

PeopleSoft EnterpriseOne 8.10 Upgrade

Overview

Please use this document to review the changes resulting from the NIS upgrade from Oneworld XE to PeopleSoft EnterpriseOne 8.10.

This document includes:

[General Changes](#)

[HR/Payroll Changes](#)

[Procurement Changes](#)

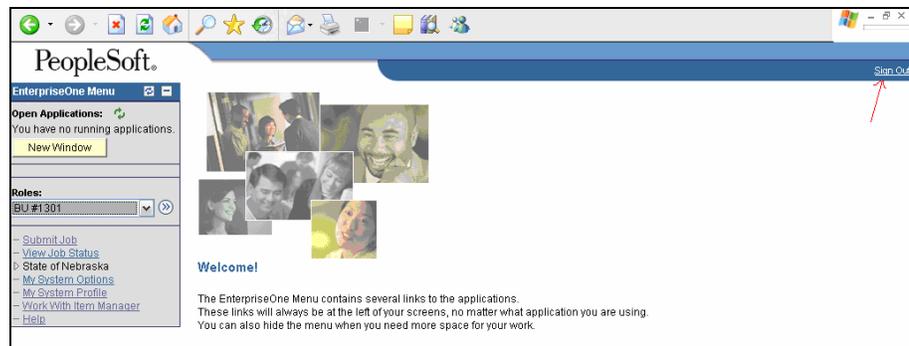
[Financial Changes](#)

[Questions and Answers from the December 14, 2005 - 8.10 Upgrade Overview](#)

General Changes

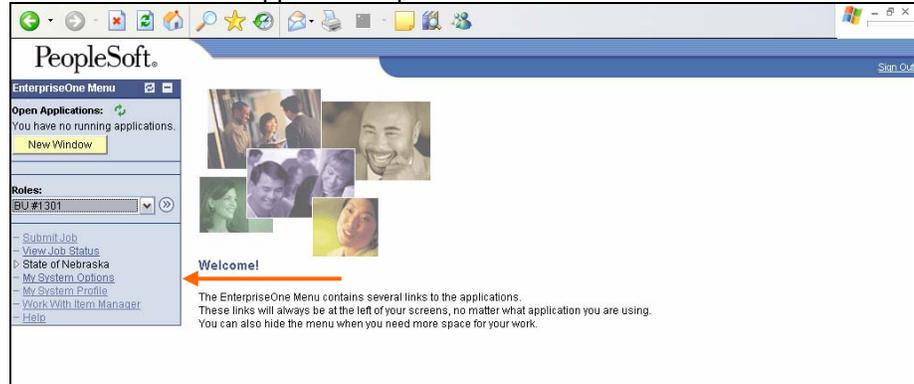
Logging In and Out

- When you login, you will go straight to the Welcome Page. You no longer have to choose an environment.
- The logout button is located at the top right hand corner of the screen and reads "Sign Out"

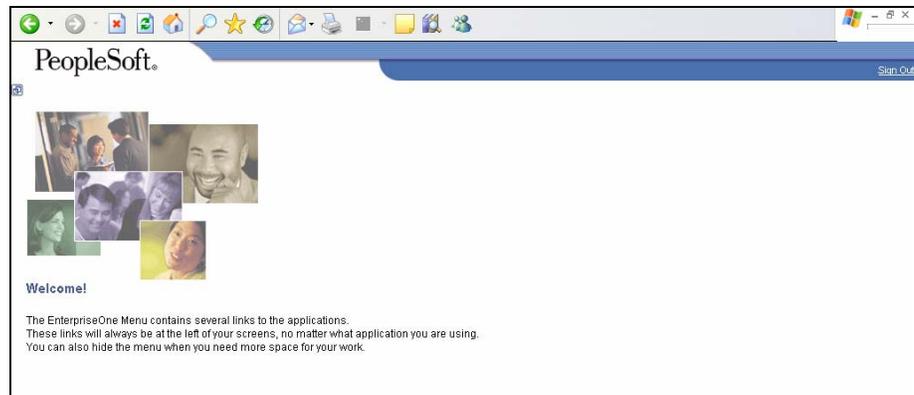


Menus

- Menus are on the left side of the screen. You will be able to see these menus even with an application open.



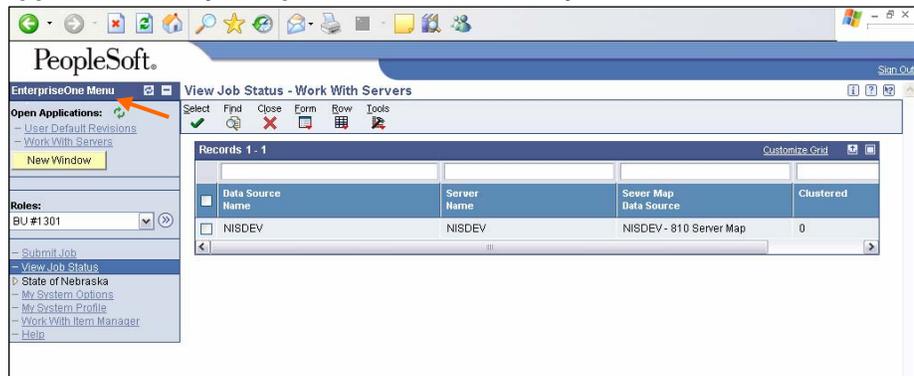
- You have the option to minimize the menu by clicking the minimize (☐) button. Click the restore button (☒) to make the menu tree reappear.



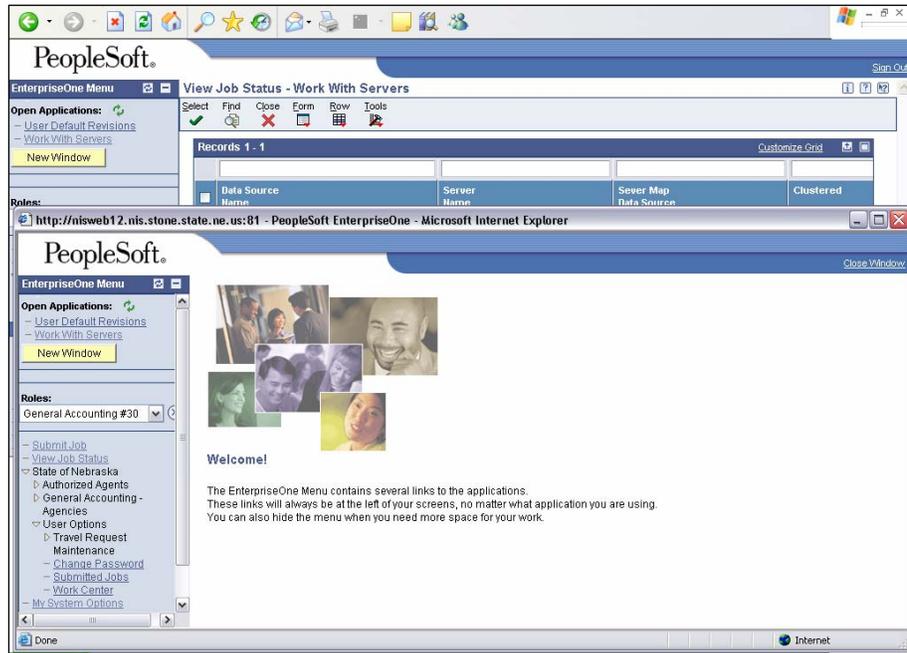
- Rather than being at the top of the screen, Submit Job and View Job Status are now at the top of the menu tree. Work with Item Manager is near the bottom of the menu tree. User Options (where you change your password) is now called My System Options on the main menu tree and is located under the State of Nebraska menu.



- When an application is opened, a link with the name of the screen appears under Open Applications near the top of the menu tree. More than one application can be opened at one time by choosing another option from the menu tree. The name of each open application will appear under Open Applications. You are able to toggle between the open applications by clicking the links under Open Applications. **Please note: only 5 applications may be open at one time under your User ID.**



- You can open an additional session of NIS by clicking New Window. The logout button is replaced with "Close Window" on the subsequent NIS session. **Please note: the applications opened in the new window are included in the total number of open applications under your User ID.** For example, if two (2) applications are open in the original session, only 3 additional applications can be opened in the second session, to equal a total of 5 open applications. **Users are encouraged to have only one open NIS session with the maximum of 5 open applications, rather than opening a new window.**



- After choosing a Role, click the double right arrow (>>).



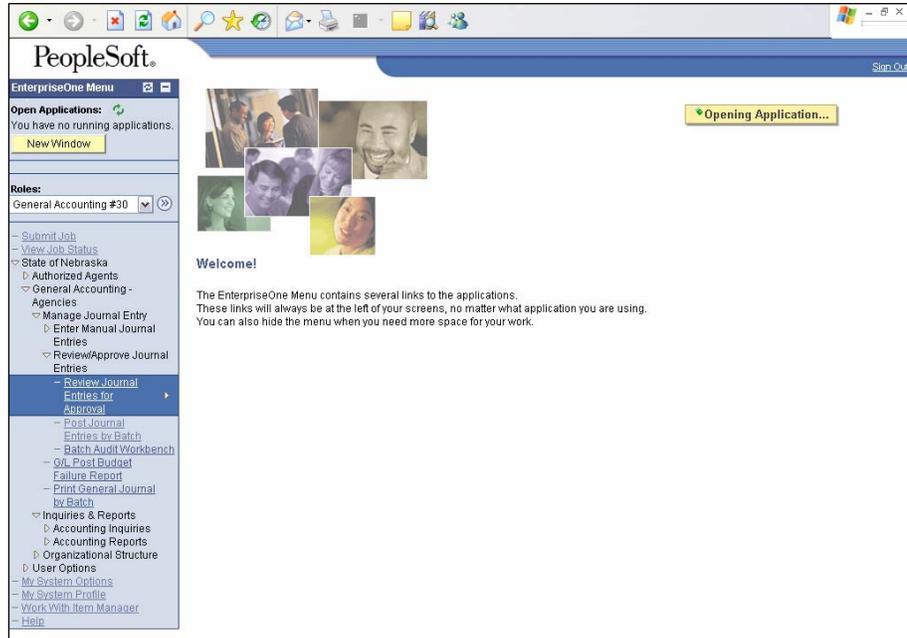
- Notice that the menu tree does not change after clicking the double right arrow. Click the right arrow to the left of the State of Nebraska menu option (or click directly on the menu option) to view the menu options for the role selected. Once the State of Nebraska menu is open, the options underneath will change when the Role is changed above.



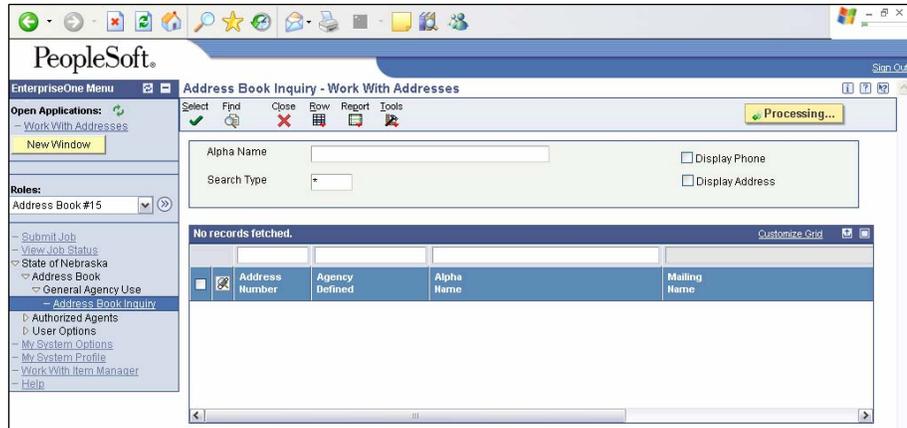
- Menu options are preceded by a right arrow. The arrow will point down when the menu is open. Applications and reports are preceded by a dash and appear as links.
- All Roles include menu options for Authorized Agents and User Options. The User Options menu includes Change Password, Submitted Jobs, and Work Center. These options can also be found under the My System Options menu selection on the main menu tree.

Grids and Forms

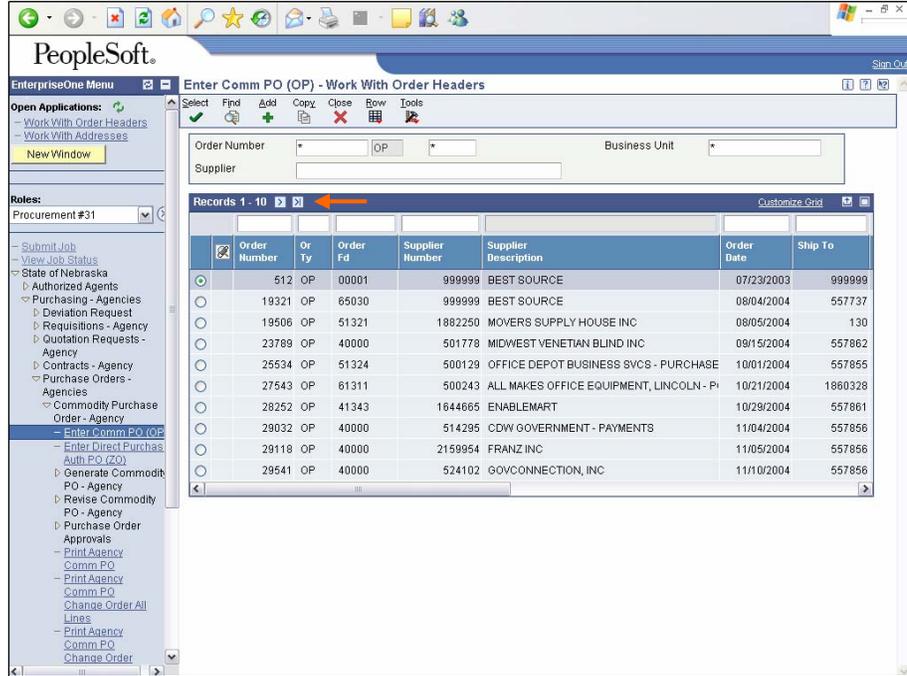
- "Opening Application..." will appear when an application is loading.



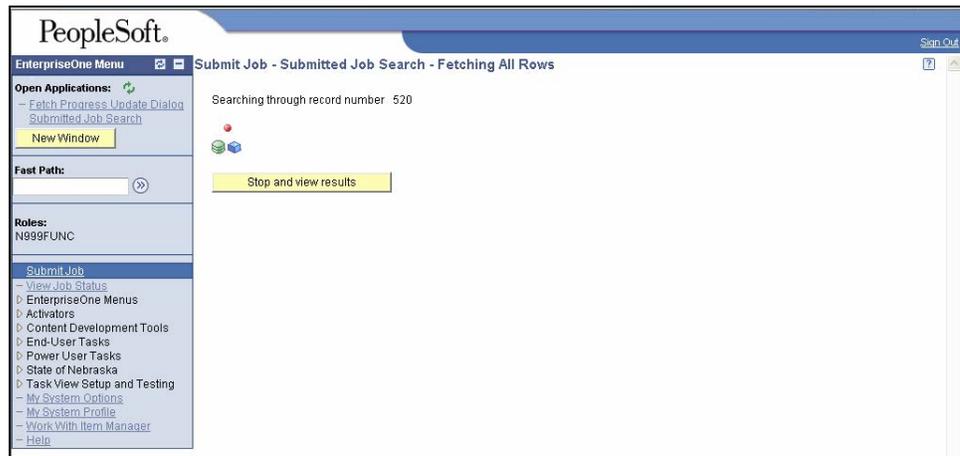
- "Processing..." will appear when performing a search.



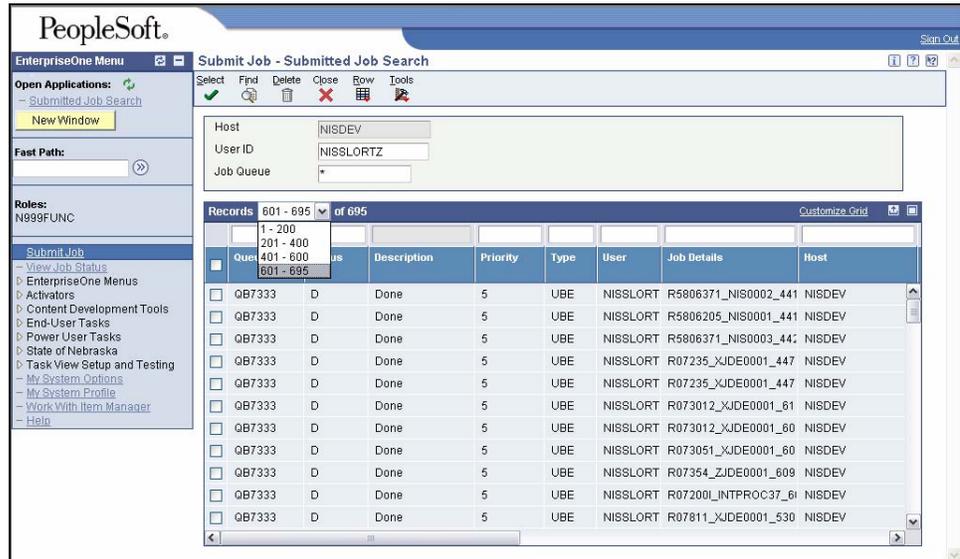
- In some applications, you are able to scroll to the end of the records in a grid. Click the right arrow end button () to scroll to the end.



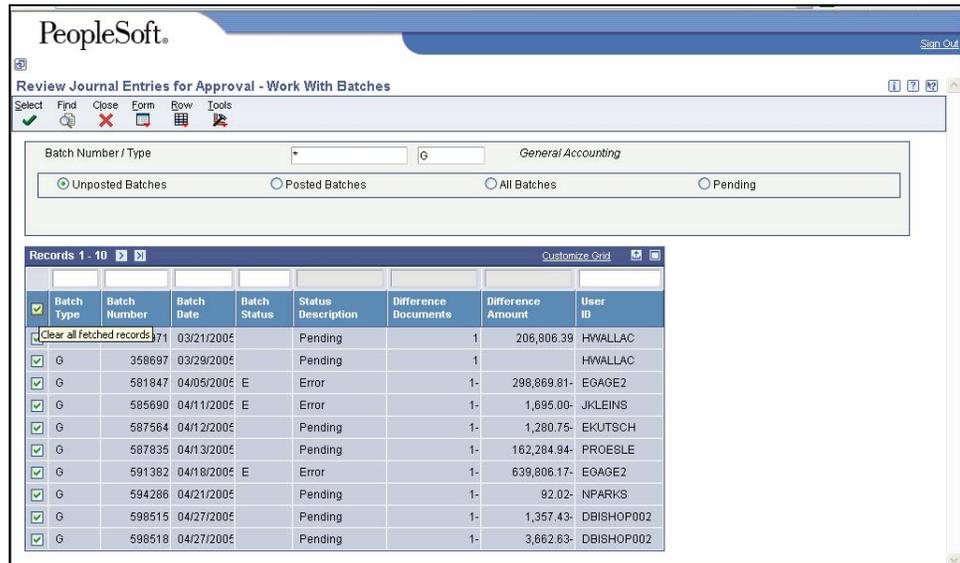
- If a grid contains a large amount of records, you may see the following screen when attempting to "scroll to end." You have the option of either continuing the search or stopping to view the records found thus far.



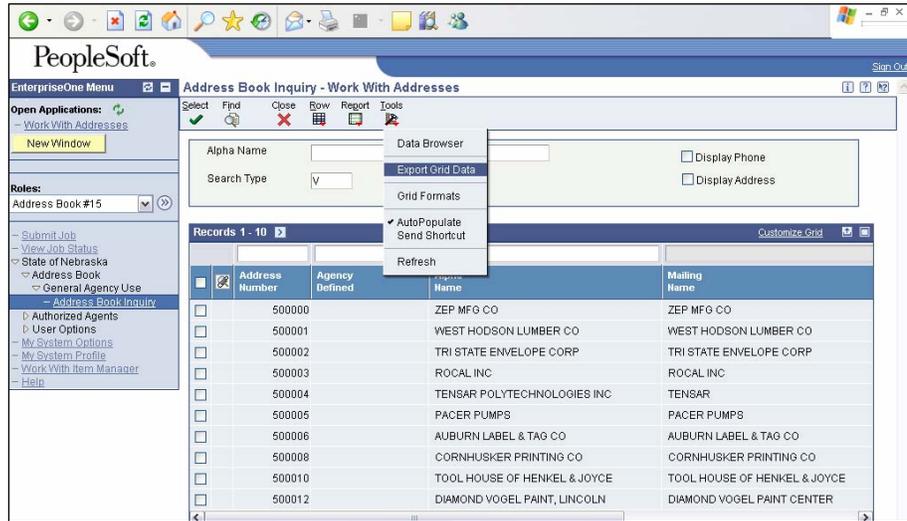
- Once all the records have been found, view the records in 200 record increments.



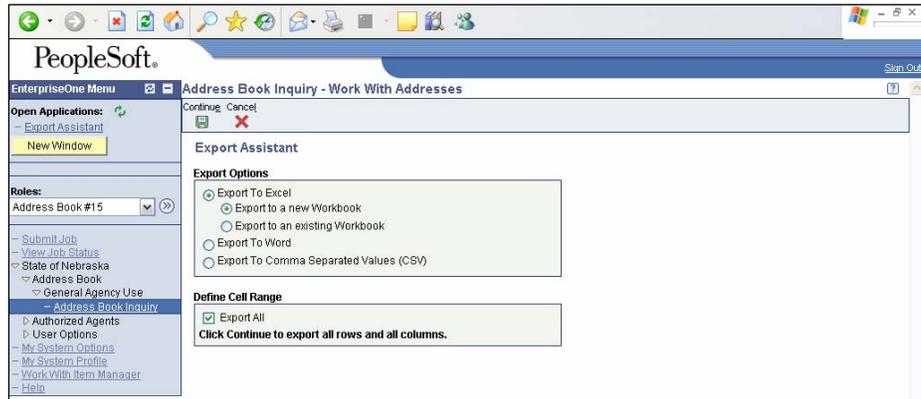
- You are now able to check all records in a grid by checking the "Select all fetched records" button at the top left corner of the grid.



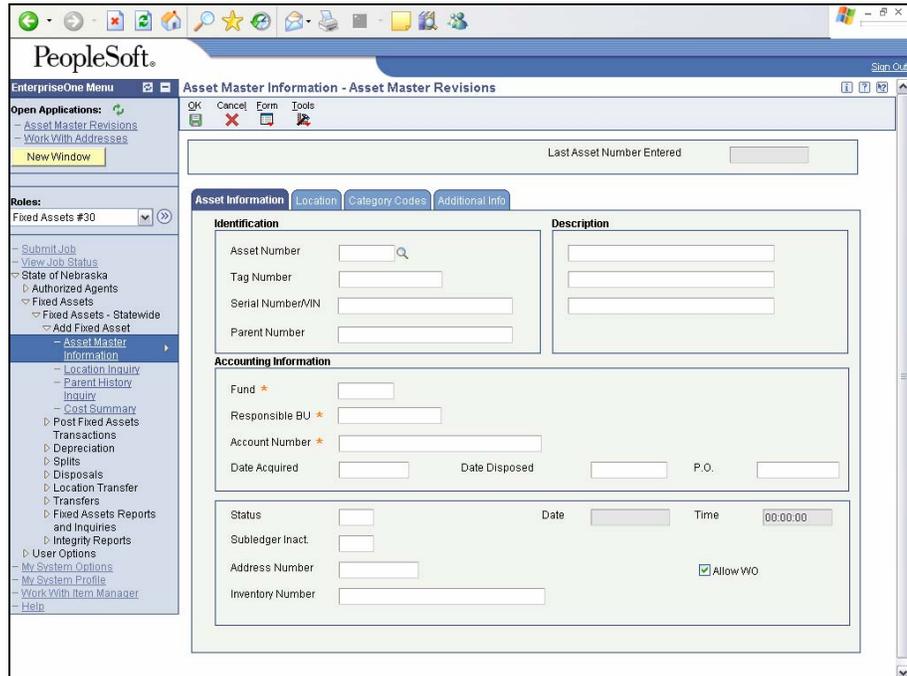
- You are now able to export an entire grid to excel by clicking the Export Grid Data button () or by choosing Export Grid Data from the Tools exit.



- Keep the Export All option checked in the Define Cell Range section to export the entire grid. Uncheck Export All to define a specific cell range for export.



- When entering information, required fields are labeled with an asterisk (*). Please note that not all required fields are labeled with an asterisk.



- NIS now has an auto-fill feature. Example: On the first line, enter the complete Account Number. When you start typing the number in the second line, the rest of the number automatically fills in. The auto-fill feature can be turned on (or off) from the Tools menu by checking (or un-checking) the AutoPopulate option. This feature is system-wide, so it will either be turned on for all applications, or off for all applications.

Account Number *	Debit Amount	Credit Amount	Account Description	Subledger Type	Subleder
65025009.532100			NON-CAPITALIZED EQUIP I		
65025009.532100					

Remaining Amount

- The Visual Assist image is now a magnifying glass, instead of a flashlight. Magnifying glass in 8.10 (new)



Flashlight in XE (Old)



HR/Payroll

- Employee Master - The 'Date Pay Starts' and 'Date Pay Stops' are now on the Employee Information - Employee screen. This is where changes to the Date Pay Start and Date Pay Stop will need to be made. Previously, these dates were entered/changed on the Employee Information - Organizational Assignment screen. They still appear on the Organizational Assignment screen, but are grayed out.

The screenshot displays the 'Employee Information - Employee' screen in PeopleSoft. The left-hand navigation pane shows the 'Employee Information' menu item selected. The main content area is divided into several sections:

- Employee Identification:** Fields for Employee Number and Employee Tax ID.
- General Information:** Fields for NIA, Security Business Unit, Home Fund, Check Route Code, Pay Frequency, Pay Status, Employee Benefit Status, and Benefit Group. An 'Adj. Service Date' field is also present.
- Employment Dates:** Fields for Original Hire Date, Agency Original Hire Date, Leave Begin Date, Leave End Date, Expected Recall Date, Termination Date, Date Pay Starts, and Date Pay Stops.
- Data Protection Standards:** Fields for NIA.
- Upon Termination:** A checkbox for 'NIA' and a 'Country of Employment' field with a 'Country' dropdown menu.

- New Reports
 - Labor and Burden Distribution Register (R053010) - This is a report that runs during the Journal Entries portion of payroll processing. This report displays, by fund and business unit within fund, hours worked and wages paid, along with state paid taxes and benefits (health and life insurance, retirement, etc.), for each employee. See [Appendix A](#) for an example.
 - Historical Labor and Burden Distribution Register (R053011)- This report gives the same data as the Labor and Burden Distribution Register, but it can be run by an agency to get historical data. History will be available for payrolls processed after 8.10 go-live. See [Appendix B](#) for an example.
 - Historical Payroll Register (R07345) - This report gives the same data as the Payroll Register that is created during payroll processing, but can be run by an agency against historical data, allowing the ability to create a Payroll Register for one or more historical pay cycles. See [Appendix C](#) for an example.

Procurement

- The approval screen has a new field that indicates what line of a Procurement Document has changed when the document is being re-approved.

Comm PO (OP) Approval - Purchase Order Requisition App

OK Find Cancel Row Form Tools

Order Number 46280 OP 10000

Originator 100386

Supplier 500900 SIMON CONTRACTORS, OGALLALA

Ship To 678925 DAS - NIS

Records 1 - 2

<input type="checkbox"/>	<input type="checkbox"/>	Line	Chg Ln	Inventory Number	Status
<input type="checkbox"/>	<input type="checkbox"/>	1.000		920	
<input type="checkbox"/>	<input type="checkbox"/>	2.000	C	920	

Blank

C Changed

R Rejected

R* Rejected and Amended

- When using the quote process and entering the price per item, you are now required to enter price breaks. If you don't use price breaks, the system will populate the price per item at zero when generating a contract or purchase order less than the original estimated quantity.

Enter Bid Response (OQ) - Quote Price Breaks

OK Delete Cancel Tools

Order Number: 892 OQ 10000 Line Number: 1.000
 Account Number: 47110350.583300 COMPUTER HARDWARE EQUIPMENT
 Original Qty: 1.0000 EA Promised Date:
 Supplier: 999999 Expire Date: 11/28/2006
 Change Order: 000

Records 1 - 2				
	Quantity	Price	Promised Delivery	Expire Date
<input checked="" type="radio"/>	1.0000	100.00		
<input type="radio"/>				

- On the order release screen, you will see three tabs. End users must click on each tab and fill in the appropriate information in order to complete the order release process. The Order Number, Order Type, and Fund information is now at the bottom of the Header, instead of the top.

Gen Comm PO (OG) from Contract (OC) - Order Release

OK Cancel Form Tools

Supplier: 501246 FORT, INC Branch/Plant: 9000
 Buyer: 576679 KATHY DEVRIES
 Ship To: 558508 PATROL NEBRASKA STATE -CARRIER
 Order Number: 10154 OC 00001 000 1.000

Release
 Close
 Cancel

Release Information | Detail Information | Dates

Release Qty: 95.0000 PR Release Amt: 15,254.15
 Qty To Date: 5.0000 Amt To Date: 787.55
 Original Qty: 100.0000 Original Amt: 16,057.00
 Unit Cost: 160.5700 Purchasing UOM: PR Line Type: J

- The PA Commitment Inquiry has added a new button called "Order Summary". That allows end users to see a sub total for each procurement document within a business unit.

PA Commitment Inquiry - Work With Commitment Inquiry

Select Find Close Form Row Tools

Order No * OP * Branch/Plant *

Account *

Type/Subledger * *

G/L Date from 04/01/2005 thru 04/15/2005

Order Summary

Records 1 - 17 Customize Grid Grid Format Na

	Order Number	Or Ty	Order Co	Chg No.	Line Number	Supplier	Description	Amount Committe	Amount Relieved	Amount Open
<input type="checkbox"/>	15796	OP	56520	000	1.000	506294	CM-00424MAXE-7-01		1,500.00-	
<input type="checkbox"/>	Order Total									1,500.00
<input type="checkbox"/>	16432	OP	56500	000	1.000	1708888	E-clip Video Suppressio	4,500.00-		
<input type="checkbox"/>	Order Total									4,500.00
<input type="checkbox"/>	16695	OP	56500	000	1.000	503398	Terminal Circuit Breaker	200.00-		
<input type="checkbox"/>	Order Total									200.00
<input type="checkbox"/>	16843	OP	10000	000	1.000	500129	Bush Wheaton Workstat	121.52-		
<input type="checkbox"/>	Order Total									121.52

- Orders can be cancelled at the header level.

Revise Comm PO (OP) - Order Detail

OK Cancel Form Row Tools

Order Detail

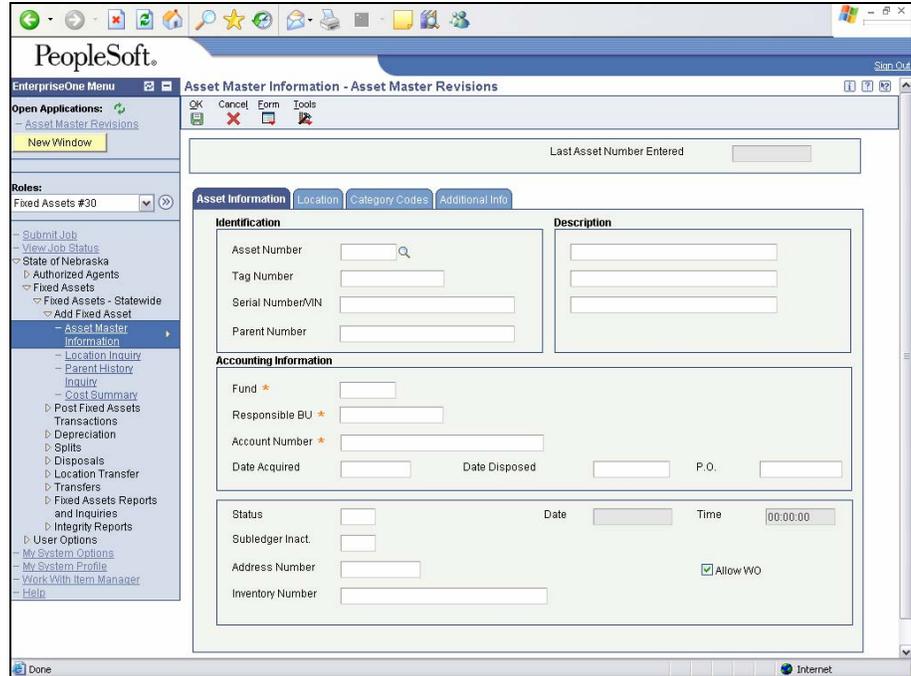
Order Numk OP 10000

- Catalogs
- Multi Item Search
- Cancel Order**
- Templates
- Supplier Hyperlink

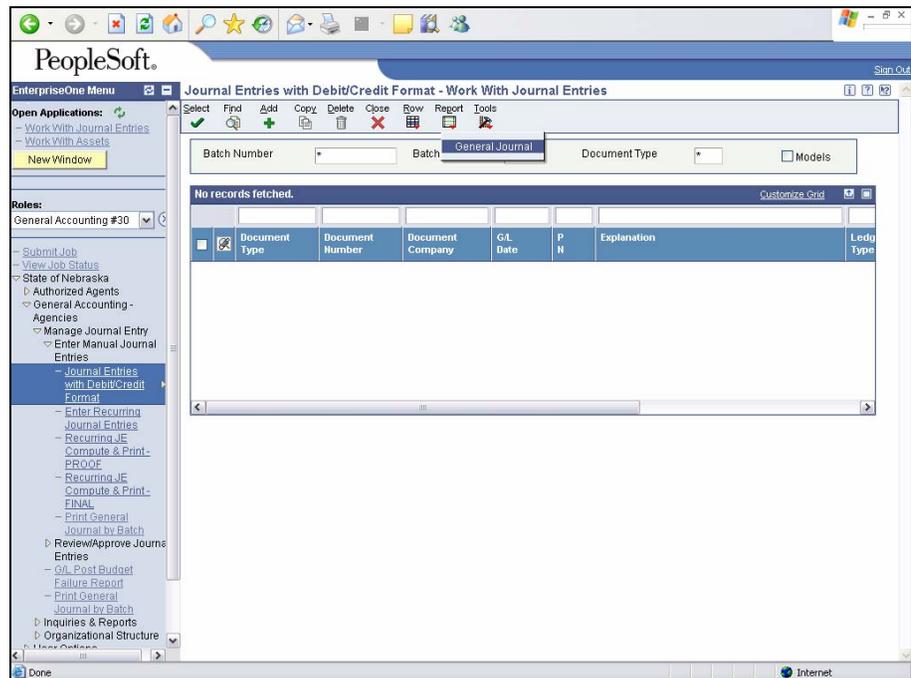
- K Field is going away. All payments created from a Service Contract must have a Purchase Order generated from a Service Contract and the end user must complete the three-way match.
- All Receipt batches must be posted in order to create reverse receipt batch. DO NOT DELETE O TYPE BATCHES
- Changes can not be made to an account/object once a line has been received against and the reverse receipt completed. If the account has to change once the line has been receipted against, the line will need to be cancelled and a new line will need to be added.
- Formscape will now print attachments up to over 100,000 characters.

Financials

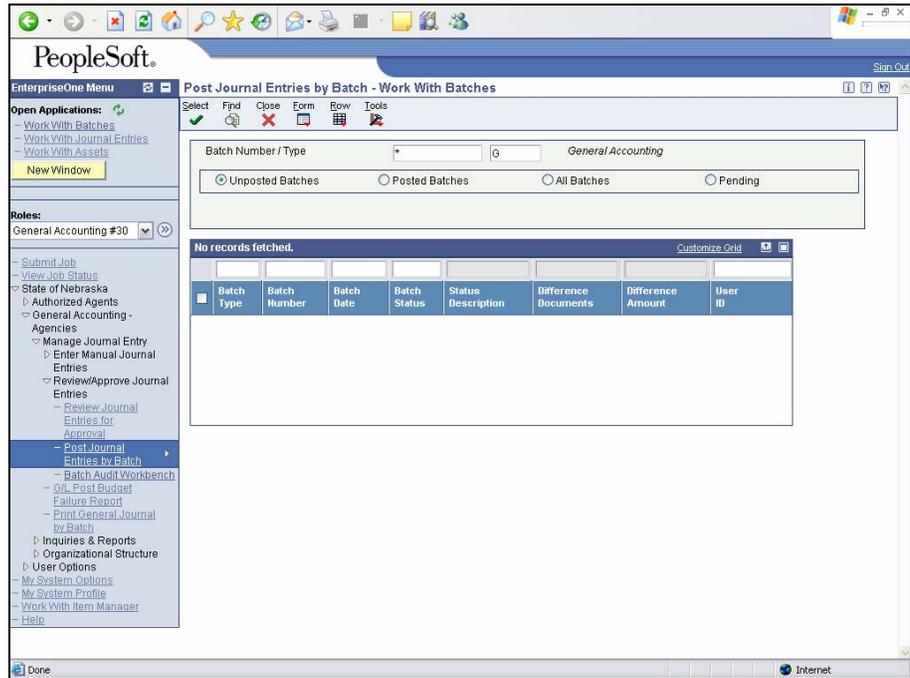
- On Fixed Asset Entry, use tabs instead of Form exit.



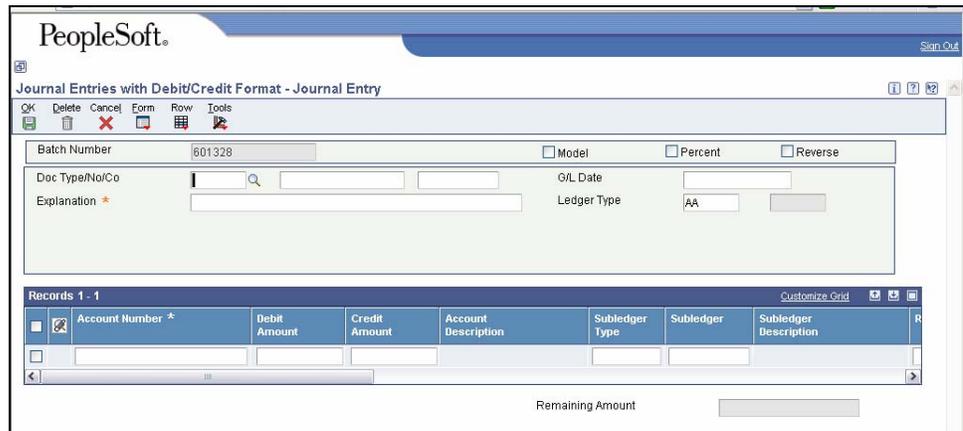
- Location Transfer no longer requires you to click Row, Transfer Rows – Work Instructions will be updated to reflect new process.
- Print General Journal exit available on Journal Entry screen.



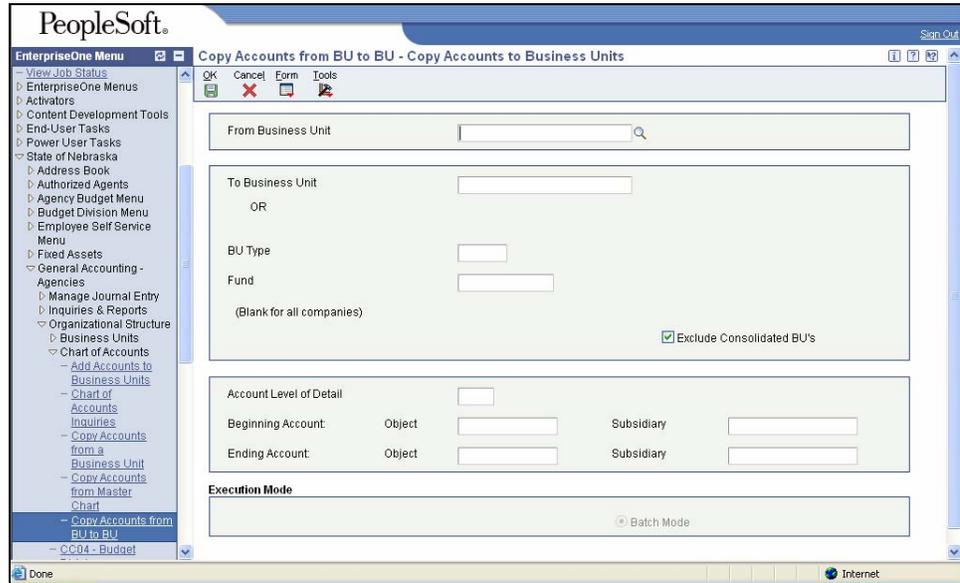
- Pending radio button on Work with Batches windows.



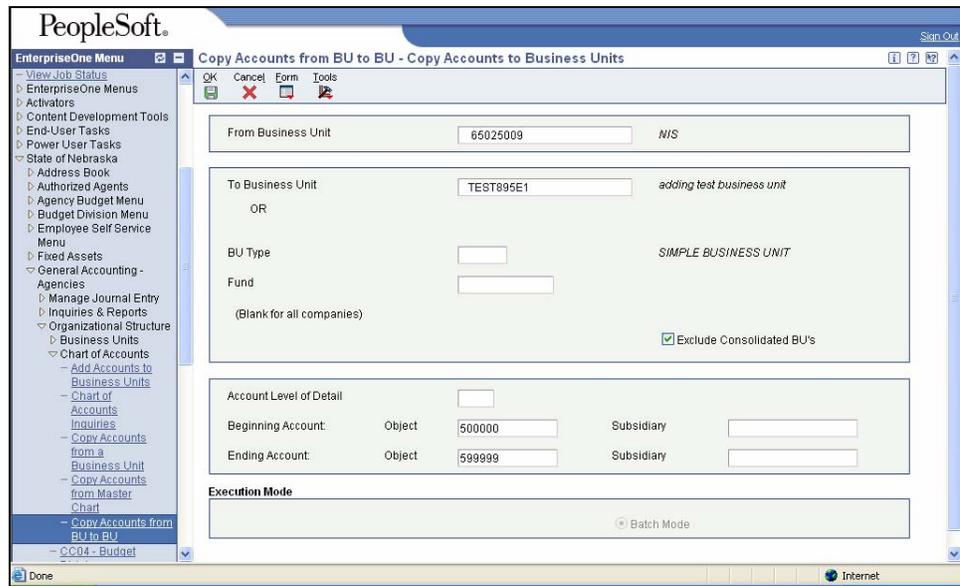
- On the grid, Subledger Type precedes Subledger



- New application for copying accounts (P09804). Navigation: General Accounting – Agencies > Organizational Structure > Chart of Accounts > Copy Accounts from BU to BU. See screen shots below.



1. Enter the From Business Unit and to Business Unit (required). Then fill in as much information as necessary in the Beginning Object/Subsidiary and Ending Object/Subsidiary.



2. Click OK.

PeopleSoft EnterpriseOne Menu

Copy Accounts from BU to BU - Copy Accounts to Business Units

From Business Unit: 65025009 NIS

To Business Unit: adding test business unit

OR

BU Type: SIMPLE BUSINESS UNIT

Fund: (Blank for all companies)

Exclude Consolidated BU's

Account Level of Detail:

Beginning Account: Object: 500000 Subsidiary:

Ending Account: Object: 599999 Subsidiary:

Execution Mode: Batch Mode

Done Internet

3. Click OK – Printer Selection window appears.

PeopleSoft EnterpriseOne Menu

Printer Selection

Printer Selection | Print Property | Document Setup | Advanced

Printer Name: QGPL/ONEWORLD_A

Printer Location: HERE

Printer Model: LASER

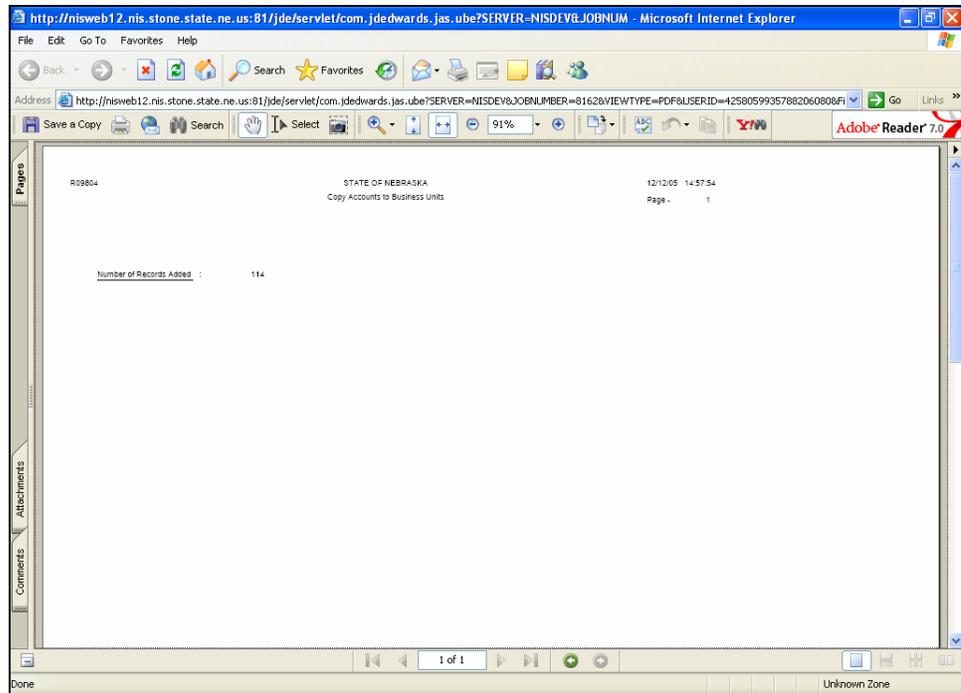
Number of Copies: 1 Range: 1 - 9999

Done Internet

4. Click OK.

5. Click Cancel

6. Go to Work with Submitted Jobs to view the report. The output provides the number of records added.



- Other notes: you will see minor changes to the menu. During this process we have tried to clean-up and make consistent the menus for all modules. Work instructions will be updated to include new menu navigations.

Q & A from the December 14, 2005 8.10 Upgrade Overview Meeting

General Changes

Q: Can the auto-fill feature be turned off?

A: Yes, the auto-fill feature can be turned on (or off) from the Tools menu by checking (or un-checking) the Auto Populate option. This feature is session-wide, so it will either be turned on for all applications, or off for all applications.

Q: How will "timing out" be effected by the ability to open multiple applications and NIS sessions?

A: "Timing out" functions the same as it has in the past. NIS will time out after 60 minutes of inactivity under one User ID. As long as you are active in one of the open applications, NIS should not "time out."

Q: Can we use Customized Grids?

A: NIS has not detected issues with Customized Grids. Please feel free to use Customized Grids and be sure to notify the IMS Help Desk with any problems.

Q: Can we get training manuals for 8.10 before go-live?

A: Yes, the training manuals for 8.10 will be put on the website as they are completed.

Q: Are automatic password resets a possibility?

A: Yes, this is a priority project after the implementation of the 8.10 upgrade.

HR/Payroll Changes

Q: Can the Home Business Unit be added to Data Selection on the Historical Labor and Burden Distribution Register report?

A: HMCU can be added without much difficulty, although it will require developer time. We can address after the 8.10 upgrade is in place.

Q: Can the Historical Labor and Burden Distribution Register report be run in CSV?

A: Yes.

Q: Can you see employees who have transferred out of your agency on the Historical Labor and Burden Distribution Register report?

A: No, you will only be able to see employee's that are included in your security business unit range.

Q: Can Historical Labor and Burden Distribution Register report be run by Payroll ID?

A: No

Procurement Changes

Q: Will a change to a split-coded Purchase Order show on the Approval Screen?

A: Yes, any line changed after approval will have a C in the Chg Ln (Change Line) field. The Chg Ln field will be blank for any new lines added.

Q: Will the Order Release screen look this way (see screen shot above in the [Procurement section](#)) only for generating a Purchase Order from a Commodity Contract?

A: No, the Order Release screen will look this way when generating one document from another document (Ex. Generate Purchase Order from Service Contract, Generate Purchase Order from a Requisition.)

Q: Is the description field still 30 characters?

A: Yes

Q: Will the Send Invoice field be added to the Order Release screen?

A: At this point this field is not on the Order Release screen. End users are required to revise the Purchase Order and change the Send Invoice To field on the Order Header and Detail lines.

Q: Are the fields on the tabs on the Order Release screen now required?

A: No, users will need to ensure they change the necessary fields.

Q: With the "K" field going away, how will this effect subsystems?

A: End Users are required to generate a Purchase Order from a Commodity Contract, receive against the Purchase Order and complete the three way match process. Agencies using a subsystem to track Service Purchases should contact NIS to discuss other options.

Q: Can you change the Business Unit field on a detail line after the Purchase Order has been received and reversed?

A: Yes, you can change the Branch/Plant business unit field on a detail line after the purchase order has been received, but you cannot change any part of the account number (business unit.object.subsidiary), subledger, or subledger type.

Financial Changes

Q: Will users still be able to copy accounts from the Nebraska Master?

A: No, but the Nebraska Master will be available on the website for review.

Q: Is the General Journal print option available in Accounts Payable?

A: No, the General Journal report was developed by JDEdwards/PeopleSoft/Oracle specifically as a General Accounting report. As such, the report is not available directly from the Accounts Payable voucher entry applications. However, because the report is available as an exit from the Journal Entries with Debit/Credit Format application, you could enter/search for the Voucher batch from this application and then print the report.

Q: Will we use a new Budget System?

A: Per Lyn Heaton, we will use the same Budget system until 2009.

Appendix A

12/07/05 13:34:09
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STATE OF NEBRASKA
Labor and Burden Distribution Register
Payroll ID - 53BW
Pay Period Date Range: 12/10/05 - 12/23/05

RO33010
Fund 10000 STATE GENERAL FUND
Business Unit 50415610 ATHLETICS ADMINISTRATION
Address Number 100546 LORTZ, STEVE
Pay Code 1 Regular Pay

Hours Worked	Earnings	Employer Paid Taxes	Employer Paid Benefits
20.00	400.00	E Social Security Paid 24.30	4412 Life - Basic 27.02
		Q Medicare Paid 5.68	4910 Retire-State 27.19
Totals:	400.00	29.98	

1 of 11

Appendix B

12/07/05 13:52:30
Page - 1

R033011 STATE OF NEBRASKA
Historical Labor and Burden Distribution Register
Work Date Range: 01/01/05 - 12/31/05

Fund	10000 STATE GENERAL FUND						
Business Unit	50415610 ATHLETICS ADMINISTRATION						
Address Number	100546						
Name	LORTZ, STEVE						
Pay Code	1 Regular Pay						
Hours Worked	40.00	Earnings	800.00	Employer Paid Taxes		Employer Paid Benefits	
Totals:	<u>40.00</u>	<u>800.00</u>					
					24.30	Flat Burden	0.00
					5.68	4412 Life - Basic	.17
						4910 Retire-State	29.95
					<u>29.98</u>		<u>30.12</u>

1 of 14

Address: http://nisweb12.nis.stone.state.ne.us:81/jde/servlet.com:jdedwards,jas.ube?SERVER=NISDEV8JOBNUM - Microsoft Internet Explorer

Address: http://nisweb12.nis.stone.state.ne.us:81/jde/servlet.com:jdedwards,jas.ube?SERVER=NISDEV8JOBNUMBER=69598&VIEWTYPE=PDF&USERID=3466821923001

Current Employee: LORTZ, STEVE A

Current Check Control Number: 73593603

Check Date: 02/16/05

2 of 11

Pay Code	Description	Current Hours	Current Dollars	YTD Dollars	YTD Hours	DBA Code	Description	Current Amount Taken	YTD Amount Available	YTD Amount Accrued	YTD Table Amount
1	Regular Pay	72.00	2,207.23	5,355.45	176.00	***	Gross Wages	2,452.48	7,357.44	7,357.44	6,942.87
30	Vacation P/L	6.00	245.25	1,226.24	40.00		Federal Income Tax	295.91	887.73	887.73	2,314.39
240	Holiday Retirement	6.00	165.55	735.75	34.00		Federal FICA Withheld	150.07	450.21	450.21	2,420.48
	Basic Life Ins		.70	458.98	2.10		Federal Medicare Withheld	35.10	105.29	105.29	2,420.48
	Vacation Hours Earned	7.70	7.70	23.10	33.10		Nebraska State Income Tax	128.85	386.55	386.55	2,314.39
	Sick Hours Earned	9.24	9.24	37.72	37.72		Federal FICA Company Contrib	150.07	450.21	450.21	2,420.48
1105	Gross Pay	2,452.48	7,357.44	14,714.88	1,714.88		Federal Medicare Company Contr	35.10	105.29	105.29	2,420.48
1113	YTD Gross	106.19	2,452.43	7,357.29	318.87		Parking	12.00	36.00	36.00	7,351.44
1115	CalCBenefits	.05	.05	.15	.15		Medical Reimbursement	106.19	318.57	318.57	7,351.44
1116	CalCBenefits						Medical Reimbursement	20.00	60.00	60.00	
Current Employee: LORTZ, STEVE A								Current Check Control Number: 73593603		Check Date: 02/16/05	
*** Total Pay/Hours								Gross: 80.00		2,452.48	
								Gross: 7,357.44		340.00	
								Taxable: 2,314.29		6,942.87	
								*** Total Employee Deductions		748.12	
								*** Total Employer Deductions		185.17	
								*** Net Pay		5,113.09	
8500 Vac State BW								40.00		24.80	
8502 StateBW								1489.48		1489.48	
8500 Vac State BW								40.00		16.90	
8502 StateBW								1467.72		1467.72	
1 Regular Pay								80.00		2,452.48	
30 Vacation P/L								6.00		245.25	
240 Holiday Retirement								6.00		165.55	
Basic Life Ins										.70	
Vacation Hours Earned								7.70		7.70	
Sick Hours Earned								9.24		9.24	
1105 Gross Pay								2,452.48		7,357.44	
1113 YTD Gross								106.19		2,452.43	
1115 CalCBenefits								.05		.05	
1116 CalCBenefits											
Current Employee: LORTZ, STEVE A								Current Check Control Number: 73593603		Check Date: 02/16/05	
*** Total Pay/Hours								Gross: 80.00		2,452.48	
								Gross: 7,357.44		340.00	
								Taxable: 2,314.29		6,942.87	
								*** Total Employee Deductions		748.12	
								*** Total Employer Deductions		185.17	
								*** Net Pay		5,113.09	
8500 Vac State BW								40.00		24.80	
8502 StateBW								1489.48		1489.48	
8500 Vac State BW								40.00		16.90	
8502 StateBW								1467.72		1467.72	
1 Regular Pay								80.00		2,452.48	
30 Vacation P/L								6.00		245.25	
240 Holiday Retirement								6.00		165.55	
Basic Life Ins										.70	
Vacation Hours Earned								7.70		7.70	
Sick Hours Earned								9.24		9.24	
1105 Gross Pay								2,452.48		7,357.44	
1113 YTD Gross								106.19		2,452.43	
1115 CalCBenefits								.05		.05	
1116 CalCBenefits											
Current Employee: LORTZ, STEVE A								Current Check Control Number: 73593603		Check Date: 02/16/05	
*** Total Pay/Hours								Gross: 80.00		2,452.48	
								Gross: 7,357.44		340.00	
								Taxable: 2,314.29		6,942.87	
								*** Total Employee Deductions		748.12	
								*** Total Employer Deductions		185.17	
								*** Net Pay		5,113.09	
8500 Vac State BW								40.00		24.80	
8502 StateBW								1489.48		1489.48	
8500 Vac State BW								40.00		16.90	
8502 StateBW								1467.72		1467.72	
1 Regular Pay								80.00		2,452.48	
30 Vacation P/L								6.00		245.25	
240 Holiday Retirement								6.00		165.55	
Basic Life Ins										.70	
Vacation Hours Earned								7.70		7.70	
Sick Hours Earned								9.24		9.24	
1105 Gross Pay								2,452.48		7,357.44	
1113 YTD Gross								106.19		2,452.43	
1115 CalCBenefits								.05		.05	
1116 CalCBenefits											
Current Employee: LORTZ, STEVE A								Current Check Control Number: 73593603		Check Date: 02/16/05	
*** Total Pay/Hours								Gross: 80.00		2,452.48	
								Gross: 7,357.44		340.00	
								Taxable: 2,314.29		6,942.87	
								*** Total Employee Deductions		748.12	
								*** Total Employer Deductions		185.17	
								*** Net Pay		5,113.09	
8500 Vac State BW								40.00		24.80	
8502 StateBW								1489.48		1489.48	
8500 Vac State BW								40.00		16.90	
8502 StateBW								1467.72		1467.72	
1 Regular Pay								80.00		2,452.48	
30 Vacation P/L								6.00		245.25	
240 Holiday Retirement								6.00		165.55	
Basic Life Ins										.70	
Vacation Hours Earned								7.70		7.70	
Sick Hours Earned								9.24		9.24	
1105 Gross Pay								2,452.48		7,357.44	
1113 YTD Gross								106.19		2,452.43	
1115 CalCBenefits								.05		.05	
1116 CalCBenefits											
Current Employee: LORTZ, STEVE A								Current Check Control Number: 73593603		Check Date: 02/16/05	
*** Total Pay/Hours								Gross: 80.00		2,452.48	
								Gross: 7,357.44		340.00	
								Taxable: 2,314.29		6,942.87	
								*** Total Employee Deductions		748.12	
								*** Total Employer Deductions		185.17	
								*** Net Pay		5,113.09	
8500 Vac State BW								40.00		24.80	
8502 StateBW								1489.48		1489.48	
8500 Vac State BW								40.00		16.90	
8502 StateBW								1467.72		1467.72	