

Module Enhancement Reviews

Donna Wooddell, Teresa Page and
Jason Beitzel

Agenda

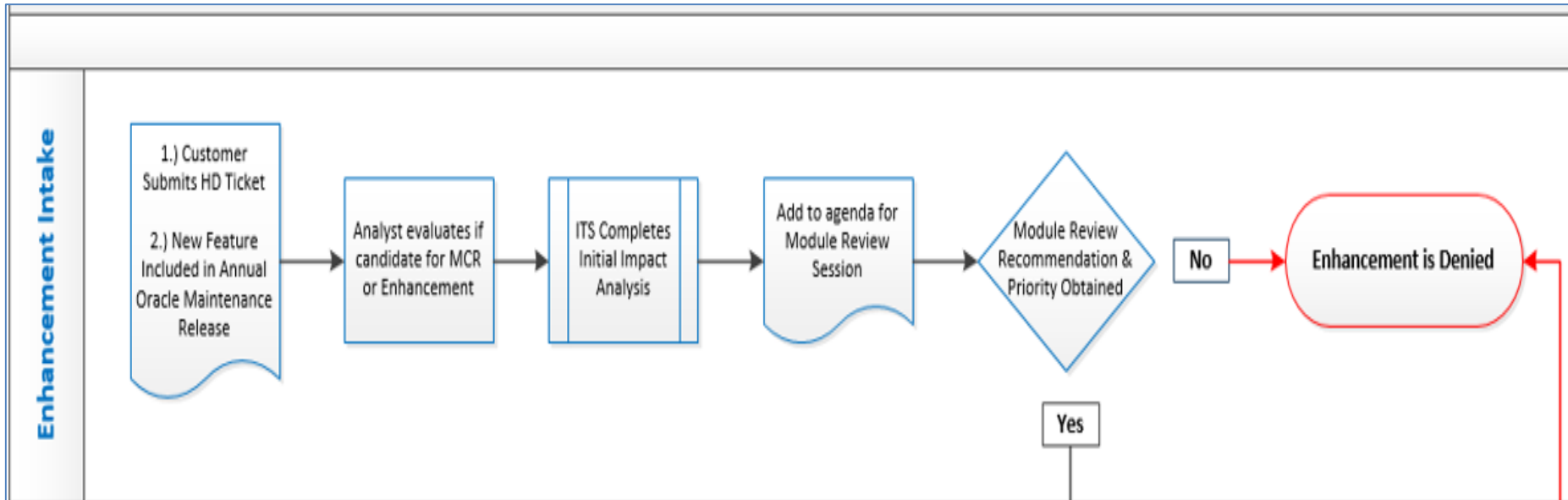
- Purpose of Module Enhancement Review Sessions
- Change Management process
- Upcoming sessions
- Overview of Session
- Outcome of ePro and Purchasing Session
- Coming Soon: AP & AM Sessions

Purpose of Module Enhancement Reviews

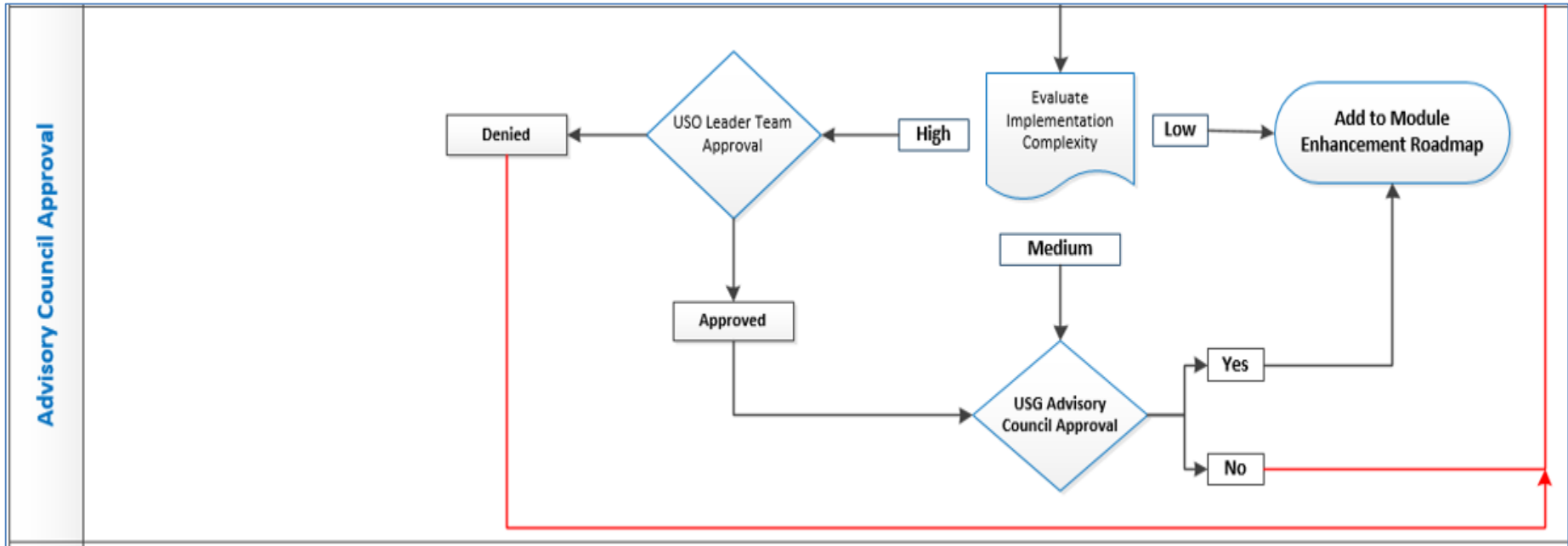


- Oracle images include new features or functionality.
- These sessions allow sharing with institution process experts to obtain customer feedback and priority for implementing.
- Depending on the implementation complexity (High, Medium, Low), USO Leader Team and/or USG Advisory Team approval required.

Change Management Process



Change Management Process



Module Enhancement Review Schedule

- Goal is each module to have annual review.
- ePro and Purchasing module session conducted April, 2016.
- Asset Management November 1, 2016
- Accounts Payable November 11, 2016
- General Ledger/Commitment Control and Expense module reviews planned for February or March, 2017.

Overview of Session

Overview of Session

Agenda

- Purpose of Module Enhancement Review session
- Where we are today
- Georgia*FIRST* Financials Roadmap
- Production Support Update
- Enhancement requests submitted to Oracle
- Review of enhancements delivered as part of the v9.2 upgrade

Overview of Session

Agenda

- Review of enhancements delivered since the v9.2 upgrade
- Demo/Discussion of available Oracle enhancements for ePro & Purchasing modules
- Other enhancements requested?
- Discuss Prioritization of possible Oracle enhancements and other requested enhancements

Outcome of ePro & Purchasing Session

Outcome of ePro & Purchasing Session

- 24 Georgia*FIRST* Institutions attended
 - UGA & Augusta University also in attendance
- 8 enhancements discussed
 - Pre-Check Budget
 - Procurement Contracts
 - Supplier 360
 - Supplier Onboarding
 - FLUID / Mobile Functionality
 - Electronic Signature – PO
 - Training & Documentation

Outcome of ePro & Purchasing Session

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

Outcome of ePro and Purchasing Session

Roadmap & Implementation Plan

- Fall 2016 (Rel 5.20): Supplier 360
- Spring/Summer 2017:
 - Procurement Contracts/Sourcing Workbench
 - Electronic Signature on PO

Attend “eProcurement and Purchasing Module Review Update” session Friday @ 10:30 am

Coming Soon!
Asset Management
&
Accounts Payable
Sessions

Asset Management Module Review

- Tentatively Scheduled for November 1, 2016
- AM Workcenter
 - Currently in Production
- Transaction Reversal
 - New functionality to be discussed

Accounts Payable Module Review

- Tentatively Scheduled for November 11, 2016
- Payment Request Functionality
 - With a simple understanding of PeopleSoft, professionals outside Accounts Payable departments can now initiate and submit their non-purchase order expenses using Payment Request.
 1. Payment Summary Information
 2. Supplier Information
 3. Line Details
 4. Review and Submit

Accounts Payable Module Review

Payment Request

Summary Information

Supplier Information

Invoice Details

Review and Subm

Exit

Save for Later

Summary Information - Step 1 of 4

Instructions ?

*Business Unit

Invoice Number

Entered By Kenneth Schumacher

Request ID 0000000001

*Invoice Date

Entered Datetime 02/18/2014 7:00AM

Description

Attachments (0)

Cost Sub-Total

Misc Charge Amount

Freight Amount

Tax Amount

Total Amount 37.50 *Currency

Notes/Comments

Accounts Payable Module Review

– Fluid

- Mobile voucher approval
- Can also be used for approving payment requests
- You can use any mobile device (e.g. smartphone, tablet, and so on.) with an OS platform that supports HTML 5.

Accounts Payable Module Review

- Mass Payment Cancellation

- Currently, users have to cancel one payment at a time
- The Mass Payment Cancellation component enables you to search for multiple payments and then cancel, escheat or stale-date, or undo those actions

Accounts Payable Module Review

– Mass Payment Cancellation

Restore Encumbrance to PO

*Cancel Action:

Allow if Withholding Exists

Action:

Select All Deselect All

Search Results Personalize | Find | View All | | First 1-19 of 19 Last

Payment Information		Payee						
Sel	Bank Code	Bank Account	Payment Status	Cancel Action	Payment Reference	Payment Method	Payment Amount	Payment Currency
<input type="checkbox"/>	USBNK	CHCK	P	N	000001	CHK	1042.50	USD
<input type="checkbox"/>	USBNK	CHCK	P	N	000001	CHK	1042.50	USD
<input checked="" type="checkbox"/>	USBNK	CHCK	P	N	000002	CHK	24087.50	USD
<input checked="" type="checkbox"/>	USBNK	CHCK	P	N	000003	CHK	15677.87	USD
<input checked="" type="checkbox"/>	USBNK	CHCK	P	N	000004	CHK	40783.64	USD
<input checked="" type="checkbox"/>	USBNK	CHCK	P	N	000005	CHK	29346.65	USD

