Materials Management
User Group Meeting
Friday, January 31, 2014

STATE INFORMATION
TECHNOLOGY

SC BUDGET AND CONTROL BOARD

Welcome
John Taylor, SCEIS User Support Team Director

Production Status Overview

- The team has closed 898 tickets from 1140 submitted between 11/25/13 and yesterday.

- Currently 169 tickets are open; others are awaiting additional information from users

- As we continue to make progress on resolutions, we will establish a date when we resume standard Help Desk procedures; an announcement will be sent to users prior to the transition.

- We will be working with Wanda to set MM refresher training dates for the 2nd quarter of the calendar year.

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

SRM Topics

- **SRM System Updates and Resolutions**
- **Demonstrations on Purchase Order Functions**
  - Partnering Function
  - Add Vendor
  - Add Item
  - Delete PO
    - Header Level
    - Line Item Level
- **Tips and Reminders**
- **U-Performs and Microsite**
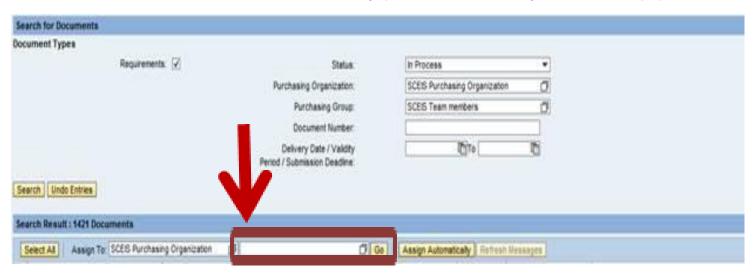
SRM Updates and Resolutions

- ## Internet Explorer Versions 8, 9, 10, and 11
  - **Status: Resolved December 30, 2013**
  - Users that continue to have browser issues after December 30 may need to involve their agency's Information Technology staff to assist.

  (Note: As a result of the User Group input, SCEIS will further analyze and provide a follow-up on browser versions.)

Workload Redistribution of Shopping Cart

- **Status: Resolved December 13, 2013**
- Delete any settings you have in your **Personal Value List** or in the **Assign To** field, type the name of the purchasing group of the person who should receive the shopping cart. The name must be typed exactly as it appears.

SRM Updates and Resolutions – Shopping Carts

- **Sales Tax Calculation**
  - **Status: Resolved January 7, 2014**
  - The sales tax jurisdiction codes have been applied.

- Deleted Shopping Cart when in "Ordered" Status (getting stuck in approver's inbox)
  - **Status: In Process**
  - **Target Date of Resolution: Under Analysis. Once complete, a target date will be provided.**

SRM Updates and Resolutions – Shopping Carts

Shopping Cart Email Notification Issues

- **Status: In Process**
- **Target Date of Resolution: Under analysis. Once complete, a target date will be provided.**
- Non-approvers are receiving approval notifications; Approvers not always receiving notifications; Double notifications

- Shopping Carts Created from a Purchase Requisition Going to Wrong Purchasing Group (Automated Program)
  - **Status: Resolved January 17, 2014**
- Shopping Carts Created from a Purchase Requisition Going to Wrong Purchasing Group (Prior to Automated Program)
  - **Status: In Process**
  - **Target Date of Resolution: February 7, 2014**
  - SCEIS is manually redistributing shopping carts from a purchase requisition that were erroneously sent to another purchasing group PRIOR TO to the automated resolution being implemented.

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- "No Transaction Type Available" Error on Shopping Carts brought over from 5.0
  - **Status: Resolved December 12, 2013**
  - Buyers may now select a shopping cart that was approved prior to the freeze and covert into a PO by selecting the Transaction Type.

Purchase Order Vendor Text

- **Status: Resolved December 13, 2013**
- The issues of special characters appearing in Vendor Text and of duplicate text have been corrected.
- **Status: In-Process** (Note: This status change was added after the January 31 meeting as a result of User Group input.)
- **Target Date of Resolution: Under analysis. Once complete, a target date will be provided**

SRM Updates and Resolutions – Purchase Orders

SRM Delivery Address

- **Status: Partly Resolved December 13, 2013 (for PO Printed Form)**
- **Target Date of Part 2 Resolution: February 7, 2014**
- Additional analysis is underway to correct the ship to address display on screen.

Unable to Add Invoicing Party in Purchase Order

- **Status: Resolved January 7, 2014**
- Users can add Invoicing Party to a PO at the header level in SRM. ECC is updated automatically.

SRM Updates and Resolutions – Purchase Orders

- **Sole Source Purchase Order (Error: Buffer Table not up to date)**
  - **Status: Resolved December 19, 2013**
  - Users correct their POs and select Sole Source.

- **PO with Status of Deleted is Not Releasing Encumbrance**
  - **Status: Resolved January 24, 2014**
  - POs deleted at the header level prior to December 17 will require additional steps.

SRM Updates and Resolutions – Purchase Orders

Options to Header Freight on Purchase Order

- **Status: Resolved November 22, 2013**

- SAP does not support conditions at the PO header level in SRM 7.2. Therefore, the previous Header Condition functionally used in ECC is no longer available in SRM. Conditions at the Line Item are available.

- For alternatives to using line item conditions, reference the help document "Options to Header Freight on Purchase Order" published in the November 22, 2013, SCEIS Communication.

- Using "Unplanned Freight" in AP is also an option. A help document will be sent through SCEIS Communication in the near future.

SRM Updates and Resolutions – Purchase Orders

- **Inability to add Purchase Order Conditions on Line Item**
  - **Status: In Process**
  - **Target Date of Resolution: February 14, 2014**

- **No Validity Date on Operating Lease, ZOPE, Transaction Type**
  - **Status: In Process**
  - **Target Date of Resolution: February 14, 2014**
  - There are no fields to enter data for the beginning date and ending date on the operating lease PO.

Edit button on Purchase Order disappears

- **Status: In Process**
- **Target Date of Resolution: Under analysis. Once complete, a target date will be provided.**
- User receives "Error in Process" message and is unable to print PO
- MM Team will restore the Edit button until the issue is resolved.

PO Form Print

- **Status: In Process**

- **Target Date of Resolution: Form changes will be put in Production in several stages.**

- We have made progress and moved some resolutions into production for the ZCMS and Inventory forms. We will continue to see progress on these forms as work is done. The Standard and Blanket forms are being worked as well.

SRM Updates and Resolutions – Goods Receipt

- **Goods Receipt (Error: Purchase Order has not been released)**
  - **Status: Resolved January 7, 2014**
  - This error prevented the creation of goods receipt in MIGO.
  - Pertains only to agencies with purchase order release strategy.

- **Inability to perform Goods Receipt on Inventory Purchase Order**
  - **Status: Resolved January 24, 2014**
  - Error message received was "No funds center entered/derived in item …"

SRM Updates and Resolutions – RFx

- ⓒ **Inability to Add Items to RFx**
  - Status: In Process
  - Target Date of Resolution: February 7, 2014

- ⓒ **Inability to Copy and Paste Items to RFx**
  - Status: In Process
  - Target Date of Resolution: February 7, 2014

Inability to Add Attachments (Note: This update was added after the January 31 meeting as a result of User Group input.)

– **Status: In Process**

– **Target Date of Resolution**: **Under Analysis. Once complete, a target date will be provided.**

SRM Updates and Resolutions – Contracts

- **Hard Stop on Making Award**
  - **Status: Resolved December 13, 2013**
  - The error message "Net 30 Days Does Not Exist" that prevented an award from being made from a solicitation is corrected.
- **Error "Contract has exceeded target value"**
  - **Status: Resolved January 23, 2014**
  - Before resolution, system looked at target value at each line item and header
  - After resolution, system looks at target value at header

- Inability to Create Contracts with Conditions Only (such as %) and No Price
  - **Status: In Process**
  - **Target Date of Resolution: February 7, 2014**

  Currently system requires condition and price. Users need to be able to create a condition with no price.

SRM – Demonstrations

STATE INFORMATION TECHNOLOGY

SC BUDGET AND CONTROL BOARD

Purchase Order Functions

@ Partnering

@ Add vendor

@ Add Item

@ Delete Purchase Order

- − Header Level
- − Line Item level

South Carolina Enterprise Information System

SRM – Tips and Reminders

STATE INFORMATION TECHNOLOGY
SC BUDGET AND CONTROL BOARD

Tips and Reminders- Shopping Cart

- **"Unknown" Account Assignment Category**
  - Approver who adds the account information MUST add the account assignment information to each line item.
    - If the account assignment information is not added to each line item, the shopping cart will be returned to the shopping cart creator.
    - Shopping cart creator will have to create a new shopping cart.
- **Shopping carts should be created by using the ESS folder**

Editing a Rejected Shopping Cart

- User must click on "Show my Task" button after selecting the rejected shopping cart from your work list.

- SRM200U Online Training Course - Manage a Rejected Shopping Cart

- uPerform Business Process Procedure (BPP): SRM ESS Manage Rejected Shopping Cart

- Select "Limit Item" ONLY when creating a Framework Purchase Order

- "Save" button
  - Use to save the document before completion. The "Save" button holds but does not order the purchase order.

- "Check" button
  - Use the "Check" button before clicking on the "Order" button.
  - Fix "Backend" errors before "Order." Otherwise "Edit" button disappears.

"Order" button

- – Use to advance when the PO is complete and ready to send to the vendor.

- "Use "Close" button in published version of RFx
  - Do not click on "Close RFx." Using this could result in marking the document "Transaction Complete."

Contracts

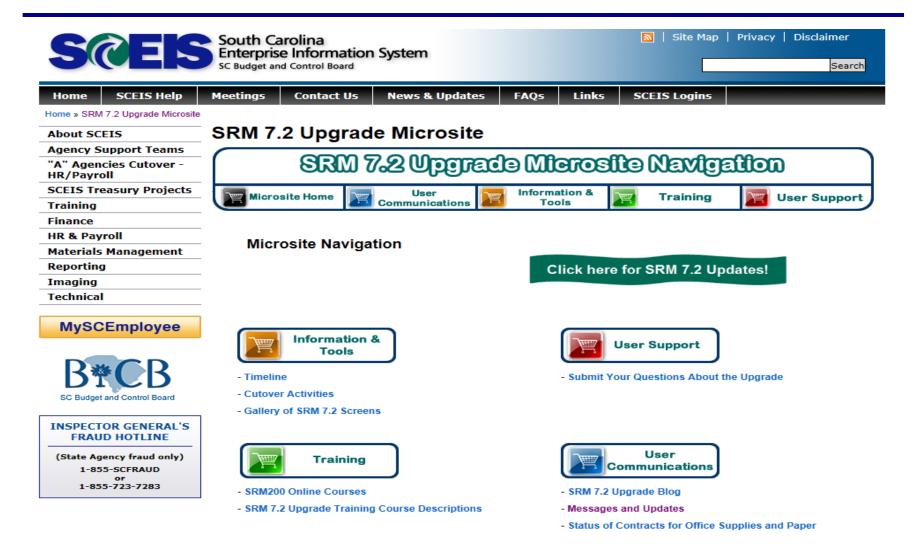– Release: Use this button after all information on contract has been entered.

u-Perform Documents

⦿ New u-Performs published will be communicated

SRM 7.2 Upgrade Microsite

Next Meeting

Friday, February 28, 2014
Midlands Technical College, Airport Campus