



South Carolina Enterprise Information System

User Group Meeting

Friday, October 25, 2013

STATE INFORMATION
TECHNOLOGY



SC BUDGET AND CONTROL BOARD



Welcome and Updates

John Taylor, SCEIS User Support Team Director





SCEIS User Group Leads Committee Elections

John Taylor, SCEIS User Support Team Director



🌀 Finance Lead

Yvette Sistare; Parks, Recreation and Tourism

🌀 Human Resources/Payroll Lead

Dottie Blankenship; Department of Motor Vehicles

Karl McCottry; Department of Transportation

🌀 Reporting Lead

Kelley Donkle; Department of Transportation

🌀 Materials Management Lead

Kimber Craig; Budget and Control Board



South Carolina Enterprise Information System

Update: SRM 7.2 Upgrade

Wanda Dixon, SCEIS MM Team Lead

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SC BUDGET AND CONTROL BOARD

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- Train the Trainer Program Complete: September 23 and October 16:
 - 71 users from 17 agencies were trained by SCEIS in Train-the-Trainer Program

Thank You to the Following Agencies!

- Budget & Control Board
- Consumer Affairs
- Department of Agriculture
- Department of Commerce
- Department of Corrections
- Department of Disabilities and Special Needs
- Department of Education
- Department of Health & Environmental Control
- Department of Mental Health
- Department of Motor Vehicles
- Department of Transportation
- Health & Human Services
- Judicial Department
- Labor, Licensing & Regulation
- Materials Management Office/ Info. Technology Management Office
- Parks, Recreation & Tourism
- Vocational Rehabilitation

🔄 Online Courses

- Shopping Cart Creator
- Shopping Cart Approver
- Goods Receiver

🔄 Instructor-led Courses

- Purchasing Processes
- Bidding Processes
- Contract Administration

Train the Trainer Program

🌀 October 21 through November 22: Go-live Training

- Agency Trainers will deliver to their agencies:
 - Shopping Cart Creator (Supplement to online course - Agency Discretion)
 - Purchasing Processes
 - Bidding Processes
 - Contract Administration
- SCEIS will deliver to all other agencies
 - Purchasing Processes
 - Bidding Processes
 - Contract Administration

Freeze Period: November 8 (COB) – November 24, 2013

- ☛ SRM 5.0 will NOT be available
 - Affects Shopping Carts (including internal goods and services requested from warehouse), Approvals, Bidding, Vendor Bid Response
- ☛ No new purchase orders will be created in ECC
- ☛ Contracts will NOT be available
 - All Contracts now in ECC will be migrated to SRM 7.2
 - Agencies will validate Contract Data Extraction: ECC to SRM Production (details will follow at a later time)

Freeze Period: November 8 (COB) – November 24, 2013

- ☉ Process payments: Agencies will be able to enter invoice, change PO, enter goods receipt, IF payment is not against a purchase order connected to a contract
- ☉ Purchase Orders (PO's) from ECC will NOT be migrated to SRM
- ☉ Vendors will NOT have access to vendor registration

Freeze Period: November 8 (COB) – November 24, 2013

🔄 Agency Inventory Warehouses

- Will NOT be able to:
 - Receive agency orders through shopping cart
- Will be able to:
 - Transfer material from plant to plant
 - Transfer material from storage location to storage location
 - Process a sales order
 - Receipt a transfer
 - Create a goods issue

SCEIS System Freeze

Freeze Period: November 8 (COB) – November 24, 2013

- ☛ Funds reservations will not be affected
- ☛ Direct Payments will not be affected
- ☛ MySCEmployee or Citrix will not be affected

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- 🌀 Policy for Use of Purchasing/Payment Document Types will be enforced during Freeze
 - Invoices entered in ECC to be paid by the direct payment method during the freeze period will be reviewed individually by the Comptroller General's Office to determine if payment should be made using direct pay or purchase order.
 - 🌀 No use of direct pay or P-Card for inventory items

🌀 Suggestions on How to Prepare for Freeze

- Plan ahead on all purchases
- Communicate freeze period to users well in advance
- Set deadline for requests/shopping carts
- Post notice of freeze on your agency's website
- Communicate with your vendors

☉ Suggestions on How to Prepare for Freeze

– Shopping Carts:

- Develop manual process to capture purchases that must be made to enter in SRM 7.2 after Go Live

– Solicitations:

- SRM will not be available for vendors to respond - plan so that freeze period coincides with evaluation of bids, if possible
- If solicitation is issued before freeze, build in additional time and notify vendors through an amendment
- If work has to be done, develop process to manually record what was done and enter into SRM 7.2 after go-live

🌀 Suggestions on How to Prepare for Freeze

– Inventory

- Develop process to manually track inventory processes (internal shopping cart movement)

☉ Active Data from SRM 5.0 to SRM 7.2 at Go-Live

– Shopping Carts

- Shopping Carts created in SRM 5.0, but not approved, will be inactive in SRM 7.2 and will have to be re-entered (can be copied from old shopping carts)
- Shopping Carts begun in SRM 5.0 and approved will be active in SRM 7.2

– Solicitations

- Agencies will be able to continue with solicitations in process

– Fixed Price Bids

- Still testing

🌀 Purchase orders in ECC

- Agencies will maintain POs created prior to COB November 8 in ECC until new fiscal year begins

🌀 Process for FI users working in ECC should not change

Why Upgrade?

- ⌚ SAP no longer supports the current version of SRM.
- ⌚ Upgrades contain enhanced functionality and corrections to existing functionality.
- ⌚ Keeping your system or program up-to-date increases the security of the system or program.
- ⌚ Remain compatible with changing technology and to receive continued support from SAP.

SRM 7.2 Upgrade Microsite



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SC Budget and Control Board

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About SCEIS

Agency Support Teams

"A" Agencies Cutover - HR/Payroll

SCEIS Treasury Projects

Training

Finance

HR & Payroll

Materials Management

Reporting

Imaging

Technical

MySCEmployee



SC Budget and Control Board

**INSPECTOR GENERAL'S
FRAUD HOTLINE**

(State Agency fraud only)

1-855-SCFRAUD
or
1-855-723-7283

SRM 7.2 Upgrade Microsite

SRM 7.2 Upgrade Microsite Navigation


[Microsite Home](#) | [User Communications](#) | [Information & Tools](#) | [Training](#) | [User Support](#)

Microsite Navigation



Information & Tools

- Timeline
- Gallery of SRM 7.2 Screens



User Support

- Submit Your Questions About the SRM 7.2 Upgrade



Training

- SRM 7.2 Upgrade Training Courses



User Communications

- SRM 7.2 Upgrade Blog

SRM 7.2 Upgrade Microsite

SCEIS Microsite

<http://sceis.sc.gov/page.aspx?id=254>



Training Update

Tracy Powers, SCEIS User Support Lead



PR215: Additional Sections

- 🕒 9 a.m. to 5 p.m. on **Tuesday, October 29**
SCEIS Training Room B01-B, Wade Hampton Building, 1200 Senate St, Columbia
- 🕒 9 a.m. to 5 p.m. on **Wednesday, October 30**
SCEIS Training Room B01-B, Wade Hampton Building, 1200 Senate St, Columbia
- 🕒 9 a.m. to 5 p.m. on **Thursday, October 31**
SCEIS Training Room B01-B, Wade Hampton Building, 1200 Senate St, Columbia

- Nearly 950 course completion forms have been submitted to SCEIS for the 3 courses
- 68% selected “agree” the majority of the course evaluation statements related to the content and quality of the course
- 21% strongly agreed to those items
- 9% neither agreed nor disagreed
- Less than 1% disagreed and less than 1% did not respond to those items

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- ☉ Users are very positive about the
 - “On demand” availability of the courses
 - Self-pace option
 - Ongoing availability of the courses
 - Thorough content
 - Professional quality of the presentation
 - ☉ Limited feedback related to audio questions
 - Users have reported that they were able to resolve there questions through technical support within their agencies or by closing other programs that were open while they were viewing the courses
 - Audio will also be optimized by allowing sufficient time for all content to load

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- 🌀 Courses are available at
<http://sceis.sc.gov/page.aspx?id=284>
 - 🌀 Remind users to
 - Fill in and submit the completion form for each course
 - Read the support information available through the above link
 - Adjust audio settings, close all other programs while viewing the material and allow the fully load
 - 🌀 Questions may be submitted to
training.sceis@sceis.sc.gov

- 🌀 Active at SRM 7.2 go-live
- 🌀 Provides advanced searching capabilities
- 🌀 Content is significantly improved, with obsolete information removed
- 🌀 Training contents and supplementary materials are available in a separate area rather than intermingled with BPPs.
- 🌀 Printable materials now available for simulations as well as overall business process procedures.



Public Budget Formulation Status Update

Rachael Fulmer, State Budget Division





Year End Update

Anjali Griffin, Comptroller General's Office





Reconciliations: Overview of Issues Related to Transactions

Renee Rochester, Budget and Control Board



- Reversals of payments against a PO done incorrectly. After MR8, remember the F-44 must be done to re-set the PO. Consider correcting with a journal entry if posted incorrectly.
- Use tax liability adjustments: do not pay liability from one source and then create JE to change liability amounts. This moves cash but throws STARS and SCEIS out of balance. Pay the liability the way it was posted.

Reconciliations

Example: **When expenditure is recorded:**

DR expenditure fund 31234567	50.00	
CR Use Tax Payable fund 31234567		50.00

Payment of Use Tax

DR Use Tax Payable fund 10010000	50.00	
CR Cash fund 10010000		50.00

Journal Entry to true up cash

DR Use Tax payable fund 31234567	50.00	
CR Use Tax Payable fund 10010000		50.00

This transaction, since it is between funds, invokes the splitter and moves cash. Now cash and expenditures are correct on SCEIS but a STARS only entry MUST be posted to correct expenditures and cash.

- 🌀 **IMAGES:** Have all images facing the same direction and do NOT use double sided imaging unless the image is double-sided.
- 🌀 Changing AR postings after collection by re-setting clearing document and reversing the billing. Just adjust or correct with a journal entry re-class. SAME for AP.
- 🌀 Carry-forwards and lapses in 10010000

Reconciliations

- 🔄 IDT Refund of expenditures **MUST** be reversed and re-established correctly in the new-year.
- 🔄 Assets transfer entries still moving cash when not the intent of agency. Look at general ledger view of your 17* documents.
- 🔄 Invoking the splitter without meaning to!!



South Carolina Enterprise Information System

HR/Payroll Refresher

Infotype 2012 Maintenance

Katie Derrick, SCEIS HR/Payroll Team

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- 🌀 HR/Payroll Reporting User Group: AC 143
- 🌀 Finance Breakout Session: Auditorium
- 🌀 MMO, Recovery Audit Presentations: Auditorium at 11:45

Next User Group Meeting

Friday, December 13, 9:00 a.m.

Midlands Technical College Airport Campus – Academic
Center Auditorium