

PeopleSoft Finance/Supply Chain Upgrade Memorial Day Weekend Update May 8th, 2015

DEADLINES THIS WEEK

Expense Reports/Cash Advances/Travel Authorization - No transactions may be entered or submitted/resubmitted after Friday, May 15th, at 5 pm. All T&E transactions must be in an Approved or Pending status by May 20th at 5pm.

CAMPUS INFORMATION SESSIONS

The number of sessions and start times are being set for the campus information sessions that will be held May 18th – 21st. Sessions are scheduled to last around 1 ½ hours and will be held several times on the assigned days. Times will be sent as soon as they are finalized early next week.

NEW FEATURES IN ACCOUNTS PAYABLE

This week we are highlighting new features in the Accounts Payable module.

There are several changes in Accounts Payable that will result in better business processes and efficiencies for the users and the university.

- “Vendor” is now “Supplier” – Terminology in the Accounts Payable and Supply Chain modules has changed and vendors are now referred to as suppliers. You will notice this change on all screens and help documents in version 9.2.
- Payment Request Form – The majority of users will begin using a simplified non-PO voucher form when requesting payments to suppliers. This form is designed to prompt for the necessary information and walks the user through each step. Once it has been completed, it will create the voucher behind the scenes and begin the electronic workflow process. [Training materials and Quick Reference Guides are available on the Training web site.](#)
- Electronic Workflow - Electronic workflow will eliminate a manual paper based process and replace it with a new business process for approvals, similar to what was designed for the Travel and Expenses system. Once the user has completed the payment request and hits submit, the voucher will be created and move into workflow. If the voucher contains a detailed project chartfield, it will route to the project manager for approval. It will then route to the fiscal approver. If there is not a detailed project, it will go directly to the fiscal approver. Once approvals have been completed, it will route to the Accounts Payable Shared Services (APSS) office to be released for payment.

- Supplier Request Form – PeopleSoft has delivered a process for users to request the creation of/or changes to a supplier. The information will route electronically to APSS for approval and setup. The use of this delivered functionality will replace a large customized application. Training materials and Quick Reference Guides will be available on the Training web site.