



South Carolina Enterprise Information System

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# **Materials Management User Group Meeting Friday, March 28, 2014**

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SC BUDGET AND CONTROL BOARD



South Carolina Enterprise Information System

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# Welcome

## John Taylor, SCEIS User Support Team Director

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# **Update: SRM 7.2 Upgrade**

## **Wanda Dixon, SCEIS MM Team Lead**

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SC BUDGET AND CONTROL BOARD

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- SRM System Updates and Resolutions
  - SRM Stats
  - Tips and Reminders



# SRM Updates and Resolutions

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## 🔄 Internet Explorer Version 11

- **Status:** Plans for Version 11 testing are underway
- **Target Date of Resolution:** A target date will be determined once analysis is complete.
- The SCEIS Team will test the compatibility of Internet Explorer Version 11 with SRM 7.2.

## 🌀 Shopping Cart Email Notification Issues

- **Status:** In Process
- **Target Date of Resolution:** A target date will be determined once analysis is complete. SCEIS is correcting the issues as they are identified.
- Non-approvers are receiving approval notifications. Approvers are not always receiving notifications or are receiving double notifications.

# SRM Updates and Resolutions – Shopping Carts

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- 🔄 Deleted Shopping Cart when in “Ordered” Status
  - **Status:** Resolved
  - **Date of Resolution:** March 11, 2014
  - When a user clicks “Order” and then deletes the shopping cart, the shopping cart is removed from their work list and will also be removed from the approver’s work list by clicking the refresh icon.



# SRM Updates and Resolutions – Shopping Carts

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## 🌀 SCEIS Root Text in Delivery Address

- **Status:** Resolved
- **Date of Resolution:** March 27, 2014
- SCEIS created a document that provides a guide for users to manage the delivery address.
- SCEIS Root Text Document

Demonstration of how to manage a delivery address.

# SRM Updates and Resolutions – Purchase Requisition

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- 🌀 Error “Procurement Profile PR cannot be changed”
  - **Status:** In Process
  - **Target Date of Resolution:** April 30, 2014
    - SCEIS will provide template to users to complete.
  - User receives an error when attempting to change quantity in a purchase requisition for inventory. This applies to requisitions created before go-live and after go-live.

- ① Unable to Add Invoicing Party in Purchase Order
  - **Status:** Resolved
  - **Date of Resolution:** March 7, 2014

Users can add Invoicing Party to a purchase order at the header level in SRM. The Invoicing Party is now updating the purchase order in ECC.

- 🔄 Edit Button on Purchase Order Disappears
  - **Status:** In Process
  - **Target Date of Resolution:** April 18, 2014
    - Testing is underway.
  - User receives “Error in Process” message and is unable to print purchase order. The SCEIS MM Team will restore the Edit button until the issue is resolved.

## 🔄 Incorrect Vendor in ECC

- **Status:** Resolved
- **Target Date of Resolution:** March 21, 2014
- **Date of Resolution:** March 27, 2014
- The fix for this issue went into PRD the evening of March 27 and should correct the issue of vendor discrepancy in SRM and ECC.
- For those that have already occurred, SCEIS will run a report and correct the vendor.

## 🔄 Purchase Order Form Print

- **Status:** In Process
- **Target Date for Resolution of Forms:** Form changes will be put in Production in several stages.
- SCEIS will continue to make improvements to the purchase order forms.

# SRM Updates and Resolutions – Purchase Orders

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- Some shopping carts with multiple line items create two purchase orders
  - **Status:** In Process
  - **Target Date for Resolution:** April 18, 2014

## 🔄 Inability to Add Items to Bid

- **Status:** In Process
- **Target Date of Resolution:** April 4, 2014
- When creating a solicitation, users are unable to copy and paste items



- 🔄 Inability to Copy and Paste Items to RFx
  - **Status:** In Process
  - **Target Date of Resolution:** April 4, 2014
  - When creating a solicitation, users are unable to add line items.

## Numbers 1-6 came from multiple agencies

1. System gives error numbers and then Edit Button Disappears on PO.
  - Related to Slide 12 issue. SCEIS is in the process of testing possible solution.
2. Can't reverse a locked or deleted PO
  - A “no further confirmation” process CAN be reversed if the line item has not been fully received, invoiced, and paid.
  - A PO deleted at the HEADER level CANNOT be reversed.
  - A PO deleted LINE ITEM can be undeleted.

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3. Incorrect Delivery Address Populates and can't be changed
    - February 21 communication
    - Verify and Change Delivery Address
  4. SRM/ECC not communicating (Back End Error Messages)
    - Partly related to issue 1 and Slides 12 and 13. SCEIS has corrected the vendor discrepancy and is in the process of testing possible solution for other error in process issues.

5. Unable to add clear, neat, concise Header Text for vendor information & related field limit for printing Header
  - Vendor text field limit is Standard SAP and matched to the printed form.
  - For more text, consider adding an attachment to the PO.
6. When trying to combine two carts into 1 PO; system generates two POs
  - SCEIS is in the process of investigating issue.
7. Workload Redistribution – Blue Circle Rotates/Freezes
  - SAP OSS Note applied 3/27/14

8. Work Redistribution – Organizational Unit Does not Exist – must click twice to clear
  - SCEIS will research and test for resolution.
9. Notes to Supplier field not on PO or in Citrix
  - System not passing all text to ECC PO. SCEIS will assess additional fields at a later time.
10. “Error in Processing” message without explanation
  - Related to number 1 and slide 12 . SCEIS is in the process of testing possible solution.
11. Unable to edit Shopping Carts that have already been approved (e.t. add document to forward to MMO)
  - System is functioning as designed. Suggest sending document through e-mail.

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12. Budget exceeded but cannot identify which lines are exceeded
    - Related to number 1 and slide 12 . SCEIS is in the process of testing possible solution.
  13. Unable to view PO due to incorrect P-Group – No Authorization in Advanced Search
    - The fix for this issue went into PRD evening of March 27.
  14. POs on Open Encumbrance that are closed or can't be found
    - Communication will follow from SCEIS on process.

## 15. Unsure how to final invoice a PO in MM

- Process presented during 2.28.2014 User Group. PowerPoint with instructions is located on Microsite
- No Further Confirmation & No Further Invoice

## 16. Where are old A/P u-Performs?

- The u-Perform software was updated and the u-Performs are being revised as a result. According to FI staff, the revised A/P u-Performs should be available within 2 weeks

## 17. Not able to change PO type after creation

- This is a standard SAP function

## 18. Different vendor numbers on contract/remit-to

- Related to number 1 and Slide 12 issue. SCEIS is in the process of testing possible solution.

## 19. Purchase Order will not delete – No delete button

- Related to number 1 and Slide 12 issue. SCEIS is in the process of testing possible solution.

## 20. Closed items on Inventory Requisitions remain in SRM

- Need clarification from users.



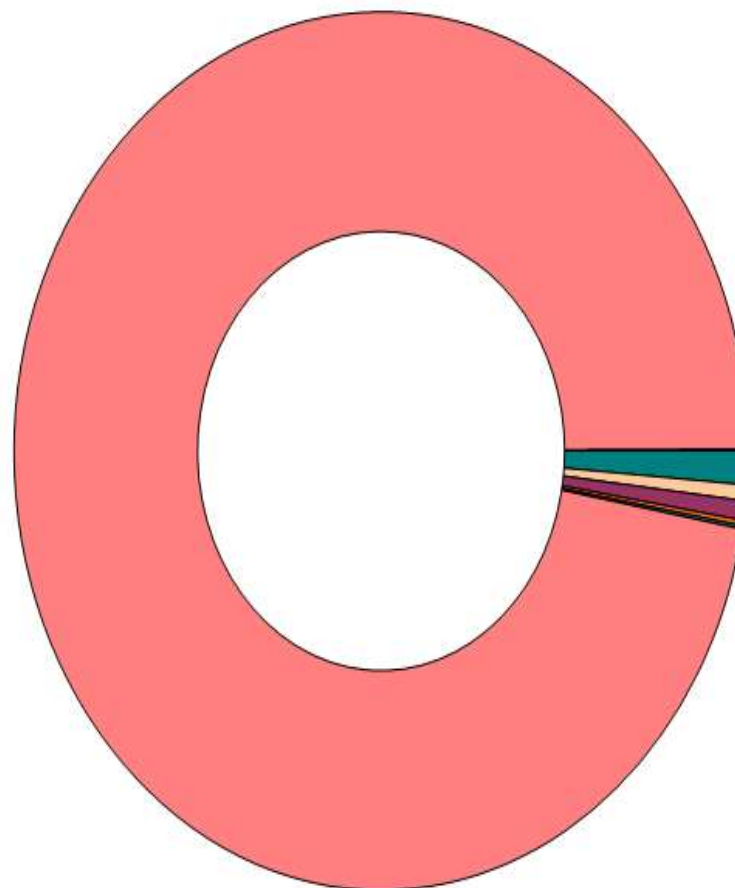


## SRM - Stats

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	A	B	C
1			
2		<b>Status</b>	<b>Total Tickets</b>
3		Acknowledged	1
4		Closed	1498
5		Hold	2
6		Information Reque	3
7		Open	11
8		Researching	9
9		Work In Progress	19
10		Sum:	1543



- Work In Progress
- Researching
- Open
- Information Requested
- Hold
- Closed
- Acknowledged



## SRM - Tips and Reminders

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- ④ Use the “Check” button before using the “Order” button on purchase order
  - ④ All PO created in ECC before COB November 8, 2013, will NOT be carried forward and will have to be recreated in SRM
  - ④ Before deleting the PO line item with an asset, remove the Asset Shell associated with that asset

## 🌀 Accessing Purchase Orders in SRM

### – “Purchasing” Folder

- Use to access purchasing functions in SRM. As of November 25, 2013, all purchase orders have to be created in SRM

### – “ME23N” Folder

- Use to access purchase orders created in ECC before COB November 8, 2013.

## 🌀 Inventory Purchase Order Account Assignment

- “Unknown” account assignment is used for inventory purchase orders since it’s a revolving account. Otherwise, you will receive the message “PO does not exist” when they try to create a GR.

- Shopping Carts MUST be created using the “ESS” folder
- Purchase Orders cannot be created from the Contract tab
- POs still in ECC do not have “hard stop” on Target Value of Contract
  - SRM POs pointed to for “Central Contract” field whereas POs in ECC point to “Outline Agreement” field

# Upcoming Projects for MM until July 1, 2014

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- 🌀 Support on Current Upgrade Issues and Master Data
- 🌀 Year End
  - March - Develop testing scripts
  - April: Test scenarios
  - May: Training
- 🌀 Implementation of Support Packs
  - Rescheduled for August 2014
- 🌀 DOA Phase I

**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

Fiscal Year-End Training  
Course Guides and  
Materials

MySCEmployee Training  
for SCDOT

MySCEmployee Training

SCEIS Quick Reference  
Cards

SCEIS Training Guides and  
Tools

Blackboard

SCEIS uPerform

[Click here to view  
SRM 7.2 Upgrade Microsite](#)

*Get the latest . . .*

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

*. . . and more, updated regularly to  
keep you informed.*

**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:



## Recently Published

- How to Create and Post a No Award (3/10/14)
- How to Add Questions to an RFx (3/19/14)



South Carolina  
Enterprise Information System  
SC Budget and Control Board

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## SRM 7.2 Upgrade Microsite

### SRM 7.2 Upgrade Microsite Navigation



[Microsite Home](#)



[User Communications](#)



[Information & Tools](#)



[Training](#)



[User Support](#)

### 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](#)

# Next User Group Meeting

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**Friday, April 25, 9:00 a.m.  
(For All Users)**

**Midlands Technical College Airport Campus  
Academic Center Auditorium**