SCEIS
South Carolina Enterprise Information System

# User Group Meeting
# Friday, October 31, 2014

STATE INFORMATION TECHNOLOGY

SC BUDGET AND CONTROL BOARD

# Welcome and Updates

## John Taylor, SCEIS User Support Team Director

# New SCEIS 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

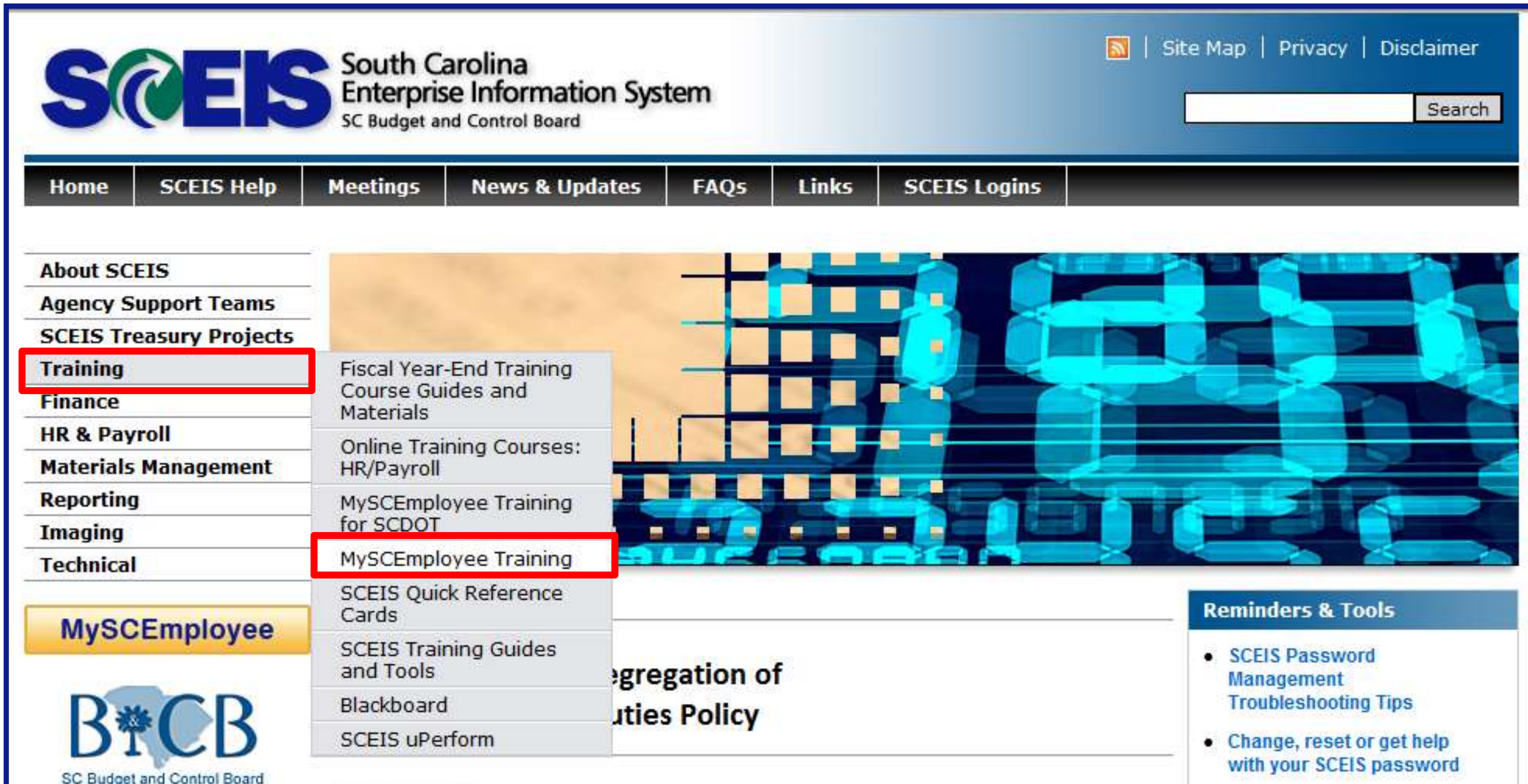
- TM200U – SCEIS Time Administration

# New Online Courses

- TM200U – SCEIS Time Administration

# New Online Courses

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



# New Online Courses

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

Home | SCEIS Help | Meetings | News & Updates | FAQs | Links | SCEIS Logins

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- Agency Support Teams
- 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

## 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

| Title/Area | Description | Status | Completion Date |
|---|---|---|---|
| **Department of Administration Phase I** | Implementation of Department of Administration | **Complete** | August 2014 |
| **Security - 2 Factor Authentication** | Installing 2-Factor Authentication | **Complete** | September 2014 |
| **Decommission BEX 3.5** | Transition BW Reporting from BEX 3.5 to 7.3 | **Complete** | September 2014 |
| **Year End Processing** | Support Year-End Activities | **Complete** | September 2014 |

# Completed Projects

| Title/Area | Description | Status | Completion Date |
|---|---|---|---|
| **STO STARS** | Moving Deposits from STARS into SCEIS - IMS Deposits | **Complete** | September 2014 |
| **Process Integrator (PI) Upgrade** | Update for SAP Integration Server | **Complete** | September 2014 |
| **Changes to Census Codes** | Change 700 Codes from 3 to 4 Digits | **Complete** | October 2014 |

# Projects for Remainder of CY14

# Projects for Remainder of CY14

| Title/Area | Description | Status | Completion Date |
|---|---|---|---|
| **STO STARS** | Implement functionality into SCEIS - Debt Service Payment Agent Interface | Green | October 2014 |
| **Historical Checks to the State Treasurer's Office Website** | Create a file to post outstanding (and over two years old) SCEIS checks to the STO website. | Green | October 2014 |
| **CG STARS** | Y14 – Ports Authority | Green | October 2014 |
| **CG STARS** | Y18 – Public Service Authority | Green | October 2014 |
| **Track Bank File Confirmation** | Provide receipt confirmation for all files originated and submitted to the bank from SCEIS | Green | October 2014 |

# Projects for Remainder of CY14

| Title/Area | Description | Status | Completion Date |
|---|---|---|---|
| **Business Objects Upgrade** | Business Objects Upgrade | Green | November 2014 |
| **Identity Management Upgrade** | Operating System Migration is scheduled to go live November 15, 2014. | Green | November 2014 |
| **Training** | Implement Blackboard 9.1 SP14 | Green | November 2014 |
| **Upgrade to Nakisa 4.0** | Upgrade Nakisa | Green | December 2014 |
| **CG STARS** | Convert transactional processing from STARS to SCEIS - Lump Sum Transaction Activities - Daily Draws, Journal Entries, Deposits | Green | December 2014 |

# Projects for Remainder of CY14

| Title/Area | Description | Status | Completion Date |
| --- | --- | --- | --- |
| **Training** | Prepare a training client and develop a plan for ongoing maintenance | **Green** | December 2014 |
| **BSI Tax 10.0** | Tax Upgrade | **Green** | December 2014 |
| **Support Pack Updates** | Implement a collection of SAP prescribed support packs. Will include the HR support packs | **Green** | December 2014 |
| **Purchase Order Enhancements** | VRD solution for Shopping Carts that do not belong appearing in workload distribution | **Green** | December 2014 |

# Projects for Remainder of CY14

| Title/Area | Description | Status | Completion Date |
|---|---|---|---|
| **Shopping Cart Enhancements** | Add p-group field | **Green** | December 2014 |
| **Shopping Cart Enhancements** | Monitor SC for Approvers/Buyers | **Green** | December 2014 |

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# SCEIS User Group Leads Committee Nominations

## John Taylor, SCEIS User Support Team Director

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# Nominations

- Training Lead
- Budget/Funds Management Lead
  – Vicki Bowles; Vocational Rehabilitation
- Materials Management Lead

# Human Resources/Payroll Updates

# Nakisa Organizational Chart Software Update

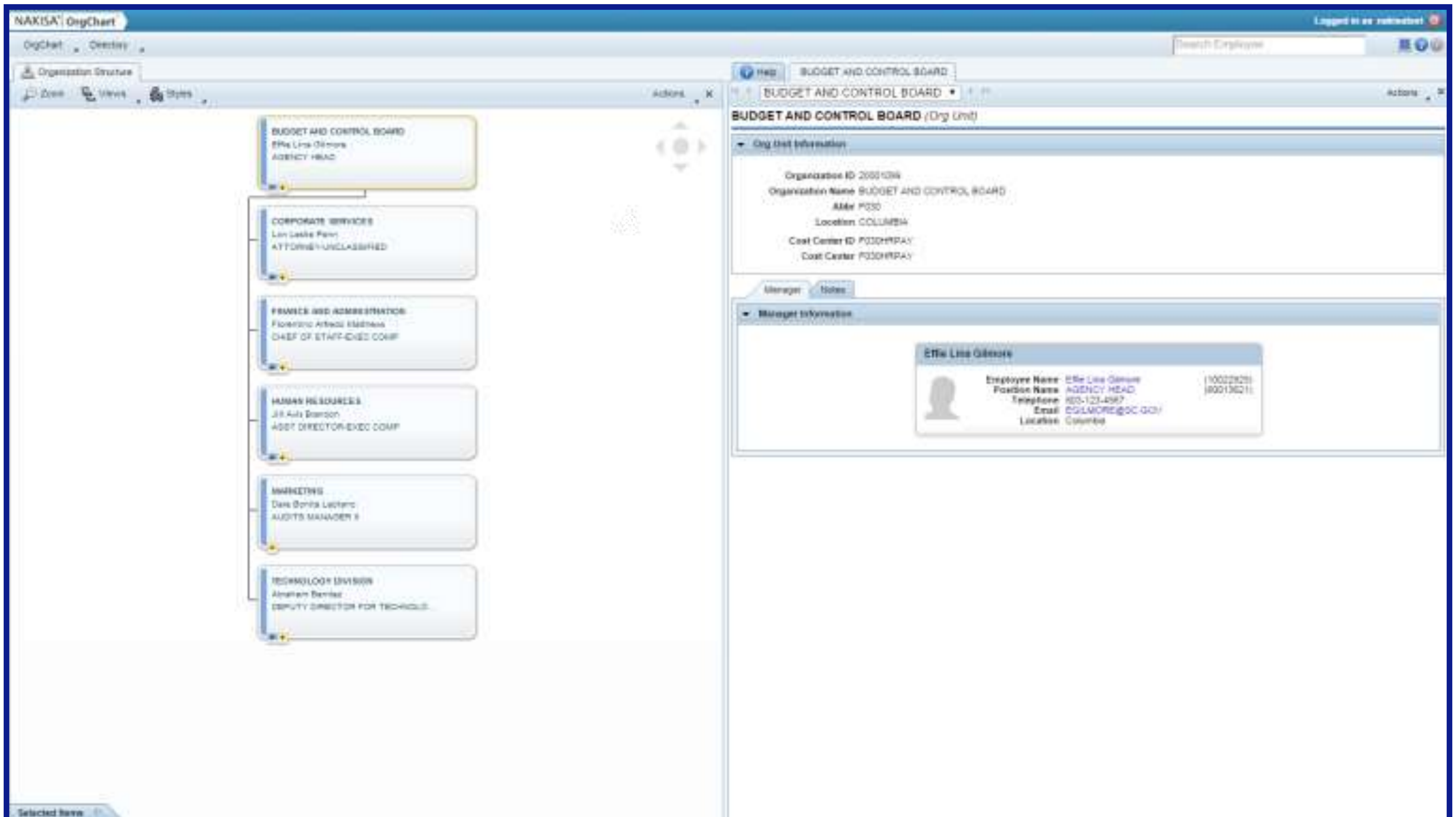
Paige Stephens, SCEIS HR Team
Lane Small, SCEIS HR Team

# 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

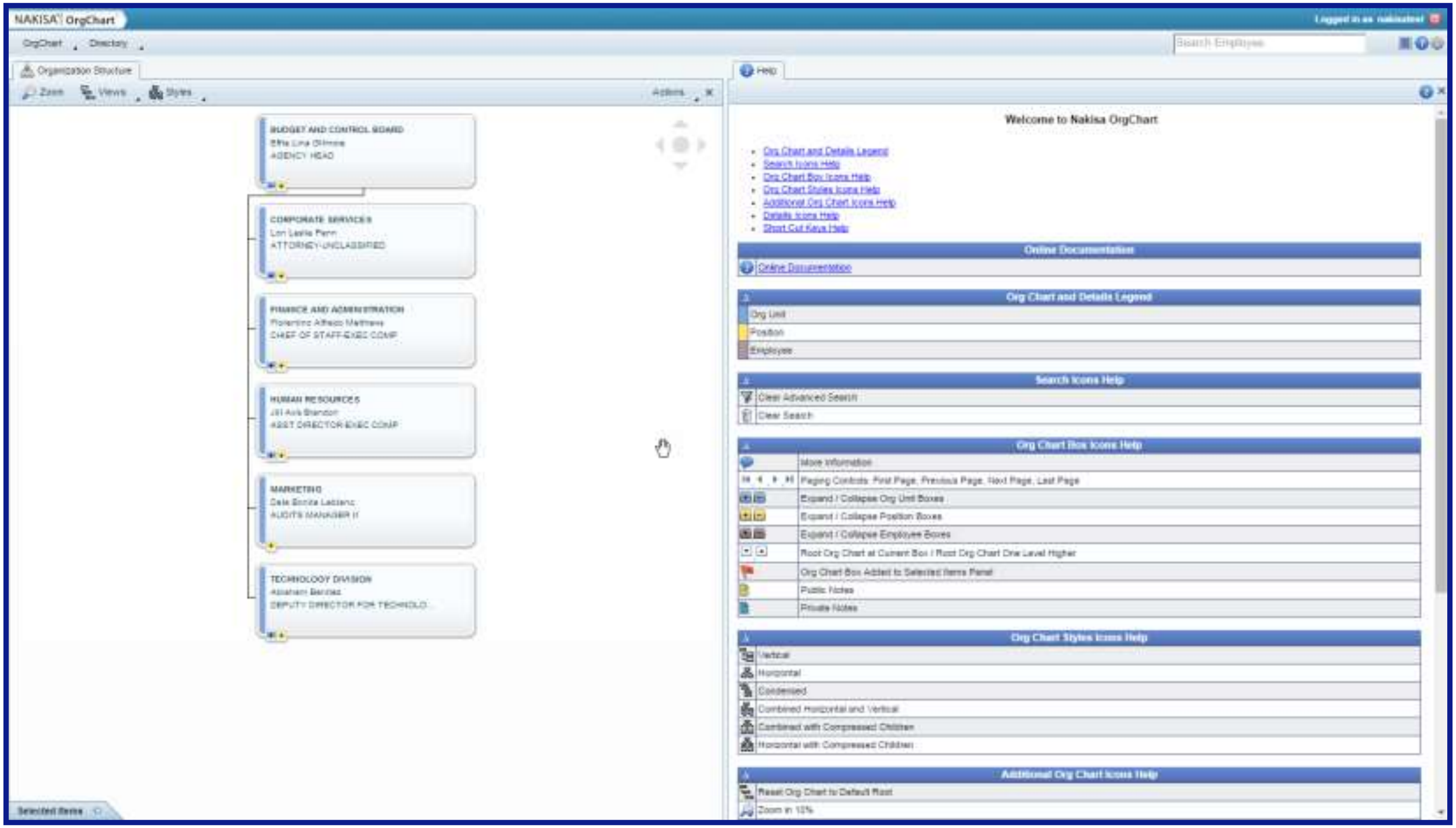
# Initial Screen

- 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.



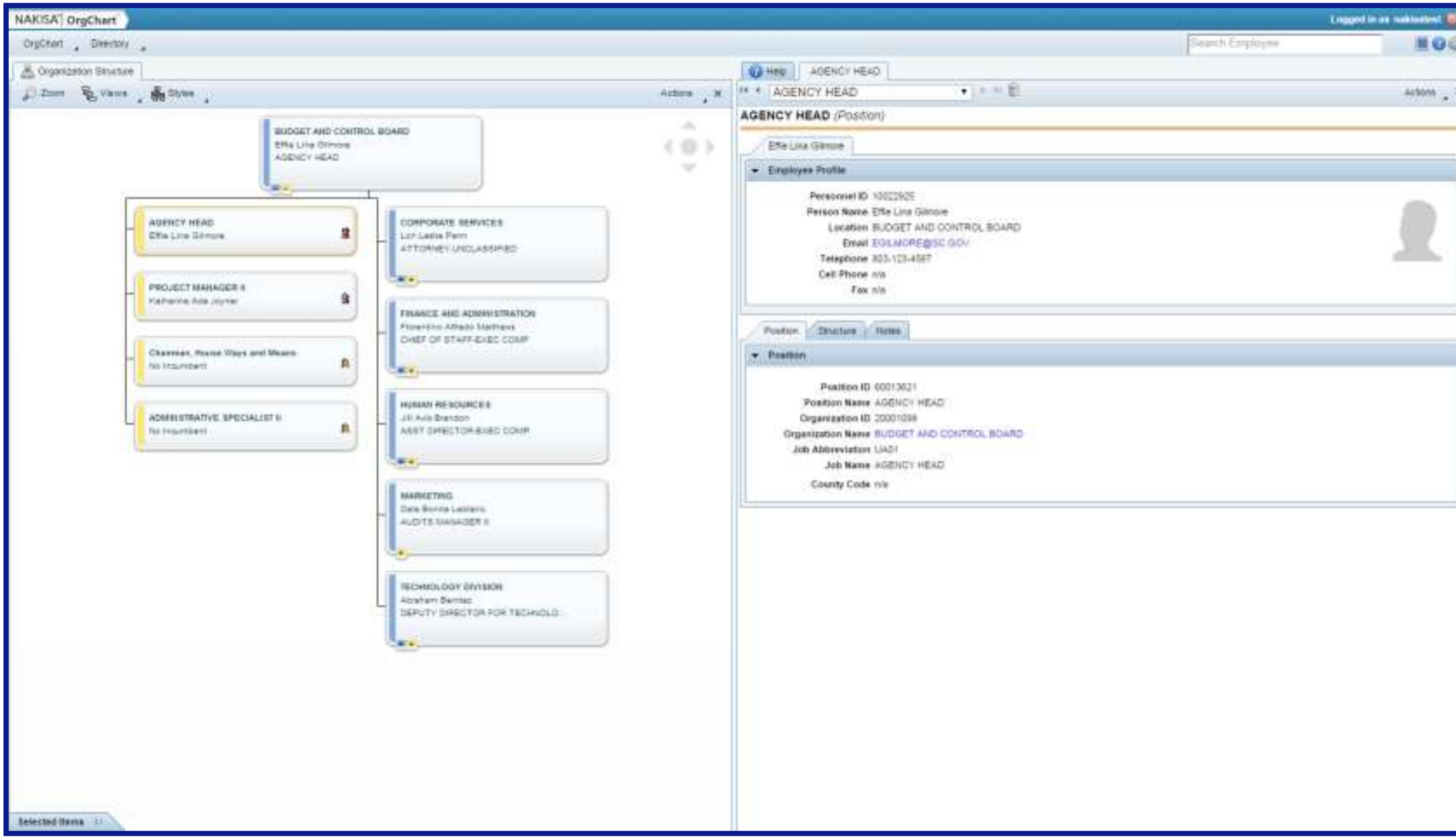
# Help Panel

- 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.

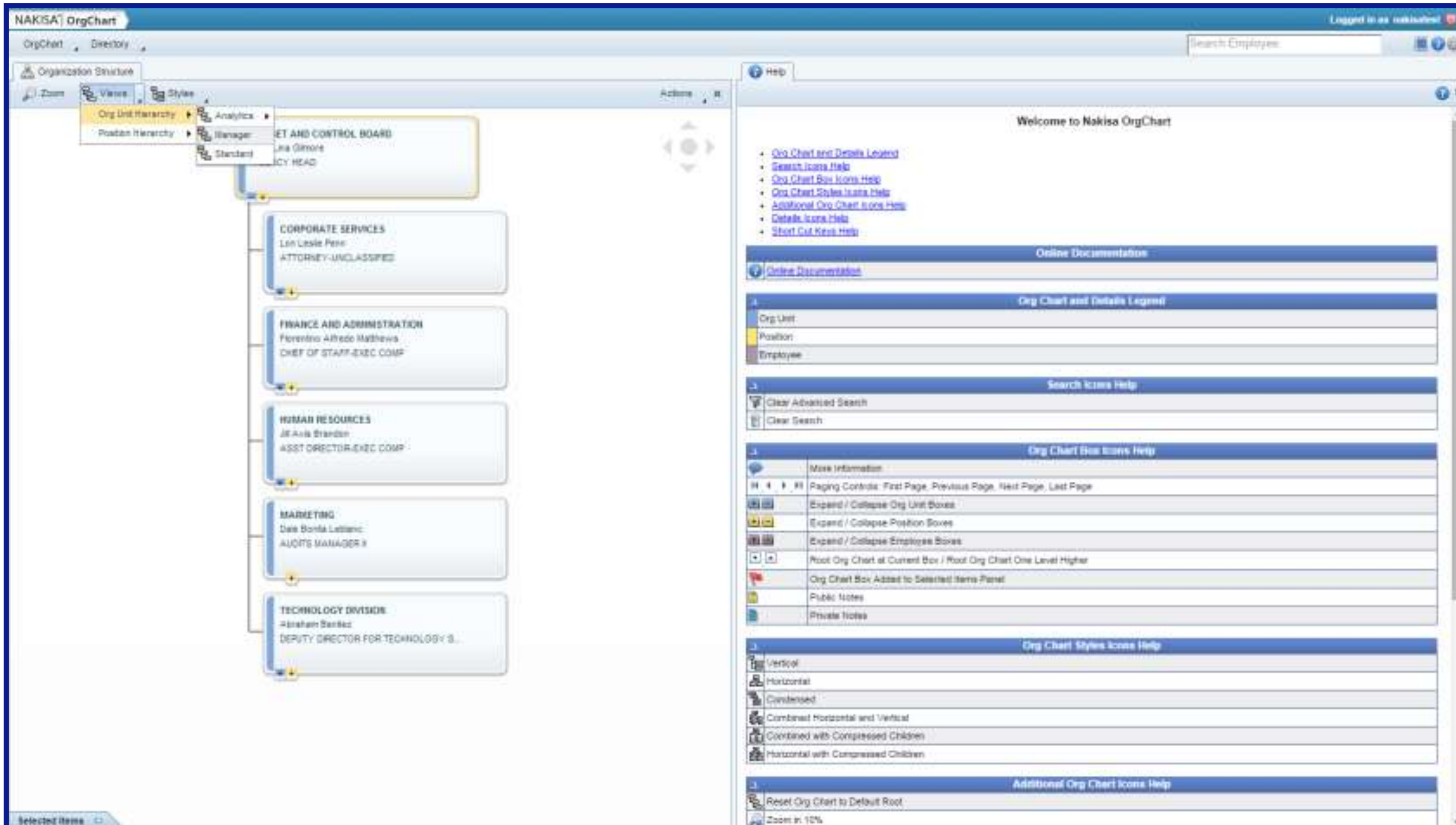


# View and Styles in Nakisa

- Views – Change the information displayed in the organizational chart.
  - Org Unit Information
    - Org Unit Name and ID
    - Managers Job Name - Managers Position Name
    - Managers Employee Name - Employee Grievance Status
  - Position information
    - Position Name & Abbr - Position Number
    - Employee Name - Employee Group Name
    - Retiree Type - Employee Grievance Status
    - Job Name - Job Abbr
- Styles – Change the positioning and appearance of the organizational chart.

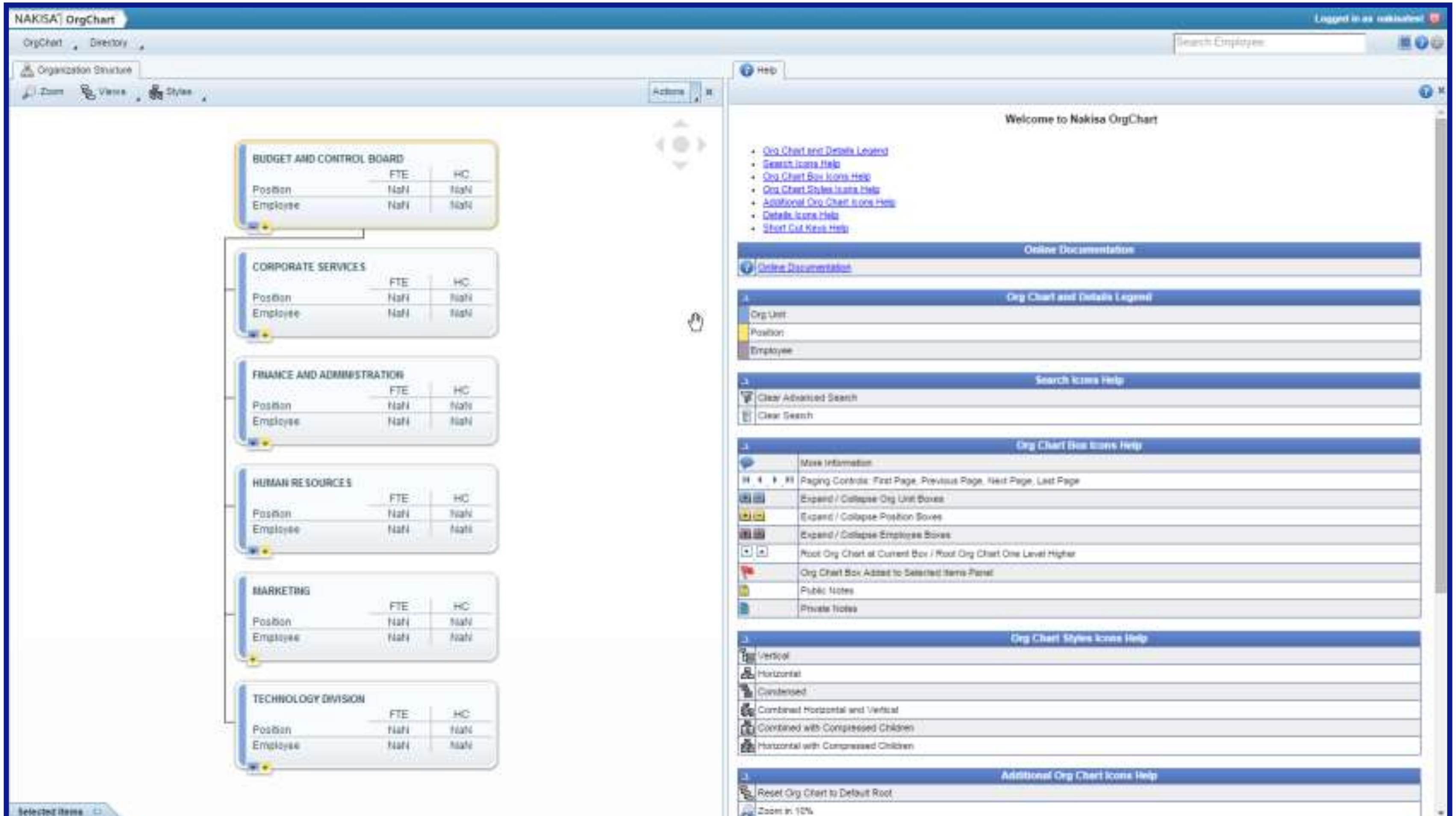
# Views

- Select the View you would like from the drop down menu.



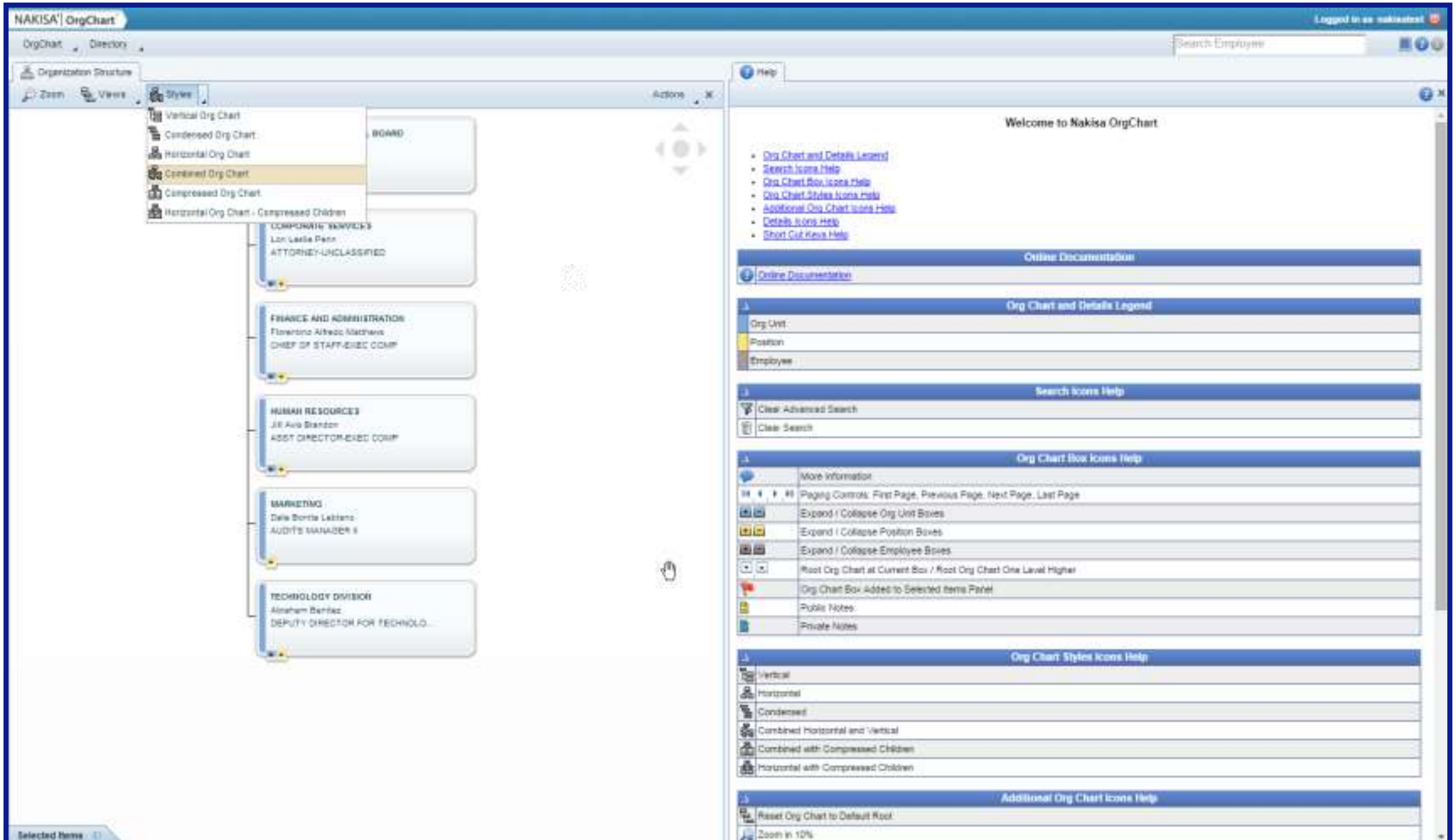
# Analytics

- Available analytics will be FTE, Head Count, Age, Gender and Race.



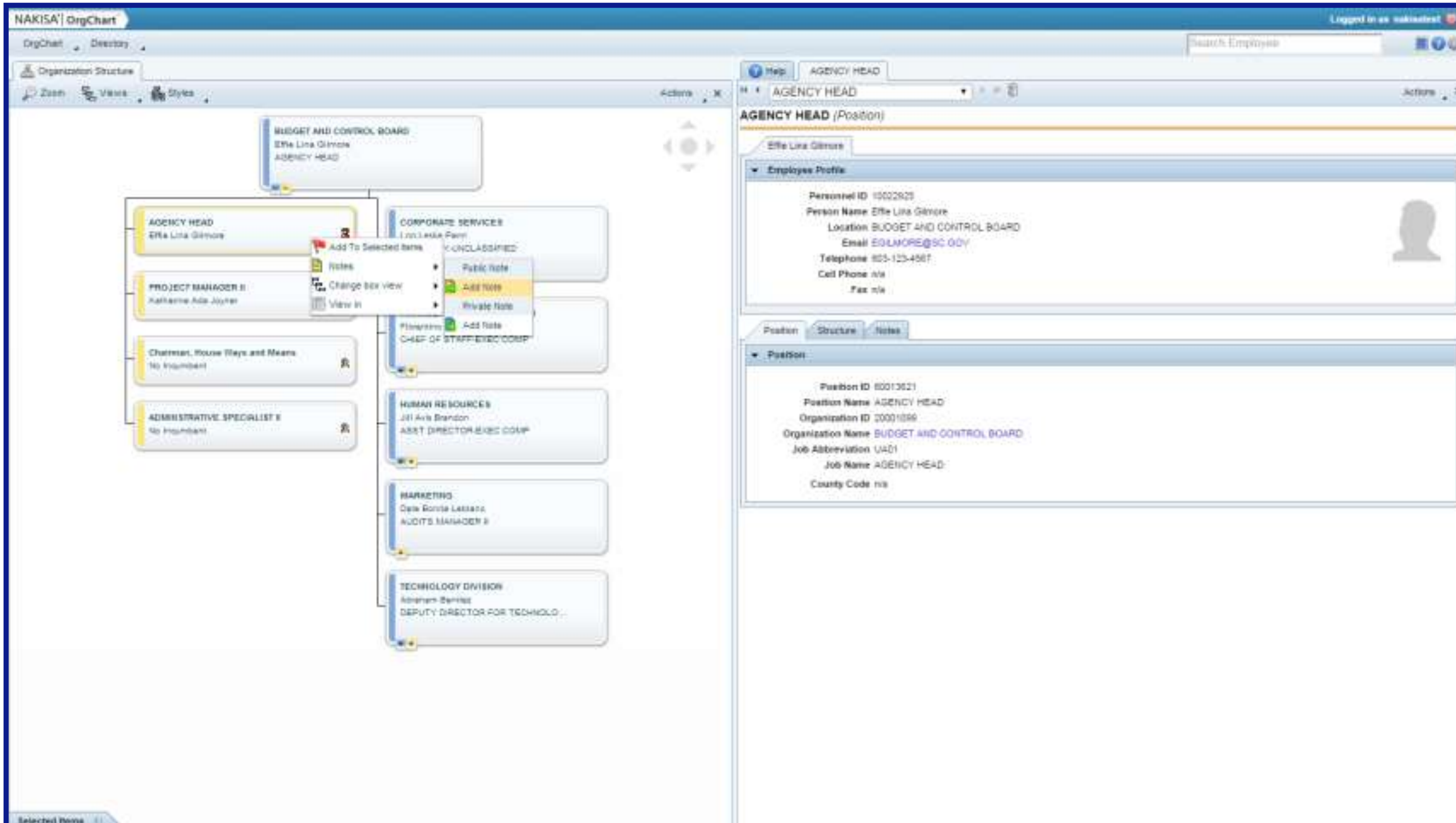
# Styles

- Select the Style you would like from the drop down menu.

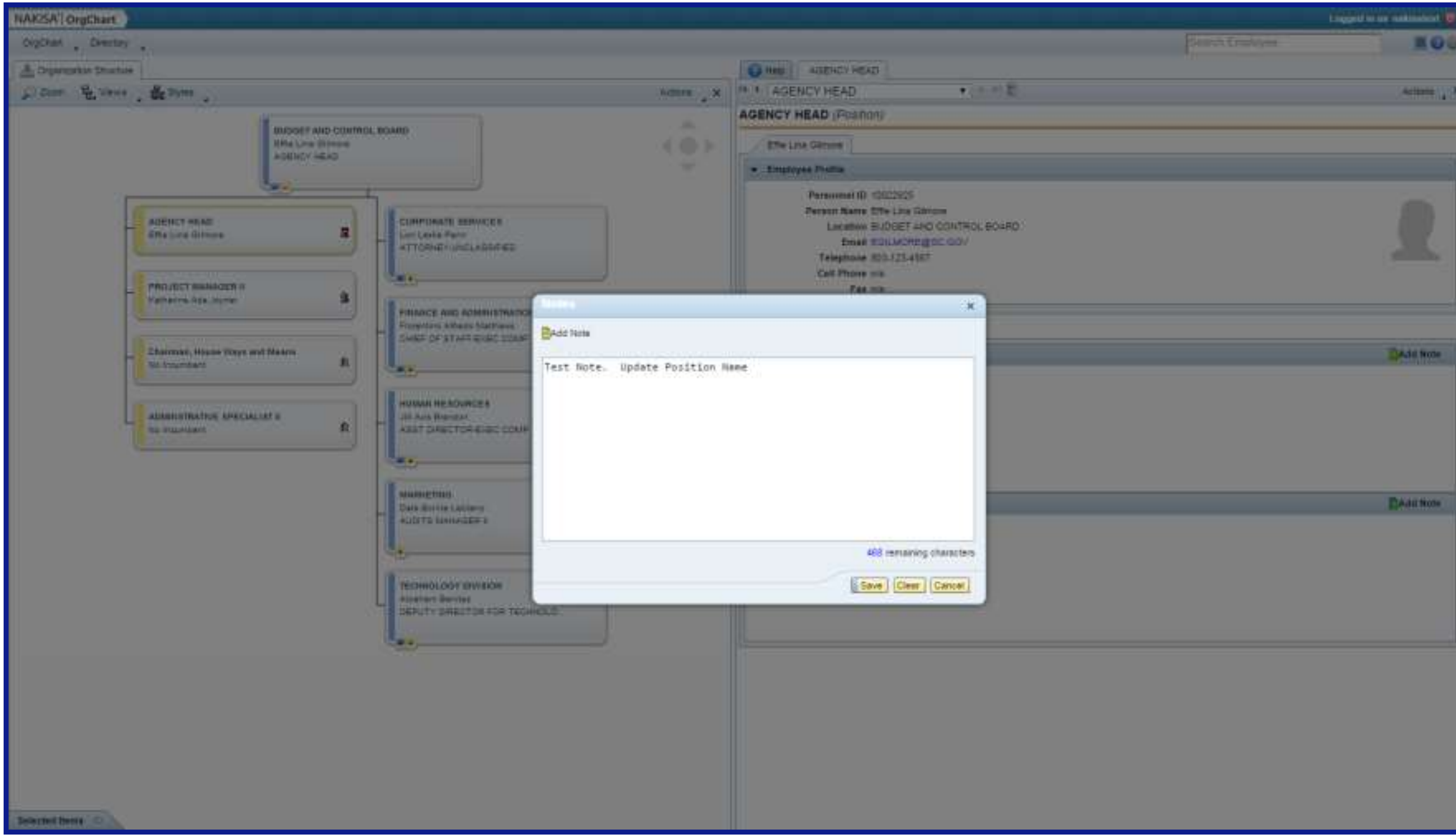


# Notes – Public or Private

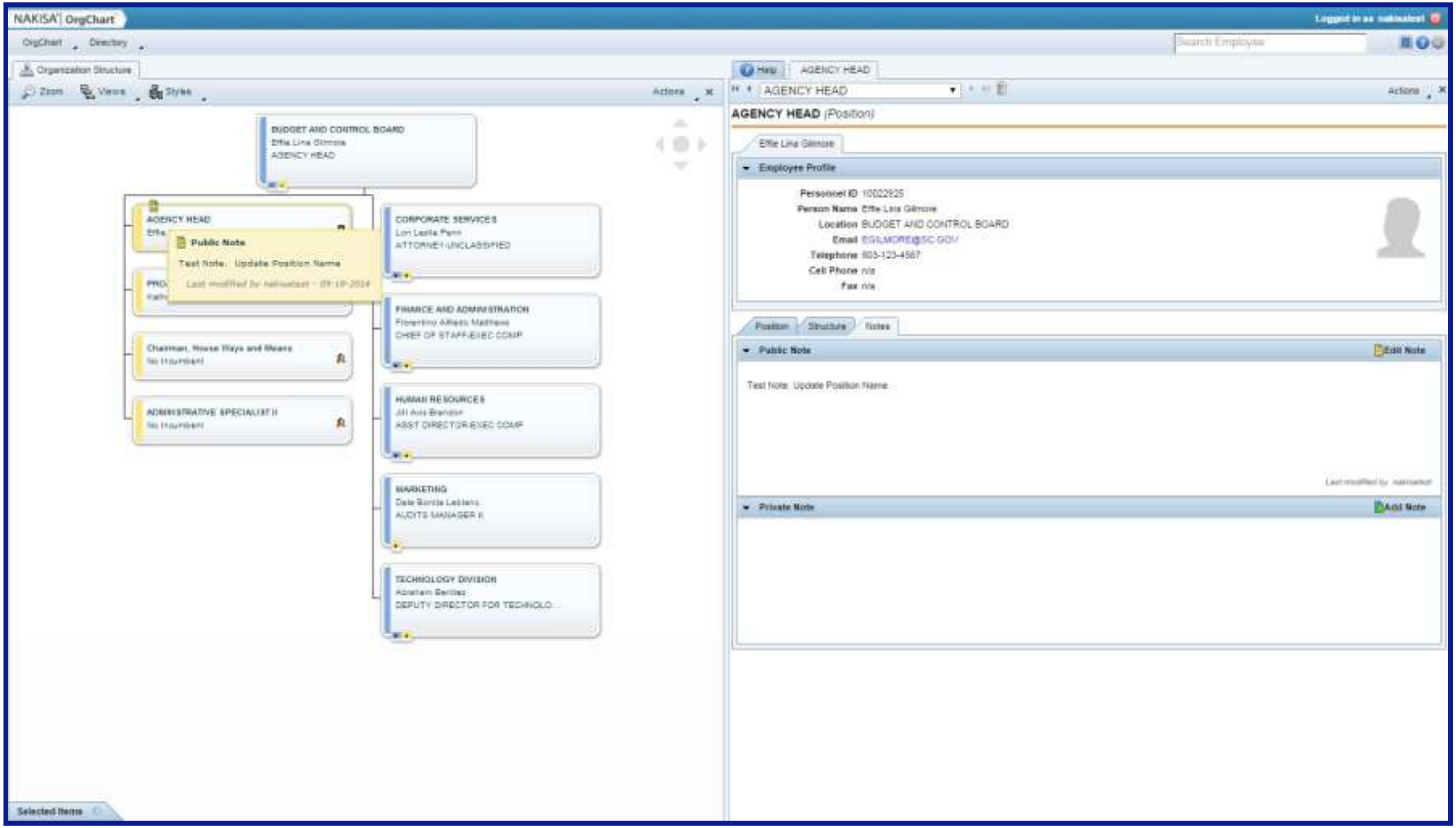
- Public notes can be seen by anyone with access to your agency.
- Private notes can only be seen by the person who creates the note.



# Create Note

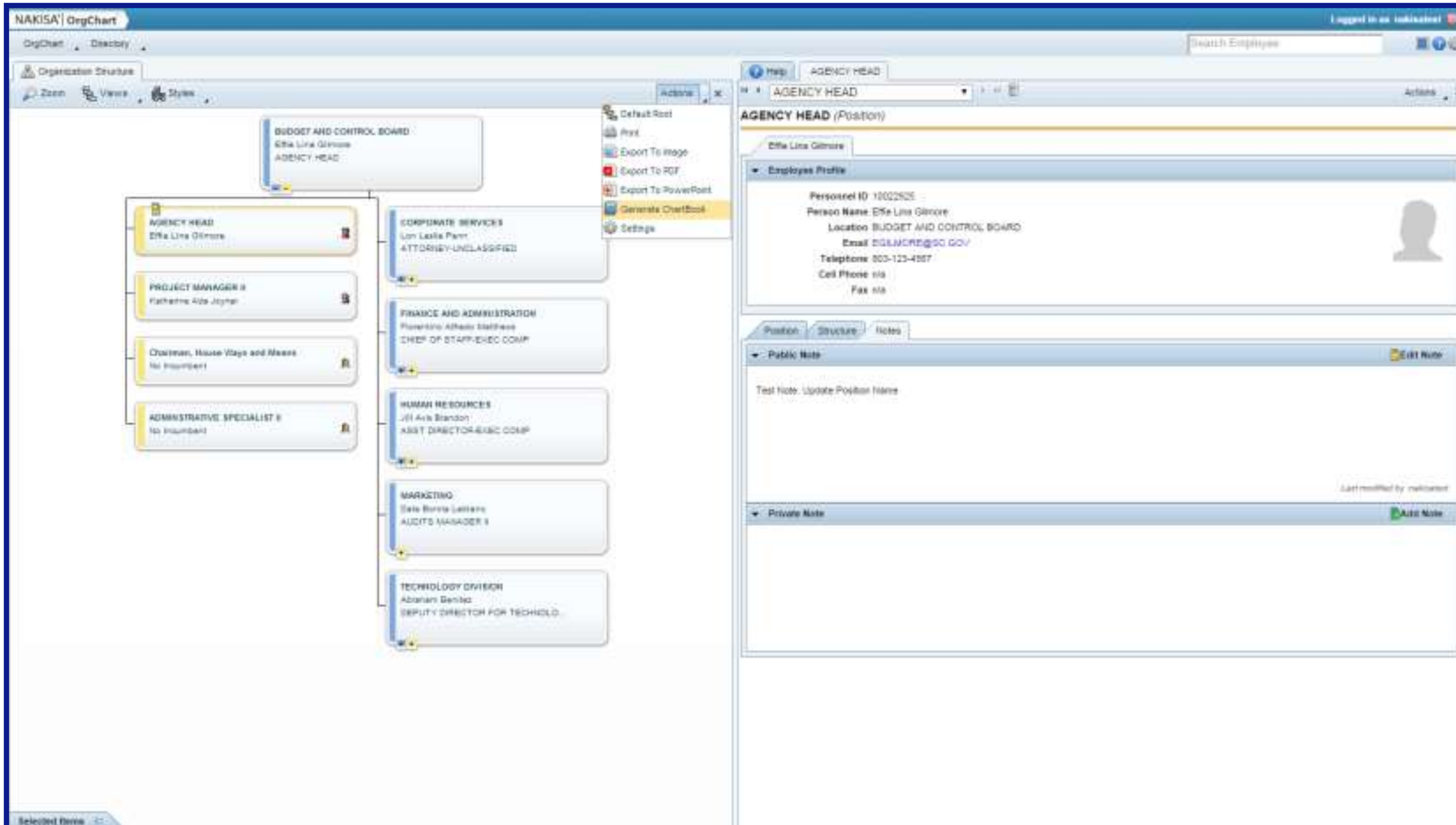

Add Note
Test Note.  Update Position Name
remaining characters
Save
Clear
Cancel

# Notes Indicator

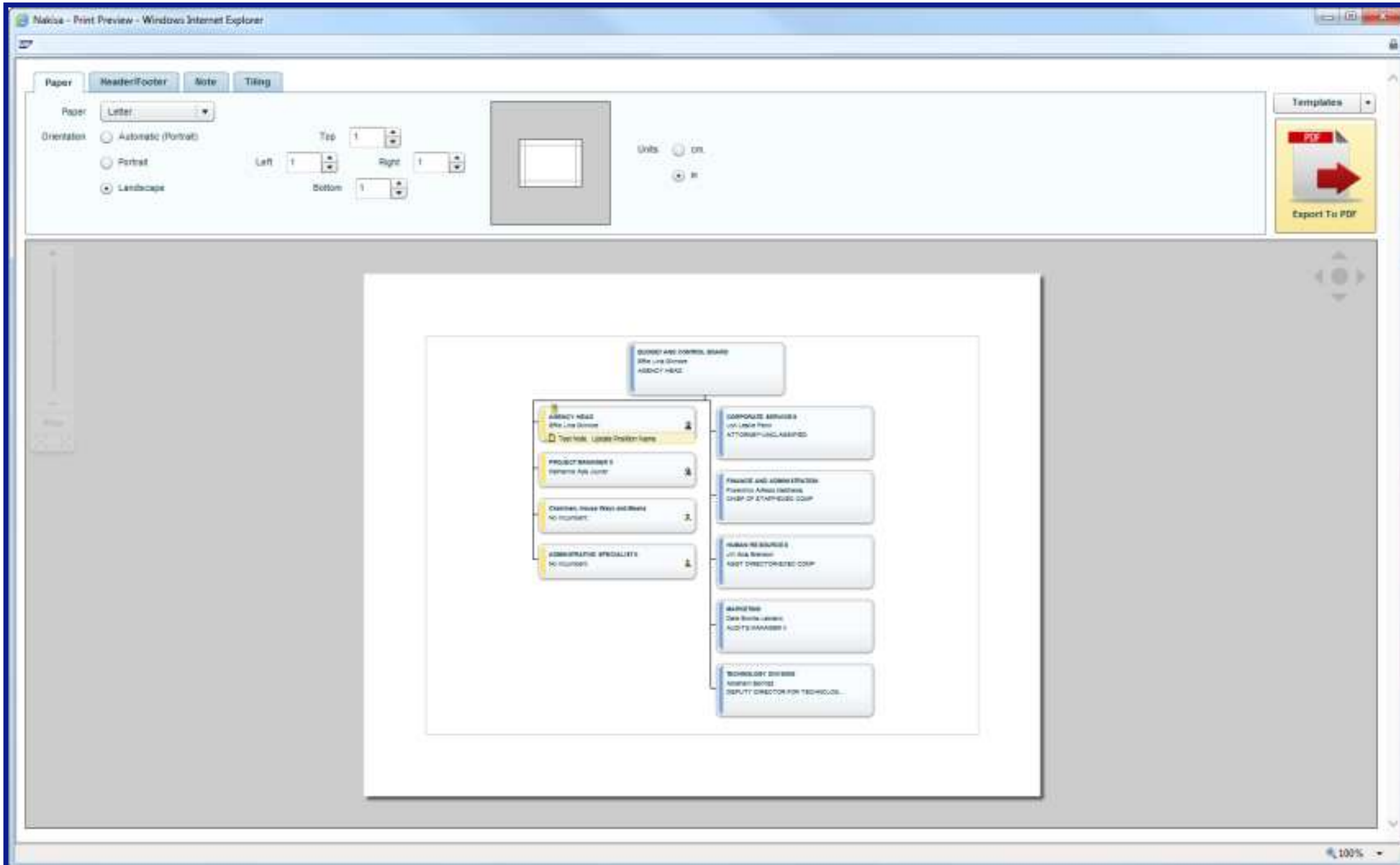


# Chartbooks

- Is an interactive PDF document to display and print org charts.
- Able to run in the background.



# Chartbooks



Nakisa - Print Preview - Windows Internet Explorer
Paper
Header/Footer
Note
Tiling
Paper
Letter
Orientation
Automatic (Portrait)
Portrait
Landscape
Top
Left
Right
Bottom
Units
cm
in
Templates
PDF
Export To PDF
100%

# Questions?

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# Year-End Activities
# Time and Leave Management
## Katie Derrick, SCEIS HR Team

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# 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

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# 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

# Finance Updates

# Closing Grants

## Bruce Burnett, SCEIS Finance Lead

# Lifecycle Stages of a Grant

- Lifecycle Stages

**Initial Draft**

**Award**

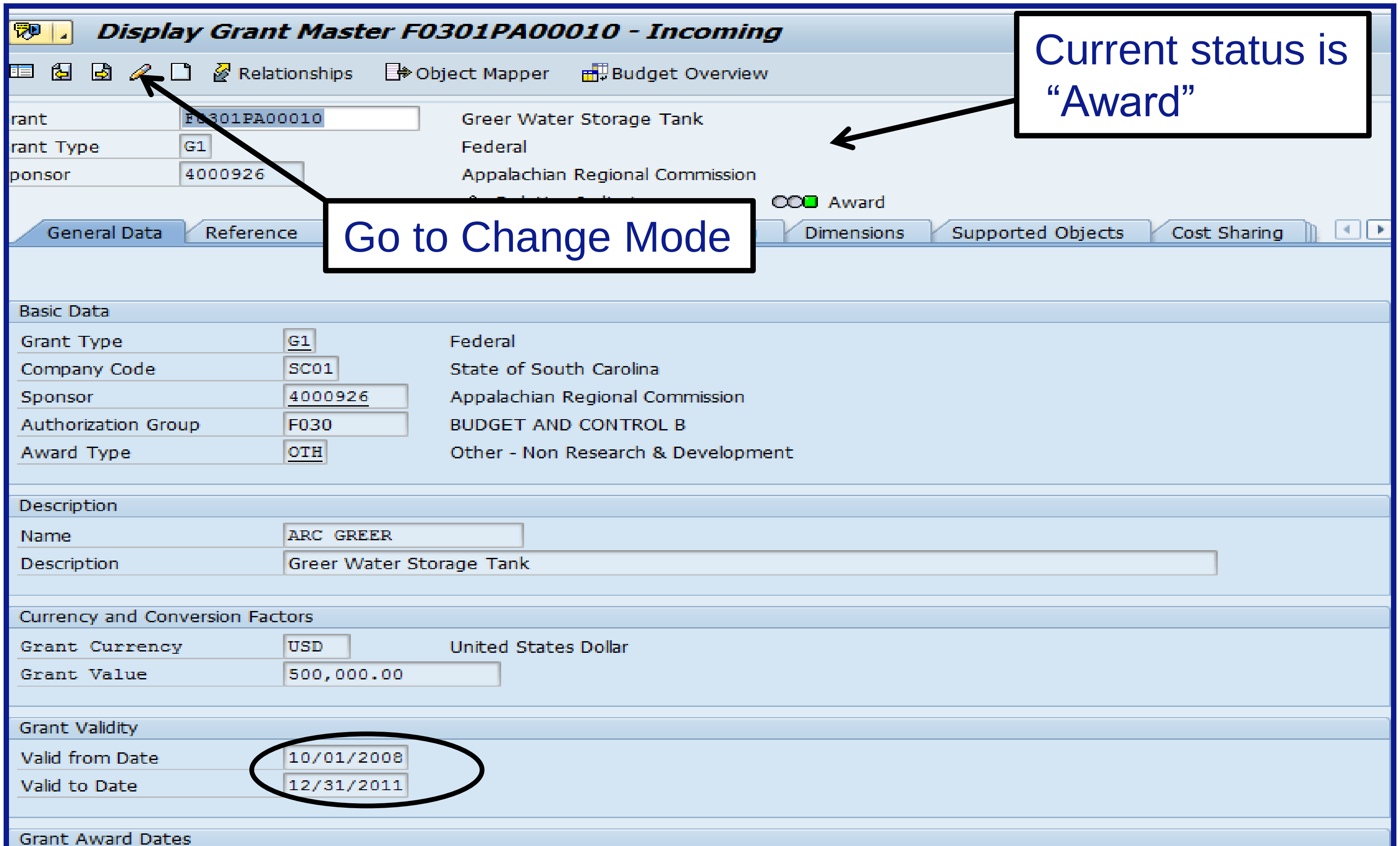
**Closing**

**Closed**

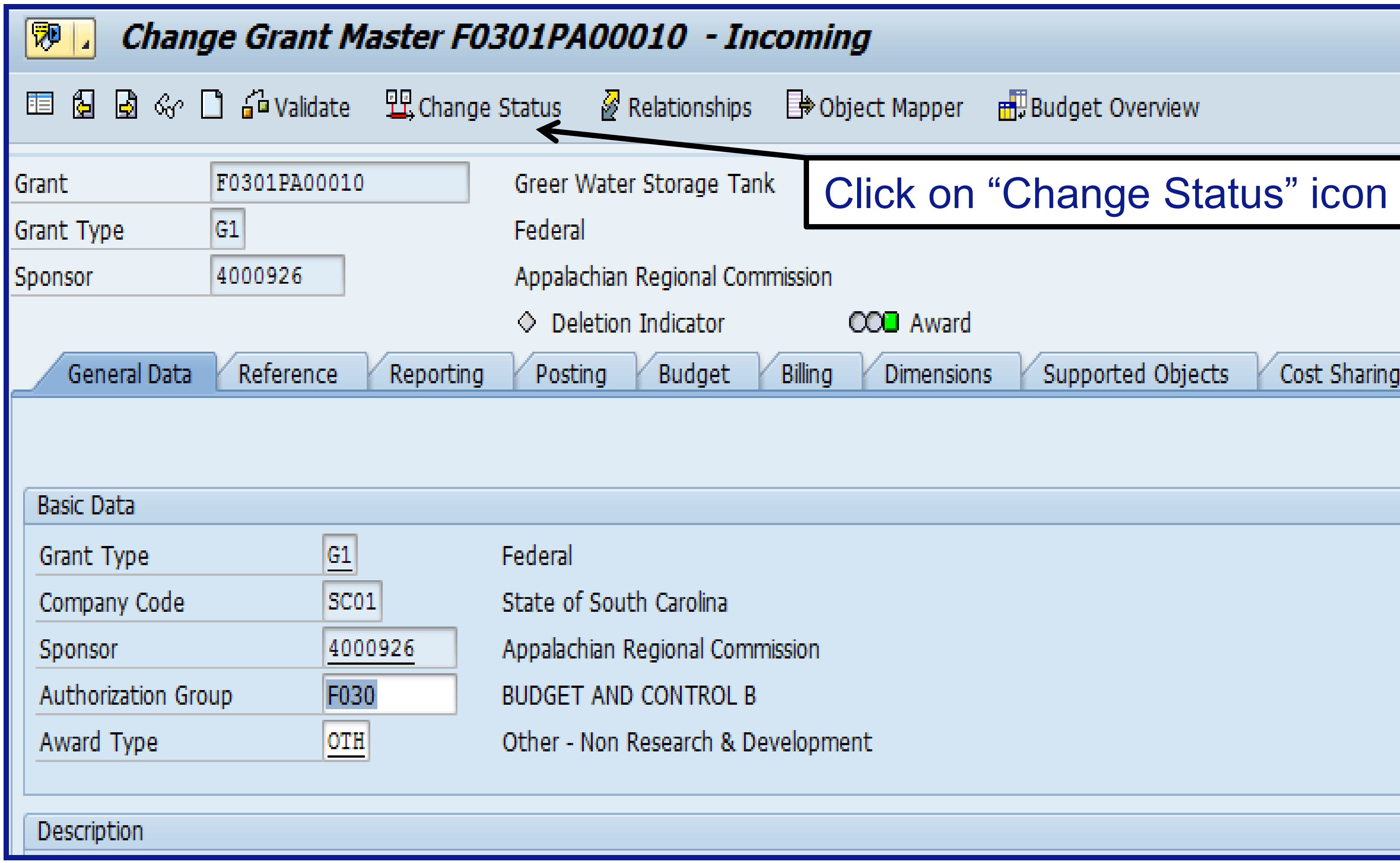
**Cancelled**

- 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

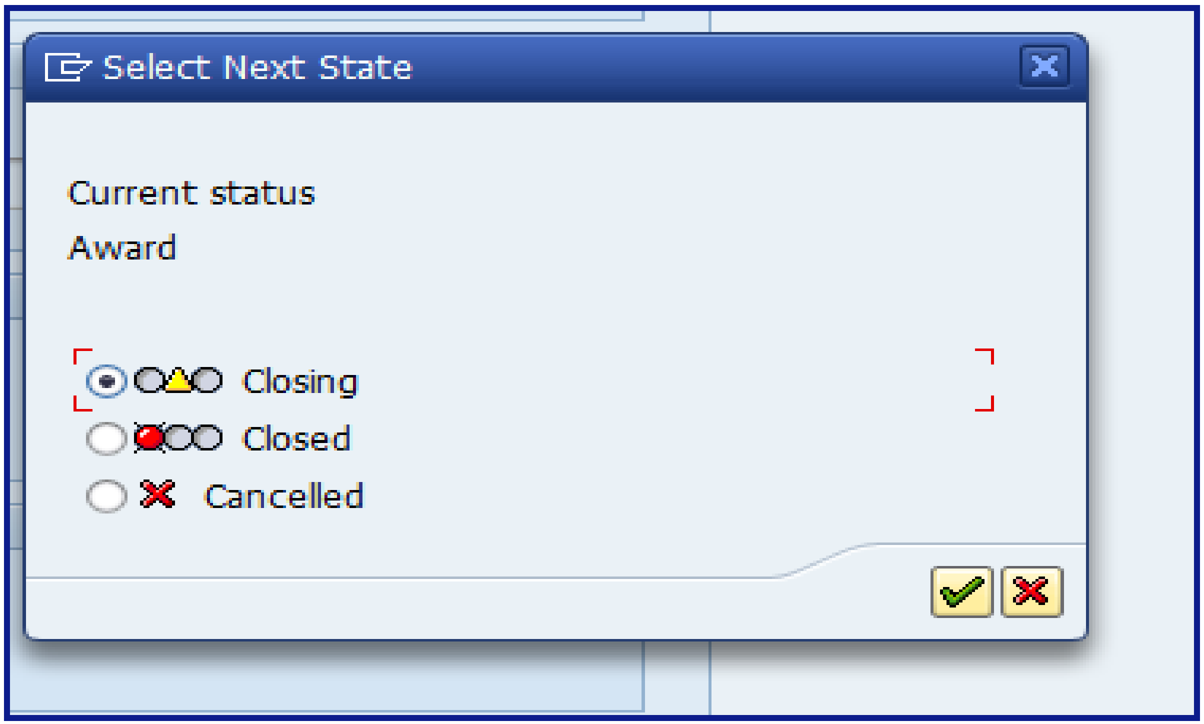


# Change Grant Status



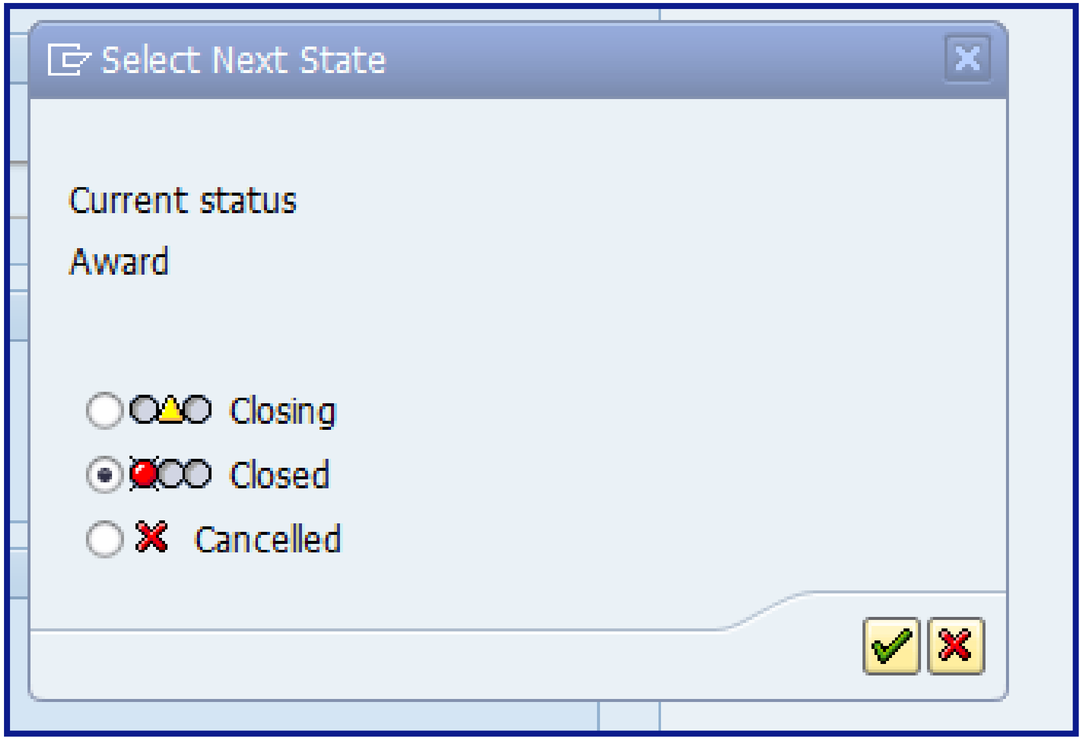
# Change Grant Status

The box below will appear; the normal progression is from "Award" to "Closing;" however; "Closed" or "Cancelled" can be selected.

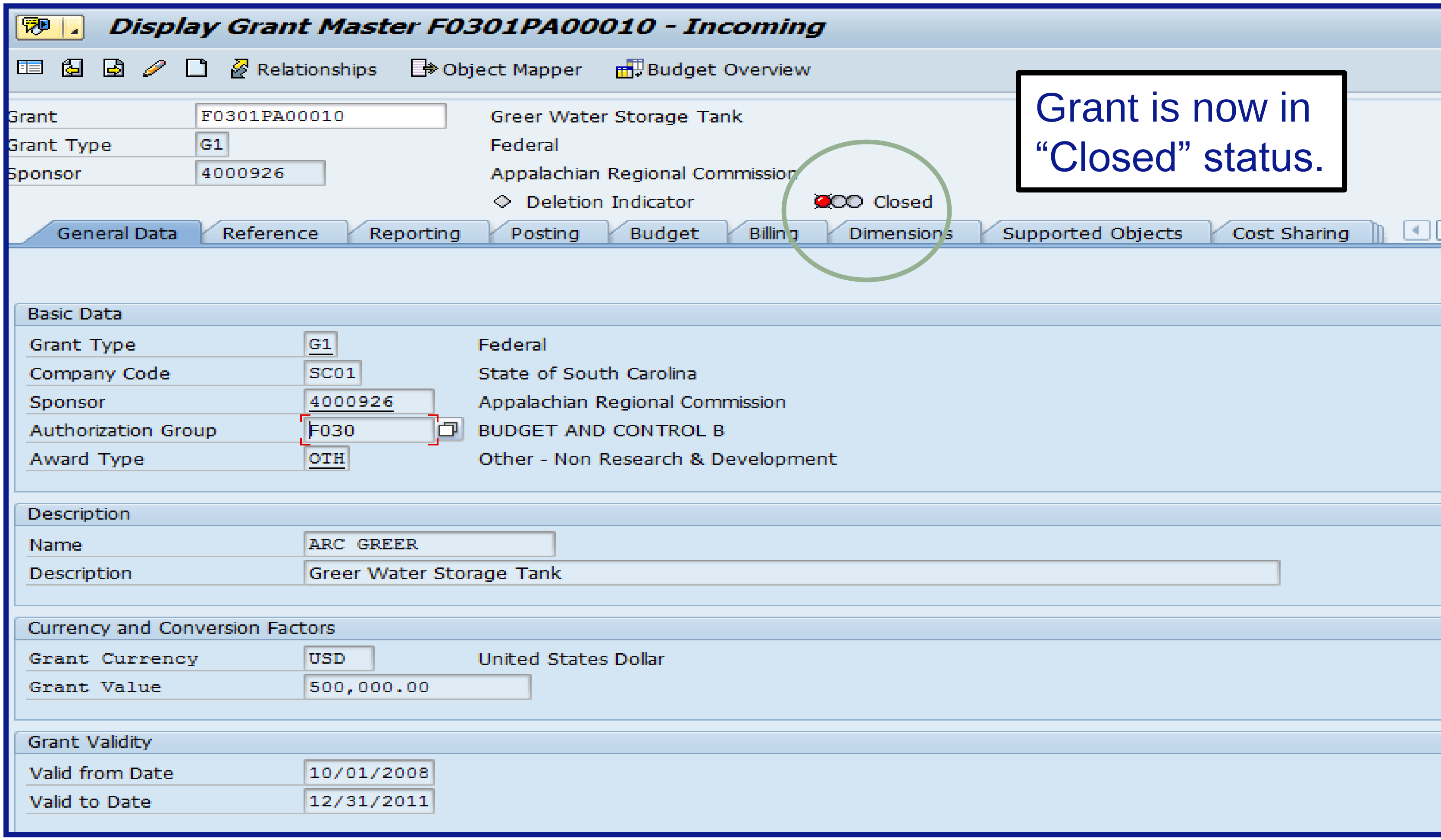


# Change Grant Status

To close the grant, select “Close,” click the green check, and “Save.”



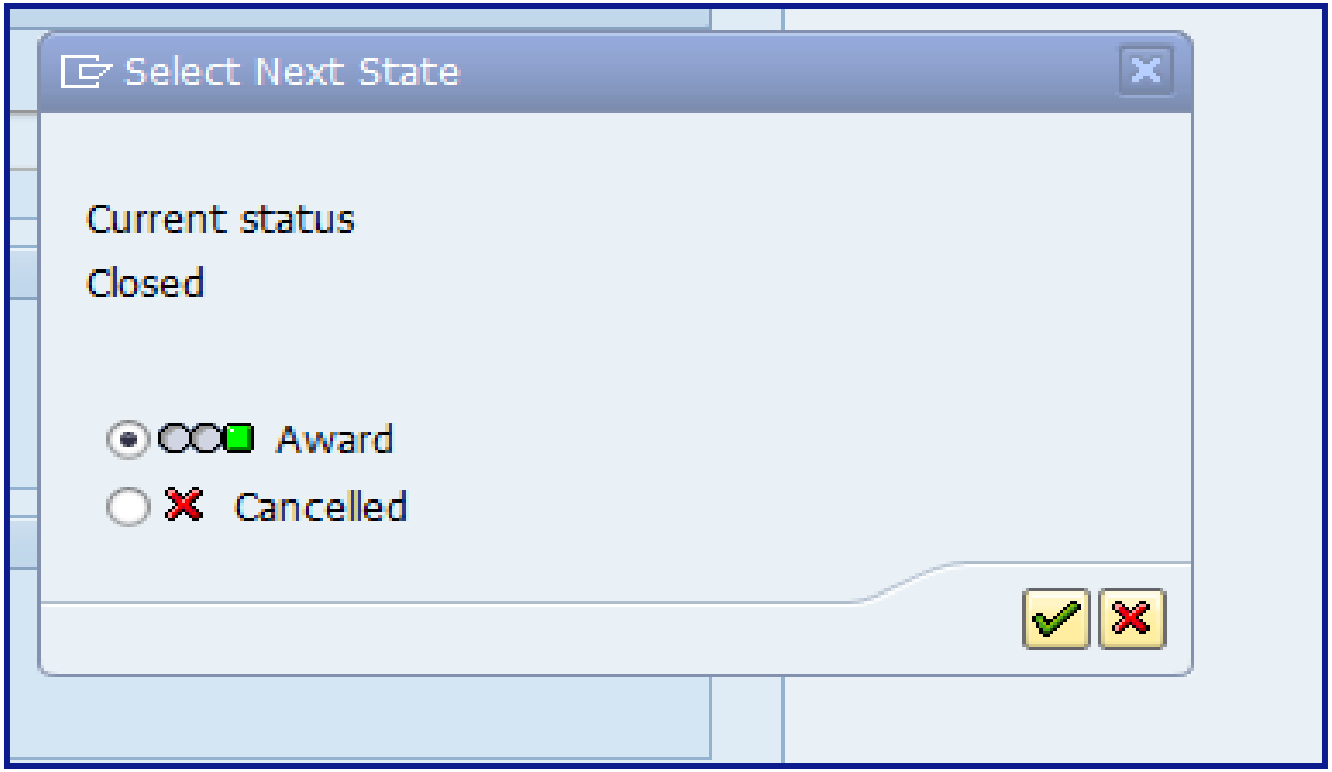
# Change Grant Status



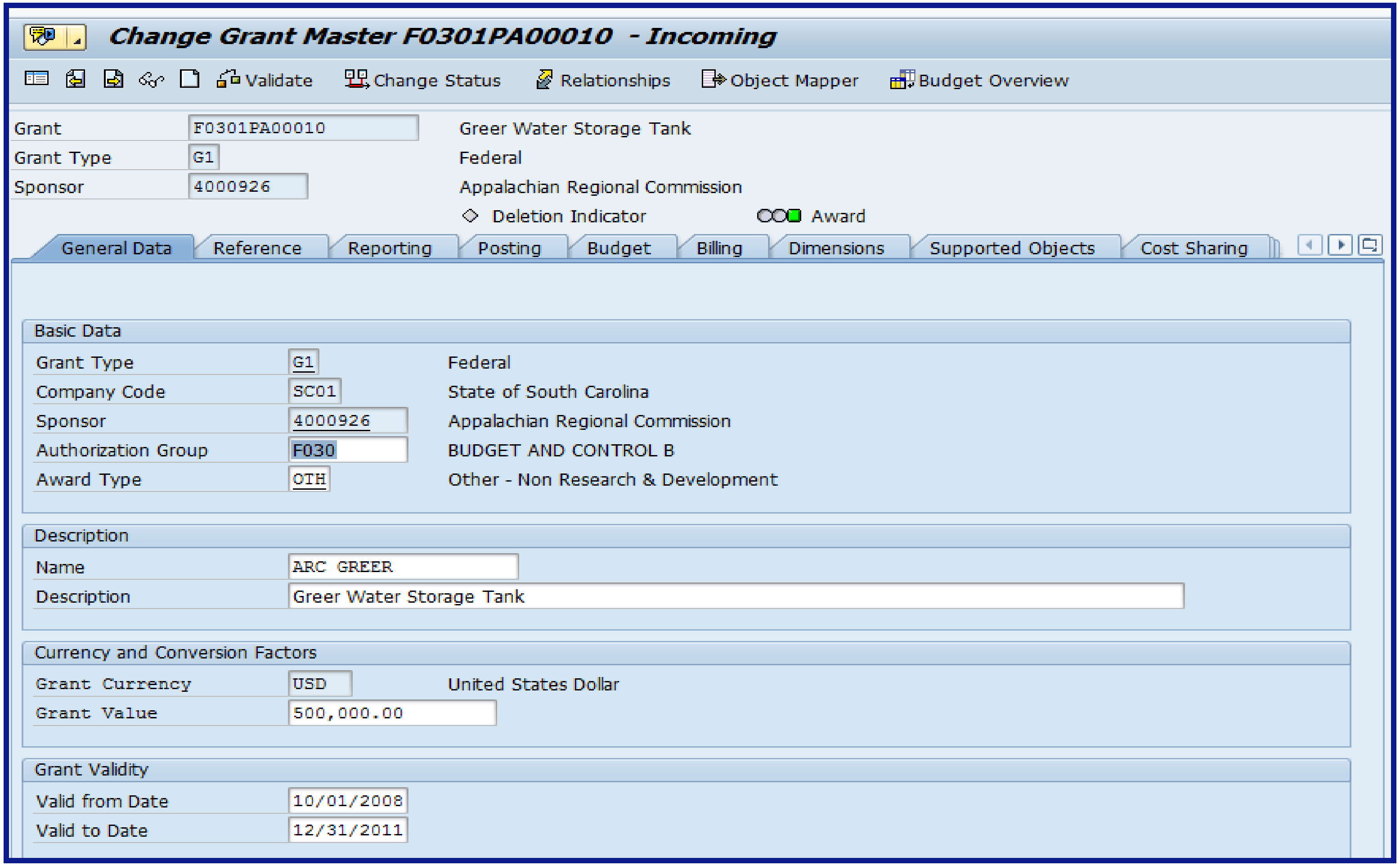

Grant is now in "Closed" status.

# Change Grant Status

A grant in “Closed” status can be changed to “Award” status.



# Change Grant Status



# 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

# Completed Tasks

- 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

# Department of Administration
# Renee Rochester, Budget and Control Board

# Department of Administration

- FY 2015 Effective July 1 – Revenue and Fiscal Affairs Office (Business Area E500)
- FY 2016 Effective July 1 – Department of Administration (Business Area D500)

# Department of Administration

## 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

# Department of Administration

## 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

# Department of Administration

## 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

# Department of Administration

- **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

# SRM Updates and Resolutions – Purchase Orders

- 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.

# SRM Updates and Resolutions – Purchase Orders

- 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.

# SRM Updates and Resolutions – Purchase Orders

- 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.

# SRM Updates and Resolutions – Purchase Orders

- 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.

# SRM Updates and Resolutions – Shopping Cart

- 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 Updates and Resolutions – Purchase Order

- “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

# SRM Updates and Resolutions – Shopping Cart

- 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

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# Improvements in Process

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# 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

# Improvements in Process

- 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

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# Frequently Asked Questions (FAQs)

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# FAQs

- 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

# FAQs

- 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

# FAQs

- 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.

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# Demonstrations

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B&CB

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# Demonstrations

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

    Purchase Order Account Assignment Processes

- 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.

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

# Tips and Reminders

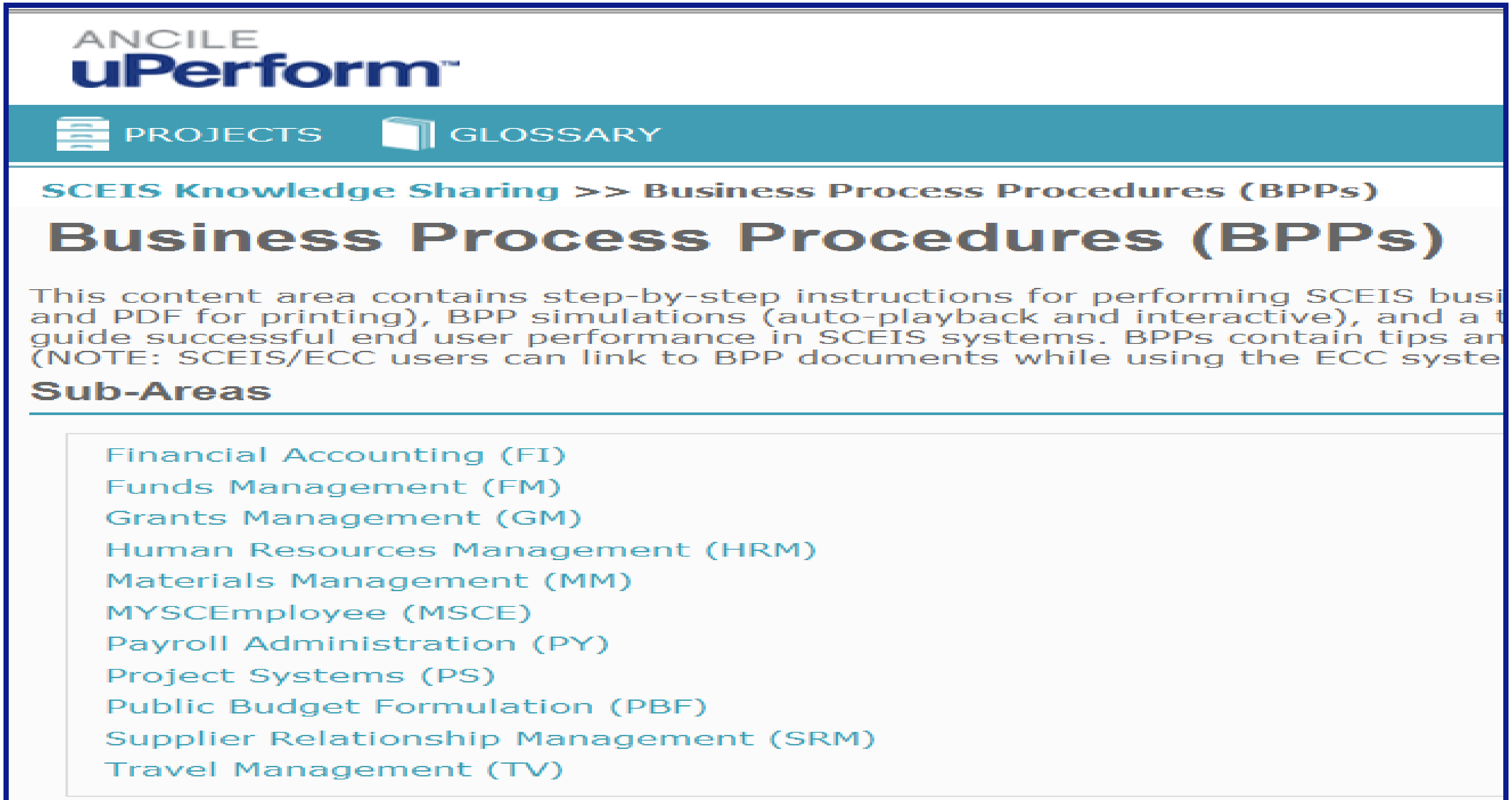
# u-Perform Documents

# u-Perform Documents

- Click on Business Process Procedures (BBPs).

# u-Perform Documents

- Click on Supplier Relationship Management (SRM).

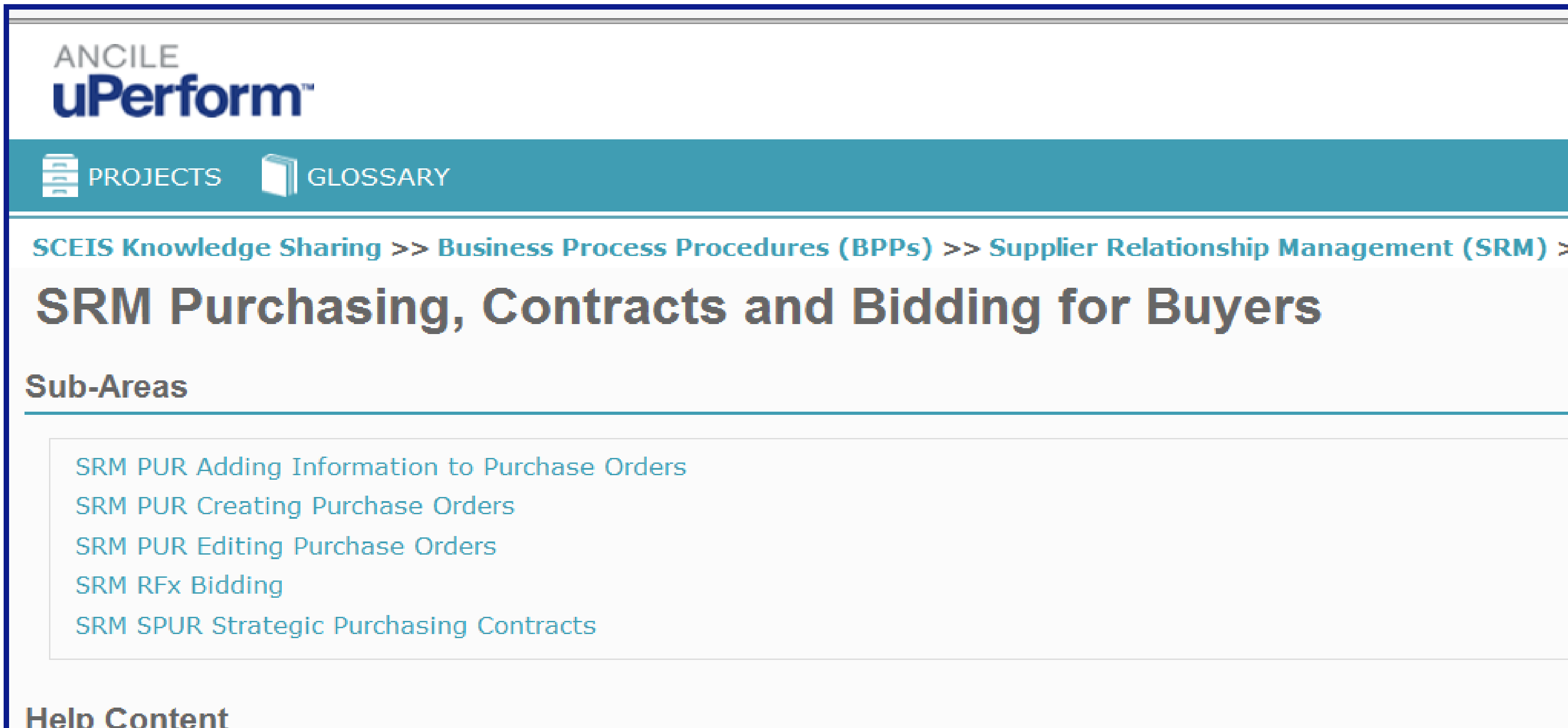


# u-Perform Documents

- Click on the general “Sub-Area” for a list of “Help Content” documents.

# u-Perform Documents

- For example, Purchasing, Contracts and Bidding for Buyers

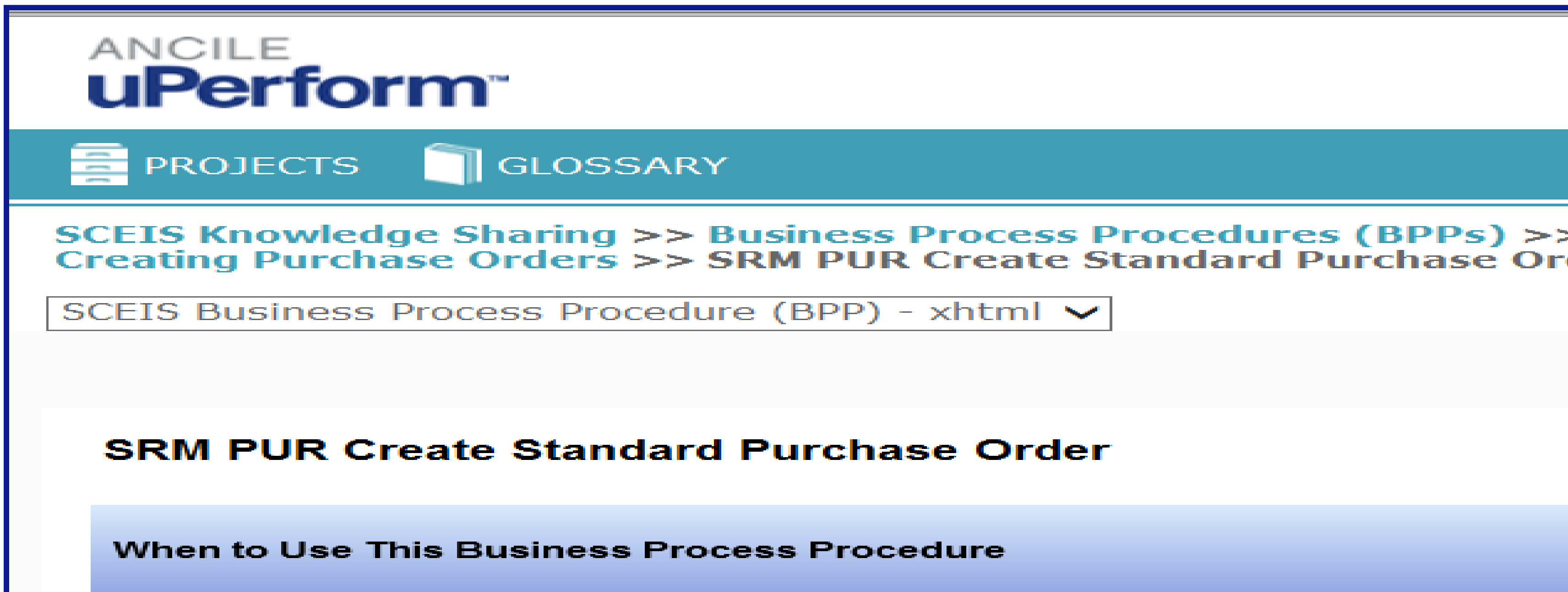


# u-Perform Documents

- Then select the specific “Help Content” area you wish to view.

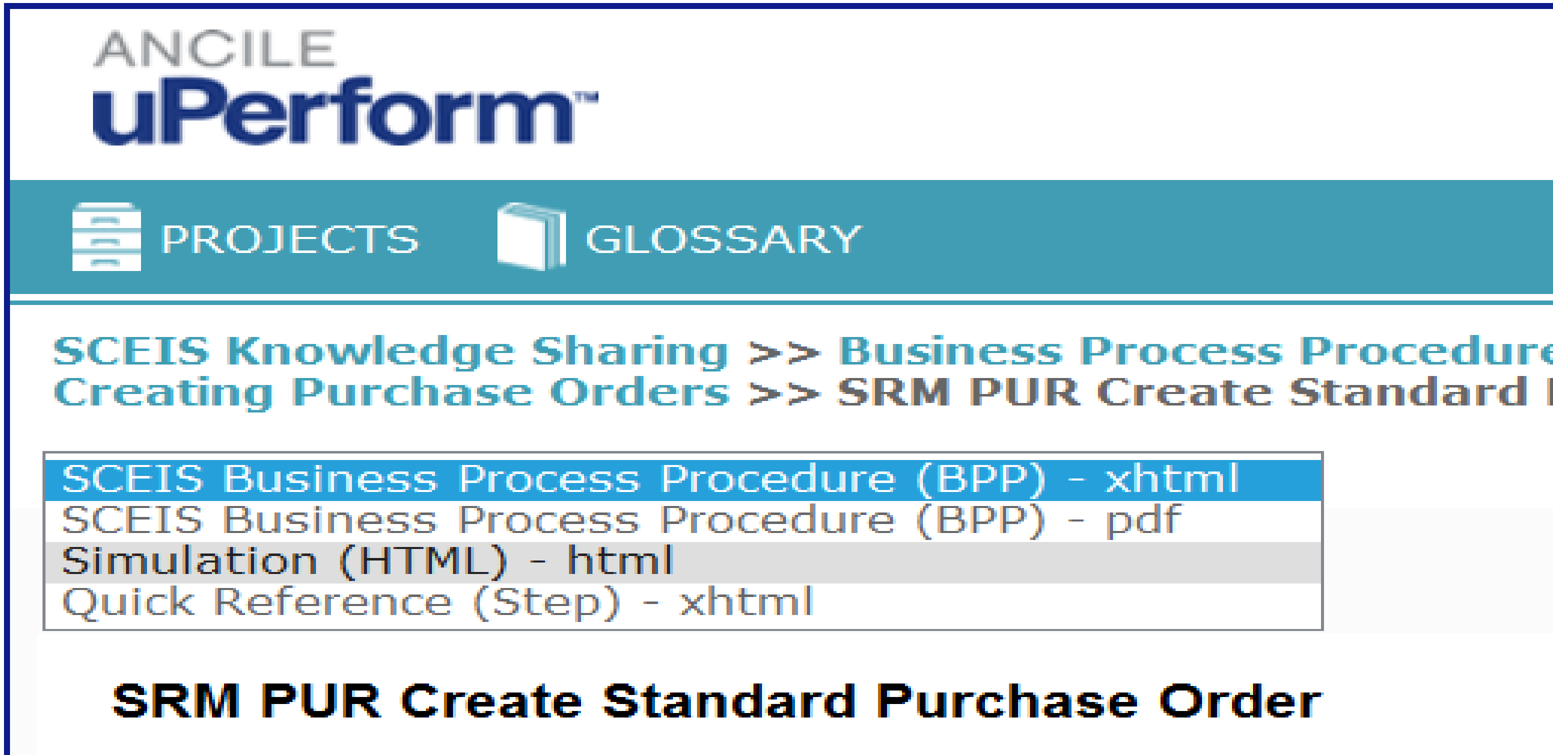
# u-Perform Documents

- 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.



# u-Perform Documents

- After reading the document version, another option is “Simulation” which allows you to click through each step of the process.

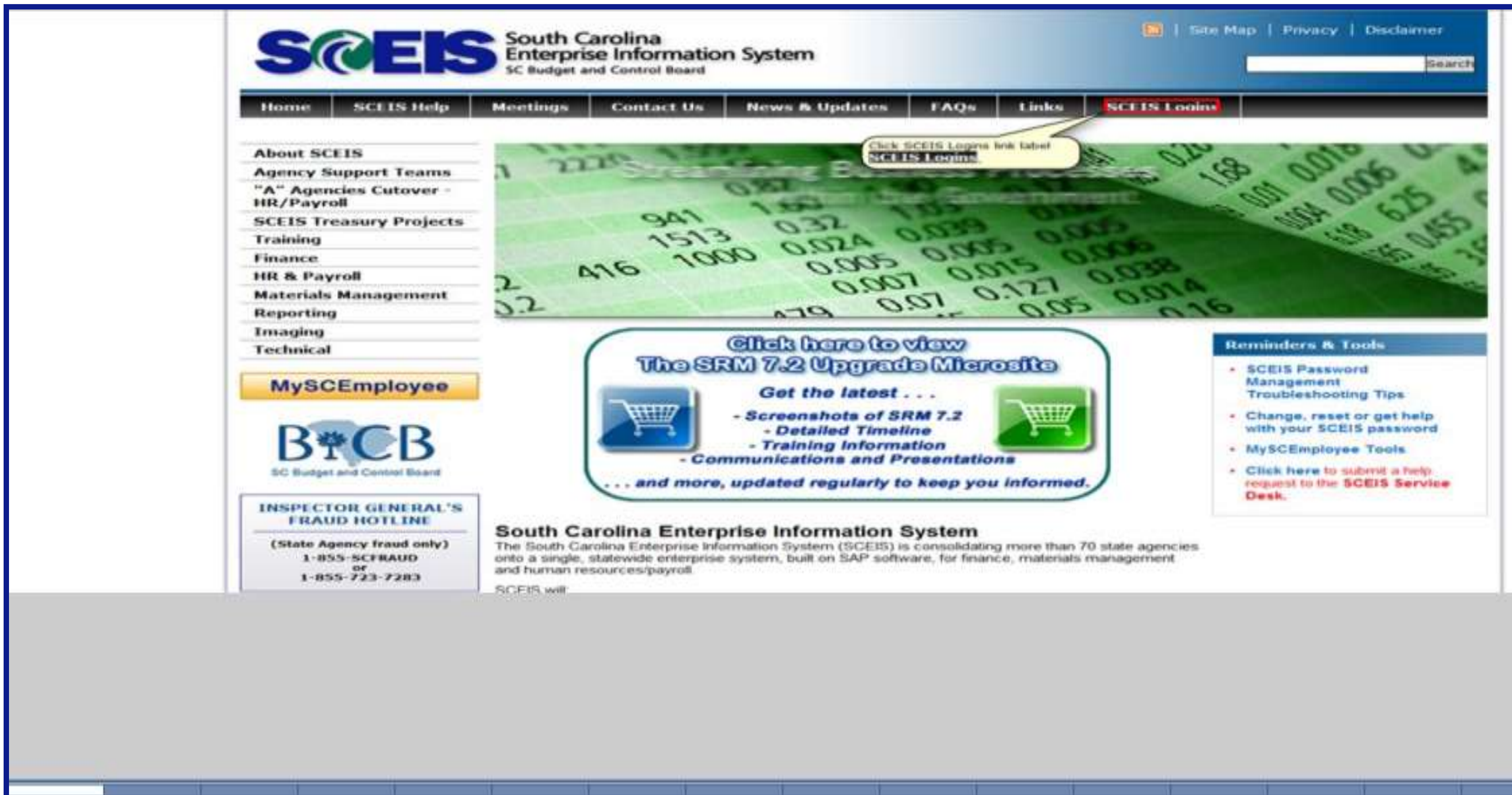


# u-Perform Documents

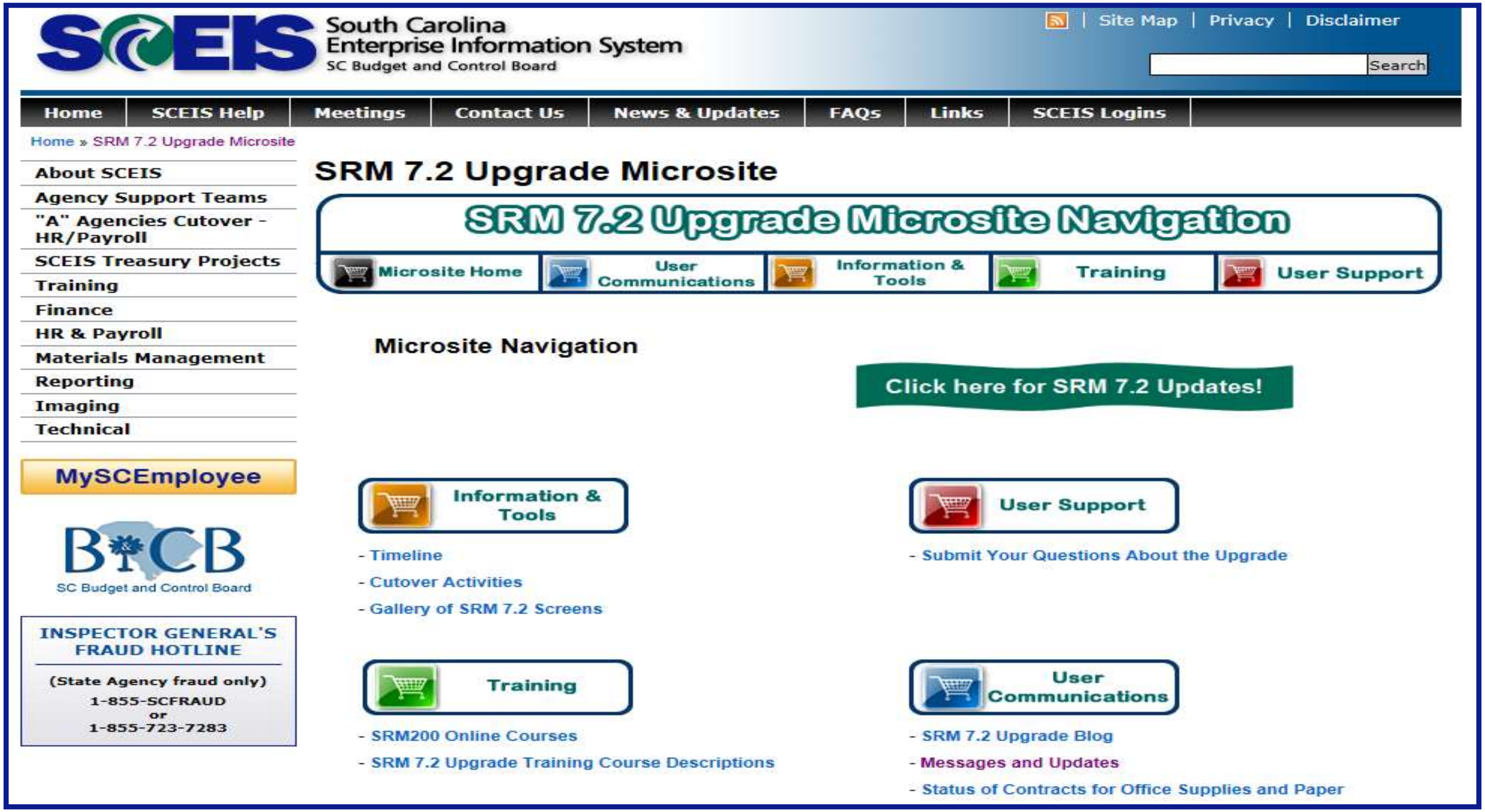
- Select among the options for "Simulation."

# u-Perform Documents

- 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



# Next User Group Meeting

- 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.