

FIN SESSION B

Purchasing Roundtable


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conference 2018 *building bridges*

PEOPLESOFT

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FUTURE WITHOUT BOUNDARIES

The slide features a large blue truss structure with the word 'PEOPLESOFT' in orange letters. Above the truss, the text 'conference 2018 building bridges' is displayed. In the top right corner, there is a green circle with the text 'FIN SESSION B'. The background has a light gray diamond pattern.

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Session Topics

- Welcome & Introductions (5 min)
- Roundtable Discussion (50 min)
 - Enhancement Requests
 - Issues on Master List
 - Favorite Purchasing Queries
 - Year End Learnings
- Wrap up & Closing (5 min)

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Enhancement Requests

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Purchasing: Requisitions

- E2 - Add the field SUPPLIER NAME to the printed requisition form.
- E3 - Add the Budget Code/ChartString and Requisition Number to the printed requisition form.
- E7 - Put the "Supplier Item ID" field on Manage Requisitions screen
- E17 - Add Stock number to Requisition form
- E48 - Automate budget check on saving requisition

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Purchasing: ePro

- E1 - Want the ability to save(Save for later)a partially completed requisition before entering the ChartFields.
- E25 - Fix warning message on Save for Later function
- E51 - Ability to change the accounting date on ePro requisition

Purchasing: Purchase Orders


- E16 - Add site and Requisition number in the Purchase Order Inquiry page (within Review PO Info)
- E28 - Update Default payment terms
- E35 - Change order of ChartString on Approval Screen
- E44 - Ability to change the supplier after dispatching a PO
- E45 - Allow a buyer to change the PO UOM
- E47 - Under Report Manager/Admin Tab: change color on items that have already been printed
- E107 - Change the navigation to get to the Procure to Pay History page
- E129 - Allow email to be added to the "Attention" field

Purchasing: Purchase Orders PO Form

- E6 - Print school district name on ship to on PO
- E8 - Remove district code and the leading zeroes from PO number
- E9 - Add ChartString to PO
- E10 - Print Fixed Asset on PO when it is a fixed asset
- E43 - Add Page numbers to PO
- E46 - Make PO number larger on PO

Purchasing: Security

- E108 - Partially received POs - Districts see Other Districts' Data

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Purchasing: Integration

- E15 - Set up PO Punch out for Amazon
- E100 - Mass upload template for non stock items

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Issues on the Master List

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Issues

- 1038 – SQL Error on Requisitions Search Page- Requester Name lookup
- 922 - Encumbrances not liquidating correctly when creating voucher(isolated)
- 1069 – Configure Keyword Search in PO Add/update Page
- 1534 – PO Description not retain returns, runs words into 1 line (PUM 27)
- 1300 – Add business unit security when searching PO using buyer
- 1301 - Add business unit buyer security in Requisition default
- 1072 - eProcurement Express Item Entry Catalog Item Search Slow
- 1517 - ePro Review Approval link not working

Favorite Purchasing Queries


Discussion: Favorite Purchasing Queries

What are your favorite Purchasing queries?

Is there a need for any to be created/modified?

Did anyone create a query that is more helpful?

Year End Learnings

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Year End Learnings

1. How did you prepare for year end?
2. Is it a better experience this year?
3. What change did you do from last year?
4. Is there a new process that you did? How did it work out?
5. What were your challenges?

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Other Topics

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Session Notes

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<http://crc.sdcoe.net/peoplesoftconference>