PeopleSoft Financials Training Opportunities

Register for these classes through HR Training.

- PeopleSoft Basic Navigation: 8:30-10:30AM – 4/20/2011
- Requisition Training: 10:30AM-Noon - 4/20/2011
- PS Tools for Grants: 1:00-2:30PM - 4/20/2011
- Delivered Reports & Inquiries: 2:00-4:00PM - 4/12/2011
- Advanced Query: 1:00-4:00PM - 4/15/2011

Inside This Issue

- Item Commodity Code Query
- GA Health eShop
- Common Problem Running Reports & Queries
Periodically, new item commodity codes get entered into PeopleSoft Financials. If you need a new listing of these codes, you can run a public query called: `MCG_FIS_ITM_CAT_TBL`. This query will list the Commodity Code, Description, Asset Profile ID and Account associated with the Commodity code.

Have you heard? GA Health eShop is coming
What is Health eShop?

Health eShop, used in conjunction with PeopleSoft’s eProcurement, is web-based software used to centralize various vendors’ electronic catalogs specific to GHSU.

Health eShop is easy to use and will enhance our use of PeopleSoft and eProcurement. How? It is a point-and-click environment similar to online shopping. In fact, Fisher’s and Staples’ websites are built-in to Health eShop. End-users will be able to utilize the requisition system for these and many other commonly used vendors on campus.

Vendor information in Health eShop (item descriptions, category codes, prices, unit of measures, etc.) is built-in and automatically populates your requisition lines. This makes the requisition system easier, faster, and hopefully error-free….

Several PeopleSoft enhancements will also be implemented as part of the Health eShop rollout:

- Desktop Receiving – a quick and easy way to receive desktop delivered items in PeopleSoft
- Updates to Category Codes – more and better defined descriptions
- Auto Assignment of Buyers - requisitioners will not need to choose a Buyer as the system will automatically assign a Buyer based on Colleges / Departments
- Workflow Changes - Asset Management and groups under Special Item Approvals will be moved between the requisitioner and the department approver. This reduced delays when requisitions need corrective action based on recommendations of Asset Management or the Special Item Approvers.
- Auto Sourcing of GA Health eShop orders – Buyers will no longer need to review or approve these orders as requisitions built from GA Health eShop catalogs will automatically be processed into Purchase Orders and routed to the vendors after being approved in Workflow. This will speed up the time it takes for vendors to receive and process orders for GHSU.
A select group of departments are scheduled to go-live in late March with other departments coming on board between May and August of this year.

There will be two types of users in Health eShop:

**Shoppers** are those employees who would normally develop a list (usually handwritten) of items to be purchased, i.e., researchers, faculty, etc.

**Requisitioners** are those employees who currently enter requisitions in PeopleSoft to purchase goods and services for your department.

Shoppers, using the point and click of their mouse, are able to create a shopping cart (shopping list). This shopping cart contains one or more items for purchase from vendor catalogs. By selecting an item from a vendor’s catalog, the shopping list is created and will automatically include the item description, unit of measure, price and NIGP Code. This information will no longer have to be selected and entered manually.

Requisitioners can create a PeopleSoft Requisitions from the “shoppers” shopping cart or they can create their own carts. The information from the shopping cart will automatically populate the requisition. The requisition header information is the only information that requires manual entry.

Any employee, *whether on campus in Augusta or offsite in Athens, Savannah, etc.*, who currently has access to PeopleSoft can have access to **Health eShop**.

Materials Management / Purchasing will reach out to departments in the next few weeks to schedule training and complete Security forms for access to Health eShop and PeopleSoft.
Ever Run a report and you Received no data?

- Please check your criteria in your run control page.
- Name your run controls different names to prevent from using the same run control for other reports because criteria does change often.
- If you have used the same run control for awhile, and are having problems, try creating a new run control.
- When running a query or report and you are prompted for a fiscal year or budget reference you must use the four digit year. For example, use 2011 (not a two-digit date).
- If you cannot determine the problem, please print screen your page and mail it to PS_FINANCIALS@georgiahealth.edu, so that we can help diagnose the problem.
- In the Comprehensive Financial Report, you may be trying to run it for a department that you do not have security. If this is the case, then your report may be blank. Please email PS_FINANCIALS@georgiahealth.edu to check your report security settings or give us a call.
1. Read E-mail notification that is sent regularly during the month as frequent reminders are sent that requisitions are still pending for varies of reasons. **These requisitions need your attention.**

2. Please insert a buyer name on your requisition in step 1 of eProcurement/ Create Requisition so this information will default to other lines on your requisition. If this information is not put in step 1 it will error out in the workflow process.

3. Not updating your Department Signatory Forms when an employee retires or terminates employment could result in error in workflow when submitting a requisition.

4. Computer Specifications in the Quote is required by IT when approving requisitions. They must be contacted when a requisition is denied because of a specification problem.

5. Please correct your denied requisition based on the error or message from an approver. Resubmitting them does not correct them unless you have fixed the reason for them being denied.

6. **Requisitions with 20 or more lines** will cause the system to timeout so please beware of the number of lines on your requisition when you create them.
We have found when users commonly get the AM Business Unit error, after they have changed the delivery location on their requisition. In testing, we have found that, if the following business process is used, then the error will not occur.

1) When entering a requisition click on the (Step 1). Define Requisition at this step enter chartfield information

2) Click on (Step 2), Add item and Service at this step choose the tab for special, request/special item, favorite or template.
3. Click on (Step 3) Review and Submit. **IF** you need to change the delivery location click the Modify Line/ Shipping /Accounting button.

4. Click on the detail tab located in the beside chartfield tab. (Do not choose to Load values from default for a room change.)
5. The detail tab shows a place to change the delivery location. Change the location and click the Apply button.

6. At the screen called Distribution Change Options click the first radio button to apply the distribution changes too. Budget check and Save/Submit.
Based on the results of the Morehead Faculty Satisfaction Survey conducted in 2008, the Departmental Administrative Support Staff Training team has been asked by Dr. Azziz to develop **quarterly training** for **Department Business Managers** and **Administrative Support Staff** in the following areas:

- Human Resources
- Finance, Controller’s Division
- Materials Management and Budget, Planning & Analysis
- Research Administration for business managers and administrative staff

The quarterly training **"Lunch and Learn"** series will focus on:

- Process navigation
- Forms completion
- Explaining the “why” behind many requirements and policies

The first Controller’s Division session will be offered on Tuesday, April 26, 2011 in EC-1222 from 11:00AM – 1:00PM. Lunch will be provided fee-of-charge. Registration is required. Please register at: [https://www.oacs.mcg.edu/hr/training/CourseDetails.asp?courseid=303](https://www.oacs.mcg.edu/hr/training/CourseDetails.asp?courseid=303)

At this link, you can also register for the other sessions. There will be two sessions offered for each support area.

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