PeopleSoft Financials 9.2

PUM 38 Upgrade

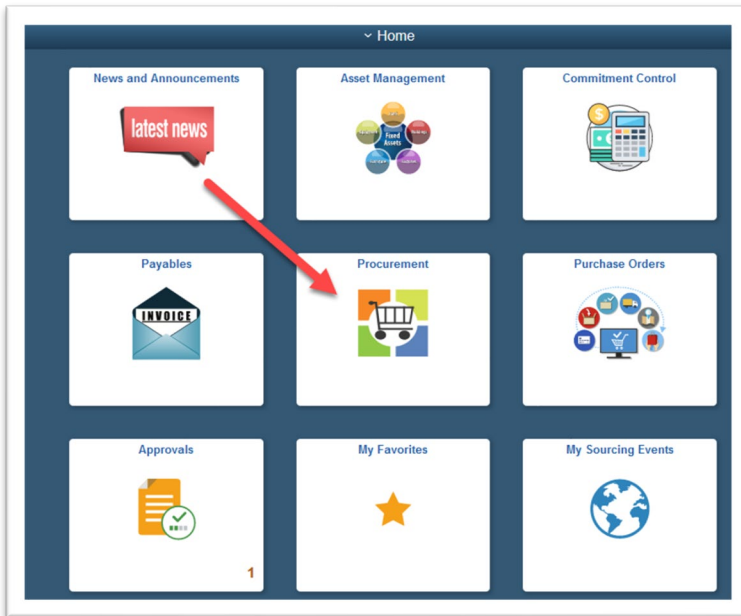# Delta Guide

TABLE of CONTENTS

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
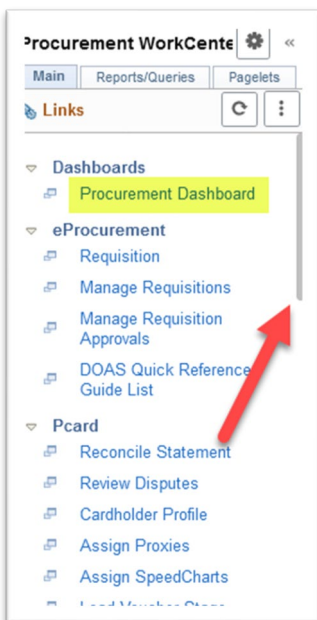

1.1. Procurement WorkCenter

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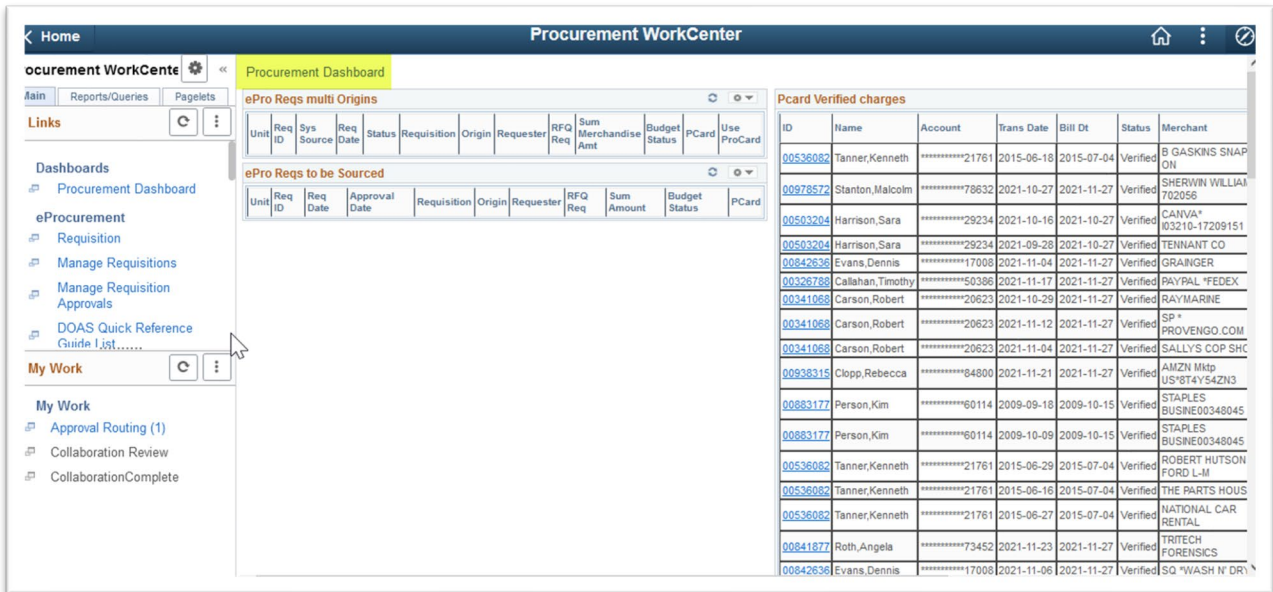
The next thing that you will notice is that the layout of the menu has changed. The colors are blue and white and there is more space between options. The menu options available are still based on a users' security.

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.


1.3. Requisition

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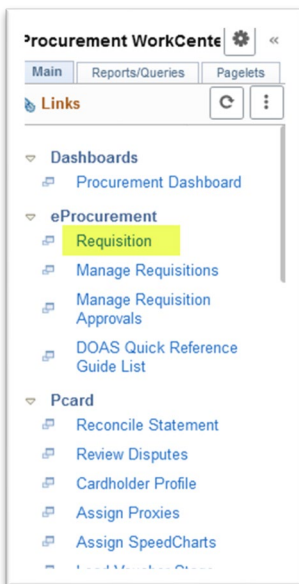

The pages used to create a Requisition have not changed. **All fields are still the same and will use the same page layout. NO new fields or functionality have been introduced**

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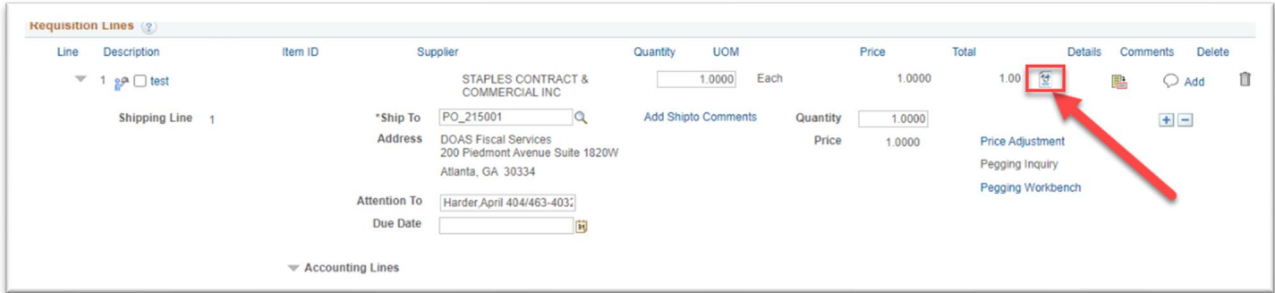
Chartfields layout may change depending on the screen each user is on. If this change is noted on a page, the 'Personalize' option on the accounting lines section allows the user to to arrange chartfields defining the tab each value is visible on.
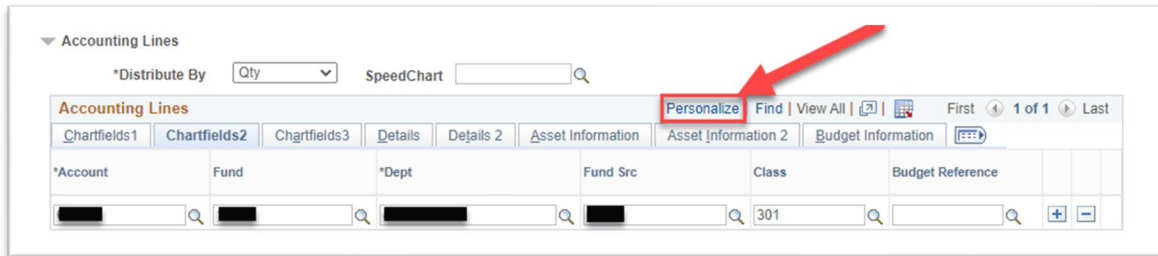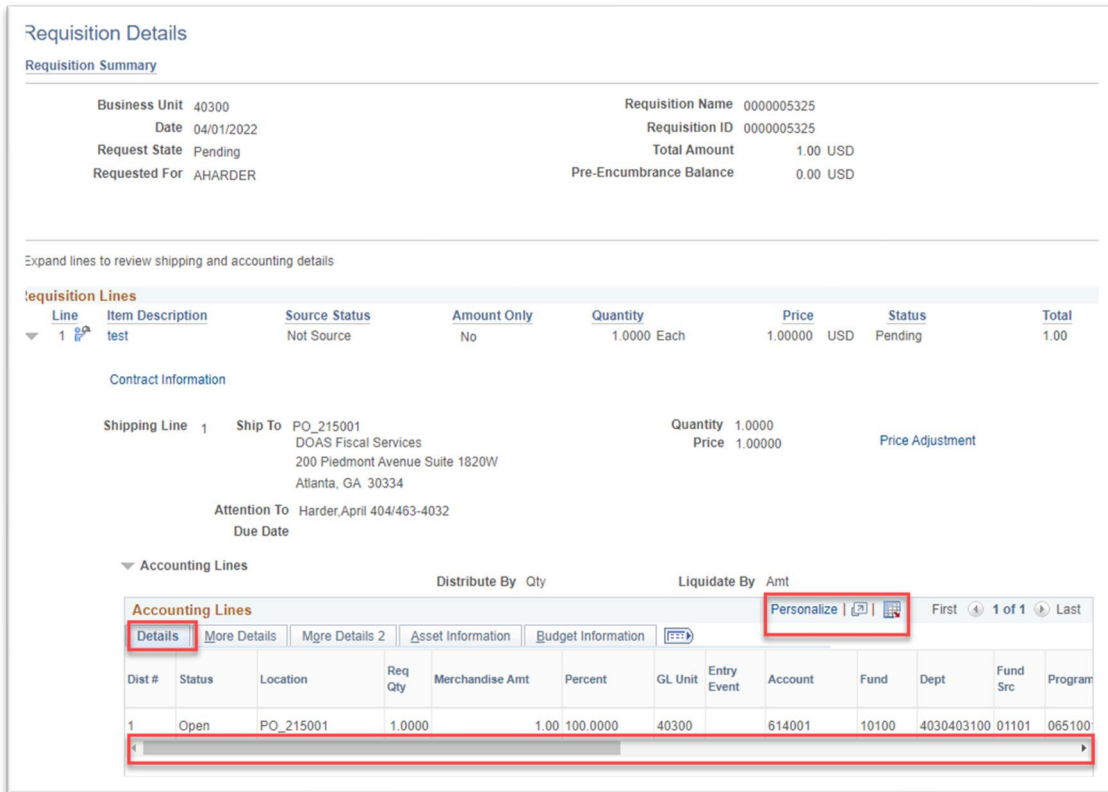

When changes are complete, users will need to scroll down and click 'OK' to save the new arrangement.
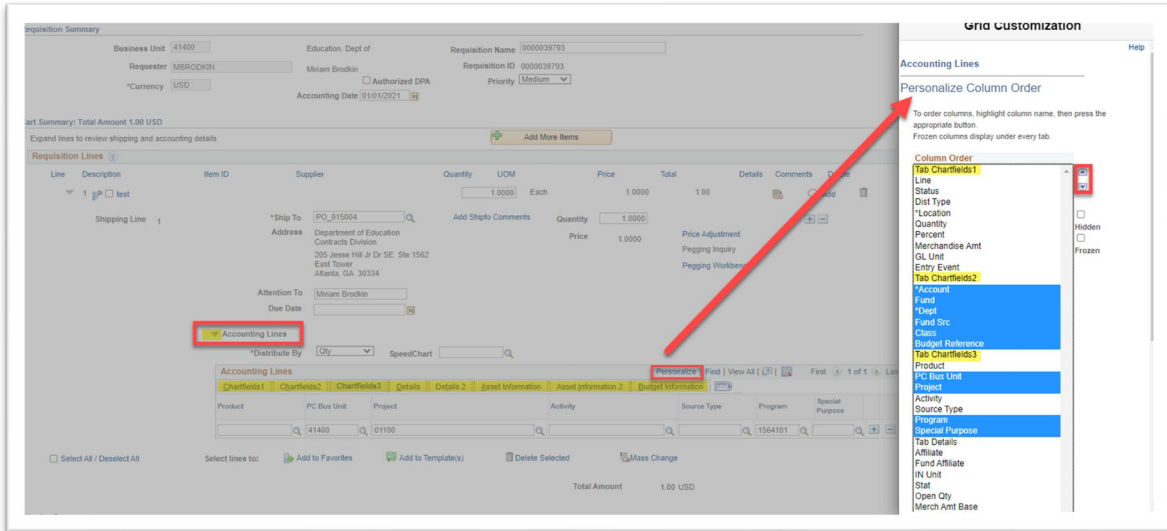
Current: The majority of all chartfields exist and can be scrolled through on the 'Details' tab. Also, options exist for Personalize, Zoom, and Export

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.

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:

Upgraded:

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.

1.5. Manage Requisitions

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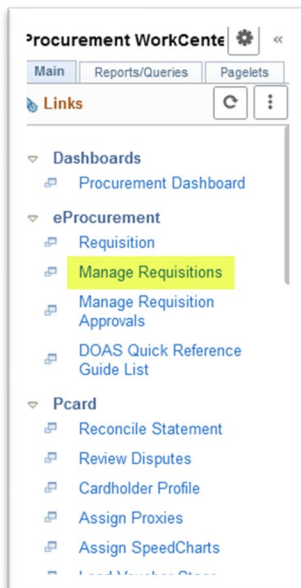
The information display on the manage requisition page, how it's used, and the layout of the page have not changed.

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 allows you to see the selected option.

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
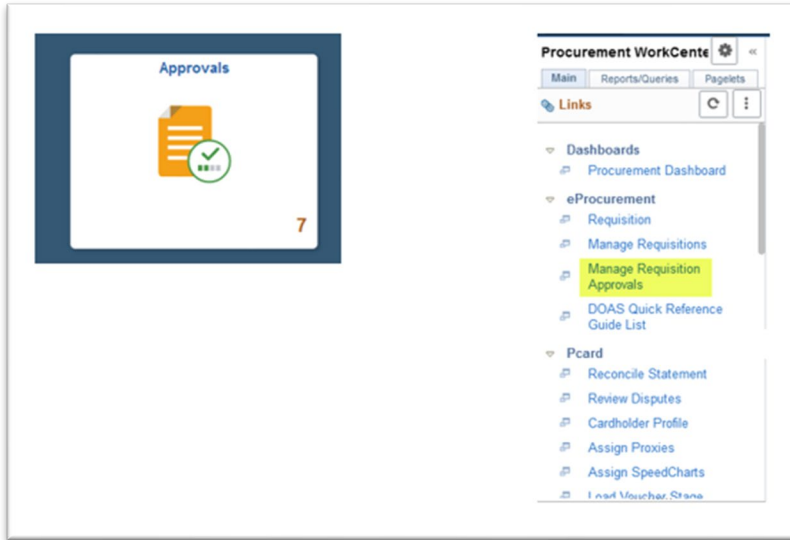
When you click on the Approvals tile, the Pending Approvals page will display showing all the Requisitions that are waiting for your approval. To approve a Requisition, click on the Requisition in the list. The process of approving a requisition from the tile has not changed. The layout and information 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.
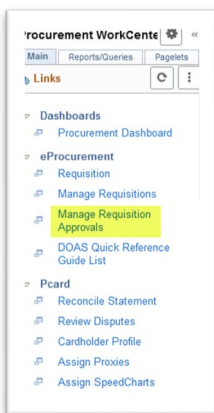
The Manage Requisition Approvals page will display all the Requisitions that are pending approval. Click on the Req ID.

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.

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.

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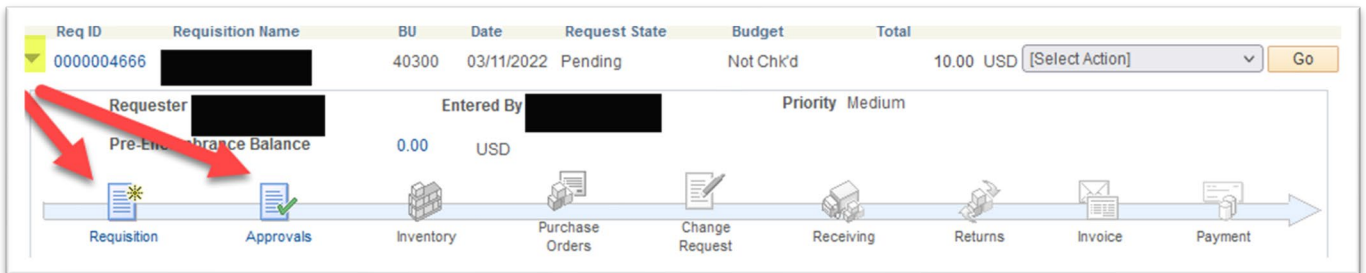
The current issue occurs when the Approvals link is selected. It does not take you to the correct page or displays an error message. The issue is expected to be resolved after the go-live date of 4.22.22

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.

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

The layout of the menu will has 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.
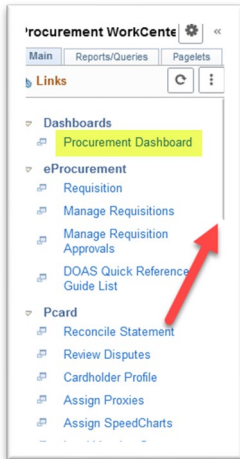
Using the gray bar allow you to scroll down the menu and access the Contract Entry page. All options displayed are based on Security.
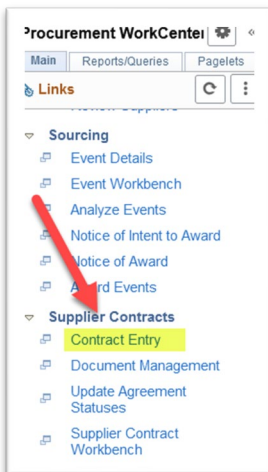
2.3. Supplier Contracts

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.

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

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

Contract ID	40300-401-DAS0000116-0003	
*Status	Open	

Version 1   Status Current

Approved Date 06/30/2017

Administrator/Buyer DESIREEW 🔍 Desiree Williams 404/657-9443

▼ **Authored Document**

Authored Status Executed

Maintain Document

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

▼ **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	📅	

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.

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

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.

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.
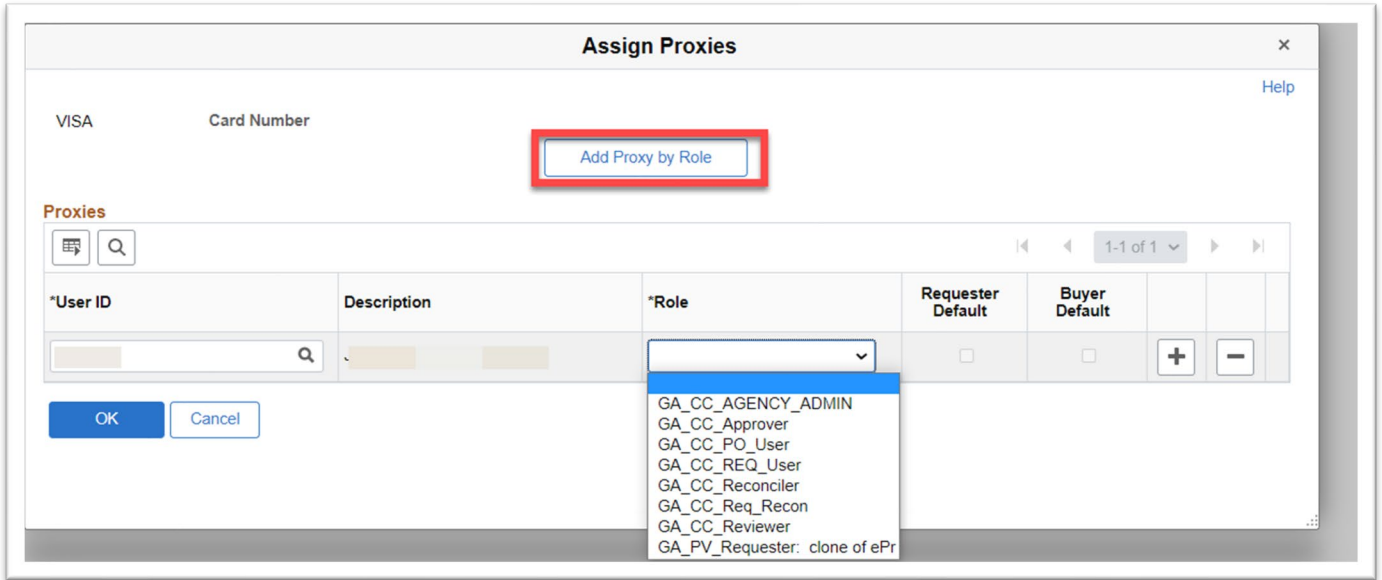
3.3. Update in Voucher Process – Load Voucher Stage

Fields were added to the Load Voucher Stage Request Parameters, the "**Invoice Date to Use**" and "**Invoice Date**" fields.
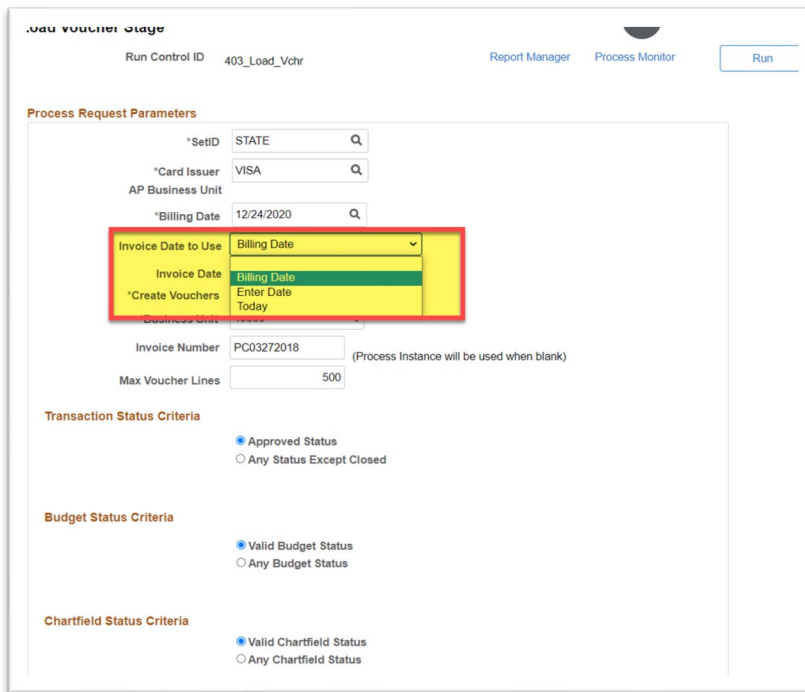
Invoice Date to Use: The AP User can select between using the billing date of the transactions, manually entering an invoice date, or allowing the system to use the current date that the AP User is running the voucher process as the invoice date.

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

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   Payment Terms and Contact Info
Event Comments and Attachments   Event Constraints
Event Header Bid Factors

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
☑ Public Event

Bidder Invitation List ?

Select	Bidder ID	Bidder Type	Status	Georgia Resident	Small Business *	Bidder Company
☐	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

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.

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.

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 ⑦

Select	Bidder ID	Bidder Type	Status	Georgia Resident	Small Business *	Bidder Company	Category	Diversity	*Dispatch Method
☐	PUBLIC_AUC	Public				This is a Public Event			Email
☐		Supplier	Approved	Y	Y	TOM GRADDY ENTERPRISES LLC	📖	👥	Email ▾
☐		Supplier	Approved	Y		MSC INDUSTRIAL SUPPLY COMPANY	📖	👥	Email ▾
☐		Supplier	Approved			UNITED REFRIGERATION INC	📖	👥	Email ▾
☐		Supplier	Approved			DAIKIN APPLIED AMERICAS INC	📖	👥	Email ▾
☐		Supplier	Approved	Y	Y	BROOKS AUTO PARTS INC	📖	👥	Email ▾
☐		Supplier	Approved			PEP BOYS CORPORATION	📖		Email ▾
☐		Supplier	Approved	Y	Y	NATIONAL BUS SALES	📖	👥	Email ▾

1-20 of 87