



South Carolina Enterprise Information System

User Group Meeting

Friday, December 13, 2013





South Carolina Enterprise Information System

Welcome

John Taylor, SCEIS User Support Team Director





South Carolina Enterprise Information System

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)



South Carolina Enterprise Information System

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



🔄 Leave Pool Administration

🔄 Worker's Compensation Option 3

🔄 Year-end activities

🔄 Work Schedule Rule creation process change



South Carolina Enterprise Information System

HR/Payroll Refresher

Leave Pool Administration (IT0613)



-
- 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

- 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

- 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

Guidelines for Returns (cont.)

- 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



South Carolina Enterprise Information System

HR/Payroll Refresher

Worker's Compensation Option 3



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
- Do not use leave type 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



- ④ Leave rollover occurs December 31
- ④ Changes can be made to time/leave after the rollover occurs
- ④ 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



- 🕒 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



Finance Refresher

Bruce Burnett, SCEIS Finance Team Lead





South Carolina Enterprise Information System

Finance Refresher - SCEIS Workflow Error Document Logically Deleted



- ⌚ 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.

- 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 70000000001 SGL Ind ☐
 Invoice date 12/10/2013 Reference 25689
 Posting Date 12/10/2013
 Document Type KR (Vendor invoice...) 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.

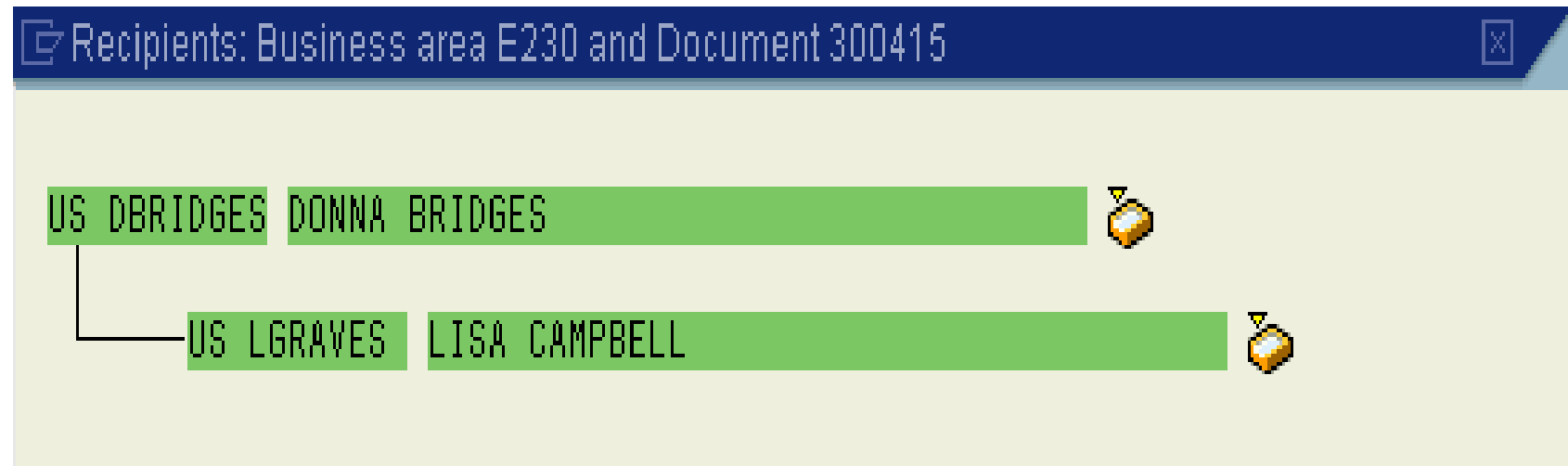
Vendor
 Address
 BEAUFORT AUTO ELECTRIC
 PO Box 95
 PORT ROYAL SC 29935
 OIs

1 Items (No entry variant selected)

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

Check Document Workflow

Data on Linked Workflows				
Workflows for Current Context				
Title	Creation D...	Creation ...	Status	Task
Invoice 3004159787 Approval	12/10/2013	15:48:29	In Process	AP Invoice Approval FIPP



Documentation Rejection

Document rejected by supervisor → notification to initiator

Business area E230 and Document 3004159787	
Choose one of the following alternatives	
<input type="radio"/>	Approve
<input checked="" type="radio"/>	Reject
<input type="radio"/>	Cancel and keep work item in inbox

Document in Initiator's Inbox

Display Parked Vendor Invoice 3004159787 SC01 2014

Tree on | Document | Editing options

Data on Linked Workflows









Workflows for Current Context

Title	Creation D...	Creation ...	Status	Task
Invoice 3004159787 Approval	12/10/2013	15:48:29	Completed	AP Invoice Approval FIPP
Invoice 3004159787 rejected. Display back to Initiator	12/10/2013	15:52:21	In Process	Display Rejected FIPP Document

Recipients: Business area E230 and Document 300415

US JTINDER BARBARA TINDER

Select Document from Inbox

									
Workflow 6									
Ex...	Title	Status	Creation D...	Creation ...	Priority	Attac...	Confi...	Work it...	
	Business area E230 and Document 3004159787 was rejected		12/10/2013	15:52:21	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	15:53:43	5				

Change Document

Make a change and Save as Complete

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 SQL Ind ☐
 Invoice date 12/10/2013 Reference 25689
 Posting Date 12/10/2013
 Document Type KR (Vendor invoice ...) 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.

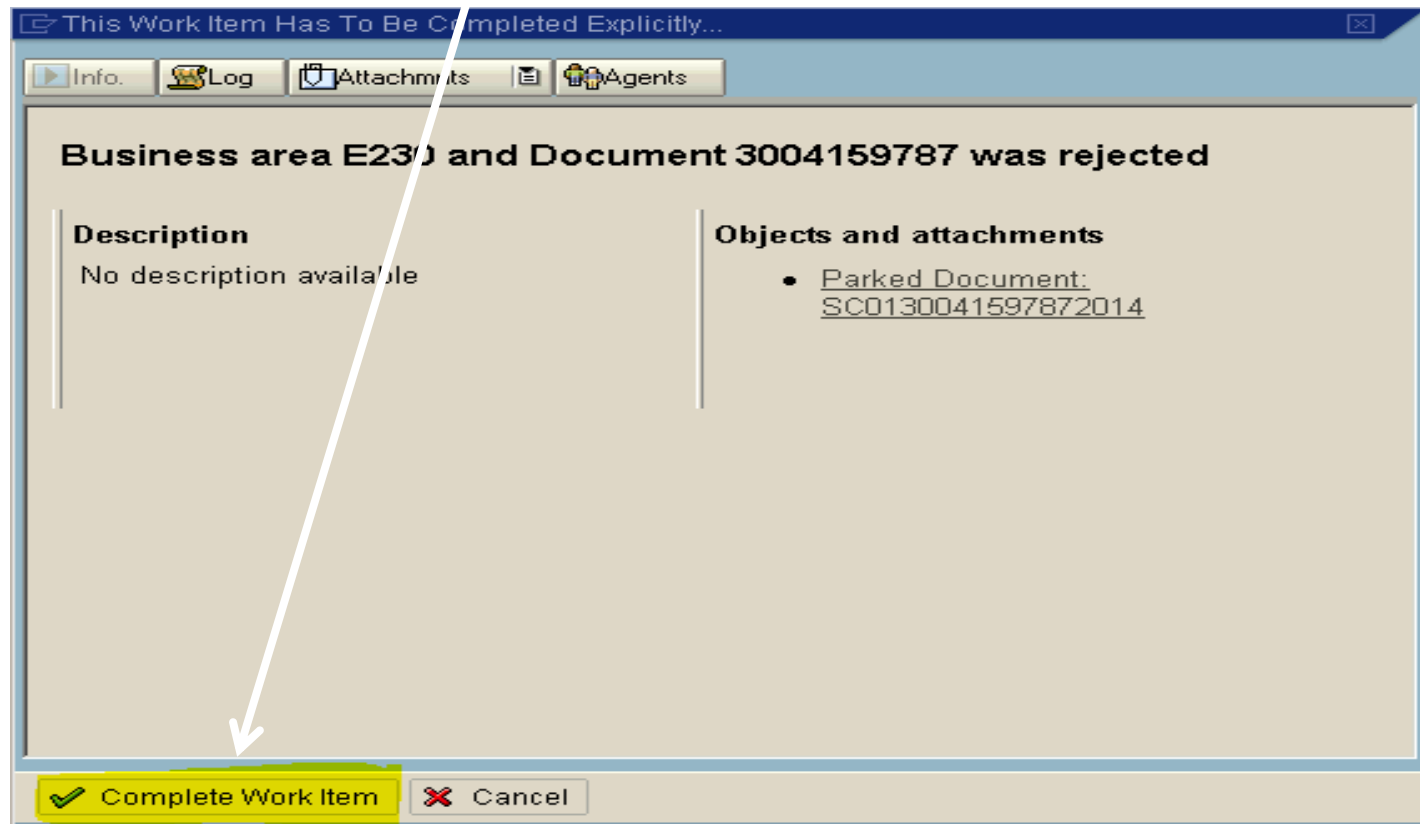
Vendor
 Address
 BEAUFORT AUTO ELECTRIC
 PO Box 95
 PORT ROYAL SC 29935

1 Items (No entry variant selected)

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

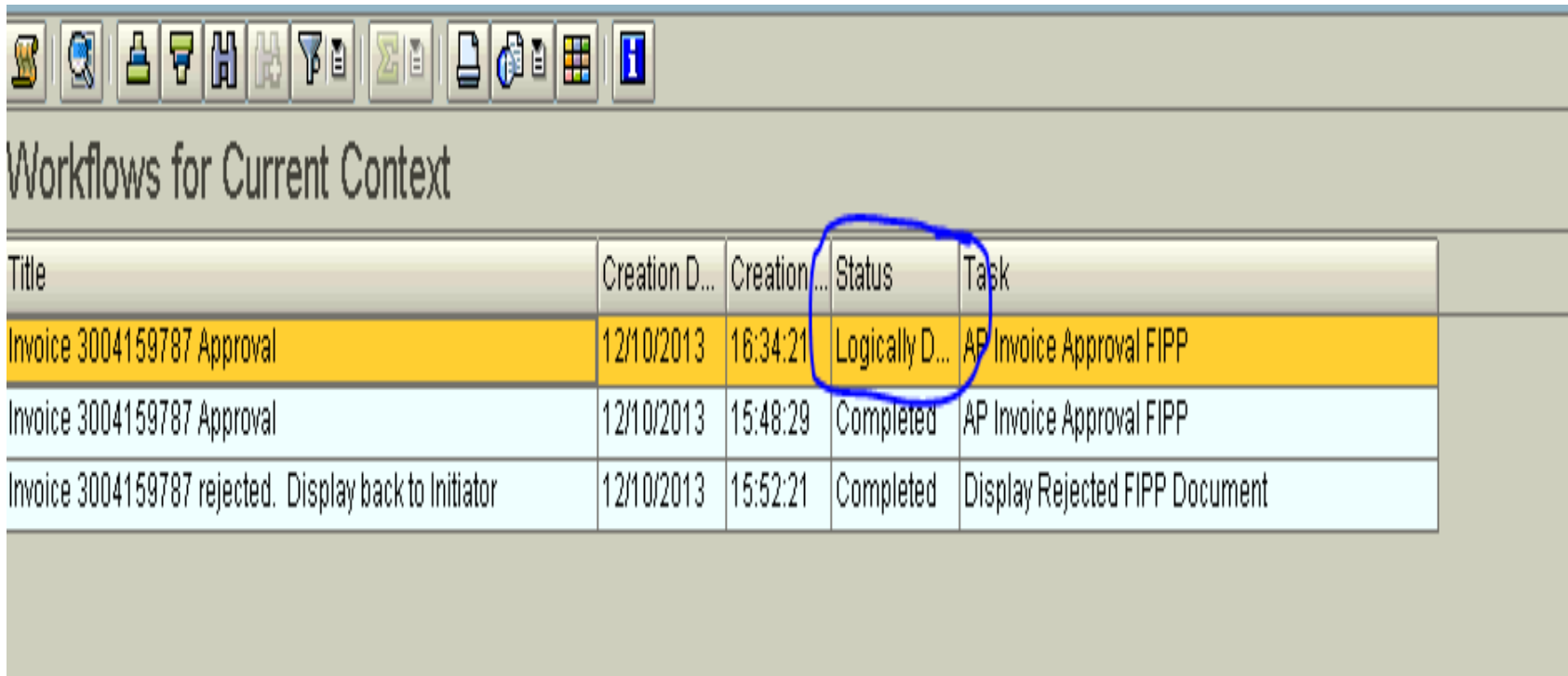
Save as Complete

Complete Work Item



Document Logically Deleted

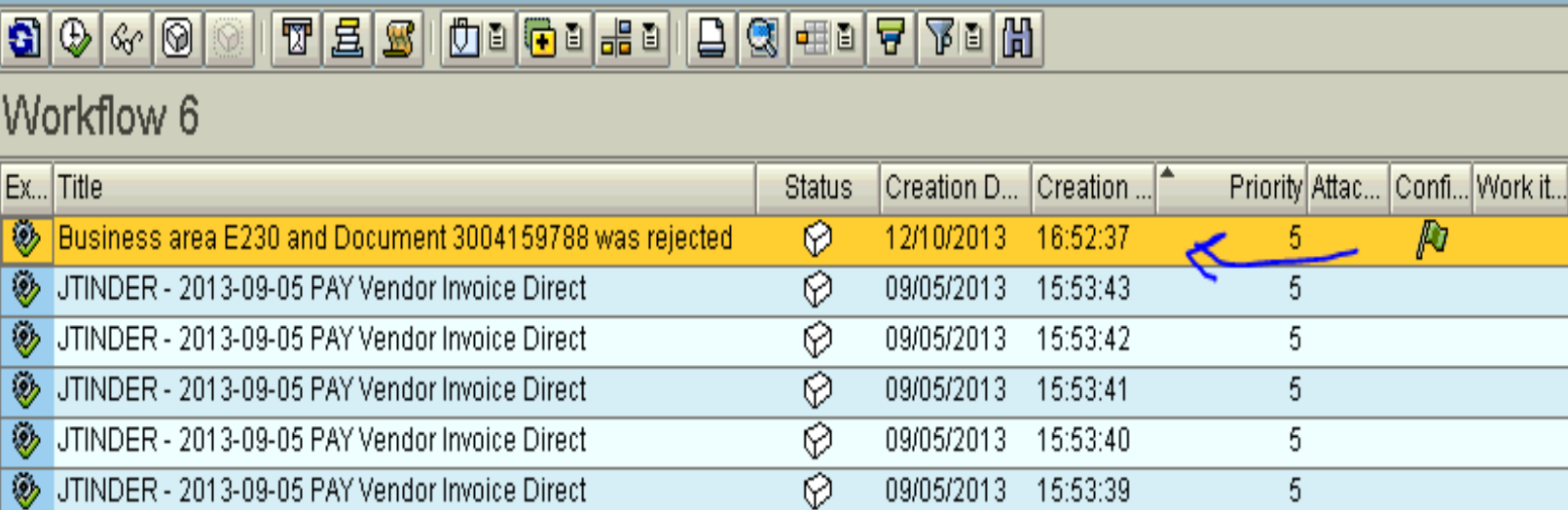
To start workflow you must create a helpdesk ticket



Title	Creation D...	Creation ...	Status	Task
Invoice 3004159787 Approval	12/10/2013	16:34:21	Logically D...	AP Invoice Approval FIPP
Invoice 3004159787 Approval	12/10/2013	15:48:29	Completed	AP Invoice Approval FIPP
Invoice 3004159787 rejected. Display back to Initiator	12/10/2013	15:52:21	Completed	Display Rejected FIPP Document

New Method

Select Document from Inbox



The screenshot shows a software interface with a toolbar at the top containing various icons for document management. Below the toolbar is a section titled "Workflow 6" which contains a table. The table has columns for "Ex...", "Title", "Status", "Creation D...", "Creation ...", "Priority", "Attac...", "Confi...", and "Work it...". The first row is highlighted in yellow and contains the text "Business area E230 and Document 3004159788 was rejected". A blue arrow points to the "Priority" column of this row, which has the value "5". The subsequent rows all have the title "JTINDER - 2013-09-05 PAY Vendor Invoice Direct" and a "Priority" of "5".

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

Display Parked Vendor Invoice 3004159788 SC01 2014

Tree on | Document | Editing options

Transactn Invoice

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

Vendor: 7000000001 SGL Ind: ☐
 Invoice date: 12/10/2013 Reference: 256897
 Posting Date: 12/10/2013
 Document Type: KR (Vendor invoice ...) DocumentNo: 3004159788
 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.:

Bal. 0.00

Vendor Address: BEAUFORT AUTO ELECTRIC
 PO Box 95
 PORT ROYAL SC 29935

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						
	Debit	0.00						

Complete Work Item

This Work Item Has To Be Completed Explicitly...

Info. Log Attachmnts Agents

Business area E230 and Document 3004159788 was rejected

Description	Objects and attachments
No description available	<ul style="list-style-type: none"><u>Parked Document:</u> <u>SC0130041597882014</u>

✓ Complete Work Item ✗ Cancel

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

Data on Linked Workflows

Workflows for Current Context

Title	Creation D...	Creation ...	Status	Task
Invoice 3004159788 Approval	12/10/2013	16:59:36	In Process	AP Invoice Approval FIPP
Invoice 3004159788 Approval	12/10/2013	16:51:59	Completed	AP Invoice Approval FIPP
Invoice 3004159788 rejected. Display back to Initiator	12/10/2013	16:52:37	Completed	Display Rejected FIPP Document

Recipients: Business area E230 and Document 300415

US DBRIDGES DONNA BRIDGES

US LGRAVES LISA CAMPBELL

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.



South Carolina Enterprise Information System

Reporting/Training Update

John Taylor, SCEIS User Support Team Director



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

Reporting Training Courses

☉ 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!

- ☉ 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





South Carolina Enterprise Information System

Update: SRM 7.2 Upgrade

Wanda Dixon, SCEIS MM Team Lead



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

🔄 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

🔄 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

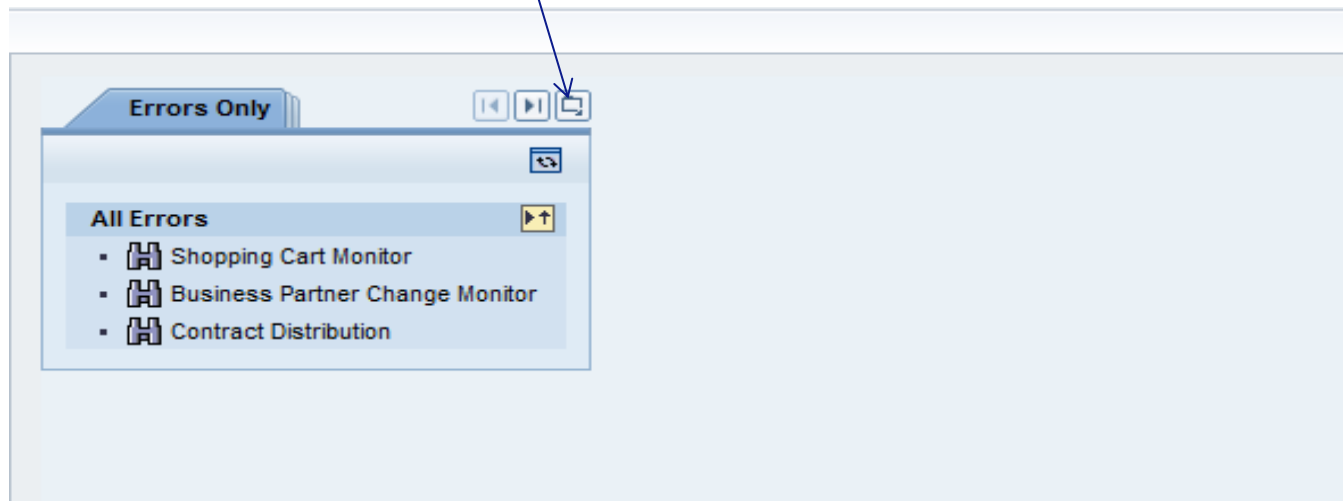
- Corrected “Net 30 Days Does Not Exist” hard stop error preventing an award from solicitation

🔄 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

▼ Search for Shopping Carts

Name of Shopping Cart:

Status:

Purchasing Group:  

Product: To:

Created On: To:

Requester: To:

Catalog: To:

Delivery Date: To:

Assigned To:

Type of Follow-On Document:

Maximum Number of Items (Total):

Number of Shopping Cart: To:

Item Description:

Purchasing Organization:

Product Category: To:

Created By:

Supplier: To:

Preferred Supplier: To:

Goods Recipient: To:

Logical System: To:

Number of Follow-On Document: To:

Search Clear Entries

Shopping Cart Monitor

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

The screenshot shows the 'Shopping Cart Monitor' application window. A search results window is open, displaying a table of purchasing groups. The table has columns for 'Object type', 'Object ID', and 'Name'. The 'Show Search Criteria' link is highlighted with a red box.

Object type	Object ID	Name
<input type="radio"/>	50000009	Comptroller General Office
<input type="radio"/>	50000010	State Treasurer's Office
<input type="radio"/>	50000011	State Auditor's Office
<input type="radio"/>	50000012	Will Low Gray Opportunity School
<input type="radio"/>	50000013	State Library
<input type="radio"/>	50000014	Dept of Insurance
<input type="radio"/>	50000033	ITMO - Acquisition Manager
<input type="radio"/>	50000034	ITMO - D. Lemmon
<input type="radio"/>	50000035	ITMO - D. Potts
<input type="radio"/>	50000036	ITMO - S. Harvey

Shopping Cart Monitor

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

All Values: Restrictions

Search Criteria

Object type:

Object ID:

Object name:

☒ Restrict Number of Value List Entries To

Start Search **Reset**

Results List: There are more than 500 results for Purchasing Group

Object type	Object ID	Name
O	50000009	Comptroller General Office
O	50000010	State Treasurer's Office
O	50000011	State Auditor's Office
O	50000012	Wil Lou Gray Opportunity School
O	50000013	State Library
O	50000014	Dept of Insurance
O	50000033	ITMO - Acquisition Manager
O	50000034	ITMO - D. Lemmon
O	50000035	ITMO - D. Potts

OK **Cancel**

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

All Values: Restrictions

Search Criteria

Object type:

Object ID:

Object name:

☒ Restrict Number of Value List Entries To:

Results List: 18 results found for Purchasing Group

Object type	Object ID	Name
O	50031175	DOC - Procurement Director
O	50031476	DOC - Stephen Hill
O	50031477	DOC - Trina Free
O	50031478	DOC - Rebecca Long
O	50031479	DOC - Melissa Mims
O	50031480	DOC - Myrtle Derwerdt
O	50031481	DOC - Susan Netherton
O	50031482	DOC - Rebecca Diblasi
O	50031483	DOC - Nathaniel Rush

Shopping Cart Monitor

- 🕒 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*.

The screenshot displays the 'Shopping Cart Monitor' application window. At the top, there is a title bar with the text 'Shopping Cart Monitor' and a 'Help' button. Below the title bar is a search bar labeled 'Search for Shopping Carts'. The main area contains various search criteria fields. On the left side, the 'Purchasing Group' field is highlighted with a blue box and contains the value '050031476'. Below it, the 'Created On' field is also highlighted with a blue box and shows a date range from '1/1/2010' to '1/1/2010'. Other fields include 'Name of Shopping Cart', 'Status', 'Product', 'Requester', 'Catalog', 'Delivery Date', 'Assigned To', 'Type of Follow-On Document', and 'Maximum Number of Items (Total)'. On the right side, there are fields for 'Number of Shopping Cart', 'Item Description', 'Purchasing Organization', 'Product Category', 'Created By', 'Supplier', 'Preferred Supplier', 'Goods Recipient', 'Logical System', and 'Number of Follow-On Document'. At the bottom left, there are 'Search' and 'Clear Entries' buttons.

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

The screenshot shows the 'Shopping Cart Monitor' search interface. The title bar includes 'Shopping Cart Monitor' and a 'Help' icon. Below the title bar is a blue header with a dropdown arrow and the text 'Search for Shopping Carts'. The search criteria are organized into two columns. The left column includes: 'Name of Shopping Cart' (text input), 'Status' (dropdown), 'Purchasing Group' (text input with value '050031475' and a search icon), 'Product' (text input with a search icon), 'Created On' (date range input with a yellow highlight), 'Requester' (text input with a search icon), 'Catalog' (text input with a search icon), 'Delivery Date' (date range input), 'Assigned To' (dropdown), 'Type of Follow-On Document' (dropdown), and 'Maximum Number of Items (Total)' (text input with value '1,000'). The right column includes: 'Number of Shopping Cart' (range input with a green highlight), 'Item Description' (text input), 'Purchasing Organization' (text input with a search icon), 'Product Category' (text input with a search icon), 'Created By' (text input with a search icon and a yellow highlight), 'Supplier' (text input with a search icon), 'Preferred Supplier' (text input with a search icon), 'Goods Recipient' (text input with a search icon), 'Logical System' (text input with a search icon), and 'Number of Follow-On Document' (range input). At the bottom left are 'Search' and 'Clear Entries' buttons.

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

Search for Shopping Carts

Name of Shopping Cart:

Status:

Purchasing Group:

Product: To

Created On: To

Requester: To

Catalog: To

Delivery Date: To

Assigned To:

Type of Follow-On Document:

Maximum Number of Items (Total):

Number of Shopping Cart: To

Item Description:

Purchasing Organization:

Product Category: To

Created By:

Supplier: To

Preferred Supplier: To

Goods Recipient: To

Logical System: To

Number of Follow-On Document: To

Search Result

Details | Delete | Create Follow-On Document | Update Shopping Cart Back-End Data | Update Messages | Team Cart | Filter Settings

Object Number	Name of Shopping Cart	Created By	Created On	Status	Total Value	Currency	Messages	Message Counter	Team Cart
▶ 2000596213	Health Services Consultant Bld	KAR40017	08/02/2013	Approved	107,400.00	USD		0	<input type="checkbox"/>
▶ 2000596039	SABRE RED 08/06/2013 14:59	SHA39163	08/06/2013	Approved	3,700.00	USD		0	<input type="checkbox"/>
▶ 2000596279	LAVIENS-DEVICE 08/07/2013 09:04	SHA39163	08/07/2013	Approved	1,374.75	USD		0	<input type="checkbox"/>
▶ 2000596311	MK-4 Holder 08/07/2013 09:17	SHA39163	08/07/2013	Approved	447.50	USD		0	<input type="checkbox"/>
▶ 2000596355	Dana Root Baton 08/07/2013 09:54	SHA39163	08/07/2013	Approved	10,150.00	USD		0	<input type="checkbox"/>
▶ 2000596373	Lamens 08/07/2013 10:09	SHA39163	08/07/2013	Approved	1,707.00	USD		0	<input type="checkbox"/>
▶ 2000596407	BATTERIES 08/07/2013 10:24	SHA39163	08/07/2013	Approved	222.00	USD		0	<input type="checkbox"/>
▶ 2000596418	Leco Plastics 08/07/2013 10:34	SHA39163	08/07/2013	Approved	1,120.00	USD		0	<input type="checkbox"/>
▶ 2000601301	DOS Supplies 08/13/2013 09:26	SHA39163	08/13/2013	Approved	128.39	USD		0	<input type="checkbox"/>

Shopping Cart Monitor

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

Shopping Cart Monitor [Help](#)

▼ Search for Shopping Carts

Name of Shopping Cart:

Status:

Purchasing Group:

Product: To

Created On: To

Requester: To

Catalog: To

Delivery Date: To

Assigned To:

Type of Follow-On Document:

Maximum Number of Items (Total):

Number of Shopping Cart: To

Item Description:

Purchasing Organization:

Product Category: To

Created By:

Supplier: To

Preferred Supplier: To

Goods Recipient: To

Logical System: To

Number of Follow-On Document: To

Search Result

Details Delete Create Follow-On Document Update Shopping Cart Back-End Data Update Messages Team Cart Filter Settings

Object Number	Name of Shopping Cart	Created By	Created On	Status	Total Value	Currency	Messages	Message Counter	Team Cart
▶ 2000595087	JEA39695 08/08/2013 08:00 2/3	JEA39695	08/01/2013	Approved	19,238.83	USD		0	<input type="checkbox"/>

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 help

Search for Shopping Carts

Name of Shopping Cart:

Status:

Purchasing Group:

Product: To

Created On: 08/01/2013 To 11/25/2013

Requester: To

Catalog: To

Delivery Date: To

Assigned To:

Type of Follow-On Document:

Maximum Number of Items (Total):

Number of Shopping Cart: To

Item Description:

Purchasing Organization:

Product Category: To

Created By: AMY40055

Supplier: To

Preferred Supplier: To

Goods Recipient: To

Logical System: To

Number of Follow-On Document: To

Search Result Content Area

Details | Delete | Create Follow-On Document | Update Shopping Cart Back-End Data | Update Messages | Team Cart Filter Settings

Object Number	Name of Shopping Cart	Created By	Created On	Status	Total Value	Currency	Messages	Message Counter	Team Cart
▶ 2000036170	AMY40055 08/01/2013 09:14	AMY40055	08/01/2013	Release Rejected	230.00	USD		0	<input type="checkbox"/>
▶ 2000036199	AMY40055 08/01/2013 09:21	AMY40055	08/01/2013	Awaiting Approval	0.00	USD		0	<input type="checkbox"/>
▶ 2000036553	AMY40055 08/07/2013 12:01	AMY40055	08/07/2013	Approved	14,230.22	USD		0	<input type="checkbox"/>
▶ 2000000179	AMY40055 08/09/2013 13:10	AMY40055	08/09/2013	Approved	352.00	USD		0	<input type="checkbox"/>
▶ 2000002785	New Food Template 8/15	AMY40055	08/15/2013	Saved	1,655.60	USD		0	<input type="checkbox"/>
▶ 2000002983	AMY40055 08/15/2013 10:23	AMY40055	08/15/2013	Approved	13,918.42	USD		0	<input type="checkbox"/>
▶ 2000004879	AMY40055 08/20/2013 09:08	AMY40055	08/20/2013	Approved	101.94	USD		0	<input type="checkbox"/>
▶ 2000006629	AMY40055 08/22/2013 10:59	AMY40055	08/22/2013	Approved	14,343.19	USD		0	<input type="checkbox"/>
▶ 2000010152	AMY40055 08/29/2013 09:24	AMY40055	08/29/2013	Approved	12,270.55	USD		0	<input type="checkbox"/>

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

More Shopping Carts Exist than Displayed

Shopping Cart Monitor

Search for Shopping Carts

Name of Shopping Cart:

Status:

Purchasing Group:

Created On: To:

Requester: To:

Catalog: To:

Delivery Date: To:

Assigned To:

Type of Follow-On Document:

Maximum Number of Items (Total):

Number of Shopping Cart: To:

Item Description:

Purchasing Organization:

Product Category: To:

Created By:

Supplier: To:

Preferred Supplier: To:

Goods Recipient: To:

Logical System: To:

Number of Follow-On Document: To:

Content Area

Search Clear Entries

Search Result

Details | Create Follow-On Document | Update Shopping Cart Bank-End Cans | Update Messages | Team Cart

Object Number	Name of Shopping Cart	Created By	Created On	Status	Total Value	Currency	Messages	Message Counter	Team Cart
2000017817	Test Bid Frameworks Validity	MYR72608	11/04/2013	Approved	100.00	USD		0	<input type="checkbox"/>
2000017818	Test FI Freight	MYR72608	11/04/2013	Approved	20.00	USD		0	<input type="checkbox"/>
2000017819	Test FI	MYR72608	11/04/2013	Approved	20.00	USD		0	<input type="checkbox"/>
2000017820	Test FI Asset	MYR72608	11/04/2013	Approved	20.00	USD		0	<input type="checkbox"/>
2000017821	Test FI NPC	MYR72608	11/04/2013	Approved	20.00	USD		0	<input type="checkbox"/>
2000017822	Test FI NF	MYR72608	11/04/2013	Approved	20.00	USD		0	<input type="checkbox"/>
2000017823	Test NPC & NF Reversal	MYR72608	11/04/2013	Approved	20.00	USD		0	<input type="checkbox"/>
2000017826	File	JAC55579	11/04/2013	Approved	76.95	USD		0	<input type="checkbox"/>
2000017832	Report	MYR72608	11/04/2013	Approved	10.00	USD		0	<input type="checkbox"/>
2000017838	Area 11/04/2013 18:52	CAT38809	11/04/2013	Approved	200.00	USD		0	<input type="checkbox"/>
2000017851	KO/MBA exercise 11/04/2013 18:58	RUT42238	11/04/2013	Approved	200.00	USD		0	<input type="checkbox"/>

🔄 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

[Home](#) » [SRM 7.2 Upgrade Microsite](#)

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
- Cutover Activities
- Gallery of SRM 7.2 Screens
- Help Documents

User Support

- [Submit Your Questions About the SRM 7.2 Upgrade](#)

Training

- [SRM200 Online Courses](#)
- [SRM 7.2 Upgrade Training Course Descriptions](#)

User Communications

- [SRM 7.2 Upgrade Blog](#)
- [Archive of Messages Related to the SRM 7.2 Upgrade](#)

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**