



Module 5: SCEIS Procurement Process Flow

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## Learning Objectives

SC EIS  
South Carolina Enterprise Information System

- Requesting Materials
- Approving Requests
- Managing Bids for Material Contracts
- Administering Contracts
- Purchasing Approved Requests
- Managing Follow-On Purchasing Documents

SC EIS

Upon completion of this course module, you should have a better understanding of tasks within the SC Public Procurement Process Flow and its components, as performed in the South Carolina Enterprise Information System:

This module covers the following tasks:

- Requesting Materials
- Approving Requests
- Managing Bids for Material Contracts
- Administering Contracts
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## Introduction



### Planning

- Timely
- Competitive
- Meets Goals for Goods/Services



### Authorized/"Legal"

- Pursuant Code & Regulations
- Applied Business Rules



### SCEIS Processing

- Users, Roles, Responsibilities & Understanding
- Central Government Help Resources



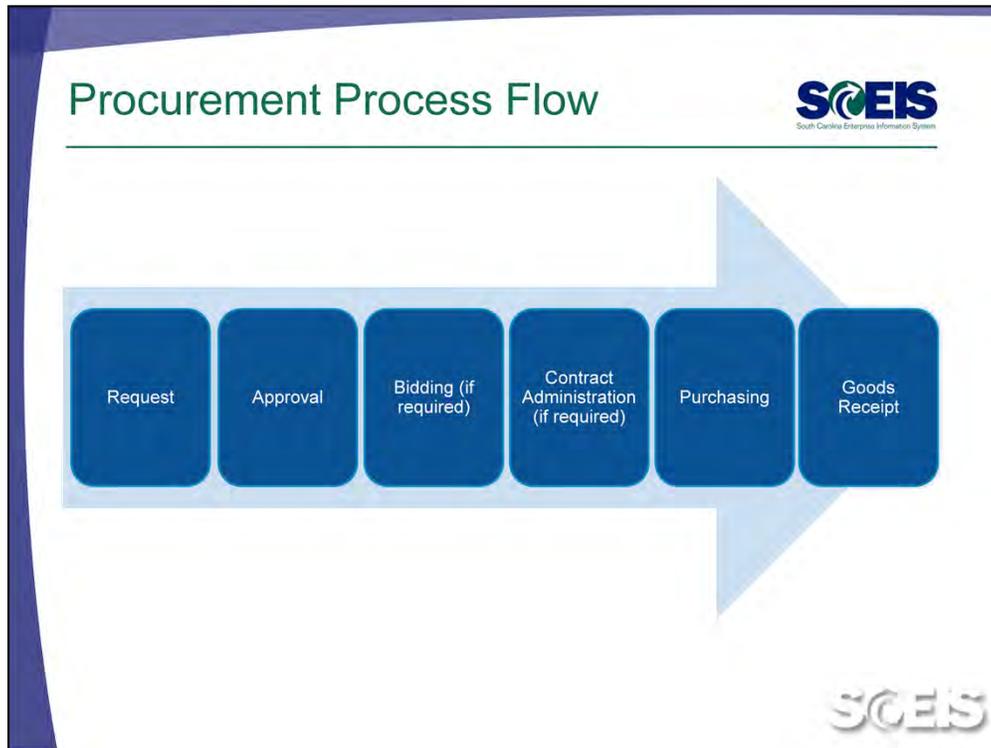
This course module is a high-level discussion of the SC Public Procurement process flow as implemented in the SCEIS Procurement system.

In general, Procurement can be a lengthy process; however, the goal is good procurements.

Planning must be timely, so all steps to competitively meet all goals and objectives for materials are met.

Authorized/"legal" Procurement is pursuant Code and Regulations, applying all business rules as required.

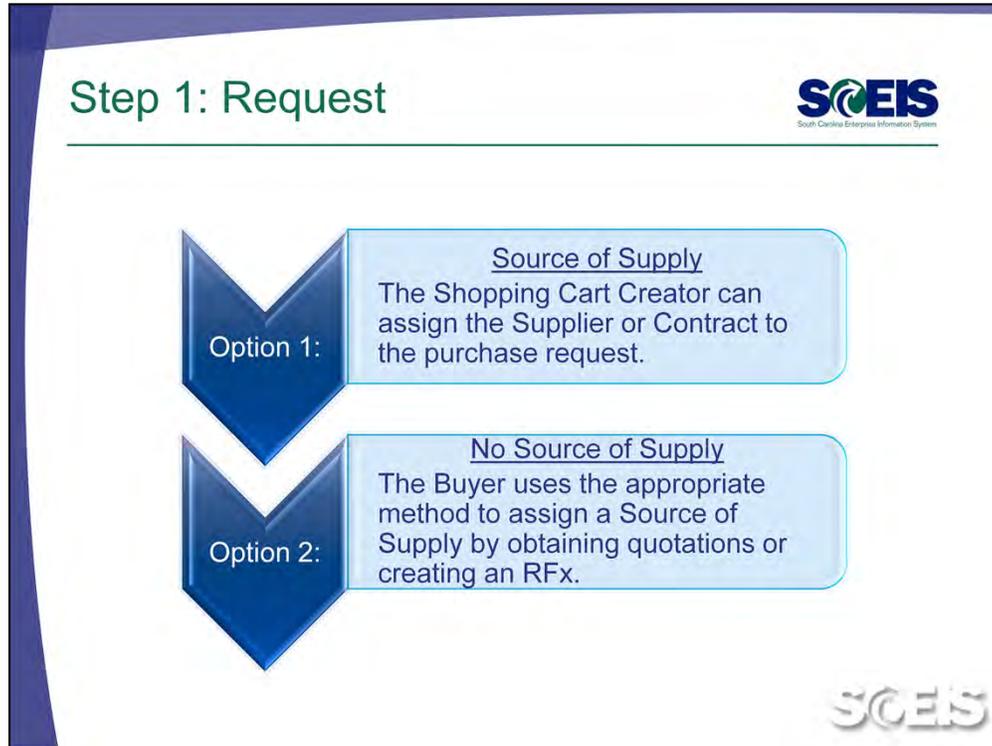
Standard processing occurs in the SCEIS Procurement system by agency assigned users with the appropriate roles, responsibilities and understanding of the system. Users also take advantage of Central Government resources for continuous support.



The Procurement Process Flow integrates six major steps that enable the continuous yet standard processing of inputs and outputs leading to good Procurement processing.

- Request
- Approval
- Bidding (if required)
- Contract Administration (if required)
- Purchasing
- Goods Receipt

## Step 1: Request



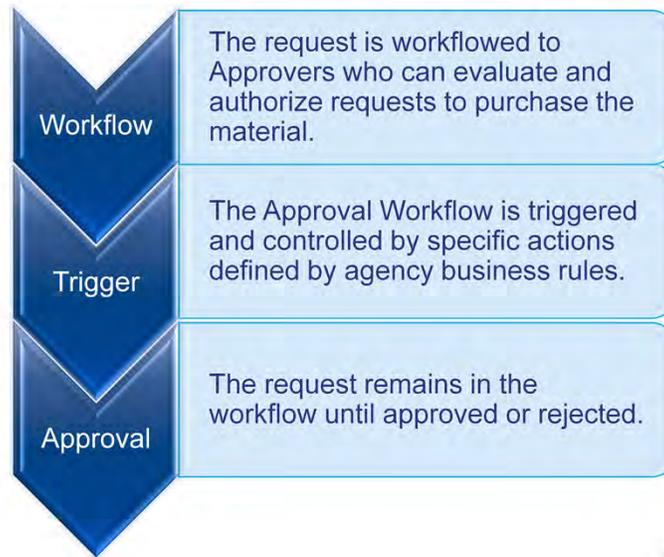
In the Request step:

Procurement begins with the assignment of a Supplier to the purchasing request.

There are two options on how the assignment can occur.

- When there is a Source of Supply, the Shopping Cart Creator can assign the Supplier or Contract to the purchase request.
- When there is no Source of Supply, the Buyer will use the appropriate method, according to Procurement Code and Regulations, to assign a Source of Supply such as by obtaining quotations or creating an RFx.

## Step 2: Approval



In the Approval step:

Requests are workflowed to person(s) in the agency who can evaluate and authorize requests to purchase materials.

- The Approval Workflow is triggered and controlled by specific actions defined by agency business rules.
- The request remains in the workflow until approved or rejected.

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## Steps 3 & 4: Bidding & Contract Administration



When no Contract is available but one is needed for purchasing the requested materials, the Bidding and Contract Administration steps are performed.

Pursuant the Code, the Buyer uses a variety of competitive processes for selecting Sources of Supply for Small Purchases versus Complex Purchases, and for awarding Contracts.

Additionally, Contracts are managed by the Buyer to ensure the validity of the Contract such as contracted dates, total value, prices, terms, and conditions.

## Step 5: Purchasing



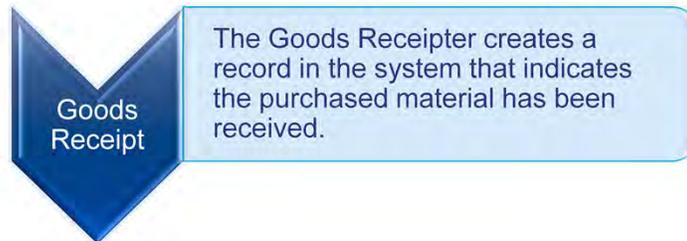
In the Purchasing step:

The information in an approved request is used to create the required Purchase Order Document Type. Such information includes

- financial accounting data such as grant, fund, cost center, and general ledger accounts;
- conditions data such as taxes, freight, surcharges, discounts, and trade-ins;
- general data such as item quantity, pricing, unit, and the ship-to address;
- standard text or notes such as internal agency communications or external instructions for the Supplier.
- attachments such as quotations, statements of work, terms & conditions, and specifications; and

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## Step 6: Goods Receipt



Accounting documents that follow the Purchase Order are called Follow-On Documents. These documents must be properly handled, allowing the procurement to become ready for payment.

In the Goods Receipt step:

- The Goods Receipter creates a record in the Procurement system that indicates that the requested material has been received.

## Procurement Process Flow and SCEIS Process Folders



SCEIS

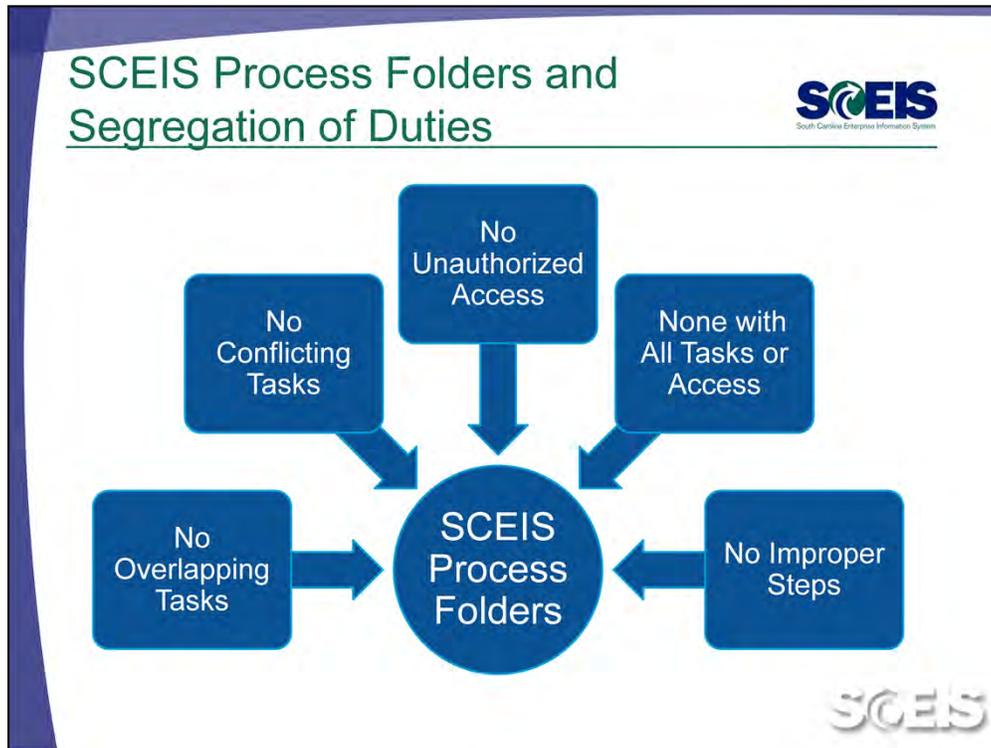
The process folders in the SCEIS Procurement system support the business rules for Procurement processing.

That is,

- The Employee Self-Services Folder is used by the Shopping Cart Creator for requesting materials.
- The Home Folder is used by the Shopping Cart Approver for approving /rejecting requests.
- The Strategic Purchasing Folder is used by the Buyer for Bidding and Contracts Administration, as required.
- The Purchasing Folder is used by the Buyer for creating and managing Purchase Orders.
- And, the Goods Receipt (M-I-G-O, “me go”) Folder is used by the

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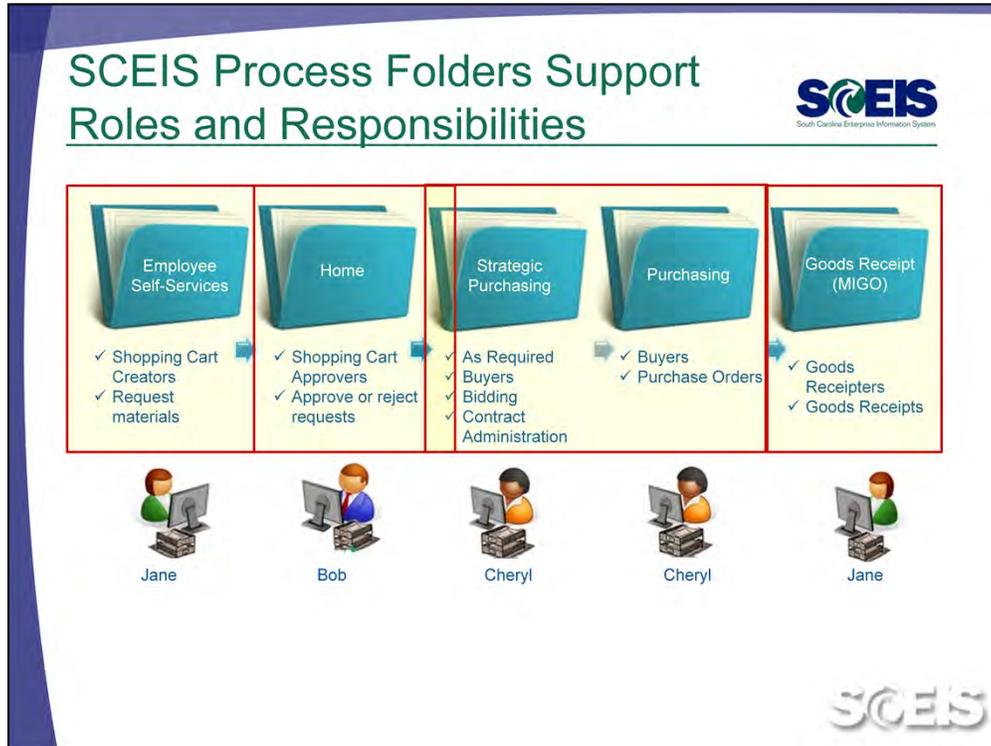
Receiver for recording a receipt for the material in the Procurement system.



The Process folders in the SCEIS Procurement system support segregation of duties.

The Process Folders do not provide:

- Overlapping tasks,
- Conflicting tasks,
- Unauthorized access,
- All Procurement tasks in a single folder, or
- Steps out-of-sequence.



The Process Folders in the SCEIS Procurement system support security roles and responsibilities.

Users can only view and access the Process Folders that align with their authorization in the Procurement system.

That is,

Jane must view and access both the Employee Self-Service and MIGO Folders to perform her work.

Bob can only view and work in the Home Folder. He cannot view or access the Employee Self-Services Folder to create his own request.

Cheryl can view and work in both the Strategic Purchasing and Purchasing Folders, but she cannot create a Goods Receipt.

And, no one can view and access all Process Folders.

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## Lesson 5: Summary



- You should now have a better understanding of the SC Public Procurement Process Flow and its components, as performed in the South Carolina Enterprise Information System (SCEIS):
  - ✓ Requesting Materials
  - ✓ Approving Requests
  - ✓ Manage Bids for Material Contracts
  - ✓ Administering Contracts
  - ✓ Purchasing Approved Requests
  - ✓ Managing Follow-On Purchasing Documents



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You have completed all materials for PR101 Foundations of Procurement. Now, you should continue to the Assessment. You must take and pass the assessment to obtain credit for this courses.