User Group Meeting
Friday, October 31, 2014
Welcome and Updates
John Taylor, SCEIS User Support Team Director
Introduction of New SCEIS Director, Ed Pearce

• Former Director of Finance, DJJ
• Served as Finance Lead for User Group Leads Committee
• Previous finance experience in the private sector
• Previous experience managing human resources in federal agency/military
Training Update: New Online Courses
John Taylor, SCEIS User Support Team Director
New Online Courses

TM200U – SCEIS Time Administration
New Online Courses

TM200U – SCEIS Time Administration

Online Training Courses: HR/Payroll
The below training resources are designed to assist HR/Payroll users.

TM200U - SCEIS Time Administration
For details about this online course including course navigation and suggestions for completing the course, click here.
New Online Courses

ESS110U – SCEIS Time and Leave Entry in MySC Employee Employee Self Service
New Online Courses

ESS110U – SCEIS Time and Leave Entry in MySCEmployee Employee Self Service

MySCEmployee Training

Attention SCDOT Employees:
The below MySCEmployee Training Courses are not customized to your unique needs. Please proceed to the page at the following link, and complete the courses available there.

Click here to access MySCEmployee Training for SCDOT.

What is MySCEmployee?
MySCEmployee will help reduce much of the paper shuffling, e-mails and phone calls that are often part of human resources administration by putting many day-to-day record-keeping and career-development responsibilities directly in the hands of employees. With easy-to-use navigation, MySCEmployee is accessible through any computer with an Internet connection and provides employees with the tools they need to better access and manage their state benefits and personal information.

All employees should complete the ESS100 MySCEmployee – Employee Self Service Course (linked below). Employees who need to take the Time Management course will be directed to do so by someone within their agency.

MySCEmployee Training Courses

ESS100 MySCEmployee Course
Click here to begin taking the ESS100 MySCEmployee – Employee Self Service Course.

We have also prepared a course guide/handout which you may print and view as you are taking the course or for future reference. To open and print the handout, click here (1.5mb PDF).

ESS110U Time and Leave Entry Course
Click here to begin taking the ESS110U Time and Leave Entry in MySCEmployee Employee Self Service course.

Note: The course script and PowerPoint are available on the Links page of the online course. For details about this online course, including course navigation and suggestions for completing the course, click here.
Reporting Update: Business Objects
John Taylor, SCEIS User Support Team Director
Reporting Update: Rollout of HR Dashboards

John Taylor, SCEIS User Support Team Director
SCEIS Project Update
John Taylor, SCEIS User Support Team Director
Completed Projects Since August Meeting
## Completed Projects

<table>
<thead>
<tr>
<th>Title/Area</th>
<th>Description</th>
<th>Status</th>
<th>Completion Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Department of Administration Phase I</td>
<td>Implementation of Department of Administration</td>
<td>Complete</td>
<td>August 2014</td>
</tr>
<tr>
<td>Security - 2 Factor Authentication</td>
<td>Installing 2-Factor Authentication</td>
<td>Complete</td>
<td>September 2014</td>
</tr>
<tr>
<td>Decommission BEX 3.5</td>
<td>Transition BW Reporting from BEX 3.5 to 7.3</td>
<td>Complete</td>
<td>September 2014</td>
</tr>
<tr>
<td>Year End Processing</td>
<td>Support Year-End Activities</td>
<td>Complete</td>
<td>September 2014</td>
</tr>
</tbody>
</table>
## Completed Projects

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<th>Title/Area</th>
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<tbody>
<tr>
<td>STO STARS</td>
<td>Moving Deposits from STARS into SCEIS - IMS Deposits</td>
<td>Complete</td>
<td>September 2014</td>
</tr>
<tr>
<td>Process Integrator (PI) Upgrade</td>
<td>Update for SAP Integration Server</td>
<td>Complete</td>
<td>September 2014</td>
</tr>
<tr>
<td>Changes to Census Codes</td>
<td>Change 700 Codes from 3 to 4 Digits</td>
<td>Complete</td>
<td>October 2014</td>
</tr>
</tbody>
</table>
## Projects for Remainder of CY14

<table>
<thead>
<tr>
<th>Title/Area</th>
<th>Description</th>
<th>Status</th>
<th>Completion Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>STO STARS</td>
<td>Implement functionality into SCEIS - Debt Service Payment Agent Interface</td>
<td>Green</td>
<td>October 2014</td>
</tr>
<tr>
<td>Historical Checks to the State Treasurer’s Office Website</td>
<td>Create a file to post outstanding (and over two years old) SCEIS checks to the STO website.</td>
<td>Green</td>
<td>October 2014</td>
</tr>
<tr>
<td>CG STARS</td>
<td>Y14 – Ports Authority</td>
<td>Green</td>
<td>October 2014</td>
</tr>
<tr>
<td>CG STARS</td>
<td>Y18 – Public Service Authority</td>
<td>Green</td>
<td>October 2014</td>
</tr>
<tr>
<td>Track Bank File Confirmation</td>
<td>Provide receipt confirmation for all files originated and submitted to the bank from SCEIS</td>
<td>Green</td>
<td>October 2014</td>
</tr>
</tbody>
</table>
## Projects for Remainder of CY14

<table>
<thead>
<tr>
<th>Title/Area</th>
<th>Description</th>
<th>Status</th>
<th>Completion Date</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Business Objects Upgrade</strong></td>
<td>Business Objects Upgrade</td>
<td><strong>Green</strong></td>
<td>November 2014</td>
</tr>
<tr>
<td><strong>Identity Management Upgrade</strong></td>
<td>Operating System Migration is scheduled to go live November 15, 2014.</td>
<td><strong>Green</strong></td>
<td>November 2014</td>
</tr>
<tr>
<td><strong>Training</strong></td>
<td>Implement Blackboard 9.1 SP14</td>
<td><strong>Green</strong></td>
<td>November 2014</td>
</tr>
<tr>
<td><strong>Upgrade to Nakisa 4.0</strong></td>
<td>Upgrade Nakisa</td>
<td><strong>Green</strong></td>
<td>December 2014</td>
</tr>
<tr>
<td><strong>CG STARS</strong></td>
<td>Convert transactional processing from STARS to SCEIS - Lump Sum Transaction Activities - Daily Draws, Journal Entries, Deposits</td>
<td><strong>Green</strong></td>
<td>December 2014</td>
</tr>
</tbody>
</table>
# Projects for Remainder of CY14

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<th>Description</th>
<th>Status</th>
<th>Completion Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Training</td>
<td>Prepare a training client and develop a plan for ongoing maintenance</td>
<td>Green</td>
<td>December 2014</td>
</tr>
<tr>
<td>BSI Tax 10.0</td>
<td>Tax Upgrade</td>
<td>Green</td>
<td>December 2014</td>
</tr>
<tr>
<td>Support Pack Updates</td>
<td>Implement a collection of SAP prescribed support packs. Will include the HR support packs</td>
<td>Green</td>
<td>December 2014</td>
</tr>
<tr>
<td>Purchase Order Enhancements</td>
<td>VRD solution for Shopping Carts that do not belong appearing in workload distribution</td>
<td>Green</td>
<td>December 2014</td>
</tr>
<tr>
<td>Title/Area</td>
<td>Description</td>
<td>Status</td>
<td>Completion Date</td>
</tr>
<tr>
<td>-------------------------------</td>
<td>------------------------------</td>
<td>--------</td>
<td>-----------------</td>
</tr>
<tr>
<td>Shopping Cart Enhancements</td>
<td>Add p-group field</td>
<td>Green</td>
<td>December 2014</td>
</tr>
<tr>
<td>Shopping Cart Enhancements</td>
<td>Monitor SC for Approvers/Buyers</td>
<td>Green</td>
<td>December 2014</td>
</tr>
</tbody>
</table>
SCEIS User Group Leads Committee
Nominations
John Taylor, SCEIS User Support Team Director
Nominations

Training Lead

Budget/Funds Management Lead

- Vicki Bowles; Vocational Rehabilitation

Materials Management Lead
Human Resources/Payroll Updates
Nakisa Organizational Chart Software Update
Paige Stephens, SCEIS HR Team
Lane Small, SCEIS HR Team
Nakisa Upgrade

- Upgrading from Nakisa 2.1 to 4.1

- Seamless, Real-time changes – Make changes in ECC then log in to Nakisa and see the change

- Ability to select the number of levels down you want to display, to include the entire agency

- Notes feature available for public and private notes

- Allows the agency to see how agency information will be presented to the Legislature

- Nakisa Role gives access to view the entire agency. HRD can see all regulatory agencies
Initial Screen

- The left side displays the top two levels of the agency.
- The right side (the tab panel) displays details of the org unit and manager.
Help Panel

- On the right there is a help panel with a legend for the system.
- There is a search feature to find positions and employees.
Details Panel

- Click on a position or org unit to see details.
- The colors on the border are blue for org units and yellow for positions.
Views – Change the information displayed in the organizational chart.

- Org Unit Information
  - Org Unit Name and ID
  - Managers Job Name
  - Managers Employee Name
  - Managers Position Name
  - Employee Grievance Status

- Position information
  - Position Name & Abbr
  - Employee Name
  - Retiree Type
  - Job Name
  - Position Number
  - Employee Group Name
  - Employee Grievance Status
  - Job Abbr

Styles – Change the positioning and appearance of the organizational chart.
Views

Select the View you would like from the drop down menu.
Available analytics will be FTE, Head Count, Age, Gender and Race.
Select the Style you would like from the drop down menu.
Notes – Public or Private

- Public notes can be seen by anyone with access to your agency.
- Private notes can only be seen by the person who creates the note.
Create Note
Notes Indicator
Chartbooks

- Is an interactive PDF document to display and print org charts.
- Able to run in the background.
Chartbooks
Questions?
Year-End Activities
Time and Leave Management
Katie Derrick, SCEIS HR Team
Time/Leave Management Topics

- Year-End Activities
- Leave Pool  Donations
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
- Payroll gate comes down for 2014 on January 26
  - Last business day for changes w/out lifting gate = 1/23
Year-End Activities

Reconcile time/leave records for 2014:

- Missing Time and Unapproved Time Report – ZHRMTR
- Time Collision Report – ZHRTCR
- Unapproved and Stuck Leave Report – ZHRUAL
- Time Evaluation Messages Report – PT_ERL00
- FMLA Exception Report (provided by SCEIS weekly)
Guidelines for Year-End Donations

Donations for year-end should use a date no later than 12/31 of the year-end
  • Can be keyed in 2015 with 12/31/14 effective date

Only use leave from the Annual Leave or Sick Leave balances – never use “rollover” or “forfeit” balances

Once the time/leave programs run overnight, the records will be adjusted accordingly
Questions?
HR/PY Calendar Year-End Activities
Tonia Morris, Comptroller General’s Office
HR/PY Calendar Year-End Reminders

- 2015 Payroll Calendar
- Claims (December 2, 2014)
- W-2’s
- Voided Checks/Reversals (December 16, 2014)
- Payroll Master Data Gate (January 26, 2014)
FTE Deletions
Beth Quick, Executive Budget Office
Break
Closing Grants
Bruce Burnett, SCEIS Finance Lead
Lifecycle Stages of a Grant

- Postings are controlled by the lifecycle of the grant
- Grant must be in Award status to begin posting/budgeting
- No new encumbrances in Closing status (Check Validity)
- Ability to change back to Award status from Closed status
Change Grant Status

Current status is “Award”

Go to Change Mode
Change Grant Status

Click on “Change Status” icon
Change Grant Status

The box below will appear; the normal progression is from “Award” to “Closing;” however; “Closed” or “Cancelled” can be selected.
To close the grant, select “Close,” click the green check, and “Save.”
Grant is now in “Closed” status.

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Grant Type</td>
<td>G1</td>
</tr>
<tr>
<td>Sponsor</td>
<td>4000926</td>
</tr>
<tr>
<td>Authorization Group</td>
<td>F030</td>
</tr>
<tr>
<td>Award Type</td>
<td>OTH</td>
</tr>
<tr>
<td>Name</td>
<td>ARC GREER</td>
</tr>
<tr>
<td>Description</td>
<td>Greer Water Storage Tank</td>
</tr>
<tr>
<td>Grant Currency</td>
<td>USD</td>
</tr>
<tr>
<td>Grant Value</td>
<td>500,000.00</td>
</tr>
<tr>
<td>Valid from Date</td>
<td>10/01/2008</td>
</tr>
<tr>
<td>Valid to Date</td>
<td>12/31/2011</td>
</tr>
</tbody>
</table>
A grant in “Closed” status can be changed to “Award” status.
Change Grant Status

**Change Grant Master F0301PA00010 - Incoming**

- **Grant:** F0301PA00010
- **Grant Type:** G1
- **Sponsor:** 4000926

**Basic Data**
- **Grant Type:** G1
- **Company Code:** SC01
- **Sponsor:** 4000926
- **Authorization Group:** F030
- **Award Type:** OTH

- **Federal**
- **State of South Carolina**
- **Appalachian Regional Commission**
- **BUDGET AND CONTROL B**
- **Other - Non Research & Development**

**Description**
- **Name:** ARC GREER
- **Description:** Greer Water Storage Tank

**Currency and Conversion Factors**
- **Grant Currency:** USD
- **Grant Value:** 500,000.00

**Grant Validity**
- **Valid from Date:** 10/01/2008
- **Valid to Date:** 12/31/2011
Asset Transfers Without a Financial Impact
Bruce Burnett, SCEIS Finance Lead
STARS Retirement Status
Anjali Griffin, Comptroller General’s Office
Bruce Burnett, SCEIS Finance Lead
Restrict posting to the G/L for Revenue with 1001XXXX and Expenditures to fund 2XXXXXXX

Go Live of “A Agencies” in SCEIS

Transition Colleges and Universities in a Lump Sum capacity

Created the reports needed by Colleges and Universities

DOR is originating all transactions in SCEIS

Processing of inventory scrapping
Completed Tasks

Transition processing for the following Business Areas to SCEIS

- E170
- F300
- F310
- F350
- P340
- P350
- P380
- X120
- Y140
- Y180
- Y200
Primary Project Tasks

- Working towards F290 (Retirement Systems) transitioning into SCEIS
- Retirement of SPIRS
- Convert Capital Projects for Colleges and Universities
- Payroll for third party vendors (F290 (Retirement Systems) / R440 (Department of Revenue – Non live portion))
Primary Project Tasks

Treasurer’s Office to convert Investment Management System (IMS), Debt Management System (DMS) and Financial Management System (FMS)
Secondary Project Tasks

- Automation of Use Tax processing
- Automation of GF cash
- Implement a Fund validation table
- Interface Journal Entries to check to ensure the period is open
- IDT refund of expenditures need to post statistically in FM similar to 3rd Party
- Implement a table with valid funds that would be checked prior to posting
FY 2015 Effective July 1 – Revenue and Fiscal Affairs Office (Business Area E500)

FY 2016 Effective July 1 – Department of Administration (Business Area D500)
FY 2016 Effective July 1 – Department of Administration (Business Area D500)

- Administration
- Internal Audit Services
- Executive Budget Office
- Human Resources Division
- General Services Division
  - Facilities Management
  - Surplus Property
  - Intra-State Mail
  - Parking
  - State Fleet Management
FY 2016 Effective July 1 – Department of Administration (Business Area D500)

- SCEIS
- Division of Information Security
- Enterprise Privacy Office
- State Technology Operations
- Executive Policy and Programs
  - Administration
- Children’s Services
  - Guardian Ad Litem
  - Children’s Case Resolution
  - Children’s Trust Fund
FY 2016 Effective July 1 – Department of Administration (Business Area D500)

- Foster Care
- Continuum of Care
- Constituent Services
  - Victim’s Assistance
  - Veteran’s Affairs
  - Veteran’s Cemetery
  - Ombudsman
  - Developmental Disabilities
  - Small and Minority Business
  - Economic Opportunity
State Fiscal Affairs Authority (Business Area E550)

- State Procurement Services (MMO)
- Information Technology Materials Office (ITMO)
- Insurance Reserve Fund

Confederate Relic Room and Military Museum (Business Area H960)

- Office of Local Government moves to Dept. of Commerce
- State Energy Office moves to Office of Regulatory Staff
Materials Management
Wanda Dixon, SCEIS MM Team Lead
SRM Topics

- SRM System Updates and Resolutions
- Improvements in Process
- Frequently Asked Questions
- Demonstrations
  - Purchase Order Account Assignment Processes
  - How to Add a Line Item to a PO from an Approved Shopping Cart
- Tips and Reminders
  - U-Perform Location
SRM System Updates and Resolutions
GR/IR Reversed after Payment

- **Status**: Resolved
- **Date of Resolution**: September 9, 2014 (Communication dated 9/15/2014)

- Account assignment can now be changed (G/L and fund code are the most common changes) by **first** reversing the IR, **then** the GR. After reversal, the revised account assignment data can be entered and the GR and IR re-entered.
Incorrect Line Item Error (when final invoice line item: message that accounting line cannot be deleted)

- **Status:** Resolved
- **Date of Resolution:** September 10, 2014

- SAP corrected issue.
SRM Updates and Resolutions – Purchase Orders

Errors when Copying PO Line Item with Multiple Account Assignments

- Status: Resolved
- Date of Resolution: September 9, 2014

- Users can copy PO line item with multiple account assignments and with split percentage.
Shopping Cart Restarts When “Park” Function Used

- **Status:** Resolved
- **Date of Resolution:** September 12, 2014
  (Communication dated 9/15/2014)

- The “Park” function was removed from the Shopping Cart workflow process. According to SAP, the availability of the “Park” button in the Shopping Cart was a program generated error. No decision has been made by SAP as to whether this function will be made available in future enhancements.
Inability to Make Changes to Shopping Cart in Perform Sourcing

- **Status:** Resolved
- **Date of Resolution:** October 10, 2014 (Communication dated 10/13/2014)

- Buyers can now change a Unit of Measure, Shopping Cart Description, Price, and Delivery Date in **Step 2 of Assign Sources of Supply**. (Prior to this change, the system did not allow any change to an approved Shopping Cart.)
- This modification **does not allow** the functionality of changing a Unit of Measure in the Purchase Order.
Shopping Cart Validation

- **Status:** Resolved

- **Date of Resolution:** October 10, 2014 (Communication dated 10/13/2014)

- Users sitting at the top of an Agency's Organizational Structure will not be able to create a SC for any amount greater than the user’s spending limit or approval limit. (No other approver exists for the agency and approver has the role to create a Shopping Cart.)

- Approval limit/spending limits updated “from less than” to “less than or equal to.” If a user has a spending limit of $1,500.00, any Shopping Cart created for $1,500.01 will workflow for approval.
“SRM Purchasing Display” Security Role Available (Communication Dated October 21, 2014)

- **Status:** Testing
- **Target Date of Resolution:** November 7, 2014

- This role will allow access for individuals, such as FI employees, to display ONLY POs and their related documents
Punch-Out Catalog Available

- **Forms and Supply, Inc. (FSI)** is currently available through the Shopping Cart creation option located in the ESS tab in SRM. (Communication dated October 13, 2014)

Punch-Out Catalog in Process

- Staples
Improvements in Process
Improvements in Process

Proportional Cost Distribution

- In Development
  - Will default “Cost Distribution” to Qty in SRM to enable flexible payments by FI

Workload Distribution Error

- Resolved through pilot testing: Will handle tickets as submitted.
  - Users no longer have to click “OK” twice to bypass Error Message in Workload Redistribution
Improvements in Process

Monitor Shopping Cart Function Change

- Testing
  - Add P-group field to SRM Reporting: Shopping Cart Status and Shopping Cart Details

- In Development
  - Will replace “Monitor Shopping Cart” tab with SRM Reporting

Activation of Purchase Order Link in Shopping Cart

- In Development
  - Allow the user to be able to display the associated PO in the “Related Documents” section of the Shopping Cart
Tracking of Shopping Cart When Buyer Rejects

- Currently, an e-mail notification will be sent to Shopping Cart Creator when a Buyer rejects a Shopping Cart

- In Development
  - When the Shopping Cart is rejected by the Buyer, the change will be tracked in the Display Document Changes link in the Shopping Cart
How can multiple ship-to addresses in a Purchase Order be reversed?

- Multiple Ship-To Addresses can be reversed. The scenario is that a Shopping Cart was created with multiple Ship-To Addresses and the PO displays multiple Ship-To Addresses at the line item level, but only one Ship-To Address is needed at the header level of the Purchase Order.

- A help document, “How to Reverse Multiple Ship-To Addresses in a Purchase Order,” is available on the SCEIS website at the link below. (Communication dated October 13, 2014)

How to Reverse Multiple Ship-To Addresses in a Purchase Order
Can a Line Item be added to a Purchase Order from an Approved Shopping Cart when the line item was missed or omitted in Perform Sourcing?

- Yes. A Line Item can be added to a PO from an approved shopping cart. A Mini-Guide, How to Add a Line Item to a PO from an approved Shopping Cart, is available from the link below.

How to Add a Line Item to a PO from an Approved Shopping Cart
What is the difference in the “Copy” function and the “Duplicate” function?

- The Duplicate function is one step and duplicates all information from the previous line to the next line.

- The Copy function is two steps. The “Copy” button places information on the clipboard and the user must click on the “Paste” button for all information to be placed into the line.
Demonstrations
Purchase Order Account Assignment Processes: Amy Everett

- A help document, “Purchase Order Account Assignment Processes,” is available from the link below.

How to Add a Line Item to a PO from an Approved Shopping Cart: Fred Pieper

- A help document, “How to Add a Line Item to a PO from an Approved Shopping Cart,” is available from the link below.
Click on Business Process Procedures (BBPs).
Click on Supplier Relationship Management (SRM).
Click on the general “Sub-Area” for a list of “Help Content” documents.
For example, Purchasing, Contracts and Bidding for Buyers

SRM Purchasing, Contracts and Bidding for Buyers

Sub-Areas

- SRM PUR Adding Information to Purchase Orders
- SRM PUR Creating Purchase Orders
- SRM PUR Editing Purchase Orders
- SRM RFx Bidding
- SRM SPUR Strategic Purchasing Contracts
Then select the specific “Help Content” area you wish to view.
For example, SRM PUR Create Standard Purchase Order. The u-Perform will open to the document version as shown below.

It is important to read the document version of the u-Perform.
After reading the document version, another option is “Simulation” which allows you to click through each step of the process.
Select among the options for “Simulation.”
In this example, “Standard Tutorial” was selected. Click each box located at the bottom of the screen for step-by-step instructions.
SRM 7.2 Upgrade Microsite

Microsite Navigation

- Timeline
- Cutover Activities
- Gallery of SRM 7.2 Screens

Click here for SRM 7.2 Updates!

- Submit Your Questions About the Upgrade

- SRM 7.2 Upgrade Blog
- Messages and Updates
- Status of Contracts for Office Supplies and Paper
The tentatively scheduled December 12, 2014 meeting has been cancelled.

The next User Group Meeting is scheduled for January 30, 2015 at Midlands Technical College – Airport Campus Auditorium.

The full 2015 User Group meeting schedule will be sent in a SCEIS Weekly Update.