



South Carolina Enterprise Information System

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



- 🌀 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 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.)

SRM Updates and Resolutions – Shopping Carts

🔄 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.

The screenshot shows the 'Search for Documents' interface. The 'Document Types' section includes a 'Requirements' checkbox (checked) and a 'Status' dropdown menu (set to 'In Process'). Below these are fields for 'Purchasing Organization' (SCEIS Purchasing Organization), 'Purchasing Group' (SCEIS Team members), 'Document Number', and 'Delivery Date / Validity Period / Submission Deadline'. A red arrow points down to the 'Assign To' field in the search results section, which is highlighted with a red box. The search results show 'Search Result : 1421 Documents' and the 'Assign To' field is currently empty.

🔄 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.**

🔄 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

SRM Updates and Resolutions – Shopping Carts

- ④ Shopping Carts Created from a Purchase Requisition Going to Wrong Purchasing Group (Automated Program)
 - **Status: Resolved January 17, 2014**

- ④ 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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- ④ “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 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.

☉ 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.

🌀 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.

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- ④ Inability to add Purchase Order Conditions on Line Item
 - **Status: In Process**
 - **Target Date of Resolution: February 14, 2014**

 - ④ 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.

- ④ 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.

- ④ 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 ...”

🌀 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**

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- 🌀 **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.**

🔄 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



Purchase Order Functions

🔄 Partnering

🔄 Add vendor

🔄 Add Item

🔄 Delete Purchase Order

- Header Level

- Line Item level



SRM – Tips and Reminders



🌀 “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

Tips and Reminders – Purchase Order

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- ④ Select “Limit Item” ONLY when creating a Framework Purchase Order
 - ④ “Save” button
 - Use to save the document before completion. The “Save” button holds but does not order the purchase order.
 - ④ “Check” button
 - Use the “Check” button before clicking on the “Order” button.
 - Fix “Backend” errors before “Order.” Otherwise “Edit” button disappears.

Tips and Reminders – Purchase Order

🔄 “Order” button

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

- ① “Use “Close” button in published version of RFX
 - Do not click on “Close RFX.” Using this could result in marking the document “Transaction Complete.”

Display RFX :

Toolbar: Edit | Refresh | Close | Copy | Check | Close Rfx | Responses and Awards | Create F

RFX Number	5400007016	Smart Number	Computer Replacement Parts	Type
Version Number	2	Version Type	Active Version	External Version Nu

Navigation Tabs: RFX Information | Bidders | Items | Notes and Attachments | Weight

Footer: RFX Parameters | Questions | Notes and Attachments | Table Extension

Contracts

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

u-Perform Documents

New u-Performs published will be communicated

SCEIS South Carolina Enterprise Information System
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

Inspector General's Fraud Hotline

(State Agency fraud only)
1-855-SCFRAUD
or
1-855-723-7283

Streamlining Business Processes within the Government of South Carolina

Click here to view SRM 7.2 Upgrade Microsite

Get the latest . . .

- Screenshots of SRM 7.2
- Detailed Timeline
- Training Information
- Communications and Presentations

Reminders & Tools

- SCEIS Password Management Troubleshooting Tips
- Change, reset or get help with your SCEIS password
- MySCEmployee Tools
- Click here to submit a help request to the SCEIS Service Desk.

South Carolina Enterprise Information System

The South Carolina Enterprise Information System (SCEIS) is consolidating more than 70 state agencies onto a single, statewide enterprise system, built on SAP software, for finance, materials management and human resources/payroll.

SCEIS will:

[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](#)



**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
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Microsite Navigation

[Click here for SRM 7.2 Updates!](#)



Information & Tools

- [Timeline](#)
- [Cutover Activities](#)
- [Gallery of SRM 7.2 Screens](#)



Training

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



User Support

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



User Communications

- [SRM 7.2 Upgrade Blog](#)
- [Messages and Updates](#)
- [Status of Contracts for Office Supplies and Paper](#)



South Carolina Enterprise Information System

Next Meeting

Friday, February 28, 2014

Midlands Technical College, Airport Campus