South Carolina Enterprise Information System

User Group Meeting
Friday, December 13, 2013

STATE INFORMATION
TECHNOLOGY

B&CB

SC BUDGET AND CONTROL BOARD

Welcome
John Taylor, SCEIS User Support Team Director

New SCEIS User Group Leads
John Taylor, SCEIS User Support Team Director

New SCEIS User Group Leads

- **Yvette Sistare -** Finance Lead

     (Parks, Recreation and Tourism)

- **Karl McCottry -** Human Resources/Payroll Lead

     (Department of Transportation)

- **Kelley Donkle -** Reporting Lead

     (Department of Transportation)

- **Kimber Craig -** Materials Management Lead

     (Budget and Control Board)

2014 User Group Meeting Schedule
John Taylor, SCEIS User Support Team Director

2014 User Group Meeting Schedule

Join us Fridays at 9:00 a.m.

February 28:
Midlands Tech, Airport Campus Academic Center Auditorium

April 25:
Midlands Tech, Airport Campus Academic Center Auditorium

June 6:
Midlands Tech, Northeast Campus Auditorium

August 22:
Midlands Tech, Airport Campus Academic Center Auditorium

October 31:
Midlands Tech, Airport Campus Academic Center Auditorium

December 12 (Tentative):
Midlands Tech, Northeast Campus Auditorium

South Carolina Enterprise Information System

HR/Payroll Refresher
Time and Leave Management
Katie Derrick and Lane Small

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Time/Leave Management Topics

- Leave Pool Administration

- Worker's Compensation Option 3

- Year-end activities

- Work Schedule Rule creation process change

HR/Payroll Refresher
Leave Pool Administration (IT0613)

General Leave Pool Maintenance

- All donations, withdrawals, and returns should be made via IT0613

- You need to enter a valid period date before you create any IT0613

- It will take overnight for the changes to the records to appear correctly

General Leave Pool Maintenance

- The Leave Pool Cost Report, ZHRLPCR, can be run to show your current balances and cost for Annual and Sick leave

- The report also shows hours donated, used, and restored along with the dollar amount for each

Guidelines for Donations

- Donations should only be made from the Annual Leave and Sick Leave balances

- When a donation is made, the system will create a record in IT0416 of Free compensation

- The record created by the system in IT0416 should never be manually adjusted

Guidelines for Donations for a Separating Employee

- The donation to your agency leave pool needs to be created before the employee goes off your agency's payroll

- Be sure to always use the **last** day that the employee is on payroll

Guidelines for Year-End Donations

- Donations for year-end should use a date no later than 12/31 of the year-end

- Only use leave from the Annual Leave or Sick Leave balances

- Once the time/leave programs run overnight, the records will be adjusted accordingly

Guidelines for Withdrawals

- The valid date used needs to be the day the employee needs to start using the leave pool hours

- When a withdrawal is made, the system will create a record in IT2013 of the type of leave that was withdrawn

- The record created by the system in IT2013 should never be manually adjusted

Guidelines for Returns

- Returns should only be made to 'Return to pools only' and using Abs. quota type 'Annual Lv recd from Pool' or 'Sick Lv recd from Pool'

- When a return is saved, the system will create a record in IT0416 of Free compensation and this should never be manually adjusted

- The system will not allow a return in an amount of more than two decimal places and it will automatically round that number up

- You must manually change this number to round down

- To get rid of the remainder leave past the second decimal place, an IT0416 needs to be created of Free compensation

HR/Payroll Refresher
Worker's Compensation Option 3

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Worker's Comp Option 3

- Full document will be provided in next week's SCEIS Weekly Update

- uPerform document also updated

- Processing of Holiday Comp time and holiday pay while on Worker's Comp Option 3

Leave type 2038-Worker's Comp

- Placeholder

- Results in holiday pay being forfeited

- <u>Do not use leave type</u> until further instructions are communicated

Worker's Comp Option 3

- Holiday Comp time earned prior to WC Opt 3, expires during WC Opt 3

  - Time earned while on regular salary

  - System pays time out at the pro-rated hourly amount

  - Agency Pay Correction (IT0015) required to fully compensate the Holiday Comp time

HR/Payroll Refresher
Year-end Activities

Year-end Activities

- Leave rollover occurs December 31

- Changes can be made to time/leave after the rollover occurs

- Once the time/leave programs run overnight, the records will be adjusted appropriately based on the changes

Reconcile time/leave records for 2013

- Time Collision Report – ZHRTCR

- Missing Time Report – ZHRMTR

- Unapproved and stuck leave report – ZHRUAL

- FMLA Exception report (provided by SCEIS weekly)

- Time Evaluation Messages report – PT_ERL00

HR/Payroll Refresher
Work Schedule Rule Creation

Work Schedule Rule Creation

- February 1, 2014
- Requests for a completely new work schedule:
  - Justification from agency
  - Approval by SC HRD
- New process does not apply to requests to have an existing work schedule added to an agency's list
- List of existing SCEIS work schedule rules housed on SCEIS website: http://www.sceis.sc.gov/documents/SCEIS_Work_Schedule_Rules_11.15.13.xls

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Finance Refresher
Bruce Burnett, SCEIS Finance Team Lead

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Finance Refresher - SCEIS Workflow Error Document Logically Deleted

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New Workflow Issue

- During the extended 12th month processing period, July 1 to July 12, SCEIS would create three workflows when a document was changed and saved as complete.

- Several agencies were concerned with the additional amount of work this created for the approver; SCEIS developed an enhancement that was put into Production in October.

New Workflow Issue

- The enhancement deletes multiple workflows on documents, this has changed the way that rejected Parked documents must be corrected.

- We will look at the way it was done and the error it now creates and then we will look at a new process for correcting rejected Parked documents.

FV60 – Create Document

Display Parked Vendor Invoice 3004159787 SC01 2014

Tree on | Document | Editing options

| Transactn | Invoice | | Bal. | 0.00 | |

Basic data | Payment | Details | Workflow | Tax | Notes

Vendor	7000000001	SGL Ind	
Invoice date	12/10/2013	Reference	25689
Posting Date	12/10/2013		
Document Type	KR (Vendor invoic ...	DocumentNo	3004159787
Amount	10.00	USD	☑ Calculate tax

Text

Paymt terms	22 Days net
Baseline Date	12/10/2013
Company Code	SC01 State of South Carolina Columbia, SC
Lot No.	

Vendor

Address

BEAUFORT AUTO ELECTRIC
PO Box 95
PORT ROYAL SC 29935

Ols

1 Items (No entry variant selected)

G/L acct	D/C	Amount in doc.curr.	Bu...	Cost center	Func. Area	Fund	Grant	WB
5030010000	Debit	10.00	E230	E230A00010	E230_0017	10010000	NOT RELEVANT	
	Debit	0.00						

Check Document Workflow

Documentation Rejection

Document rejected by supervisor → notification to initiator

Business area E230 and Document 3004159787

Choose one of the following alternatives

Approve

Reject

Cancel and keep work item in inbox

Check Workflow

Document in Initiator's Inbox

Change Document

Make a change and Save as Complete
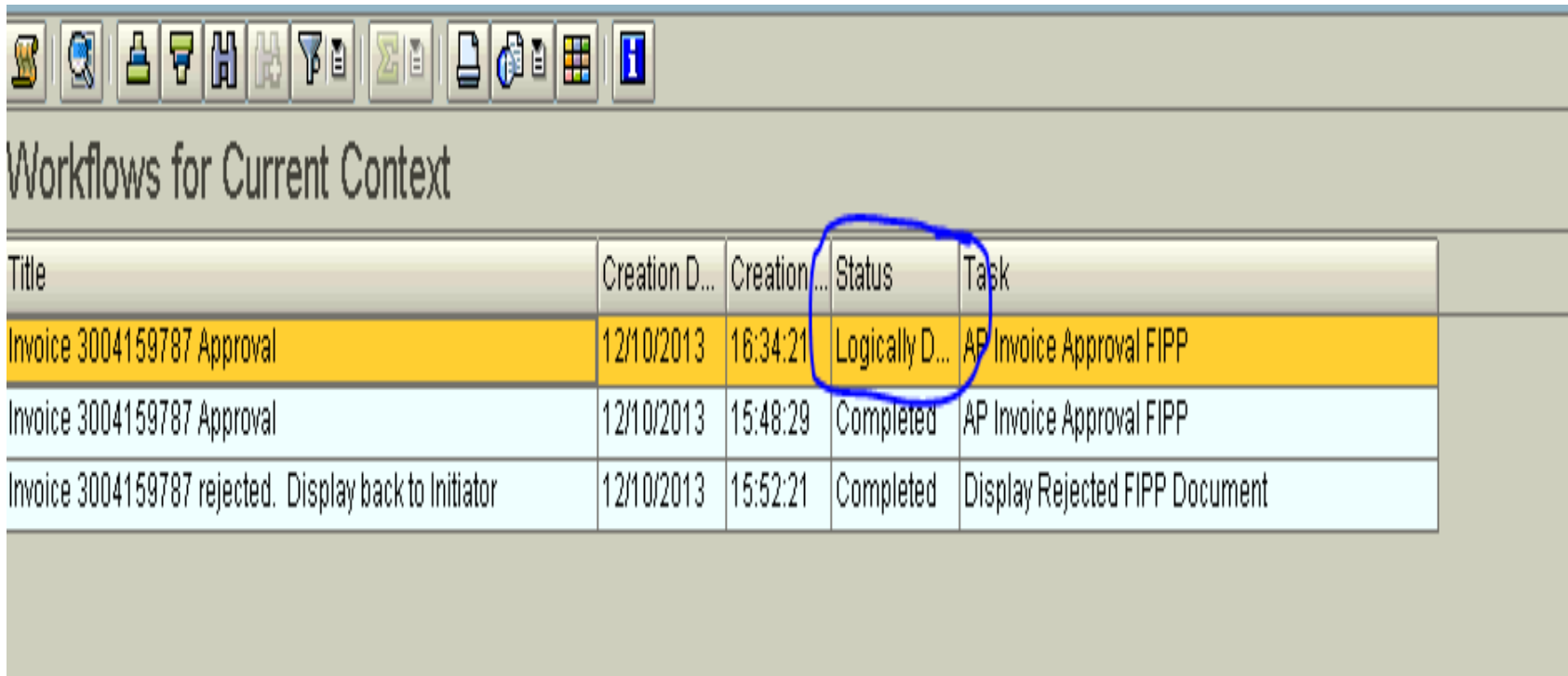
Save as Complete

Complete Work Item
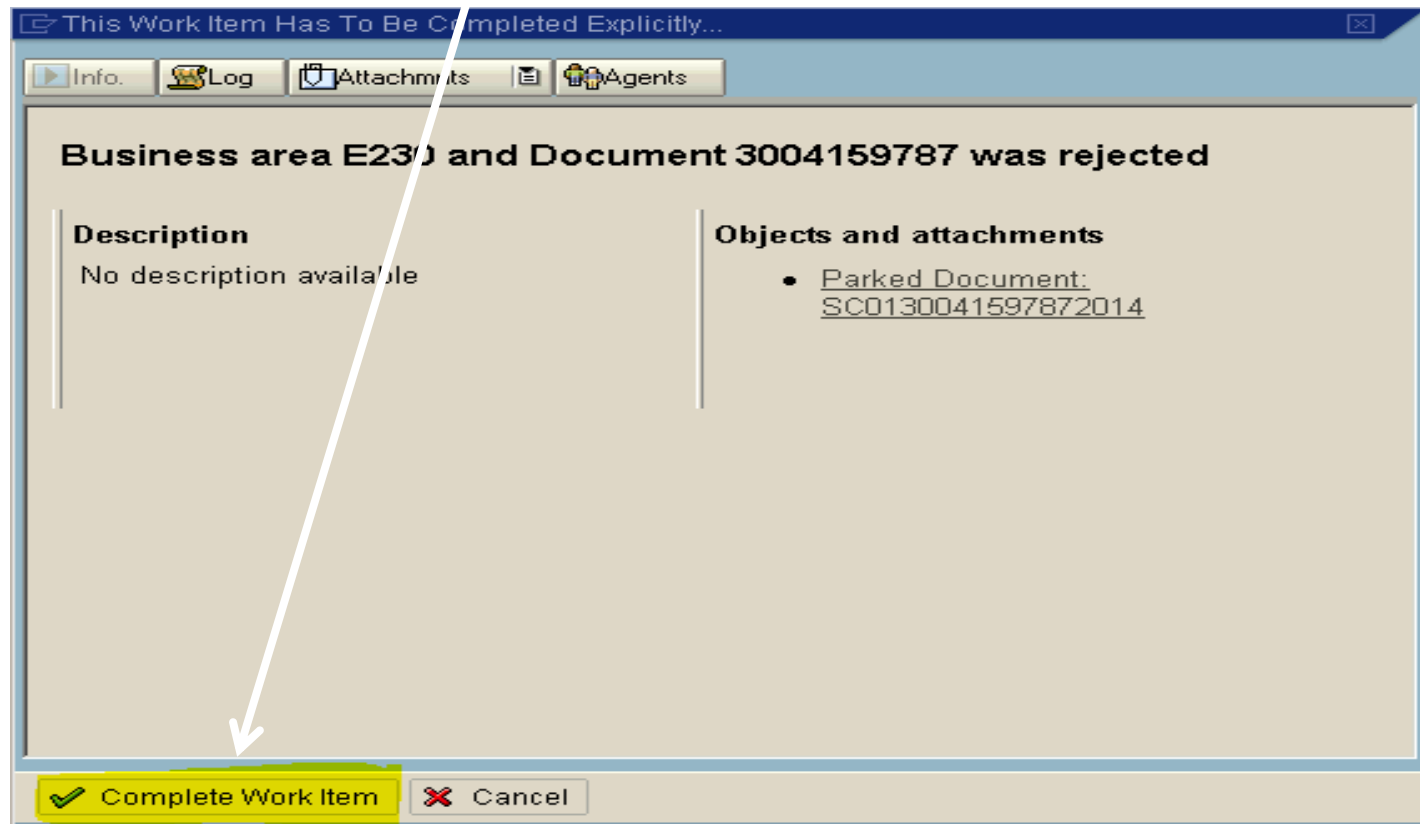
Document Logically Deleted
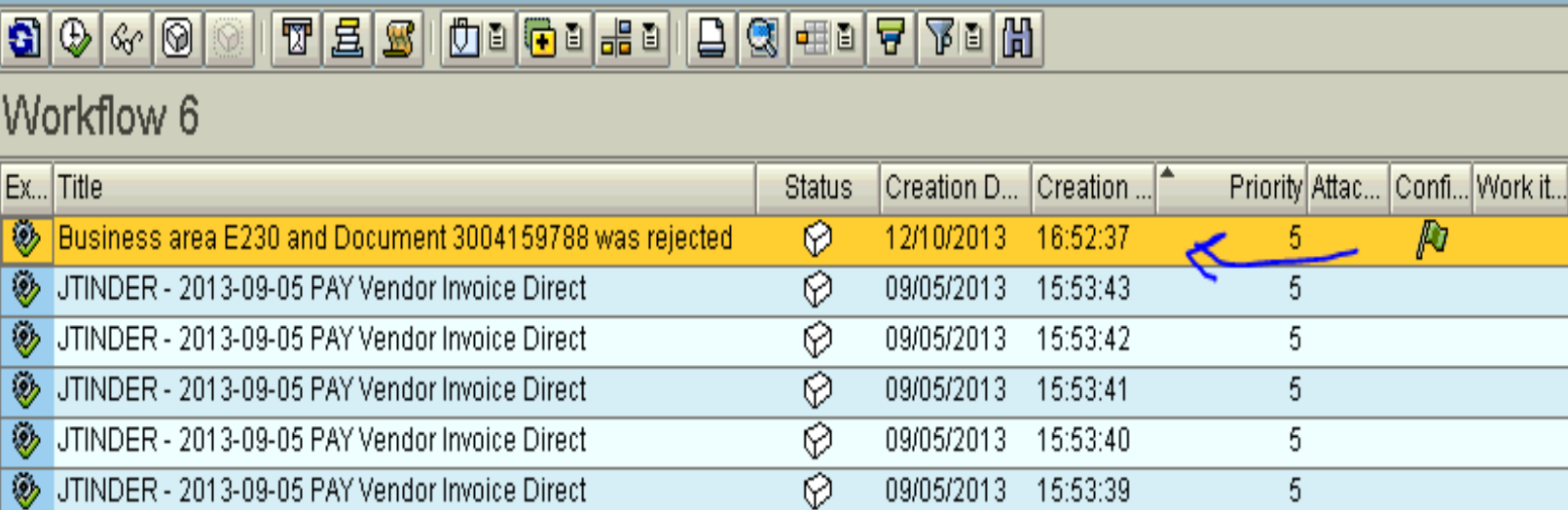
To start workflow you must create a helpdesk ticket

New Method

Select Document from Inbox

Workflow 6

Ex...	Title	Status	Creation D...	Creation ...	Priority	Attac...	Confi...	Work it...
	Business area E230 and Document 3004159788 was rejected		12/10/2013	16:52:37	5			
	JTINDER - 2013-09-05 PAY Vendor Invoice Direct		09/05/2013	15:53:43	5			
	JTINDER - 2013-09-05 PAY Vendor Invoice Direct		09/05/2013	15:53:42	5			
	JTINDER - 2013-09-05 PAY Vendor Invoice Direct		09/05/2013	15:53:41	5			
	JTINDER - 2013-09-05 PAY Vendor Invoice Direct		09/05/2013	15:53:40	5			
	JTINDER - 2013-09-05 PAY Vendor Invoice Direct		09/05/2013	15:53:39	5			

Display Document

Bring up document and then green arrow back

Complete Work Item

This Work Item Has To Be Completed Explicitly...

Info. | Log | Attachmnts | Agents

Business area E230 and Document 3004159788 was rejected

Description

No description available

Objects and attachments

- Parked Document: SC0130041597882014

✓ Complete Work Item   ✗ Cancel

FB02 Change Parked Document

Use FB02 to display and change document. Save as Complete and check workflow.

Scenario 1

Data on Linked Workflows

Workflows for Current Context

Title	Creation D...	Creation...	Status	Task
Invoice 3004400216 Approval	11/15/2013	17:27:38	Completed	AP Invoice Approval FIPP
imaging workflow to allow rejections	11/15/2013	17:07:19	Completed	imaging workflow to allow rejections
Invoice 3004400216 rejected. Display back to Initiator	11/19/2013	11:08:22	In Process	Display Rejected FIPP Document
Invoice 3004400216 Approval	11/20/2013	14:39:23	Logically D...	AP Invoice Approval FIPP
imaging workflow to allow rejections	11/20/2013	14:36:08	Completed	imaging workflow to allow rejections

This document is still "In Process" but without workflow. It can be completed by:

- Opening from the Inbox

- Green arrow back

- Complete Work Item

- Using FB02, open document, make change and "Save as Complete"

Scenario 2

🖻 Data on Linked Workflows

Workflows for Current Context

Title	Creation D...	Creation...	Status	Task
imaging workflow to allow rejections	11/18/2013	06:51:46	Completed	imaging workflow to allow rejections
Invoice 3004401216 Approval	11/18/2013	07:16:25	Completed	AP Invoice Approval FIPP
Invoice 3004401216 rejected. Display back to Initiator	11/18/2013	08:34:44	Completed	Display Rejected FIPP Document

Because there are no workflow lines "In Process" this item will not appear in the Inbox. It can be completed by:

- Using FB02, open document, make change and "Save as Complete"

Current Parked Documents

- As of 12/12/2013, there were 68 KR parked documents,

- Of the 7 reviewed, 5 were logically deleted because of the issue addressed

- Agencies need to review their parked documents and make corrections necessary to either post or delete the documents.

Reporting/Training Update
John Taylor, SCEIS User Support Team Director

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Reporting Training Courses

- Currently, SCEIS has BEx/BW and Business Objects (BOBJ) reporting courses.

- User misinterpretation regarding courses to take:
    - BEx/BW vs. BOBJ
    - Human Resources vs. Finance
    - Beginner vs. Intermediate

SCEIS is looking to:

- Provide unified instruction regarding all reporting tools
- Simplify enrollment choices and scheduling for users
- Simplify enrollment management for SCEIS Team

New Course: REP200

- REP200 will replace all existing BEx/BW and BOBJ courses.

- Course materials in uPerform will continue to be available, until system changes make them obsolete.

- BOBJ300 (Intermediate Business Objects) will be offered during the transition period for participants who already have a solid understanding of BOBJ or have completed BOBJ200.

New Course: REP200

- REP200 will offer both beginner and intermediate level instruction under one course.

- Consists of two half-day classes scheduled several weeks apart
  - (This will ensure participants have enough practice time between classes to feel comfortable moving on.)

REP200 Content and Requirements

- Users must have access to both Business Warehouse and Business Objects
  - Participants will use their own User IDs in class

- Classes will be tailored for either Finance/Materials Management audience or Human Resources/Payroll audiences
  - Only the examples and class discussions differ in the FI/MM and HR/PY classes, the steps are the same!

Other Training Updates

 The SCEIS Team is beginning to develop a calendar of training for other functional areas.

– If your agency has *specific* training needs, please send them to training@sceis.sc.gov, with the following details:

  - Agency for which the request is being submitted
  - Specific course numbers and names that are needed (PR230 SCEIS Purchasing Process, for example)
  - The names of employees who need each course, or a head count of employees who need each course requested

 The uPerform system was upgraded November 25, 2013. Content is significantly improved and obsolete information was removed.

Break

Update: SRM 7.2 Upgrade
Wanda Dixon, SCEIS MM Team Lead

SRM Update

- SRM System Challenges and Resolutions
- Monitor Shopping Cart
- Tips and Reminders
- Microsite

Update SRM System Challenges

- **Browser Versions**
  - Communication 12/6/2013
  - Testing IE 8, 9, 10, and 11
- **SRM Delivery Addresses**
  - Corrected incorrect ship to addresses on printed form
- **No Transaction Type to Create PO**
  - Corrected, Old shopping carts can now be processed
  - Communication 12/12/2013

Update SRM System Challenges

- **Tax Calculation**
  - Testing. AP to adjust difference until sync SRM and ECC
- **PO Form Print**
  - Testing forms to correct issue
- **Vendor Text**
  - Testing special characters and multiple texts

Redistribute SC

- Delete any settings in your Personal Value List or in the Assign To field and type the name of purchasing group of the person who should receive the shopping cart exactly as it appears.
- Communication 12/13/2013

Award of Contract

- Corrected "Net 30 Days Does Not Exist" hard stop error preventing an award from solicitation

Goods Receipt

- Corrected error message "the purchase order has not been released" preventing creation of goods receipt

Monitor Shopping Cart

- Standard functionality to view all carts
- Can search only for agency p-group
- Log in Screen will show "Errors Only" tab with blank space
- Click on Tree Tab
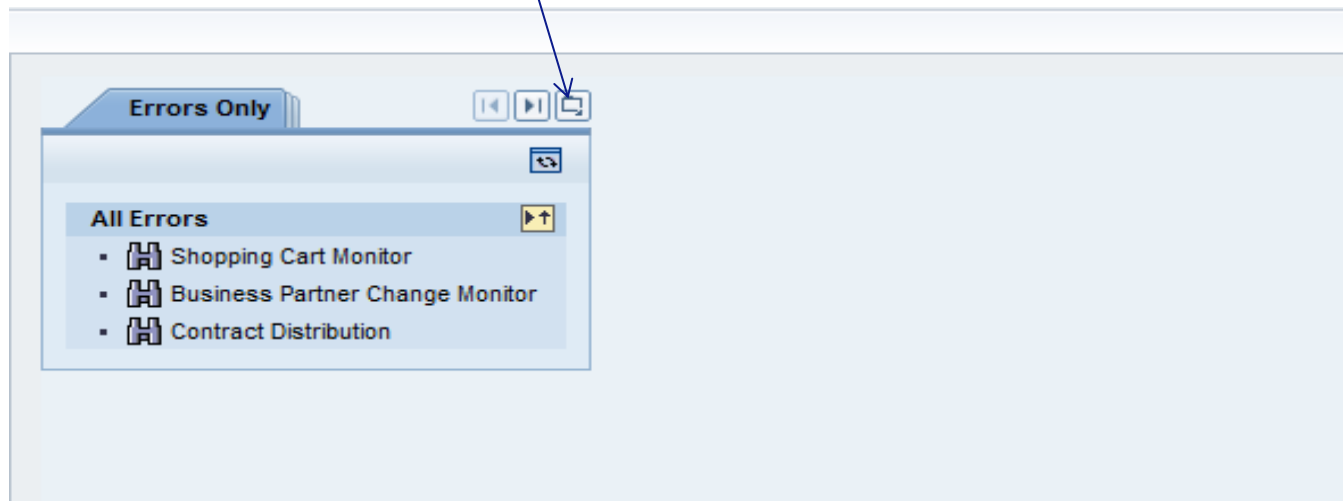
Shopping Cart Monitor

@ "All Messages" tab Screenshot (Note: Green and Red Squares do not indicate error messages that need to be fixed by the agency. This is for SCEIS Use Only.)

Shopping Cart Monitor

- Search by Purchasing Group:
- Locate the Agency's Purchasing Group by using the Search Criteria box in the Purchasing Group field.

Shopping Cart Monitor

○ Select the Agency's Purchasing Group for the Purchasing List by selecting the "Show Search Criteria link

Shopping Cart Monitor

@ Enter the Object Name (ex. DOC*)and then click the Start Search button.

Shopping Cart Monitor

- All Purchasing Groups for the specific Agency (ex. DOC) are listed in the Results List below.
- Click on the specific Purchasing Group/Object Name (ex. 50031476)/ DOC-Stephen Hill

The selected Purchasing Group/Object Name will be generated.

You can narrow your search by *first* selecting the Purchasing Group/Object Name and then secondly by selecting the following Search Criteria: *Status and Created On date.*

Shopping Cart Monitor

@ If known, you can further narrow your search by selecting the Number of Shopping Cart or by selecting the following Search Criteria: Created By and Created On date.

@ Then Click Search

Shopping Cart Monitor

- Results List for Search Criteria: Purchasing Group/Object Name, Status and Created On date:

- (Ex.050031175, Approved and 08/01/2013 To 11/25/2013)

Shopping Cart Monitor

@ Results List for Search Criteria: Number of Shopping Cart:
(Ex. 2000595087)

Shopping Cart Monitor

 Results List for Search Criteria, Created On date, and Created by: (Ex. 08/01/2013 To 11/25/2013 and AMY40055)

Shopping Cart Monitor

🌀 Use of any one of the following Search Criteria: Created On date, Status, Product, Catalog, or Delivery Date, will generate "All" Shopping Carts including those Statewide

Tips and Reminders

@ **Purchase Order**

- **Save:** Click this button to save the document before completion
- **Order:** Use this button to advance when the PO is complete and ready to send to the vendor.

@ **RFx**

- Publish: Use this button to publish solicitations.

@ **Contracts**

- Release: Use this button after all information on contract has been entered.

Tips and Reminders

- ## Refer to u-Performs
  - Still working on RFx and Contract
- ## Frequent the Microsite
- ## Access Communications from SCEIS

SRM 7.2 Upgrade Microsite

SRM 7.2 Upgrade Microsite

 SCEIS Microsite

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

Next User Group Meeting

Friday, February 28, 9:00 a.m.

Midlands Technical College Airport Campus
Academic Center Auditorium