

SAN DIEGO UNIFIED SCHOOL DISTRICT

Date: November 13, 2013

To: All District Employees

Subject: ePro Requisition Submission & Approval Deadlines and Expense Module Inactivation November 20 – December 10, 2013

Department and/or

Persons Concerned: Persons who submit and approve ePro Requisitions, travel Authorizations and Expense Reports

Due Date: November 20, 2013 for Travel Authorizations & Expense Reports
November 22 – December 4, 2013 for ePro Requisitions

Reference: PeopleSoft Financials/Supply Chain Upgrade Implementation

Action Requested: Submit and approve or deny all ePro Requisitions, Travel Authorizations, and Expense Reports on or before deadlines listed above.

Brief Explanation:

Beginning December 6, 2013, there will be a major upgrade applied to the PeopleSoft Financials/Supply Chain functionality. This upgrade will affect both the ePro module where employees create and submit orders for all supply items, as well as the Expense module where employees create and submit both travel authorizations and expense reports for professional development-related events and eligible mileage reimbursement.

This upgrade requires all requisitions, travel authorizations and expense reports are in an approved status prior to the implementation date. Below are requirements for each type of document. Please adhere to these deadlines to ensure successful encumbrance, processing and payment in the new version.

Requisitions:

Warehouse Inventory Items must be saved and submitted by Friday, November 22 at 5:00 p.m.
Special Request Requisitions must be saved and submitted by Monday, December 2 at 12:00 p.m.
Direct Connect Requisitions must be saved and submitted by Monday, December 2 at 12:00 p.m.

Approvers must approve Warehouse Inventory Items by Friday, November 22 at 5:00 p.m.
Approvers must approve Direct Connect Requisitions by Monday, December 2 at 5:00 p.m.
Approvers must approve Special Request Requisitions by Wednesday, December 4 at 5:00 p.m.

Any Special Request, Direct Connect or Warehouse Inventory Item Requisition that is neither saved and submitted nor approved by its respective deadline above will be canceled and closed. Requesters will need to re-enter canceled/closed requisitions on or after December 9, 2013.

Note: a fully-approved Special Request Requisition **does not** have to be processed into a Purchase Order by 5:00 p.m. on Thursday, December 5.

Travel Authorizations & Expense Reports:

No travel authorizations or expense reports may be saved or submitted between November 20, 2013 5:00 p.m. and December 10, 2013 8:00 a.m.

Approvers at department and branch levels will have the functionality available to clear their work lists by reviewing and either approving or denying travel authorizations and expense reports during this time. Approvers must not use the “send back” button during this time, as edits to existing reports will not be permitted once the upgrade has been applied and the employee will not be able to resubmit the report. We ask approvers at all levels to check their work lists daily during this time period. The Accounts Payable Department will need two weeks to process all expense reports submitted by the November 20, 2013 deadline.

Employees may submit mileage expense reports for a partial month in November then create a new report once the upgrade is in place to record and claim any remaining days in November. Reports may not be submitted for future-date activity.

We thank you for your understanding and cooperation in adhering to these procedures during this critical time. For questions regarding ePro requisitions, please contact Robin Hoffpauir, Expediter, Strategic Sourcing & Contracts at 858/522-5805 or rhoffpauir@sandi.net. For questions regarding travel authorizations or expense reports, please contact Sandy Davis, Manager, Accounts Payable at 619/725-7756 or sdavis@sandi.net.

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