eProcurement and Purchasing Module Review Update

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Agenda

- What is a Module Enhancement Review?
- Change Management Process
- Agenda Items for MER session
- Enhancements delivered at v9.2 Upgrade
- Enhancements delivered since v9.2 Upgrade
- Enhancements available for implementation
- Results of ePro & Purchasing Module Enhancement Review Session
- What's Next?

What is a Module Enhancement Review?

- An opportunity to meet with Institution process experts to introduce and discuss area of/for enhancements within each module of the application.
  - Oracle delivered functionality
  - Desired enhancements (ways to make the system work better for all)

- These sessions focus on three main areas:
  - Introduce new functionality that is currently available for use
  - Introduce unimplemented functionality that may be of interest to our customers
  - Configuration options

What is a Module Enhancement Review?

- An opportunity for Institutional process experts to:
  - Discuss and provide feedback
  - Assist in prioritization for implementation of enhancements

- Resulting end deliverables consist of:
  - Implementation complexity score of each enhancement
  - Priority for Implementation
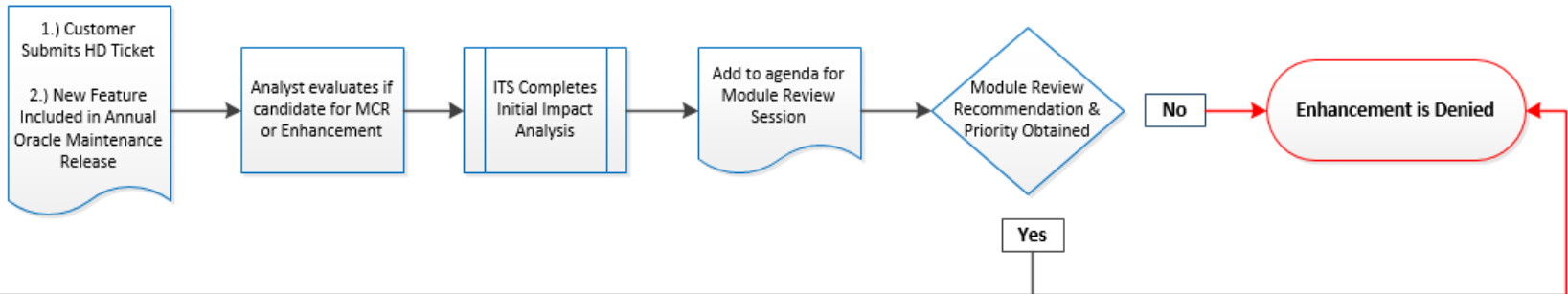 - Roadmap and implementation plan

Change Management Process

- Depending on the implementation complexity (High, Medium, Low), USO Leader Team and/or USG Advisory Team approval required.
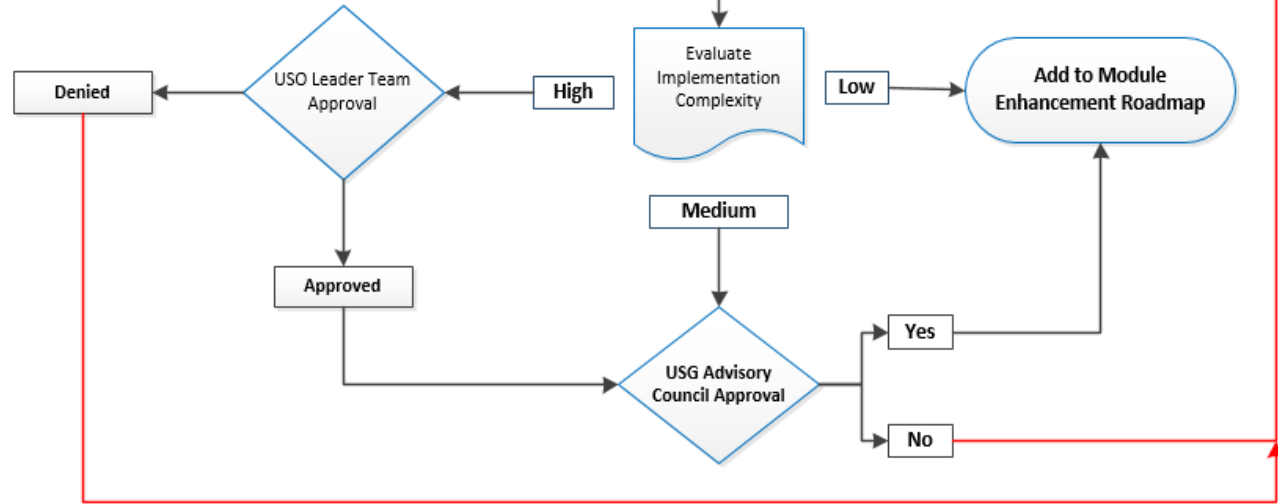
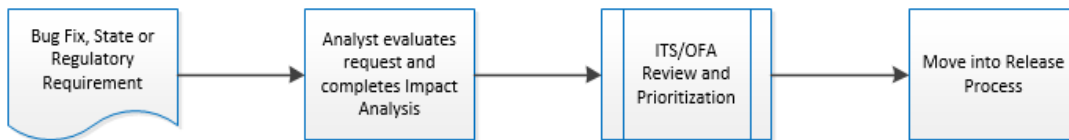# 9.2 PeopleSoft Financials Model Change/Enhancement Request Process
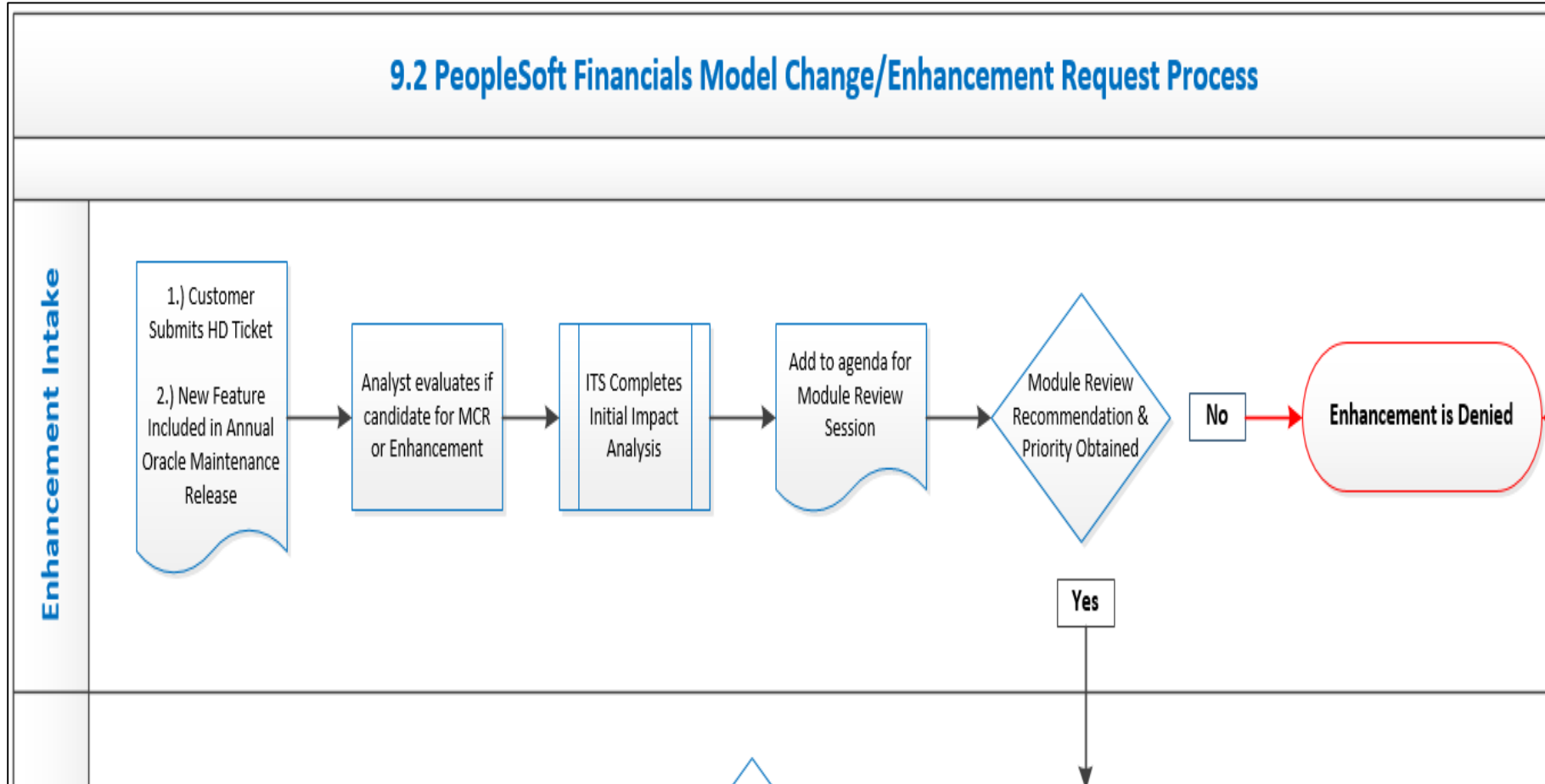
Enhancement Intake

1.) Customer Submits HD Ticket

2.) New Feature Included in Annual Oracle Maintenance Release

Analyst evaluates if candidate for MCR or Enhancement

ITS Completes Initial Impact Analysis

Add to agenda for Module Review Session

Module Review Recommendation & Priority Obtained

No → **Enhancement is Denied**

Yes

Advisory Council Approval

Denied

USO Leader Team Approval

High

Evaluate Implementation Complexity

Low → **Add to Module Enhancement Roadmap**

Approved

Medium

USG Advisory Council Approval

Yes

No

Mandatory/Bug

Bug Fix, State or Regulatory Requirement

Analyst evaluates request and completes Impact Analysis

ITS/OFA Review and Prioritization

Move into Release Process

Change Management Process

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→ Add to agenda for Module Review Session

→ Module Review Recommendation & Priority Obtained

No → **Enhancement is Denied**

Yes

Change Management Process

Change Management Process

Mandatory/Bug

Bug Fix, State or Regulatory Requirement → Analyst evaluates request and completes Impact Analysis → ITS/OFA Review and Prioritization → Move into Release Process
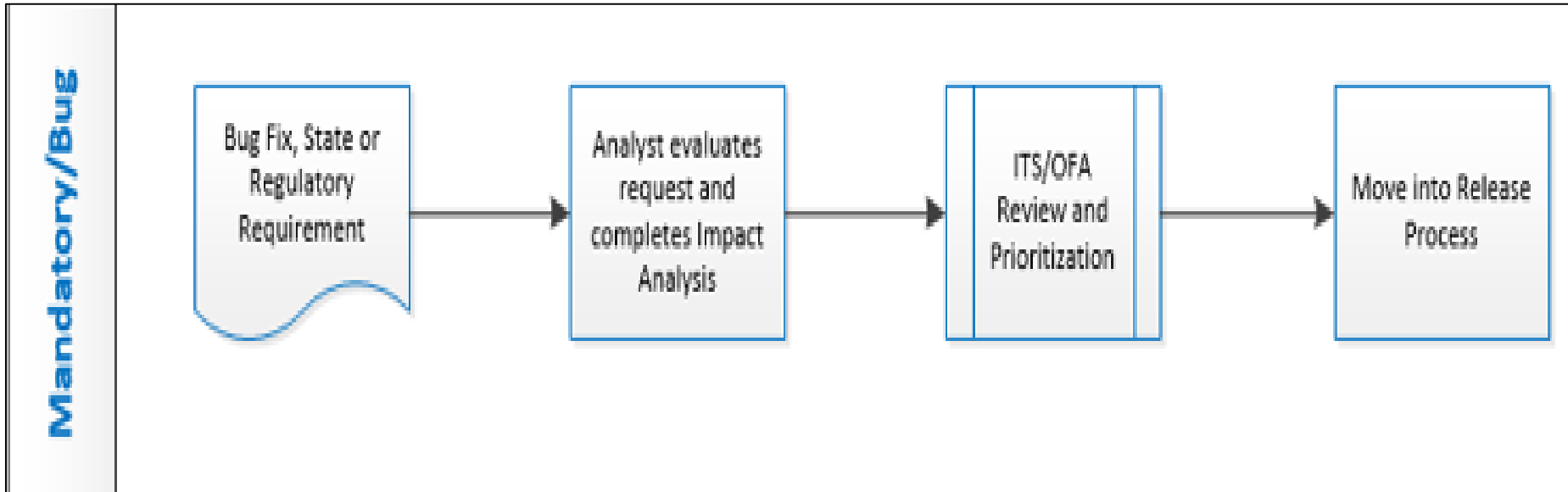
Module Enhancement Review Agenda Items

Module Enhancement Review Agenda Items

- What's going right? What's going wrong?
- Production Support Update
- Enhancements:
  - Delivered at v9.2 Upgrade
  - Delivered since v 9.2 Upgrade
  - Available for implementation now
- Demo/Discussion of enhancements
- Prioritization of available enhancements

Enhancements

Enhancements Delivered at Upgrade

eProcurement

- New Requisition entry layout

- Amount Only option added to requisition line

- Speedchart now delivered on Mass Change page

- Pre-Encumbrance balance can be viewed on Requisition

- Copy Requisition functionality now available

- Reopen Requisition functionality enhanced

Enhancements Delivered at Upgrade

Purchase Orders

- PO Approval Workflow
  - Asset Approval workflow
  - Budget Reference Approval workflow
  - Buyer Approval workflow

- Search Lines functionality enhanced

- View Encumbrance Balance from maintain POs page

- View Printable Version of PO – option to view ChartField information

- Reopen PO functionality enhanced

- Buyer Mass Change

Enhancements Delivered Since Upgrade

- eProcurement
  - Floating Cart
  - Ship Via & Freight Terms now editable fields

- Purchasing
  - Approval tab – Buyer's and Requester's Workbench
  - Document Status layout change (similar to Manage Requisitions Lifecycle)
  - Buyer WorkCenter

Enhancements Available for Implementation

Module Enhancement Review		
Topic	Implementation Complexity Score	Prioritization Score
Pre-Check Budget	High	
Procurement Contracts	High	
Contract / Sourcing WorkCenter	Med	
Procurement Cards	High	
Supplier 360	Med	
Supplier Onboarding	High	
Supplier Administration Center (WorkCenter)	Med	
FLUID / Mobile functionality	High	
Electronic Signature - PO	Med	
Training & Documentation	High	

Results from

ePro &Purchasing

Module Enhancement Review session

Where we are today

- ePro and Purchasing module session conducted April, 2016.

- 24 Georgia*FIRST* Institutions attended
  - UGA & Augusta University also in attendance (non-voting)

Results of ePro & Purchasing Session

- Prioritization sheet of available enhancements collected from each Institution

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

- Remaining enhancements will remain on Prioritization sheet, for future review

Results of ePro & Purchasing Session

- Follow up communication to all attendees
  - Roadmap & Implementation Plan
  - Request for additional information/feedback

- Development & System Testing of selected enhancements begin

Results of ePro & Purchasing Session

- Fall 2016 (Annual Release): Supplier 360

- Spring/Summer 2017:
  - Procurement Contracts/Sourcing Workbench
  - Electronic Signature on PO

What's Next?

- Procurement Contract team
  - Volunteers to help guide the implementation of Procurement Contract functionality

- Module Enhancement Review Sessions annually

- ITS review of Oracle Images as they are available

What's Next?

- Rel 5.20 – November 2016
  - Images 14 – 19: Bug Fixes and New Features

- Resolved Known Issues:
  - KI9.2-39_PO – Cancelling PO with Budget Error Does Not Change Budget Status to Valid
  - KI9.2-38_PO – Approved POs Reverting to Pending Approval after Adding Comments
  - KI9.2-23_PO&ePro – Closed PO and Requisition Lines Remain on Buyer's or Requester's Workbench

What's Next?

- New Features
  - Fluid
  - Procurement Contracts – Contract Process Options
  - PO Distribution Worksheet