

# PeopleSoft Financials 9.2 PUM 38 Upgrade Delta Guide

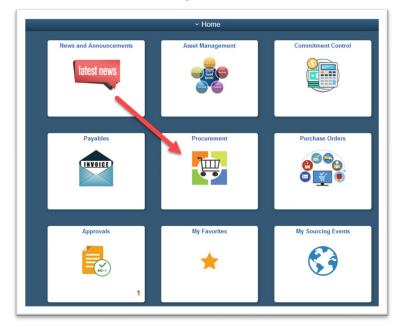
#### TABLE of CONTENTS

1.	ePro	curement Changes	3
1	L.1.	Procurement WorkCenter	3
1	L.2.	Procurement Dashboard	4
1	L.3.	Requisition	5
1	L.4.	Mass Change	8
1	L.5.	Manage Requisitions	10
1	L.6.	Approving Requisitions and Edit Requisitions	11
2.	Supp	lier Contract Changes	14
2	2.1.	Procurement WorkCenter	
2	2.2.	Procurement Dashboard	
2	2.3.	Supplier Contracts	16
3.	Pcare	d Changes	20
3	3.1.	Updates/Changes in Cardholder Setup or Maintenance	20
3	3.2.	Mass Adding Proxy Users to Cardholder Profile	20
3	3.3.	Update in Voucher Process – Load Voucher Stage	
4.	Strat	egic Sourcing Changes	22
2	4.1.	Recommend Bidders	22
2	1.2.	Additional Columns on Bidder Invitation List	25

## **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**

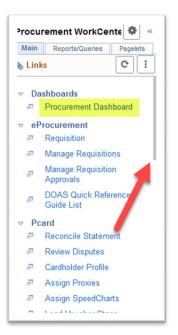
When you click on the Procurement tile, the default page has been changed to display the pagelets for the user that is logged on. The pagelets can still be seen under the Pagelets tab. In the upgraded environment the Pagelet information will display automatically on the Procurement WorkCenter landing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

( Home	Procurement WorkCenter		<u>ଜ</u> : (
ocurement WorkCente 🏶 🔍	Procurement Dashboard		
ain Reports/Queries Pagelets	ePro Reqs multi Origins		
Links C :	Unit Req Sys Req Date Status Requisition Origin Requester Req Merchandise Status PCard Use PCard ProCard ProCard Use PCard Origin Requester Req Merchandise Status	Bill Dt Status	Merchant
Dashboards	ePro Regs to be Sourced	2015-07-04 Verifie	ON
Procurement Dashboard	Reg Reg Approval a transformed and RFQ Sum Budget and 00978572 Stanton,Malcolm ************************************	2021-11-27 Verifie	d SHERWIN WILLIA 702056
eProcurement	Unit ID Date Date Requisition Origin Requester Req Amount Status PC-ard 00503204 Harrison, Sara	2021-10-27 Verifie	d CANVA* 103210-1720915
Requisition	00503204 Harrison,Sara *******29234 2021-09-28		
Manage Requisitions	00842636 Evans,Dennis 40008 2021-11-04		
Manage Requisition			d PAYPAL *FEDEX
Approvals	00341068 Carson,Robert *******20623 2021-10-29		
DOAS Quick Reference	00341068 Carson,Robert *******20623 2021-11-12	2021-11-27 Verifie	d SP * PROVENGO.COI
Guide List	00341068 Carson,Robert *******20623 2021-11-04	2021-11-27 Verifie	d SALLYS COP SH
My Work C :	00938315 Clopp,Rebecca *********84800 2021-11-21	2021-11-27 Verifie	d AMZN Mktp US*8T4Y54ZN3
My Work	008831777 Person,Kim ************************************	2009-10-15 Verifie	d STAPLES BUSINE0034804
P Approval Routing (1)	00883177 Person,Kim ********60114 2009-10-09	2009-10-15 Verifie	d STAPLES BUSINE0034804
Collaboration Review     CollaborationComplete	00536082 Tanner,Kenneth ********21761 2015-06-29	2015-07-04 Verifie	d ROBERT HUTSO
	00536082 Tanner, Kenneth *******21761 2015-06-16	2015-07-04 Verifie	d THE PARTS HOU
	00536082 Tanner,Kenneth ********21761 2015-06-27	2015-07-04 Verifie	d NATIONAL CAR RENTAL
	00841877 Roth,Angela **********73452 2021-11-23	2021-11-27 Verifie	d TRITECH FORENSICS
	00842636 Evans, Dennis ********17008 2021-11-06	2021-11-27 Verifie	d SQ *WASH N' DF

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.

rocurement Dashboard							
Pro Reqs multi Origins	Pcard Ver	ified charges					
Inii Req Sys Req Status Requisition Origin Requester RFQ Sum Merchandise Status PCard Use ProCard	ID	Name	Account	Trans Date	Bill Dt	Status	Merchant
Amt	00536082	Tanner,Kenneth	**************21761	2015-06-18	2015-07-04	Verified	B GASKINS SNA
Pro Reqs to be Sourced C ov	00978572	Stanton, Malcolm	*******78632	2021-10-27	2021-11-27	Verified	SHERWIN WILLIA 702056
Init ID Date Date Requisition Origin Requester Req Amount Status PCard	00503204	Harrison,Sara	**********29234	2021-10-16	2021-10-27	Verified	CANVA* 103210-1720915
	00503204	Harrison,Sara	**************29234	2021-09-28	2021-10-27	Verified	TENNANT CO
	00842636	Evans, Dennis	***************************************	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	RAYMARINE
	00341068	Carson,Robert	*********20623	2021-11-12	2021-11-27	Verified	SP * PROVENGO.CO
	00341068	Carson,Robert	*********20623	2021-11-04	2021-11-27	Verified	SALLYS COP SH
	00938315	Clopp,Rebecca	***************************************	2021-11-21	2021-11-27	Verified	AMZN Mktp US*8T4Y54ZN3
	00883177	Person,Kim	***********60114	2009-09-18	2009-10-15	Verified	STAPLES BUSINE0034804
	00883177	Person,Kim	60114	2009-10-09	2009-10-15	Verified	STAPLES BUSINE0034804
	00536082	Tanner,Kenneth	**********21761	2015-06-29	2015-07-04	Verified	ROBERT HUTSO FORD L-M
	00536082	Tanner,Kenneth	**************21761	2015-06-16	2015-07-04	Verified	THE PARTS HOU
	00536082	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

#### 1.3. Requisition

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

Main	Reports/Queries	Pagel	ets
Linl	ks	C	:
Da	shboards		
5	Procurement Dash	board	
⊳ eP	rocurement		
æ	Requisition		
æ	Manage Requisitio	ns	
₽	Manage Requisitio Approvals	n	
₽	DOAS Quick Refe Guide List	rence	
Pc	ard		
æ	Reconcile Stateme	ent	
æ	Review Disputes		
<b>.</b>	Cardholder Profile		
æ	Assign Proxies		
æ	Assign SpeedCha	rts	
-	1		

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

Line	Description	Item ID Su	pplier	Quantity UOM		Price	Total Detai	s Com	ments Delet
$\nabla$	1 👷 🗆 test		STAPLES CONTRACT & COMMERCIAL INC	1.0000 Each		1.0000	1.00 🔄		🖓 Add
	Shipping Line 1	*Ship To	PO_215001	Add Shipto Comments	Quantity	1.0000			+ -
		Address	DOAS Fiscal Services 200 Piedmont Avenue Suite 1820W		Price	1.0000	Price Adjustment		
			Atlanta, GA 30334				Pegging Inquiry		
		Attention To	Harder April 404/463-4032				Pegging Workbench		
		Due Date							
			Harder,April 404/463-4032						
		Accounting Lines							

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.

*Distri	ibute By	Qty	✓ S	peedCha	rt	(	2							
Accounting I	ines							Personalize	Find   V	iew All   🛃	First 🧃	) 1 of	1 🕑	Last
Chartfields1	Chartf	ields2	Chartfields3	Details	Details 2	Asset In	nformation	Asset Informa	ation 2	Budget Info	rmation 💷			
*Account		Fund		*Dept			Fund Src		Class		Budget Reference			

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

uisition Summary								Grid Customizatio	n
Business Unit 414	00	Education, Dept of	Reguisition Name 0000039793						
Requester MBR	RODKIN	Miriam Brodkin	Requisition ID 0000039793					Accounting Lines	
*Currency USE		Authorized DPA	Priority Medium V					Personalize Column Order	
Summary: Total Amount 1.00 USD								appropriate button.	press uie
xpand lines to review shipping and accounting	g details		Add More Items					Frozen columns display under every tab.	
Requisition Lines 👔								Column Order	
Line Description T g/P Line Shipping Line y	*Ship Ti Address Attention Ti Due Date *Accounting Lines Accounting Lines	y Oty Y SpeedChart		ce 1.0000	1.00 Price Adjustment Pegging Inquiry Pegging Workberg		first (* 1 of 1	Dist Type Tuccation Cuantity Percent Percent Metrophic Entry Event Tas Chartfeide2 Veccosit Percent P	Hidden Prozen
			Defails 2 Asset Information Asset	nformation 2 Budg			Special	Project Activity	
	Product	PC Bus Unit Project	Activity		Source Type	Program	Purpose	Source Type Program	
		41400 Q 01100	Q		]q a	1564101 Q	Q. B	Special Purpose	
Select All / Deselect All	Select lines to: 🎼	Add to Favorites 🔯 Add to Ter		Mass C	hange 1.00 USD			Tab Details Affiliate Fund Affiliate IN Unit Stat Open Cty Merch Am Base	

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

E	Business Unit	40300				Requi	sition Name	0000005325				
		04/01/2022						0000005325				
F	Request State					т	otal Amount	1.00	USD			
R	equested For	AHARDER				Pre-Encumbra	nce Balance	0.00	USD			
pand lines	to review shipp	ing and accou	unting details									
quisition	lines											
Line	Item Descrip test	tion	Source Status Not Source		Amount Only No	Quantity 1.0000 E	Each	Price 1.00000	USD Pendi			Total 1.00
	Contract Info	rmation										
	Shipping Line	e <sub>1</sub> Ship	To PO_215001 DOAS Fiscal Se 200 Piedmont A Atlanta, GA 303	venue S	Suite 1820W		Quantity Price	1.0000 1.00000	Price	Adjustment		
		Attentio	n To Harder, April 40	4/463-4	032							
		Due	Date									
	▼ Accour	ting Lines			Distribute By Qty		Liquidate	By Amt				
	Accoun	ting Lines						Personal	ize   🕗   🔣	First 🕚	1 of 1	Las
	Details	More Deta	ails More Details 2	Ass	set Information Bud	get Information	[:::])		-			
	Dist# S	tatus	Location	Req Qty	Merchandise Amt	Percent 0	GL Unit Even		Fund	Dept	Fund Src	Progr

**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.

unsition	Summary									
	Business Unit	44.000			B	equisition N	ame 0000039793			
	Date	41400			, in the second s	Requisitio				
	Request State	04/01/2022				Total Am		USD		
	Requested For	Pending			Pre-Encun	brance Bala		USD		
,	requested For	MBRODKIN			TTO-Enour			030		
and lines	to review shippir	ng and accountin	ıg details							
quisitio	n Lines									
Line	Item Descrip	tion	Source Status	Amount Only	Quantity		Price	Status	5	Tota
1 80			Not Source	No	1.000	0 Each	1.00000		nding	1.0
				NO	1.000	Laci	1.00000	USD Fei	iding	1.0
			Department of Education Contracts Division 205 Jesse Hill Jr Dr SE 3 Atlanta, GA 30334			Price	1.00		Adjustment	
		Attention To	Miriam Brodkin							
		Due Date								
	<ul> <li>Accounting</li> </ul>			Distribute By	Qty	Liq	uidate By Amt			
	Accounting     Accounting L	Lines		Distribute By	Qty	Liq	uidate By Amt			
		Lines		Distribute By			uidate By Amt		1-1 of 1 🗸 🕨	) 
	Accounting L	Lines	More Details 2	Distribute By	Qty		uidate By Amt	(4 - 4	1-1 of 1 👻 🕨	
	Accounting L	Lines	More Details 2				uidate By Amt	Entry Event		•

#### 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:

where the item information and submit the	reg for approval.		4	My Preferences				
equisition Summary				My Preferences ou	<ul> <li>Requisition Setting</li> </ul>	gs	Edit Lines/Shipping/Accounting for Selected Lines	
	40300 AHARDER USD		Requ thorized DPA	ion Name 0000005325 isition ID 0000005325 Priority Medium			Line Information (j) Note: The information below does not reflect the data in the selected regulation lines. When the 'OK' button is click entered on this page will replace the data in the corresponding fields on the selected lines that are available for sour	Hi rcing.
Card Number Expiration Date	Use Procurement Card	Accounting Date 03/01	2022 9				Supplier ID Q. Supplier Location Q. Buyer Q. Category Q.	
art Summary: Total Amount 1.00 USD Expand lines to review shipping and acc	ounting details			Add More I	tems		Shipping information Ship To Location Q	
Requisition Lines 👔							Due Date 3 Attention	
Line Description	Item ID	Supplier	Quantity	UOM	Price	Total	al Comments	
▶ ⊠ 1 g <sup>a</sup> test		STAPLES CONTRACT & COMMERCIAL INC	1.0000	Each	1.0000	1.00	•	
Select All / Deselect All	Select lines to:	Add to Favorites	Add to Template(s)	Delete Selecto	ed 🗾 🔁	Mass Change	Accounting Lines	
					Total Amount	1.00 (	Please enter GL Business Unit before selecting other chartfield values	
ipping Summary							Accounting Information Personalize   Find   20   R First (© 1 of Chartfields1 Details Asset Information	1 🕑 Las
Edit for All Lines Ship To Location Address	PO_215001 DOAS Fiscal Services 200 Piedmont Avenue Suite 182 Atlanta, GA 30334	914					Charthelds Deals Asset Information The Dept Dept Percent Location GL Unit Account Fund Dept 1 Q. Q. Q. Q.	Func
Attention To Comments	Harder,April 404/463-4032						Load Values From	lefaults

### Upgraded:

eview the item information and submit the	e req for approval.										
equisition Summary				My Preferences	Requisition Setting	25		Edit Lines/Shi	pping/Accounting for	or Selected L	ines
	41400 MBRODKIN USD	Education, Dep Miriam Brodkin Accounting Date	Authorized DPA	equisition Name 00000397 Requisition ID 00000397 Priority Medium	93	N			data in the selected requisition I corresponding fields on the select		
art Summary: Total Amount 1.00 USD							Buver	Q	Category	0	
expand lines to review shipping and acco	unting details			Add Me	ore Items		Buyer	Q	Category	4	
Requisition Lines 👔						S	Shipping Information				
Line Description	Item ID	Supplier	Quanti	ity UOM	Price	Total	Ship To Location	Q			
				The A	1.0000	10.00	Due Date	F	Attention		
1 gA 🗹 test	Select lines to:	Add to Favorites	Add to Template(s)	0000 Each	_	1.00 Change	Comments		Autom		
Select All / Deselect All	Select lines to:	Add to Favorites			_	Change 1			Attended		<i>li</i>
Select All / Deselect All	Select lines to:	Add to Favorites			ed BMass	Change 1 <u>A</u>	Comments Com	]q			
	Select lines to: P0_015004 Department of Education Contracts Division 205 Jesse Hill Jr Dr SE Bis Altanta, GA 3034				ed BMass	Change 1 <u>A</u>	Comments Accounting Lines SpeedChart Please enter GL Busin Accounting Inform	Q ass Unit before selecting off	her chartifield values Personalize   Details _ Asset Information		rst 🕢 1 of 1 🌛 L
Select All / Deselect All Suppling Summary Edit for All Lines Ship To Location	PO_015004 Department of Education Contracts Division 205 Jesse Hill Jr Dr SE. Ste				ed BMass	Change 1 <u>A</u>	Comments Accounting Lines SpeedChart Please enter GL Busin Accounting Inform Chartfields1 Char	Q, ss Unit before selecting off iation tfields2    Chartfields3	rer chartifield values Personalize 1 Details Asset Information	Product	

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 - Re Review the item information and Requisition Summary					erences 🎆	Requisition Setting
Ca	Requester USD Currency USD rd Number ration Date	April Harden	Authorized DPA	requiencentranie	0000005164 0000005164 Low	
Maintain Purchase O Purchase Order Business Unit 403 PO ID Copy From				PC Status Budge Status	Approved Not Chk'd	× Time Processin
*Supplier	STAPLESCON-001 Q	Supplier Search Supplier Details STAPLES CONTRACT & C	OMMERCIAL INC	De Tol Sta Regist Sta PO Tr Prio	ype SWCC	SWC-Convenier
PO Reference	Online Src From Req 00000051	164		"Dispatch Meth	nod Print	~

## 1.5. Manage Requisitions

The Manage Requisitions option opens the Manage Requisitions page.

Main	Reports/Queries	Pagele	ts
Link	s	C	:
⇒ Da	shboards		
æ	Procurement Dash	nboard	
≂ eP	rocurement		
æ	Requisition		
æ	Manage Requisition	ons	
₽	Manage Requisition Approvals	on	
æ	DOAS Quick Refe Guide List	rence	
	ard		
æ	Reconcile Statem	ent	
æ	Review Disputes		
æ	Cardholder Profile		
æ	Assign Proxies		
æ	Assign SpeedCha	rts	
-	1 A.V 04		

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

r.	Search Requi	sitions								
Го	locate requisitio	ns, edit the criteria below	w and click the Se	earch button.						
	Busines	s Unit	Q	Requisition	Name					(
	Requisit	ion ID	Q	Request	t State All but Co	mplete v	Bud	lget Status		~
	Date	From	1	D	ate To 03/23/202	2				
	Requ	ester	Q	Ente	red By	Q		PO ID		0
e	quisitions 👔									
0 \	view the lifespar	n and line items for a rec another action on a requ				list and click Go.				
0 \	view the lifespar	n and line items for a rec		lection from the		list and click Go. Budget	Total			
0 \	view the lifespan edit or perform a	n and line items for a rec another action on a requ	isition, make a set	lection from the	Action dropdown Request State			[Select Action]	v)	Go
0 \	view the lifespar edit or perform a Req ID	n and line items for a rec another action on a requ	isition, make a set BU	Date I	Action dropdown Request State Pending	Budget	102.60 USD	[Select Action] [Select Action]	~ ~	Go Go
0 \	view the lifespare edit or perform a Req ID 0000005162	n and line items for a rec another action on a requ	isition, make a set BU 40300	Date 03/03/2022	Action dropdown Request State Pending Pending	Budget Not Chk'd	102.60 USD 102.60 USD			
0 \	view the lifespai edit or perform a Req ID 0000005162 0000005161	n and line items for a rec another action on a requ	isition, make a sei BU 40300 40300	Date         03/03/2022           03/03/2022         03/03/2022	Action dropdown Request State Pending Pending Pending	Budget Not Chk'd Not Chk'd	102.60 USD 102.60 USD	[Select Action]		Go
۰ v	view the lifespaa edit or perform a Req ID 0000005162 0000005161 0000005160	n and line items for a rec another action on a requ	isition, make a set BU 40300 40300 40300	Date         I           03/03/2022         I           03/03/2022         I           02/21/2022         I	Action dropdown Request State Pending Pending Pending Open	Budget Not Chk'd Not Chk'd Not Chk'd	102.60 USD 102.60 USD 102.60 USD	[Select Action] [Select Action] [Select Action]		Go Go

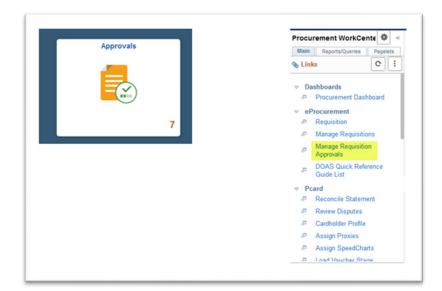
The dropdown menu is still available and has the same options. Click on the dropdown arrow, select the desired option, and click Go. This will allows you to see the selected option.

		an and line items for a requi another action on a requisi				list and click Go.			
	Req ID	Requisition Name	BU	Date	Request State	Budget	Total		
Þ	0000005162		40300	03/03/2022	Pending	Not Chk'd	102.60 USD	[Select Action] V	Go
ŀ	000005161		40300	03/03/2022	Pending	Not Chk'd	102.60 USD	Approvals Cancel	Go
Þ	000005160		40300	02/21/2022	Pending	Not Chk'd	102.60 USD	Check Budget	Go
Þ	0000005159		40300	02/18/2022	Open	Not Chk'd	100,000.00 USD	Copy Edit	Go
Þ	000005158		40300	02/18/2022	Open	Not Chk'd	249,000.00 USD	View Cycle	Go
Þ	0000005157		40300	02/18/2022	Open	Not Chk'd	1,000,001.00 USD	View Print	Go
Þ	0000005156		40300	02/18/2022	Pending	Not Chk'd	1.000.001.00 USD	[Select Action]	Go

#### **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.

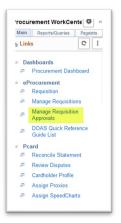
Approvals tile on the Home Page or Manage Requisition Approvals on the Procurement WorkCenter



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.

K Pending Approvals		Requisition	ራ የ
Request for REQ 2 ADDED ROBEMAR 20.00 USD			Approve Deny
Header is pending your approval			
Summary			
Business Unit	40300	Requisition ID	000004665
Routed Date	March 11, 2022	Requisition Date	March 11, 2022
Requester		Entered by	
Origin	224	Budget Header Status	Not Budget Checked
- More Information			

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.

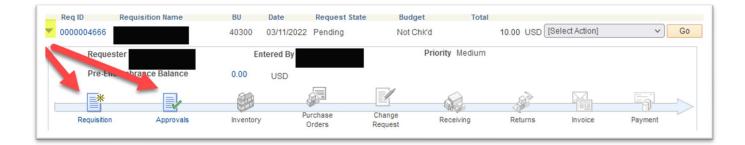
Search Requisitions	£							
To locate requisitions that	require your app	proval (or requisitions th	nat previously r	equired your	approval),	edit the criteria belo	w and click the S	Search button.
Requisition	D	Q		Requisiti	on Name			Q
Business Ur	it	Q			*Status	Pending	~	
Date Fro	n 03/23/2021	31			Date To	03/23/2022	31	
Request	er	Q		E	ntered by		Q	
Search Clei	31					Show Advance	o Search	
Requisitions To view the cumplete det	ails and approve	a Requisition, click the	e requisition ID	link.		Show Advance	o Search	
Requisitions To view the cumplete det	ails and approve	a Requisition, click the Requisition Name	e requisition ID Bus. Unit	link. Date	Requeste			tal
Requisitions To view the complete det Expand All	ails and approve Collapse All				Requeste			otal USD
Requisitions To view the complete det Expand All Action/Status	ails and approve Collapse All Req ID	Requisition Name	Bus. Unit	Date	Requeste		To	

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.

	Busin	ess Unit	40300							
	Requi	isition ID	0000004644							
	Requisitio	on Name	0000004644		Origin	224				
		equester								
	En	tered on								
		Status	1 chiding				Total Am	ount	1,000.00 USE	)
		Priority	mediani				Card Nu	nber		
	Budge	et Status	Not Checked				Card Holder M	lame		
queste No ju	r's Justification	on ed by requ	vester.							
	Edit Reguisition				-				View printable version	
	Edit Requisition									
ine li	nformation	?								
e Info	rmation									
<b>a</b>									4 4 1-1 of 1 ~	× - 3
	Line		Item Description	Supplier Name	Quantity	UOM	Price	Category	Category Description	
0	1	89	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								
Select			3							
	All / Deselect	e Details	3							
Revie	All / Deselect View Lin w/Edit Appre	e Details	3							
Revie	All / Deselect / View Lin/ w/Edit Appro Stage	e Details overs								
Revie Drigin	All / Deselect / View Lin/ w/Edit Appro Stage Requisition	e Details overs	3 04644:Pending						Start New Path	
Revie Drigin	All / Deselect / View Lin/ w/Edit Appro Stage Requisition in nding	e Details overs n 00000	04644:Pending	Routed	Not Routed			outed		
Revie Drigin Origi Pe	All / Deselect / View Lin w/Edit Appro Stage Requisition in moting Margaret R	e Details overs n 00000	04644:Pending	Multiple Approvers	H Multiple	Approvers B	_ <b>●</b> →			
Revie Drigin	All / Deselect / View Lin w/Edit Appro Stage Requisition in moting Margaret R	e Details overs n 00000	04644:Pending	Multiple Approvers	Multiple /	Approvers B		outed Phoenix Famutimi 40		
Revie Drigin Origi Pe	All / Deselect / View Lin w/Edit Appro Stage Requisition in moting Margaret R	e Details overs n 00000 ober	04644:Pending	Multiple Approvers	H Multiple	Approvers B	_ <b>●</b> →	outed Phoenix Famutimi 40	4/685-2661	
Revie Drigin Origi Pe	All / Deselect / View Lin- w/Edit Appro Stage Requisition in mding Margaret R	e Details overs n 00000 ober	04644:Pending	Multiple Approvers	H Multiple	Approvers B	_ <b>●</b> →	outed Phoenix Famutimi 40		

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.

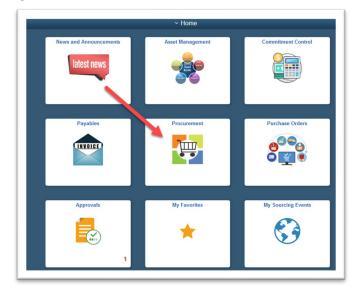
#### Note\*\*As of 03/28/2022, there is a known bug on the Manage Requisitions page.



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.

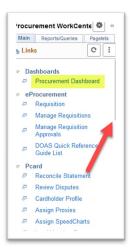
In the upgraded environment the Pagelet information will display automatically on the Procurement WorkCenter landing page.

< Home	Procurement WorkCenter						ť	ລີ : ⊘
ocurement WorkCente 🏶 «	Procurement Dashboard							· · · · · ·
Main Reports/Queries Pagelets	ePro Reqs multi Origins	Pcard Ve	rified charges					
Links C 🗄	Unit ID Source Date Status Requisition Origin Requester Req Ambre Status PCard Use Ambre Status PCard Use Status PCard Use Status ProCard	ID	Name	Account	Trans Date	Bill Dt	Status	Merchant
Dashboards	ePro Regs to be Sourced	00536082	Tanner,Kenneth	*******21761	2015-06-18	2015-07-04	verified	B GASKINS SNAP ON
Procurement Dashboard	REQ Reg Approval Design of the REQ Sum Budget Design	00978572	Stanton,Malcolm	**********78632	2021-10-27	2021-11-27	Verified	SHERWIN WILLIAN 702056
eProcurement	Unit ID Date Date Requisition Origin Requester Req Amount Status PCaro	00503204	Harrison,Sara	29234	2021-10-16	2021-10-27	Verified	CANVA* 103210-17209151
P Requisition		00503204	Harrison,Sara	***********29234	2021-09-28	2021-10-27	Verified	TENNANT CO
Manage Requisitions		00842636	Evans,Dennis			2021-11-27		
Manage Requisition			Callahan, Timothy					PAYPAL *FEDEX
Approvals		00341068	Carson,Robert	***************************************	2021-10-29	2021-11-27		RAYMARINE
DOAS Quick Reference			Carson,Robert	20623			Verified	SP * PROVENGO.COM
	v <sup>2</sup>	00341068	Carson,Robert	*************20623	2021-11-04	2021-11-27	Verified	SALLYS COP SHC
My Work C :		00938315	Clopp,Rebecca	***************************************	2021-11-21	2021-11-27	Verified	AMZN Mktp US*8T4Y54ZN3
My Work		00883177	Person,Kim	**********60114	2009-09-18	2009-10-15		STAPLES BUSINE00348045
<ul> <li>Approval Routing (1)</li> <li>Collaboration Review</li> </ul>		00883177	Person,Kim	**********60114	2009-10-09	2009-10-15	Verified	STAPLES BUSINE00348045
Collaboration Review     CollaborationComplete		00536082	Tanner,Kenneth	**********21761	2015-06-29	2015-07-04	Verified	ROBERT HUTSON FORD L-M
		00536082	Tanner,Kenneth	*********21761	2015-06-16	2015-07-04	Verified	THE PARTS HOUS
		00536082	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
		00842636	Evans, Dennis	**********17008	2021-11-06	2021-11-27	Verified	SQ *WASH N' DR)

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.

Main	Reports/Queries	Pagelets
Link	(5	C :
⇒ Sc	ourcing	
	Event Details	
8	Event Workbench	
	Analyze Events	
æ	Notice of Intent to A	Award
æ	Notice of Award	
5	A rd Events	
⇒ Su	pplier Contracts	
æ	Contract Entry	
-B	Document Manage	ment
₽	Update Agreement Statuses	
P	Supplier Contract Workbench	

#### 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.

	e Add a New Value		Enter any information you ha	ave and click Search.	Ceare neros crain, for a list of all	raidea.
Eind an Existing Valu	e Add a New Value		Find an Existing Valu	Add a New	Value	
*SetID	STATE Q		Search Criteria			
Contract ID	NEXT		*SetID	= *	ISTATE Q	
Style ID	٩		Contract ID	begins with v		
ontract Process Option	General Contract	~	Contract Version	= •		
			Version Status	= *		¥
Add			Contract Process Option	= •		~
			Supplier ID	begins with v	٩	
			Short Supplier Name	begins with v	٩	
			Supplier Name	begins with v	٩	
			Contract Status	= •		×
			Master Contract ID	begins with ~	٩	
			Description	begins with ~		
			Supplier Contract Ref	begins with ~		
			Corporate Contract	= ~		×
			Contract Style	begins with v	٩	
			Correct History Cas	e Sensitive		

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

Contract Entry				
Contract				
SetID	STATE			Contract Ver
Contract ID	40300-401-DAS	0000116-0003		
*Status	Open		~	Approv
Administrator/Buyer  Authored Document Authored Status	Approved Canceled Closed On-Hold Open		iree W	ïlliams 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		
Contract ID	40300-401-DAS000011	6-0003	Version	1	Status Current
*Status	Open	~	Approved Date	06/30/2017	
Administrator/Buyer	DESIREEW	Q Desiree William	ms 404/657-9443		
Authored Document					
Authored Status	Executed				Maintain Document
Document Version	1.00			Sponsor	
	Fixed Winged Air Charte	er Servi		Department	
Amendment				Created Date/time	06/30/2017 12:00AM
Document Administrator	CASTEELE1			Last modified date	07/21/2021 1:46PM
▼ Header ⑦					
*Contract Style	GN	Q			
Process Option					
*Supplier		Supplier Search			Edit Comments
		ouppiler ocareir			Contract Activities Primary Contact Info
*Supplier ID	0000017333 Q	EPPS AIR SERVICE	INC		Contract Header Agreement Contract Releases
Primary Contact	2 Q. DLANE				Contract Releases
Supplier Contract Ref					
Description	Fixed Winged Air Char	ter Servi			Retention Activity Log
Master Contract ID		Q			Document Status
		~			Thresholds & Notifications Price Adjustment Template
*Begin Date					View Changes Current Change Reason
Expire Date	06/30/2022				Purchase Order BU Defaults
Renewal Date					

No checkboxes have been added or removed.

	☑ A □ L Type	ax Exempt uto Default .ock Chartfields	Tax Exempt ID Fiscal Year Group		Currency Rate Date	USD Q 06/28/2017 Must Use Contrac Allow Multicurren Multi-Agreement Initial Period Non-Profit	t Rate Date	٩
Invoice Options	Invoice Number				Gross Amount		0.00	
							000	
	AP Business Unit		Q		Freight Amount		0.00	
Acc	ounting Template		۹		Misc Charge Amount		0.00 Miscella	neous Charges
P	ayment Terms ID	N30	۹		Sales Tax Amount		0.00	
	Basis Date Type		~		VAT Amount		0.00	
Amount Summa	пу 🕐							
	ury ⑦ Maximum Amoun	t 2,5	i00,000.00 (	JSD				
			00,000.00 0.00	JSD				
Line Item	Maximum Amoun	t		JSD				
Line Item Category	Maximum Amoun Released Amoun	t	0.00	JSD				
Line Item Category Open Item	Maximum Amoun Released Amoun Released Amoun	t t t 1,4	0.00	JSD				
Line Item Category Open Item Total	Maximum Amoun Released Amoun Released Amoun Released Amoun	t t t 1,1 t 1,1	0.00 0.00 512,819.31	JSD				
Line Item   Category   Open Item   Total   R	Maximum Amoun Released Amoun Released Amoun Released Amoun Released Amoun	t t t 1,t t 1,t	0.00 0.00 512,819.31 512,819.31	JSD				
Line Item   Category   Open Item   Total   R	Maximum Amoun Released Amoun Released Amoun Released Amoun Released Amoun emaining Amoun emaining Percent	t t t 1,t t 1,t	0.00 0.00 512,819.31 512,819.31 987,180.69	JSD				
Line Item I Category I Open Item Total I R Re	Maximum Amoun Released Amoun Released Amoun Released Amoun Released Amoun emaining Amoun emaining Percent	t t t 1,t t 1,t	0.00 0.00 512,819.31 512,819.31 987,180.69 39.49	JSD	Price Can Be Chan	ged on Order		

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

III Q																14	1-1 of 1 ~	- F - F - 1	Vier
Details	Ord	ler By Amount	tem Information	Default Schedule	Release Amounts	Release	Quantitie	es	Line Grou	pings	Spend Threshold	l IIÞ							
Line		Item	Desc	ription			UOM		Category		Merchandise Amt					Include for Release	Status		
1	-		Q, Aircr	aft Charter Services		R.	UNT	۹	96113	Q		0	0	-	*		Active	+	F

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.

< Home				Procurer	nent workcenter						ώ	५ : ७
» Personal Data	Card Data									New Window	w   Help	Personalize Page
Display Unmaske	ed Card Number	nits Transaction Limits	IÞ						14 4 1-1 of	1 🗸 🕨	)))) 	
*Business Unit	*Card Issuer	*Card Number	*Expiry Date	Inactive	Card Type	Date Issued		Status	Status Date			
٩	٩		<b></b>	0	· · ·	03/22/2022	<b></b>		<b></b>	+	-	
Save Retur Personal Data   Car	n to Search Previous in List	Next in List 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.

<u>Status:</u> 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.

<u>Status Date</u>: 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.

<u>Add Proxy by Role</u>: 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.

		Assign Proxies			×
VISA Ca	rd Number	Add Proxy by Role			Help
Proxies					
₽ Q			14	▲ 1-1 of	1 🗸 🕨 🕨
*User ID	Description	*Role	Requester Default	Buyer Default	
	۹.	· ·			+ -
OK Canc	el	GA_CC_AGENCY_ADMIN GA_CC_Approver GA_CC_PO_User GA_CC_REQ_User GA_CC_Reconciler GA_CC_Req_Recon GA_CC_Reviewer GA_PV_Requester: clone of eF			

# **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.

au rouon	iei Stage					
	Run Control ID	03_Load_Vchr		Report Manager	Process Monitor	Run
rocess Req	uest Parameters					
	*SetID	STATE	Q			
	*Card Issuer	VISA	Q			
	AP Business Unit					
	*Billing Date	12/24/2020	Q			
	Invoice Date to Use	Billing Date	~			
	Invoice Date	Billing Date				
	*Create Vouchers	Enter Date				
	Buoincoo Unit	Today				
	Invoice Number	PC03272018	1.			
		50	(Process Instance	will be used when blank)		
	Max Voucher Lines	50				
Transactio	on Status Criteria					
		Approved Statu	s			
		O Any Status Exce	ept Closed			
Budget St	atus Criteria					
		Valid Budget Sta	atus			
		O Any Budget Sta	tus			
Chartfield	Status Criteria					
		Valid Chartfield	Status			
		O Any Chartfield S	Status			

**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.

				Document ma	nagement
Document Manage	ment				
SetID	STATE	Contract ID	40300-401-DAS0000116-0003	Return to Document Search	
Supplier	EPPS AIR SERVICE INC				
Contract Style					
Document Type	SPD Agency Services Cor	ntract			
Description	Fixed Winged Air Charter	Servi			
Administrator	Carrie Steele 404/463-55	56			
Sponsor		Department			
Version		Created On	06/30/17 12:00AM	Document Details	
Status	Executed	Last Modified On	07/21/21 1:46PM		
Re	set to Dispatch	Executed On	07/21/21 1:46:46PM		
Cre	ate Amendment				
Imported Doc	ument				
View and Edit Op	tions:	Review and Appro		Other Document Actions:	
Vie	w Document	Internal Contacts/		Send to Contacts	
Modify Attachmen Document Versio	ts/Related Documents n History	External Contacts/ Document View Ad		Deactivate Document	j

## 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

vlodify an Ev							
nvite Bidde		5	Dural 1	Manalan			
Public Even		Event ID SPD0000	165 Round 1	Version 1	Event	Format Buy	Event 1
Bidder Invitati	ion List ⑦						
₽ Q							
Select	Bidder ID	Bidder Type	Status	Georgia Resident	Small Business *	Bidder Company	
	PUBLIC_AUC	Public				This is a Public Event	
Search for Bidde	ers	Disp	patch Lines			Save Bidders as G	Group

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

		Bidder Search	Hel
arch Criteria ⑦		DO NOT CHANGE	The second se
Use Saved Search	· ·		
Bidder Type	Bidder and Supplier 🗸		
Name/Company	= ~	Q, ID Q,	
SIC Type	Q	State Q TIN	
SIC Code	Q	City	
low More			
Category Criteria     Profile Question Cl     Diversity Criteria ③	iteria 🕜		
Results Option		Type V Maximum Rows r	retrieved 99999
Search	Recommend Bidders	🖉 Save Search Criteria	elete Search Criteria

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.

Search	Re	commend Bidde	rs		Save Se	arch Criteria	Delete Search Crit	eria	
Return to Invite Bidders	Can	cel							
	Deselect All		_						
Results 2.	]		3.					4 1-50 of 86	• •
			Georgia	Small	Bidder Company	Open for	Category	Diversity	Invite
Bidder ID	Bidder Type	Status	Resident	Business *		Ordering			
Bidder ID	Bidder Type Supplier	Status	<b>Resident</b> Yes	Business * Yes	TOM GRADDY ENTERPRISES LLC	Yes	M N	44	
Bidder ID 1 2					TOM GRADDY			24 24	
1	Supplier	Approved	Yes		TOM GRADDY ENTERPRISES LLC MSC INDUSTRIAL SUPPLY	Yes	80		

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.

٩	tion List ⑦								H I.	10 of 87 🗸 🕨	Viev
elect	Bidder ID	Bidder Type	Status	Georgia Resident	Small Business *	Bidder Company	Category	Diversity	*Dispatch Method		
•	PUBLIC_AUC	Public				This is a Public Event			Email	8	-
	1	Supplier	Approved	Y	γ	TOM GRADDY ENTERPRISES	RE .	<u>10</u>	Email 🗸		-
	3	Supplier	Approved	Y		MSC INDUSTRIAL SUPPLY COMPANY	RJE	<u>10</u>	Email 🗸		-
	d D	Supplier	Approved			UNITED REFRIGERATION INC	NS.	<u>8</u>	Email 🗸		-
	0(1	Supplier	Approved			DAIKIN APPLIED AMERICAS INC	M	<u>84</u>	Email 🗸		-
	3	Supplier	Approved	Y	Y	BROOKS AUTO PARTS INC	BE	**	Email 🗸		-
	e 9	Supplier	Approved			PEP BOYS CORPORATION	M		Email 🗸		-
	6 3	Supplier	Approved	Y	Y	NATIONAL BUS SALES	Ref.	쑢	Email 🗸		Ē
	3	Supplier	Approved			AUTO PAINT CENTER INC	86		Email 🗸		-
	3	Supplier	Approved	Y	Y	SPRAGUES SUPPLY INC	N	<u>84</u>	Email 🗸		Ē
	¢	Supplier	Approved			TECHNICAL LABORATORY ASSOCIATES INC	BE		Email 🗸		-
	4	Supplier	Approved			WAY BROS INC	RE		Email 🗸		-
		Supplier	Approved		Y	BRENT WALKER FORD SALES INC	BE .	**	Email 🗸		-
		Supplier	Approved			CONDITIONED AIR INC	B)E		Email 🗸		-
	0	Supplier	Approved			HANDICAPPED DRIVER SERVICES INC	BE		Email 🗸		-
for Bidd	ers		Dispatch Lines			Save Bidders as Group					

#### 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

**<u>Category</u>**: 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).

	ation List ⑦								
Q									4 1-20
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	ы	22	Email
	C 3	Supplier	Approved	Y		MSC INDUSTRIAL SUPPLY COMPANY	8	44	Email
	)	Supplier	Approved			UNITED REFRIGERATION INC	8	44	Email 🗸
		Supplier	Approved			DAIKIN APPLIED AMERICAS	8	245	Email 🗸
	3	Supplier	Approved	Y	Y	BROOKS AUTO PARTS INC	8	201	Email 🗸
	( )	Supplier	Approved			PEP BOYS CORPORATION	8		Email 🗸
	(	Supplier	Approved	Y	Y	NATIONAL BUS SALES	8	24	Email ~