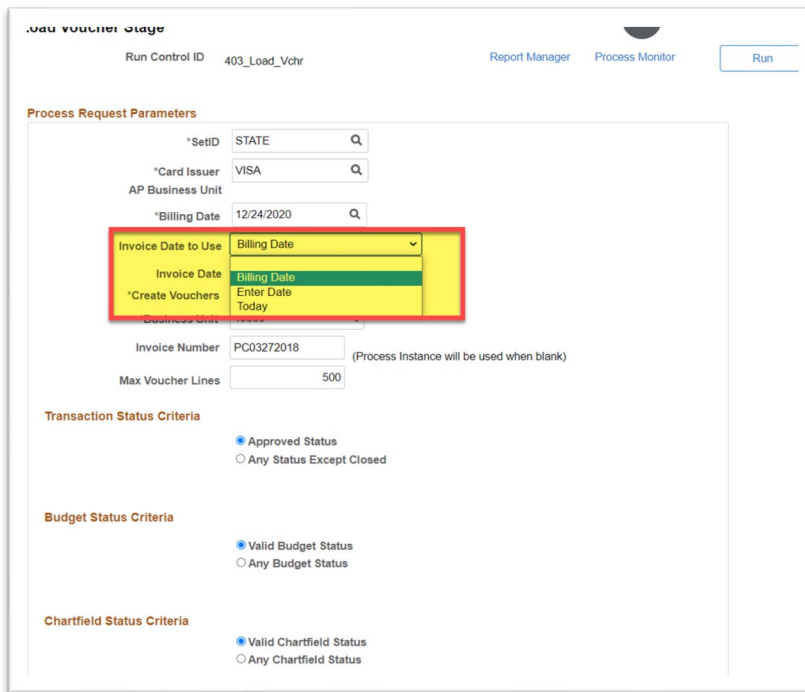
Functionality has been added that will allow P-Card Administrators to assign proxy users based on User Roles.

Add Proxy by Role: This is an option that will allow P-Card Administrators to mass assign proxy users to a Procurement Card based on their role. The P-Card Administrator can only mass assign roles to users within their business unit.



3.3. Update in Voucher Process – Load Voucher Stage

Fields were added to the Load Voucher Stage Request Parameters, the “Invoice Date to Use” and “Invoice Date” fields.



Invoice Date to Use: The AP User can select between using the billing date of the transactions, manually entering an invoice date, or allowing the system to use the current date that the AP User is running the voucher process as the invoice date.

Invoice Date: Will be populated based on the “Invoice Date to Use” selection.

The screenshot displays a 'Document Management' page for a specific contract. At the top, the title 'Document Management' is visible. Below it, the contract details are listed: SetID (STATE), Supplier (EPPS AIR SERVICE INC), Contract ID (40300-401-DAS0000116-0003), Contract Style, Document Type (SPD Agency Services Contract), Description (Fixed Winged Air Charter Servi), Administrator (Carrie Steele 404/463-5556), and Sponsor. A 'Return to Document Search' link is provided next to the Contract ID. Below the contract details, the version information is shown: Version 1.00, Status Executed, Created On 06/30/17 12:00AM, Last Modified On 07/21/21 1:46PM, and Executed On 07/21/21 1:46:46PM. A 'Document Details' link is also present. Two buttons are available: 'Reset to Dispatch' and 'Create Amendment'. Below this, the 'Imported Document' section is shown. At the bottom, there are three main sections: 'View and Edit Options' with a 'View Document' button and links for 'Modify Attachments/Related Documents' and 'Document Version History'; 'Review and Approval' with links for 'Internal Contacts/Signers', 'External Contacts/Signers', and 'Document View Access'; and 'Other Document Actions' with 'Send to Contacts' and 'Deactivate Document' buttons.

4. Strategic Sourcing Changes

4.1. Invite Bidders

The process to search for and invite bidders/suppliers is slightly modified. The new process includes one additional step that was not previously required.

Access the **Bidder Invitations** link.

Step 1: Define Event Basics
 Enter basic information, general settings and optional rules for this event.

- * Event Settings and Options
- Event Comments and Attachments
- Event Header Bid Factors
- Payment Terms and Contact Info
- Event Constraints

Step 2: Configure Line Items
 Create line listings for this event.

- * Line Items
- Item Line Defaults

Step 3: Select Bidders to Invite
 Send out targeted invitations to this event, designate it as a public event, or both.

*** Bidder Invitations**

Step 4: Invite Collaborators
 Invite others to collaborate on this event. You may not post your event while collaborators are reviewing it.

- Event Collaborators

Click on [Search for Bidders](#) link

Modify an Event

Invite Bidders

Business Unit 99999 Event ID SPD0000165 Round 1 Version 1 Event Format Buy Event 1

Public Event

Bidder Invitation List ?

Select	Bidder ID	Bidder Type	Status	Georgia Resident	Small Business *	Bidder Company
<input type="checkbox"/>	PUBLIC_AUC	Public				This is a Public Event

Search for Bidders Dispatch Lines Save Bidders as Group

By default, **Bidder and Supplier** will be populated in the **Bidder Type** drop down.
DO NOT CHANGE

x Help

Bidder Search

Search Criteria ⓘ

Use Saved Search

Bidder Type **Bidder and Supplier** DO NOT CHANGE

Name/Company =

SIC Type

SIC Code

ID

State

TIN

City

[Show More](#)

▶ [Category Criteria](#) ⓘ

▶ [Profile Question Criteria](#) ⓘ

▶ [Diversity Criteria](#) ⓘ

Results Option Type

Maximum Rows retrieved

Enter search criteria and press search to retrieve bidders.

Click on **Recommend Bidders**. This will generate a list of both bidders and suppliers that have a NIGP code that matches the NIGP codes on the line(s) and header.

Click **Select All**. This will check the Invite box for all the bidders/suppliers on the list.

Click **Return to Invite Bidders**. This will bring all the selected bidders/suppliers in to the bidder invitation list.

Results Option Type

Maximum Rows retrieved

Invite to Entire Event

Search Results

Bidder ID	Bidder Type	Status	Georgia Resident	Small Business *	Bidder Company	Open for Ordering	Category	Diversity	Invite
1	Supplier	Approved	Yes	Yes	TOM GRADY ENTERPRISES LLC	Yes			<input checked="" type="checkbox"/>
2	Supplier	Approved	Yes		MSC INDUSTRIAL SUPPLY COMPANY	Yes			<input checked="" type="checkbox"/>
3	Supplier	Approved			UNITED REFRIGERATION INC	Yes			<input checked="" type="checkbox"/>
4	Supplier	Approved			DAIKIN APPLIED AMERICAS INC	Yes			<input checked="" type="checkbox"/>

You will be returned to the **Invite Bidders** page and a full list of all the invited bidders/suppliers is displayed. No additional action is required. Click **Save Event Changes** to save the list. Click **Return to Event Overview** to return to the Event Overview page.

Invite Bidders

Business Unit 99999 Event ID SPD0000165 Round 1 Version 1 Event Format Buy Event Type RFx

Public Event

Bidder Invitation List

Select	Bidder ID	Bidder Type	Status	Georgia Resident	Small Business *	Bidder Company	Category	Diversity	*Dispatch Method		
<input type="checkbox"/>	PUBLIC_AUC	Public				This is a Public Event			Email		
<input type="checkbox"/>	1	Supplier	Approved	Y	Y	TOM GRADY ENTERPRISES LLC			Email		
<input type="checkbox"/>	3	Supplier	Approved	Y		MSC INDUSTRIAL SUPPLY COMPANY			Email		
<input type="checkbox"/>	0	Supplier	Approved			UNITED REFRIGERATION INC			Email		
<input type="checkbox"/>	0	Supplier	Approved			DAIKIN APPLIED AMERICAS INC			Email		
<input type="checkbox"/>	3	Supplier	Approved	Y	Y	BROOKS AUTO PARTS INC			Email		
<input type="checkbox"/>	0	Supplier	Approved			PEP BOYS CORPORATION			Email		
<input type="checkbox"/>	0	Supplier	Approved	Y	Y	NATIONAL BUS SALES			Email		
<input type="checkbox"/>	3	Supplier	Approved			AUTO PAINT CENTER INC			Email		
<input type="checkbox"/>	3	Supplier	Approved	Y	Y	SPRAGUES SUPPLY INC			Email		
<input type="checkbox"/>	0	Supplier	Approved			TECHNICAL LABORATORY ASSOCIATES INC			Email		
<input type="checkbox"/>	4	Supplier	Approved			WAY BROS INC			Email		
<input type="checkbox"/>		Supplier	Approved		Y	BRENT WALKER FORD SALES INC			Email		
<input type="checkbox"/>		Supplier	Approved			CONDITIONED AIR INC			Email		
<input type="checkbox"/>	0	Supplier	Approved			HANDICAPPED DRIVER SERVICES INC			Email		

Search for Bidders

Dispatch Lines

Save Bidders as Group

Save Event Changes

GoTo

Go

< Return to Event Overview

4.2. Additional Columns on Bidder Invitation List

There are additional columns that have been added to the Invite Bidders table. The table can be viewed from the Bidder Invitation link. The newly added columns are Status, Category and Diversity. You can view additional detail by clicking on the icons for Category and Diversity.

Status: Shows the current status of the bidder/supplier profile. Values can be Approved/I

Category: Shows the NIGP codes that are on the bidder/supplier profile.

Diversity: Shows the diversity selections that the bidder/supplier has made (ie. small business, Georgia based, women owned, veteran, etc) .

Invite Bidders

Business Unit 99999 Event ID SPD0000165 Round 1 Version 1 Event Format Buy Event Type RFX
 Public Event

Bidder Invitation List

Select	Bidder ID	Bidder Type	Status	Georgia Resident	Small Business	Bidder Company	Category	Diversity	Dispatch Method
<input type="checkbox"/>	PUBLIC_AUC	Public				This is a Public Event			Email
<input type="checkbox"/>	[REDACTED]	Supplier	Approved	Y	Y	TOM GRADY ENTERPRISES LLC			Email
<input type="checkbox"/>	[REDACTED]	Supplier	Approved	Y		MSC INDUSTRIAL SUPPLY COMPANY			Email
<input type="checkbox"/>	[REDACTED]	Supplier	Approved			UNITED REFRIGERATION INC			Email
<input type="checkbox"/>	[REDACTED]	Supplier	Approved			DAIKIN APPLIED AMERICAS INC			Email
<input type="checkbox"/>	[REDACTED]	Supplier	Approved	Y	Y	BROOKS AUTO PARTS INC			Email
<input type="checkbox"/>	[REDACTED]	Supplier	Approved			PEP BOYS CORPORATION			Email
<input type="checkbox"/>	[REDACTED]	Supplier	Approved	Y	Y	NATIONAL BUS SALES			Email