PeopleSoft_Financials_Upgrade_to_PUM51_Delta eProcurement Look and Feel Changes

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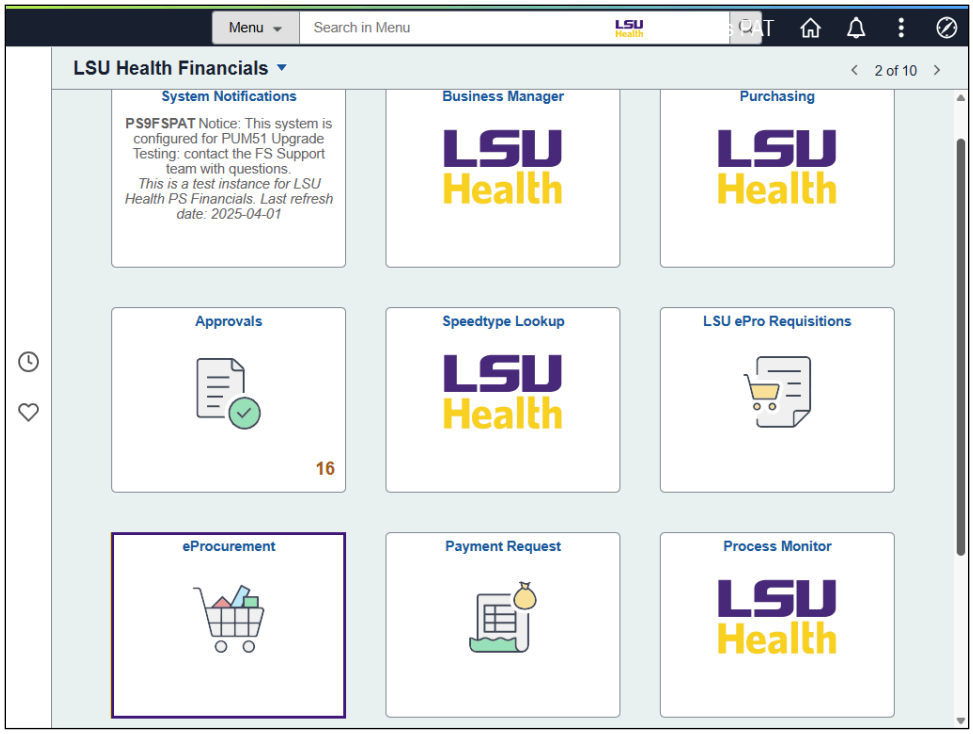
eProcurement Overall Look and Feel Changes

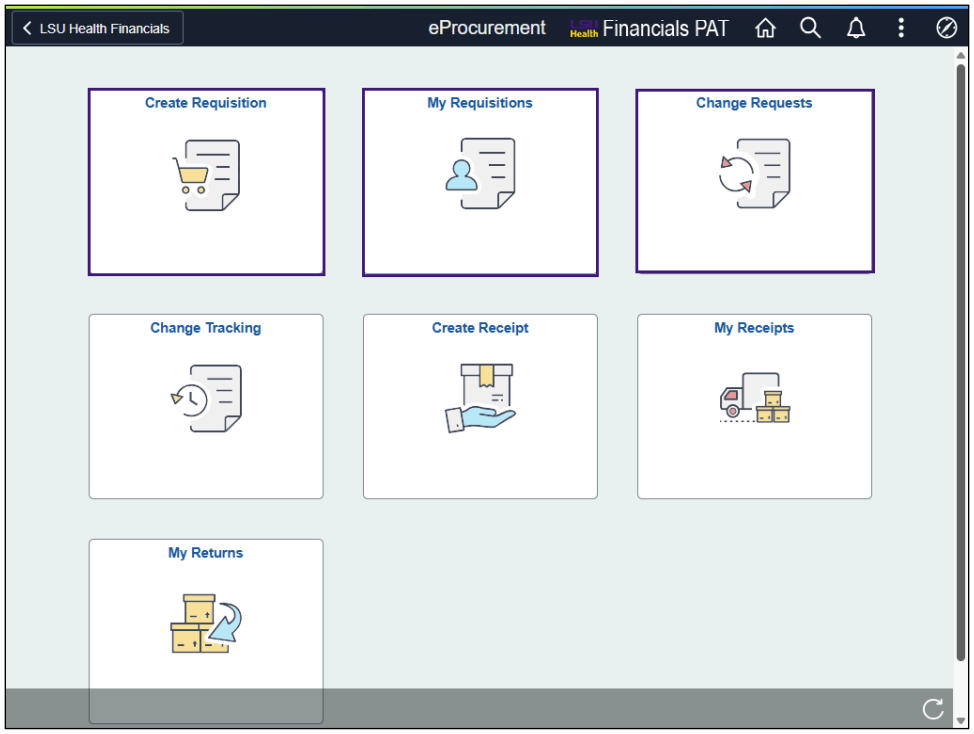
Procedure

In this topic you will learn about **eProcurement Overall Look and Feel Changes**.

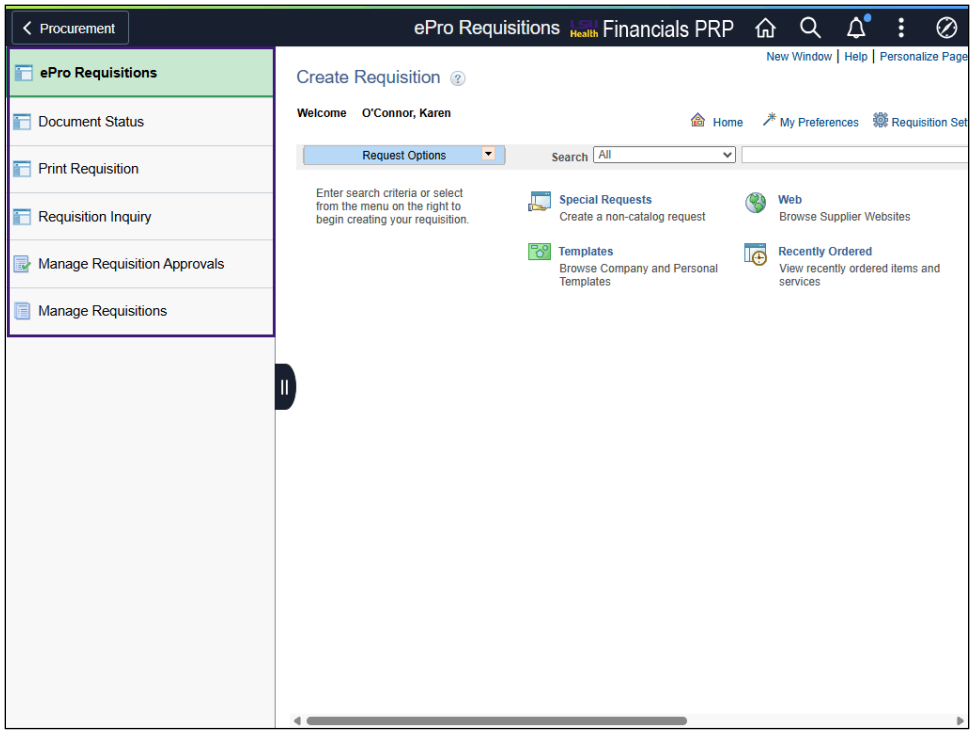
Step	Action
1.	***NOTE: The eProcurement section is for LSUSH users only.***
2.	**eProcurement Requisition Changes** ePro requisitions are now in the *Fluid style*. This *change* presents a *significant "look and feel" difference* to the user. But the *functionality* remains the *same*. There are a few key differences to note. • **eProcurement Tile** instead of LSU Health ePro Requisitions to create ePro Reqs • **Create Requisitions Tile** selection directs the user to Requisition Defaults as the landing page • **Requisition Defaults** page in Fluid is the *equivalent* to the *Requisitions Settings* page in classic o **Line, Schedule and Distribution Defaults** sections *display* as *collapsed*. Users must expand them to enter default information. o The **Chartfield Distribution** section on the *defaults page includes all* the *chartfield options* and cannot be *personalized* to hide or reorder the fields. • **New icons** • **Justification Comments** – Users should enter the purpose of the purchase • **Mass Change**



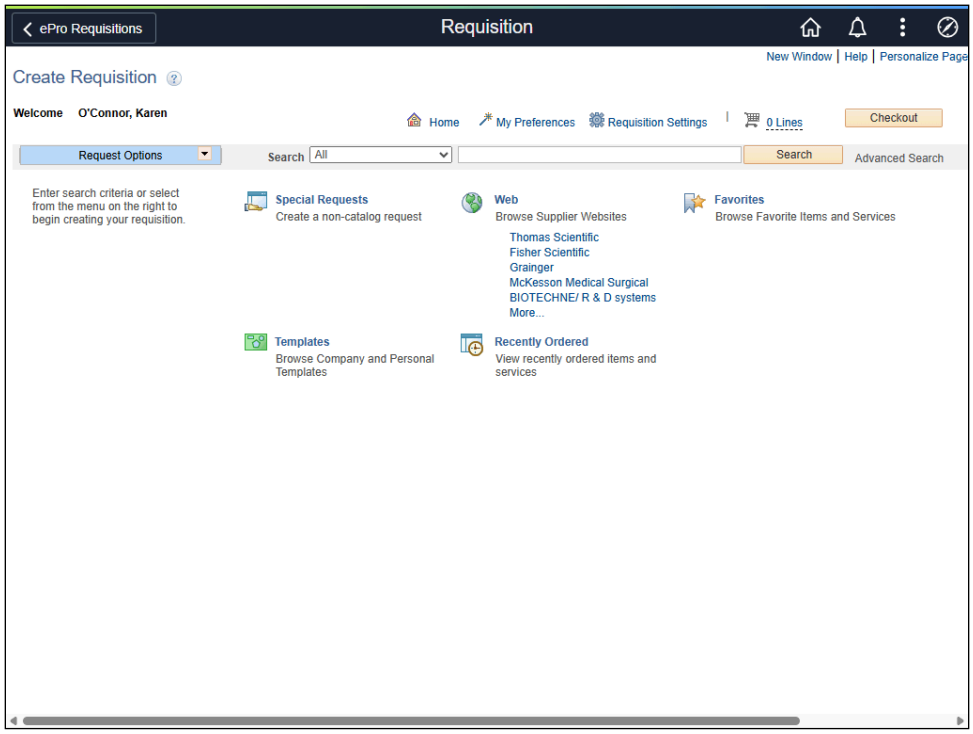
Step	Action
3.	**New Tile with the Upgrade - eProcurement** ***PAT - Upgraded*** The new ***eProcurement Tile*** *includes* several *tiles* available to the *user*.



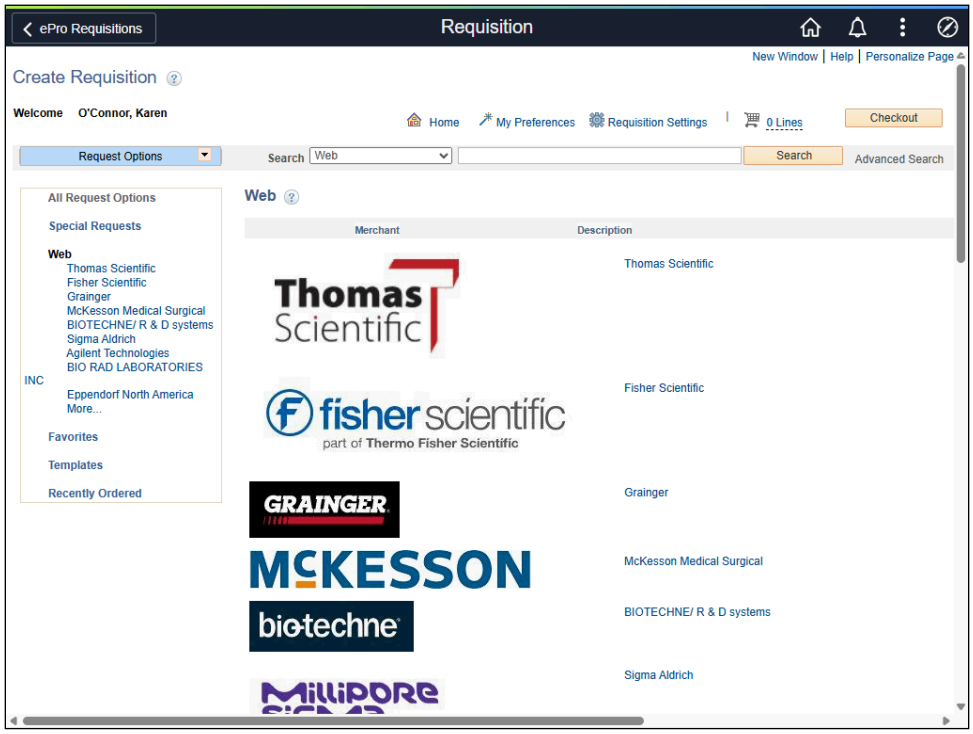
Step	Action
4.	**New Tile with the Upgrade - eProcurement** ***PAT - Upgraded*** The *Create Requisition*, *My Requisitions*, and *Change Requests* are the *tiles* that will be *most used*.



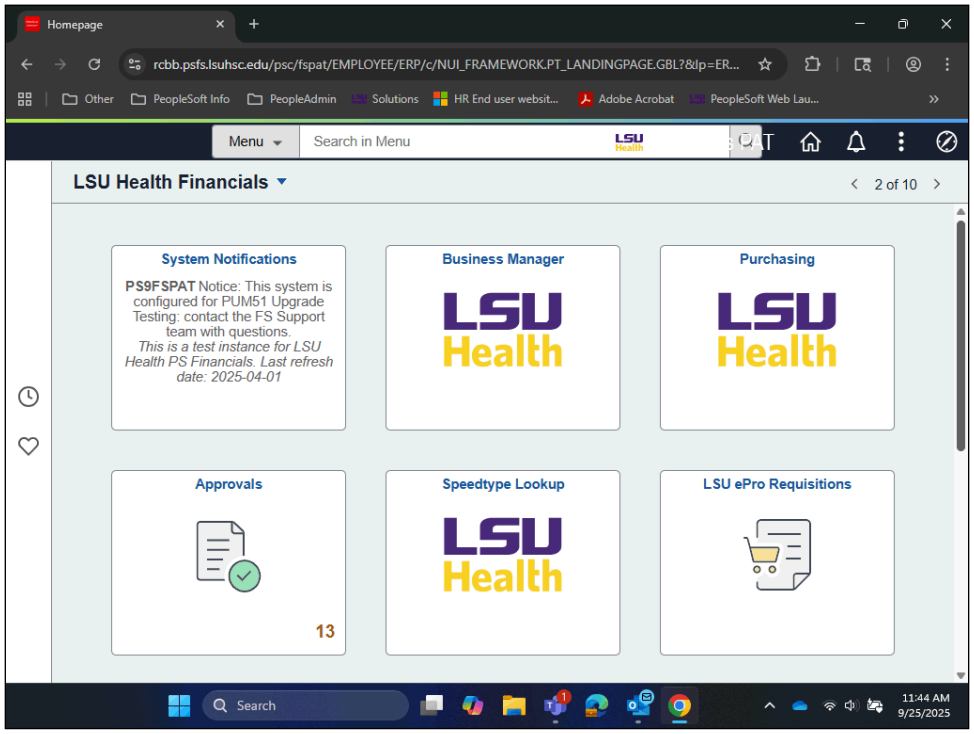
Step	Action
5.	**LSU ePro Requisition Tile Changes** ***PRP - Not Upgraded*** The **LSU ePro Requisitions Tile** may still be used to *perform Document Status Inquiry*, *Requisition Inquiry*, and *Manage Requisition Approvals* if desired. ***You may no longer access ePro Requisitions to create reqs from this tile.***



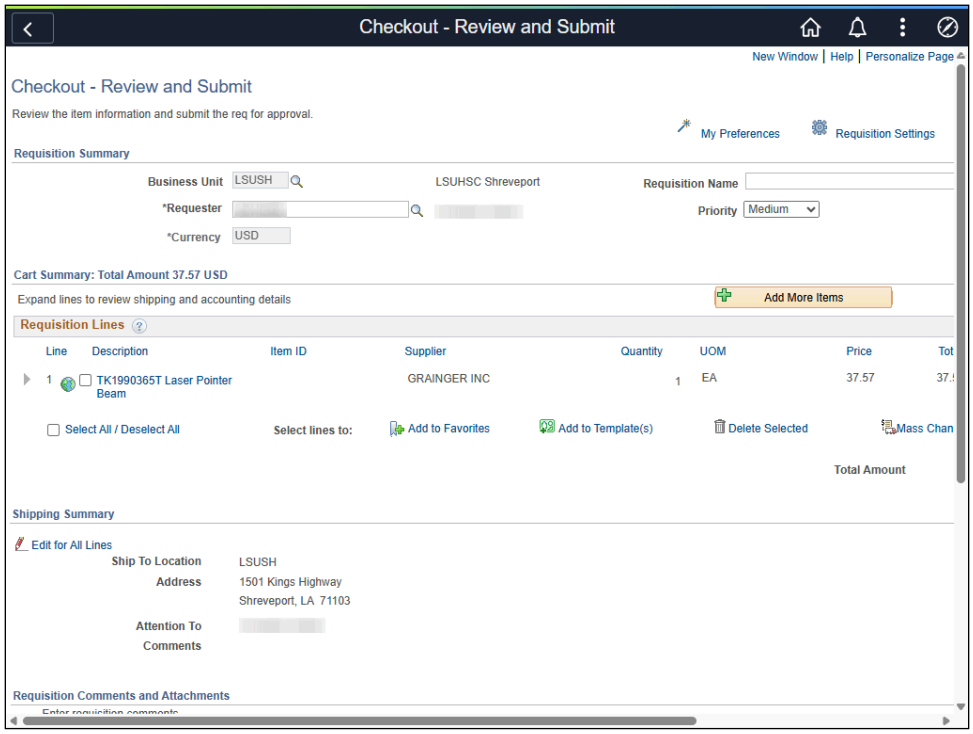
Step	Action
6.	**LSU ePro Requisition Tile Changes** ***PRP - Not Upgraded*** After completing **Requisition Settings**, users will see this screen.



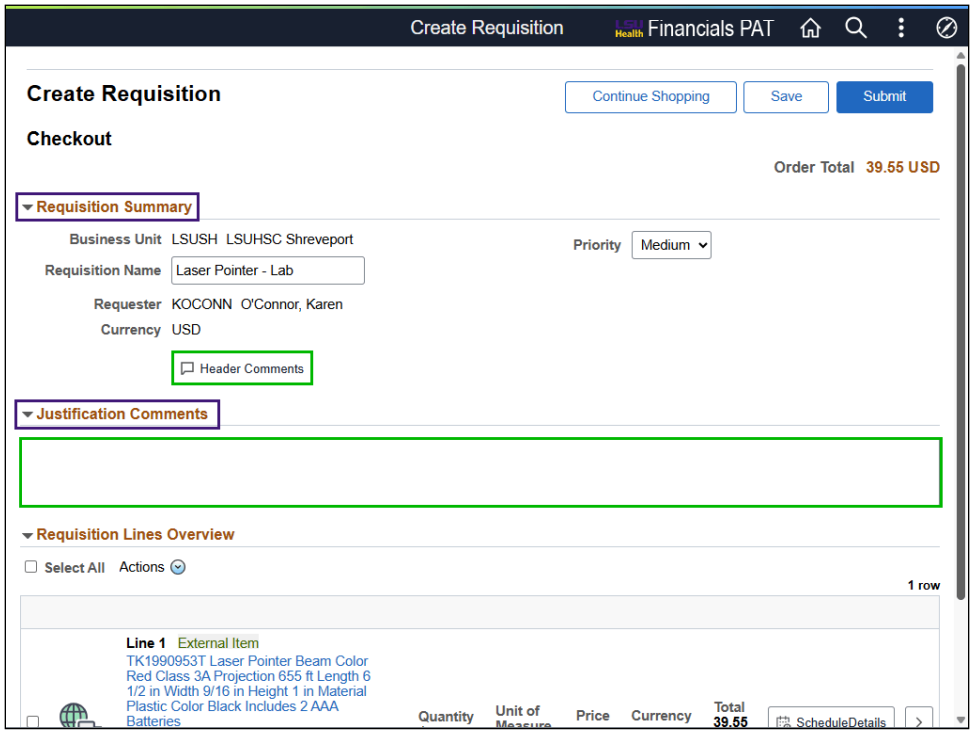
Step	Action
7.	**LSU ePro Requisition Tile Changes** ***PRP - Not Upgraded*** Once the user selects **Web**, s/he will see this page.



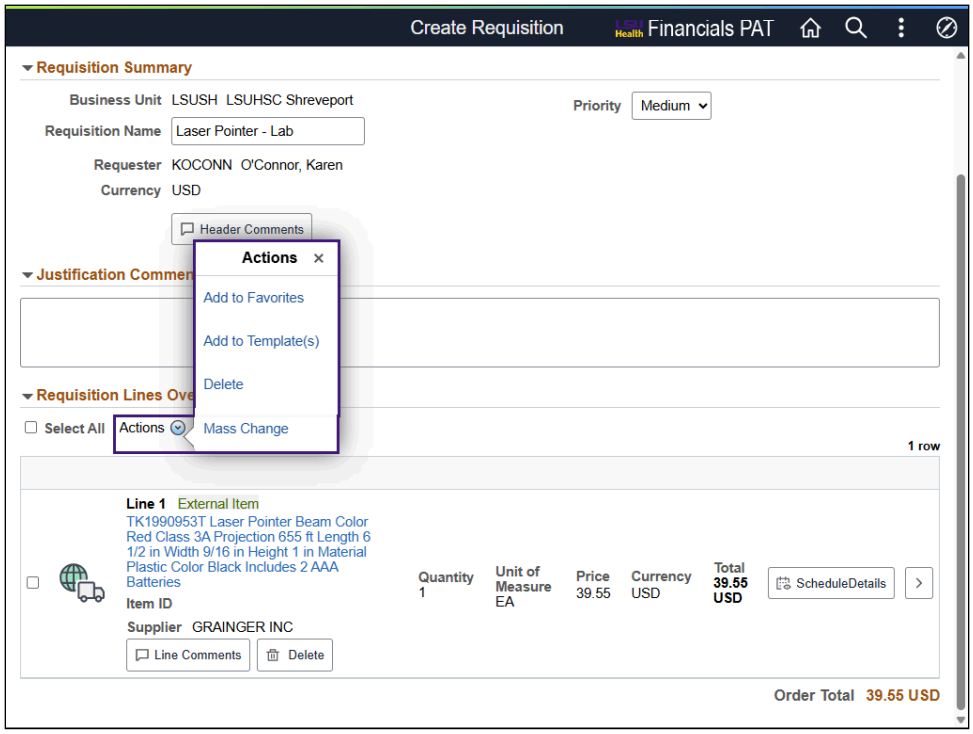
Step	Action
8.	**LSU ePro Requisition Tile Changes** ***<u>PAT Upgraded</u>*** Once the user *sets* the *default*, then the *main page displays*. ***NOTE: The Cart icon and the Cart section are located at the top of the page.***



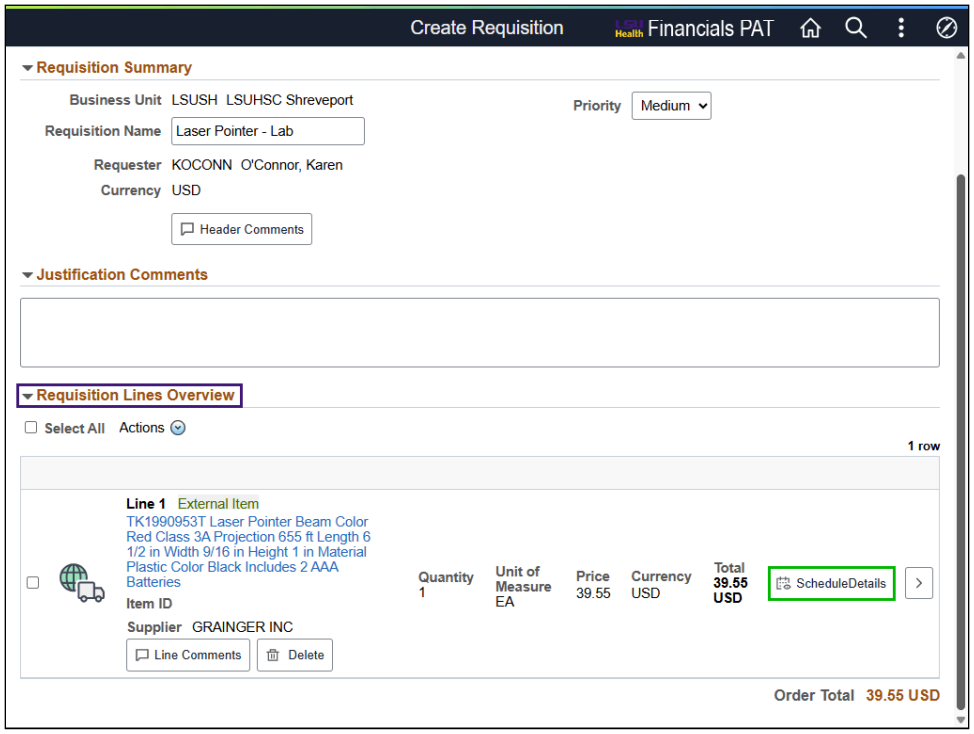
Step	Action
9.	**ePro Requisition Page** ***PRP - Not Upgraded*** There are *appearance changes* in the *ePro Req* page.



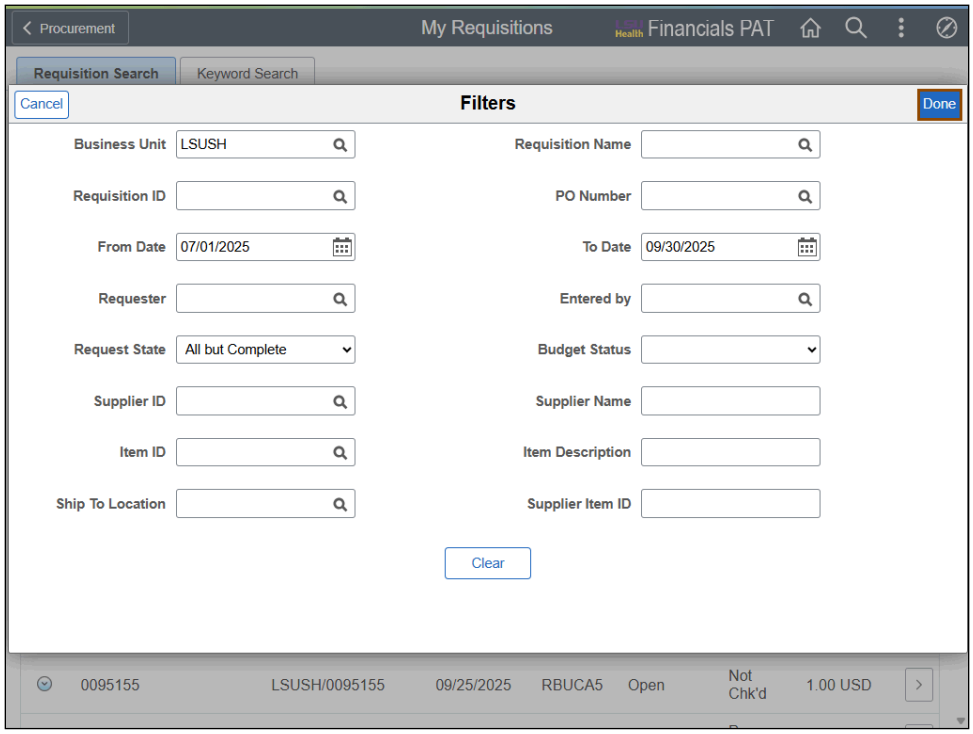
Step	Action
10.	**ePro Requisition Page** ***<u>PAT - Upgraded</u>*** Notice that the *Header Comments* is a *button* in the ***Requisition Summary*** section. *Select* the button to *add comments* and *attachments*. *Justification Comments replaces Approval Justification*. Users should *enter* the **"5Ws"** that Dr. Benefield has *requested* of *all Shreveport users*.



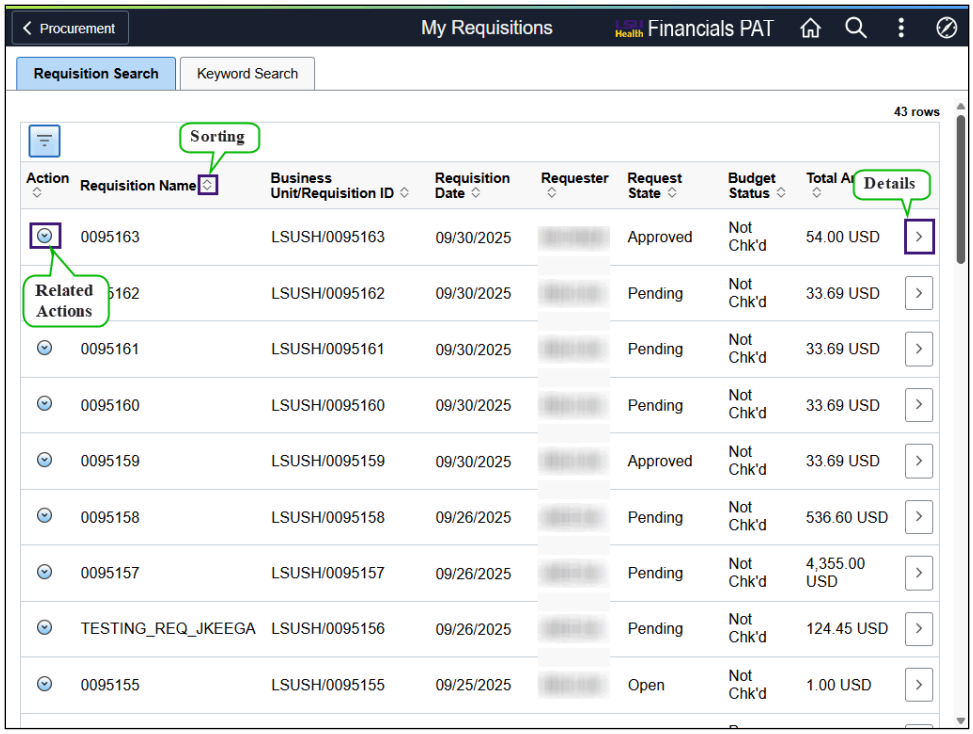
Step	Action
11.	**ePro Requisition Page** ***<u>PAT - Upgraded</u>*** Notice the *Action* icon in the ***Lines*** section. This is where a user may *add* the *item* to their *Favorites*, a *template*, *delete it from the cart* or *make mass changes* to the requisition.



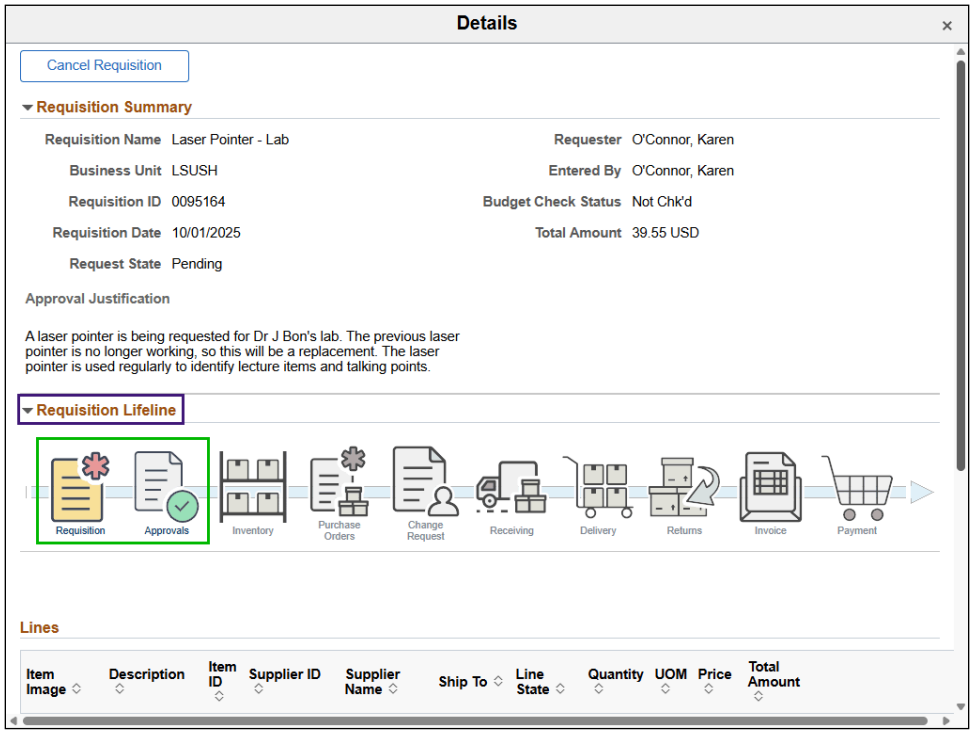
Step	Action
12.	**ePro Requisition Page** ***<u>PAT - Upgraded</u>*** In the ***Lines section***, notice the *Schedule Details* button and the *arrow* at the *far right* of the line. That is *where* the *chartfields* for the *line and* the *schedule display* may be updated. Users would be able to *select Amount Only* in the ***Line Details***, select the *Ship To location* in the ***Schedule Details***, or even *split* the *chartfield accounting tags*. ***NOTE: The eProcurement Delta Document and the eProcurement Training Guide detail all information on the ePro module.***



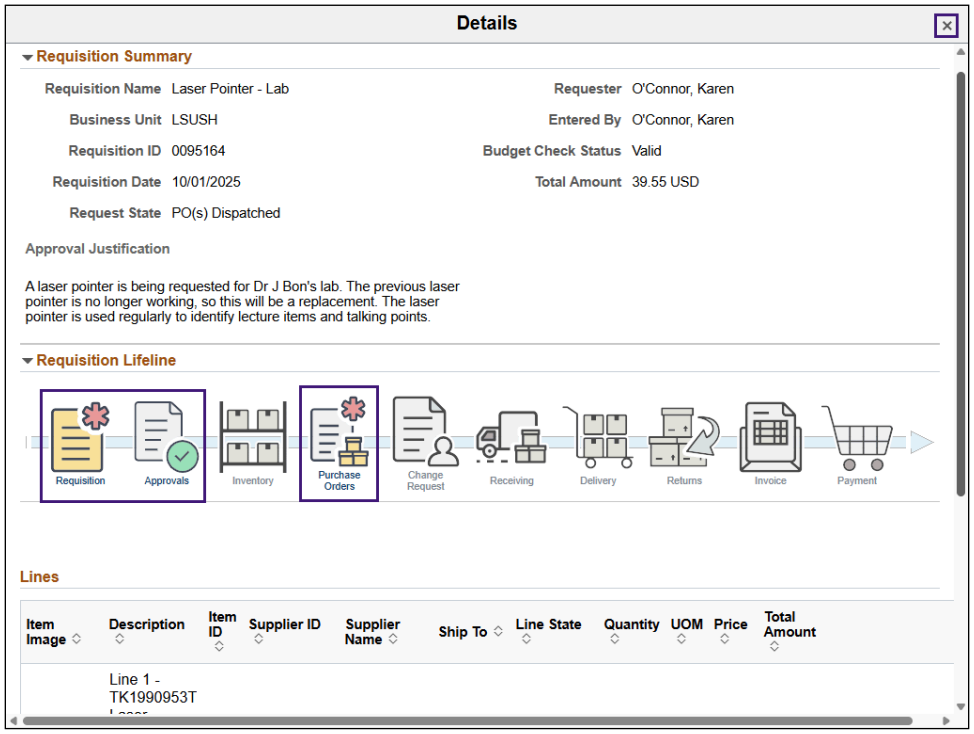
Step	Action
13.	**eProcurement - My Requisitions Tile** ***<u>PAT - Upgraded</u>*** Using **eProcurement Home** and the **eProcurement Tile**, users have *access* to the ***My Requisitions Tile***. This tile *grants* the user *access to review*, *update*, and *manage inquiries*. After selecting the ***My Requisitions Tile***, the user will need to *set filters* the *first time* they *access* the page. The following *fields* <u>must</u> be *entered* at a minimum: *Business Unit*, *From Date*, *To Date*, and *Request State*. The user may also wish to *enter* the *Requester* to *focus results*. Once the *filters* are *set*, the user should *select* the ***Done*** button. The **My Requisitions** page *displays requisitions meeting the filter criteria.*



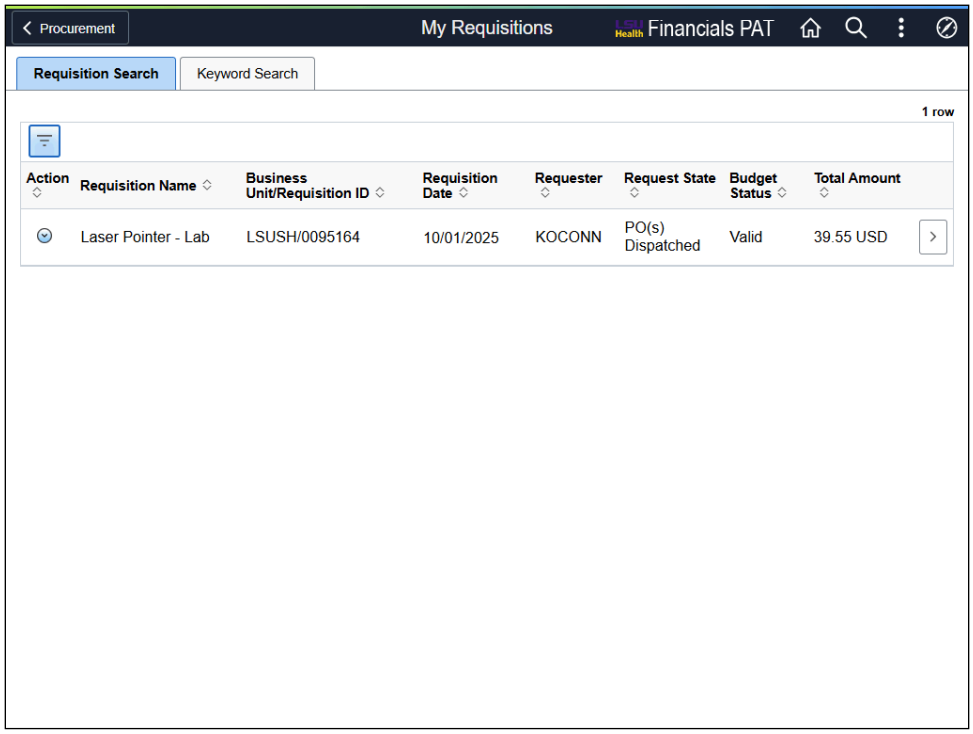
Step	Action
14.	**eProcurement - My Requisitions Tile** ***<u>PAT - Upgraded</u>*** In this screenshot, notice the *three icons highlighted* by the *purple* outline. **Sorting** - *Next to the Requisition Name* are ***two arrows***, *facing up and down*. You see this *same icon* in the *header row across the display*. The *two arrows* mean that the *field may be sorted*. *Selecting* the *arrows* for any of the *headers sorts all* of the *results* by that *field*. **Related Actions** - At the *left* side of *each requisition*, the ***Related Actions*** Icon displays. Selecting the ***Related Actions*** icon *produces* a *menu* that allows the user to *navigate* to *Details*, *Copy*, *Budget Check*, *View/Print*, *Create Receipt*, *View Approvals*, and *Inquiry*. The ***Related Actions*** *available* depend on the ***Requisition Status***. **Details Arrow** - At the *right end of the row*, select the ***Details*** arrow to *expand* to the *ePro req*.



Step	Action
15.	**eProcurement - My Requisitions Tile** ***<u>PAT - Upgraded</u>*** *Requisition pending Approval and Budget Check.*



Step	Action
16.	**eProcurement - My Requisitions Tile** ***<u>PAT - Upgraded</u>*** Requisition *sourced* to *PO and Dispatched*. *Notice* the *differences* in the *links under* the *icons*. When *active and selectable*, that indicates that the *requisition* has been *processed through that phase of the lifeline*. Users may *select* the *icon* to *inquire* further. To *close* out the *page* and *return* to the ***My Requisitions*** list, *select* the small **'x'** at the *top right* of the *inquiry* page.



Step	Action
17.	This completes ***eProcurement Overall Look and Feel Changes***. **End of Procedure.**