

SCEIS Processes for Shopping Carts and Purchase Orders for October 2015 Severe Flooding (FY16)

PURPOSE: The following process is provided by the SCEIS Team for creating Shopping Carts and Purchase Orders that pertain to expenditures **using Internal Order number 98000008 (2015 Severe Flooding (FY2016)).**

IMPORTANT: These instructions follow the normal SCEIS Shopping Cart (SC) and Purchase Order (PO) processes with the noted exceptions within these instructions. These instructions are prepared from the perspective that the user has been trained and knows how to create a SCEIS SC and/or PO.

The SC Creator must enter the <u>Internal Order Number</u> in the SC under the Account Assignment tab's <u>Details button</u>. This emergency declaration's <u>Internal Order Number is 98000008</u>. The Internal Order Number must be entered in the <u>data field Order</u>.

Details for item	Details for item 1 sand and gravel to be delivered-Anderson											
Item Data	Account Assignment Notes a	nd Attachments	Delivery Address/Performa	nce Location	Sources of Supply / Service A	Agents Approval Process Overview U						
You can see who bea	ou can see who bears the costs and, if necessary, you can distribute the cost to several cost centres											
Cost Distribution Pe	ercentage 🔻 Details Add Line	Copy Paste D	uplicate Delete Split	Distribution Change	ge All Items							
Number	Accounting Line Number	Percentage	Account Assignment Cate	gory	Assign Number	Account Assignment Description						
0001		100.0	0 Cost Center		U120E2M301	Laurens Maint						
Details for Item 0001	1 : Cost Center											
Basic Data				Fi	und: 44909000	AFS-HIWY&PUBLIC TRAN						
Perce	entage: * 100.00			Commitment It	em: 5031550000							
Account Assignment C	Category: Cost Center 💌		Un	funded Accounting Li	ine:							
Cost C	Center: * U120E2M301	Laurens Maint		in and the second second second second								
Fund	d Center: U120E2M301	Laurens Maint										
	Order: 98000008	2015 Severe Flooding	g (FY2016)									
	Grant: NOT RELEVANT	NOT RELEVANT										
Function	nal Area: U120_6210	U120 Highway Mainte	enance									
Controlli	ing Area: SC01											
General Ledger	Account: 5031550000	MOTOR OIL										

If a SC is copied from an "Old Shopping Cart," the Internal Order Number will not be transferred to the new SC. This data must be keyed-in for each SC that is applicable for this emergency situation.



The normal SCEIS SC Workflow approval processes apply to this standard SCEIS SC process. The SC will have a funds check for the SC.

The Supplier Relationship Management (SRM) SC was created and approved by the agency.

Shopping Cart Monitor											Help E
▼ Search for Shopping Carts											
Name of Shopping Cart:							Num	ber of Shopping Cart:	2001088464	То	
Status:								Item Description:			
							Pure	chasing Organization:			ð
Purchasing Group: V								Product Category:		1 To	ð
Product:								Created By:			0
Created On:	Created On: To To To To To										
Requester:	Requester: 1 To 1 To 1 To 1										
Catalog:								Goods Recipient:		🗇 То	0
Delivery Date:								Logical System:		🗇 То	đ
Assigned To:							Number of i	Follow-On Document:		То	
Type of Follow-On Document:											
Maximum Number of Items (Total):	1,000										
Search Clear Entries	Jearch Clear Entries										
Search Result											
Details Delete Create Follow	Details Delete Create Follow-On Document Update Shopping Cart Back-End Data Update Messages Team Cart Filter Setting									Settings	
Object Number	Name of Shopping Cart	Created By	Created On	Status	Total Value	Currency	Messages	Messa	ge Counter	Team Cart	
▶ <u>2001088464</u>	2015 Severe Flooding (FY2016	LIS53331	10/12/2015	Approved	77.25	USD			0		

The Buyer sources the SC from the normal SCEIS purchasing process.

The path is Purchasing > Purchasing > Perform Sourcing.

Back Forward & History Favo	rites Personalize View Help
Shopping Cart Monitor Replice	E E E E E E E E E E E E E E E E E E E
Overview Reports Service M	tap
1	Purchasing > Overview > Purchasing
Work Overview	
Purchasing 2	Active Queries
Sourcing	Shopping Carts All (0) Seved (0) Awaiting Approval (0) Public Templates (0) Recomended Items (0) POWL Refresh saved (0)
Invoice Processing	Purchase Orders All (4) Saved (0) Awaiting Approval (1) Rejected (0) Ordered (1) Confirmations pending (0) Purchase Order Responses All (0) Rejected by Supplier (0) Partially Confirmed (0) Linconfirmed Orders (0) Variance in Response (0) Confirmed by Supplier (0) Not
- Services	Confirmations All (0) Saved (0) Awaiting Approval (0) Approved (0) Rejected (0) Deleted (0) Confirmations for Team Carts (0)
Advanced Search	Document Output Last 7 Days (0)
Create Documents	Shopping Carts - All
Shopping Cart	- Hide Quick Criteria Maintenance
Shopping Cart Template	Shopping Cart Number: 📕 2001061059 To
Confirmation	Shopping Cart Name:
Invoice	Item Description:
Central Functions	Timeframe:
Notify Recipient	Creation Date: D7/01/2013 😭 To 💽 🖻
Perform Sourcing	Status:



During this emergency time, the SC Creator and the Buyer are in constant communication for the approved SCs that need to be sourced. You may search for the SC by entering either the specific SC number or you may use the Delivery Date Range option. Click on the Search button to display the results of your search criteria.

Assian Sources of	Assian Sources of Supply: Step 1 (Select Reauisition)											
Previous Next	Close	(40.5.00	,							
I.												
Select Requisition	Select Requisition Assign Sources of Supply (No Items) Review Drafts (No Items) Summary Screen (No Documents											
▼ Search Criteria: Requis	▼ Search Criteria: Requisitions											
Number of Requisition:	2001088464	e of Requisition										
Item Description:				Product Category:								
Product:		đ		Supplier:								
Requester:		đ		External Requirement:								
Purchasing Organization:		đ			Account Assignment Category:							
Purchasing Group:		đ			4	Account Assig	gnment Number		đ			
Priority:		•				Intend	ed for Grouping					
Delivery Date Range:	In 30 Days	•				Includ	le Locked Items:					
Delivery Date:	10/12/2015 👘	To: 11/11/2	2015 🕅	7								
Search												
Select All Expand (Collapse Hide S	Subordinate	Outlines				Reject It	ems				
Requisition / Item Nu	mber Description	Category	Priority	Quantity	Unit	Requester	Delivery Date	Supplier Number	Supplier Name			



The system retrieved the example data below from the above search.

	Assiss Courses of Cusplus Chap 1 (Colort Dequisition)												
Assign Sources of	Assign Sources of Supply: Step 1 (Select Requisition)												
Previous Next 🕨	Close												
Select Requisitio	n Assion Sources	of Supply (No Items)	Review	v Drafts (I	No Items)		Summary Screen (No D	ocuments)					
	n Abbigh Courtes	or cappiy (no homo)		i brano (i	10 11011107		Sammary Coroon (110 D	ocumento,					
- Secret Criterio: Bequir													
◆ Search Ontena. Requis	▼ Search Cittera: Requisitions												
Number of Requisition:	2001000404			Nam	ne of Requi	sition:							
Item Description:				P	roduct Cate	egory:							
Product:					Su	oplier:							
Requester:		Ð		Exten	nal Require	ment:							
Purchasing Organization:		ð	Acco	unt Assig	nment Cate	egory:	•						
Purchasing Group:		Ð	Acc	ount Assi	gnment Nu	mber:							
Priority:		v		Intend	led for Grou	uping:	с 🗖						
Delivery Date Range:		•		Includ	de Locked I	tems:							
Delivery Date:	To:	1 7											
Search													
Select All Expand	Collapse Hide Subor	dinate Outlines All Cate	gories		▼ Re	iect Iter	ns						
Requisition / Item Nu	mber Description		Category	Priority	Quantity	Unit	Requester	Delivery Date	Supplier Number	Supplier Name	Contract		
• 2001088464/1	sand and gravel to	be delivered-Anderson	75077		5.00	TON	LISA CUMALANDER	10/12/2015	7000028137	QUALITY HAULERS INC	4400008957/1		

The Buyer must display the SC by clicking on the Requisition/Item Number link to validate the Internal Order Number. In this example, the SC Number is 2001088464/1. Click on the SC number. The system will retrieve/display the SC in the Item Data tab view.

Display Shopping Cart												
Drist Draviow	Print Preview Close Refresh											
Number 2001088464 Document Name 2015 Severe Flooding (FY2	2016 Status Approved Created On	10/12/2015 17:05:13 Created By Ms. LISA CUMALANDER										
Details for item 1 sand and gravel to be delivered-Anderson												
Item Data Account Assignment Notes and Attachme	ents Delivery Address/Performance Loca	ation Sources of Supply / Service Agents Approval Process Overview										
Identification	Currency Values and Brisin											
Item Type: Material	Order Quantity / Unit:	t 500 TON US Ton										
Description: send and gravel to be delivered Anderson												
Description: sand and graver to be derivered-Anderson	Ordered Quantity / Unit:											
Product Category: 75077 Sand and Gravel	Open Quantity / Unit:	t: 5.00 TON										
Order as Direct Material:	Price / Currency:	r: 15.45 USD Price Unit 1										
Organization												
Purchasing Group: DOT - NORMA HALL TA	Not Separately Priced:											
	Incremental Funding Active:	E 🗌										



Change the view by clicking on the **Account Assignment** tab. Then select the **Details** button.

		1										
	Details for item 1 sand and gravel to be delivered-Anderson											
	Item Data Account Assignment Notes and Attachments Delivery Address/Performance Location Sources of Supply / Service Agents											
Yo	u can see who	bears t 2 s and, if neces	sary, you can distri	bute the cost to several cost cen	tres							
Со	st Distribution	Percel Details	Add Line Copy	Paste Duplicate Delete	Split Distribution Change	e All Items						
	Number	Accounting Line Number	Percentage	Account Assignment Category	Assign Number	Account Assignment Description						
	0001		100.00	Cost Center	U120E2M301	Laurens Maint						
CI	ipboard											

This will change the view so you can display the Internal Order Number 98000008, which was entered in the Order data field.

Details for item 1 sand a	nd gravel to be delive	ered-Anderson									
Item Data Account	Assignment N	otes and Attachn	nents Delivery Addr	ess/Performa	ance Location	Sources of Supply / Servi	ice Agents	Approval Process Overview	Related Docum		
You can see who bears the costs and, if necessary, you can distribute the cost to several cost centres											
Cost Distribution Percentage	Details Add	Line Copy	Paste Duplicate Delete	e Split	Distribution Change	All Items					
Number Accounting L	ine Number	Percentage	Account Assignment Categ	ory	Assign Number	Account Assignment D	escription	General Ledger Account	General Ledge		
0001		100.00	Cost Center		U120E2M301	Laurens Maint		5031550000	MOTOR OIL		
Details for Item 0001 : Cost Co	enter										
Basic Data Percentage: Account Assignment Category: Cost Center: Fund Center: Order: Grant: Functional Area: Controlling Area: General Ledger Account: Business Area:	100.00 Cost Center U120E2M301 U120E2M301 98000008 NOT RELEVANT U120_6210 SC01 S031550000 U120	Laurens Ma Laurens Ma 2015 Sever NOT RELEV U120 Highv MOTOR OI	int e Flooding (FY2016) /ANT vay Maintenance L	Unfu	Fund: Commitment Item: inded Accounting Line:	44909000	AFS-HIWY&PUB	LIC TRAN			



Once the correct Internal Order Number is validated in the SC, the Buyer can close the Display Shopping Cart screen by clicking on the Close button to proceed with sourcing the SC.

isp	lay Shop	oing Car	t					
Print	Preview	Close Refr	esh					
lum	ber 20010884	.64 Do	cument Name	2015 Severe Flooding (FY2016	Status Approved	Created On 10/12/2015 17:05	:13 Created	By Ms. LISA
v (General Data							,
Nam	Buy on Behai e of shopping Header D Approval Proc Bud ocument Chan	f of: 30045 cart: 2015 S ata: Values ess: Display get: Display ges: Display	Gevere Floodin	Ms. LISA CUMALANDER g (FY2016	Header Approva	il Note:		
▼ It	tem Overview							
	etails Add It	em 🖌 Copy	Paste Du	plicate Delete Process All Iter	ns 🖌			
5	Line Number	Item Type	Product ID	Description	Product Category	Product Category Description	Quantity Unit	Net Price / L
	• <u>1</u>	Material		sand and gravel to be delivered-And	lerson 75077	Sand and Gravel	5.00 TON	1
	Details for	item 1 sand	and gravel to	be delivered-Anderson				1
	Item Data	Accour	nt Assignmen	t Notes and Attachments	Delivery Address/Perfe	ormance Location Sour	ces of Supply / Se	vice Agents
Yo	ou can see wh	o bears the	costs and, if r	ecessary, you can distribute the c	ost to several cost centre	es		
Сс	ost Distributio	n Percenta	ge Det	ails Add Line Copy Paste [Duplicate Delete S	Split Distribution Change All Ite	ems	
	Number	Accounting	Line Number	Percentage Account	Assignment Category	Assign Number Ac	count Assignment	Description
-								



The Buyer will use the normal SCEIS process and source the SC.

In this example, the Buyer has selected the **Transaction Type** of **ZEMR: Emergency PO**.

ssign Sources of Supply: Step 3	(Review Drafts (1 Items))										
A Previous (Next B) Process Al Dights (Close) Process Selected Dights Edit Selected Dights											
1 2 3 4 Select Requisition Assign Sources of Supply (No Items) Review Drafts (1 Items) Summary Screen (No Documents)											
Created Drafts											
Change Selected Draft To 4 Remove						Settings					
Traft Name	Draft Type	Supplier Number	Supplier	T	ransaction Type						
Emergency PO for Gravel	Purchase Order	7000028137	QUALITY HAULERS IN	IC 🛛	EMR : Emergency PO	*					
▲ ▶ Details of Selected Drafts Local Purchase	Order1 LIS53331 10/12/201										
Remove Expand All Collapse All						Settings					
Page Requisition / Item Number Confi	gurable Item Number Description	Category	Quantity Unit Supplier Nu	mber Supplier Name Info Record	Net Price	Gross Price Currency					
 2001068464 / 1 	sand and gravel to t	e delivered-Anderson 75077	5.0D TON		15.45 per 1 TON	15.45 USD					

Since the standard SCEIS processes for SCs and POs are being used, the <u>PO will encumber funds</u>. If the Internal Order was not displayed in the SC, the buyer can edit the PO and insert <u>Internal Order</u> <u>Number 98000008</u> in the Order data field under the <u>Account Assignment tab</u>. Because the normal SCEIS PO process was used to create the PO, the SCEIS Open Encumbrance Report will reflect these POs.

If you have any questions about this message, please contact the SCEIS Service Desk at (803) 896-0001 (select option 1 for SCEIS help) or use the email form available at the following link: http://www.sceis.sc.gov/requests/