



Materials Management Knowledge Transfer Session 3 END-TO-END PROCESS

May 20, 2009

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Agenda

- ④ Review of Session 2 Knowledge Check
- ④ Create a Shopping Cart
- ④ Shopping Cart Workflow Approval
- ④ Create a Purchase Order
- ④ Receive Goods
- ④ Create a Bid Solicitation
- ④ Receive Bids
- ④ Demonstration of Walk-up Request for Inventory
- ④ Next Steps
- ④ Appendix – SCEIS uPerform



SRM Logon

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SRM Logon



Log into SRM

- User can access SRM through SCEIS webpage
<http://www.sceis.sc.gov/> and selecting SCEIS SRM

The screenshot shows the SCEIS website homepage. The browser address bar displays <http://www.sceis.sc.gov/>. The page features a navigation menu with links for Home, Projects, Background, Presentations, and FAQ. The date is Thursday, May 14, 2009. The main content area includes a section for 'The South Carolina Enterprise Information System' and a 'Knowledge Transfer Kickoff video available' announcement. A sidebar on the right contains 'Useful links' and 'System' sections. The 'System' section lists several links, with 'SCEIS SRM (login required)' circled in red.

Navigation: Home | Projects | Background | Presentations | FAQ

Left Sidebar:

- FIND A JOB with SCEIS
- Upcoming meetings
- Human Resources / Payroll Project
- User Groups
 - Meetings schedule
 - Visit "SCEIS Communities"
 - Subscribe for meeting notices
- Contact the SCEIS Team
- Preparation for Go-Live
 - Implementation planning
 - Agency Support Teams
 - Knowledge Transfer Program **UPDATED**

Main Content:

The South Carolina Enterprise Information System

A project of the SC Budget and Control Board -
Division of State Information Technology

Knowledge Transfer Kickoff video available

SCEIS recently launched the Knowledge Transfer Program, which was created to help agency Subject Matter Experts build their understanding of SCEIS functionality. Their deeper understanding will allow Subject Matter Experts to better support their agencies through implementation and to provide post-implementation support.

The kickoff meeting was recorded courtesy of SC-ETV, which generously provided all production resources for the video.

View or download the entire Kickoff program. (372mb)
View or download particular segments of the program.
Read tips for viewing a video.

Recent news items

OHR podcasts feature SCEIS.

Right Sidebar:

Useful links

Information

- System messages
- Email a SCEIS Help Request
- SCEIS Service Desk info
- Request Access Changes or Changes System
- Driving directions for frequently-used n spaces
- SCEIS Communities: An online forum and future users **NEW**

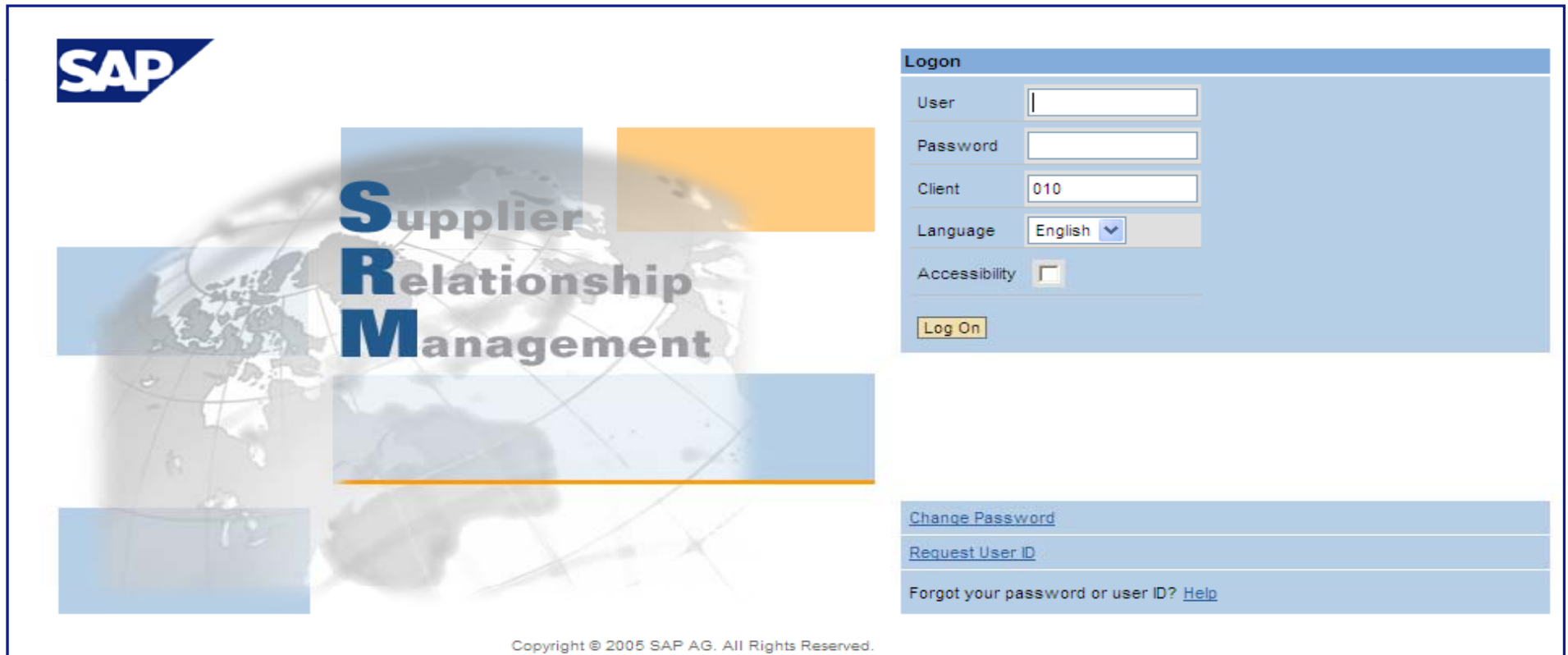
System

- Citrix entry page (login required)
- Online Vendor Registration
- SC Vendor Master files (login required)
- SCEIS SRM (login required)**

SRM Logon (cont.)

🌐 Logon to SRM

- This can be saved as a “Favorite”



SAP

**Supplier
Relationship
Management**

Logon

User

Password

Client

Language

Accessibility

[Change Password](#)

[Request User ID](#)

Forgot your password or user ID? [Help](#)

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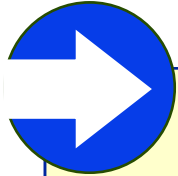


Create Shopping Cart

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Create a Shopping Cart - Demonstration Only



- ◆ SRM Shopping Cart (Create a shopping cart)

Creating a Shopping Cart – uPerform Documents

- 🌀 Different shopping cart scenarios are located in the uPerform “Shopping Cart” sub-area of “Procurement”



Shopping Cart

Areas

Help Content

- › SRM Approval (How to Name a Substitute Shopping Cart Approver)
- › SRM Shopping Cart (Approval)
- › SRM Shopping Cart (Approve Change)
- › SRM Shopping Cart (Catalog Shopping) ←
- › SRM Shopping Cart (Check the Status of a Shopping Cart)
- › SRM Shopping Cart (Confirm Goods)
- › SRM Shopping Cart (Copy an Old Shopping Cart from Template) ←
- › SRM Shopping Cart (Cost Center Split) ←
- › SRM Shopping Cart (Create A Shopping Cart) ←
- › SRM Shopping Cart (Find Shopping Cart Template)
- › SRM Shopping Cart (Monitor Shopping Cart)
- › SRM Shopping Cart (Procuring Asset in SRM) ←
- › SRM Shopping Cart (Return Delivery)
- › SRM Sourcing (Carry Out Sourcing)

Creating a Shopping Cart – uPerform (cont.)



Title	uPerform Location	Purpose/Trigger
<u>SRM Shopping Cart (Catalog Shopping)</u>	Materials Management>Procurement>Shopping Cart	You are the shopping cart user and would like to use the "Punch-Out" catalog of a state term contract provider.
<u>SRM Shopping Cart (Copy an Old Shopping Cart from Template)</u>	Materials Management>Procurement>Shopping Cart	You would like to find a Shopping Cart that was previously created to copy for a new requirement.
<u>SRM Shopping Cart (Cost Center Split)</u>	Materials Management>Procurement>Shopping Cart	You have created a shopping cart and would like to split the cost assignment by different funds
<u>SRM Shopping Cart (Create A Shopping Cart)</u>	Materials Management>Procurement>Shopping Cart	You have a need for a good or service. You will create a shopping cart to begin the procurement process.
<u>SRM Shopping Cart (Procuring Asset in SRM)</u>	Materials Management>Procurement>Shopping Cart	You have created a shopping cart. The item being procured will need to be identified as an asset. This can be done in the shopping cart.

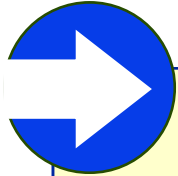


Shopping Cart Workflow Approval

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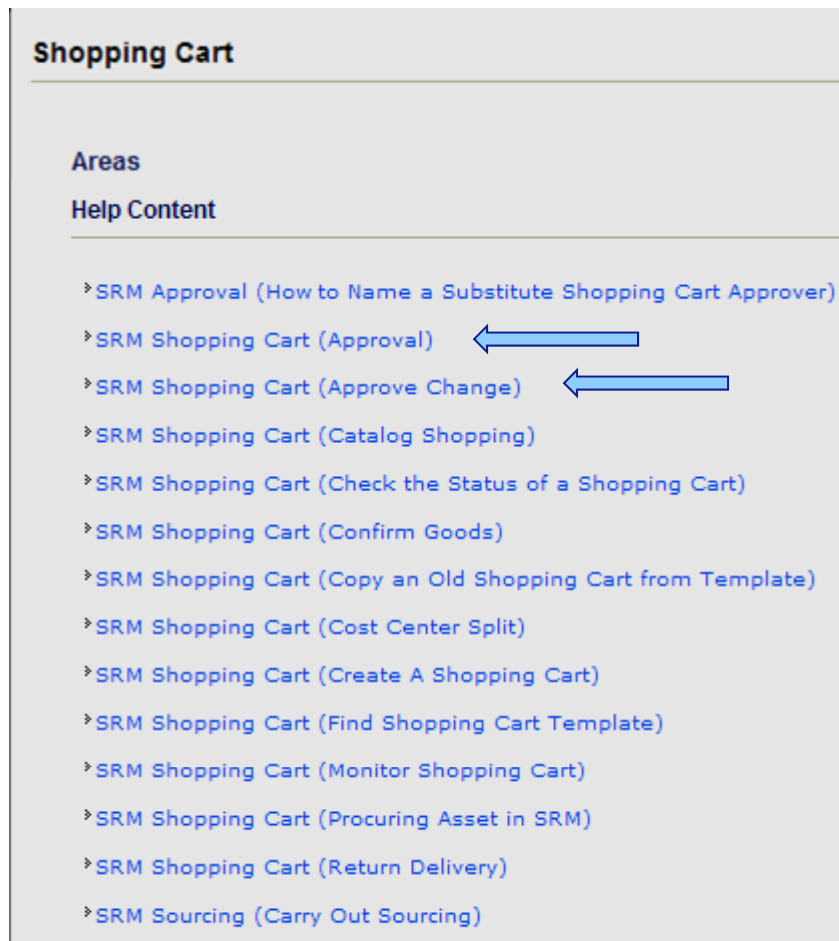
Shopping Cart Workflow Approval – Demonstration Only



- ◆ SRM Shopping Cart (Approval)

Shopping Cart Workflow Approval - uPerform Documents

- 🌐 Different Approval scenarios are located in the uPerform “Shopping Cart” sub-area of “Procurement”



Shopping Cart

Areas

Help Content

- › SRM Approval (How to Name a Substitute Shopping Cart Approver)
- › SRM Shopping Cart (Approval) ←
- › SRM Shopping Cart (Approve Change) ←
- › SRM Shopping Cart (Catalog Shopping)
- › SRM Shopping Cart (Check the Status of a Shopping Cart)
- › SRM Shopping Cart (Confirm Goods)
- › SRM Shopping Cart (Copy an Old Shopping Cart from Template)
- › SRM Shopping Cart (Cost Center Split)
- › SRM Shopping Cart (Create A Shopping Cart)
- › SRM Shopping Cart (Find Shopping Cart Template)
- › SRM Shopping Cart (Monitor Shopping Cart)
- › SRM Shopping Cart (Procuring Asset in SRM)
- › SRM Shopping Cart (Return Delivery)
- › SRM Sourcing (Carry Out Sourcing)

Shopping Cart Workflow Approval – uPerform Documents (cont.)



Title	uPerform Location	Purpose/Trigger
<u>SRM Shopping Cart (Approval)</u>	Materials Management>Procurement> Shopping Cart	You are the manager of the shopping cart creator. A completed shopping cart has been routed to you for approval. You have determined that this shopping cart is valid and are going to approve it.
<u>SRM Shopping Cart (Approve Change)</u>	Materials Management>Procurement> Shopping Cart	You are the manager of the shopping cart creator. A completed shopping cart has been routed to you for approval. You have determined that this shopping cart is valid and are going to approve it.

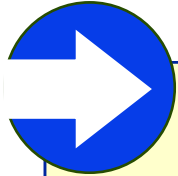


Create a Purchase Order

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Create a Purchase Order - Demonstration Only



- ◆ SRM Sourcing (Carry Out Sourcing)
- ◆ ME22N Change Purchase Order

Create a Purchase Order – uPerform Documents

- 🌀 Purchase Order scenarios are located in the uPerform “Shopping Cart” & “Purchase Order” sub-areas



Shopping Cart

Areas

- › SRM Shopping Cart (Monitor Shopping Cart)
- › SRM Shopping Cart (Procuring Asset in SRM)
- › SRM Shopping Cart (Return Delivery)
- › SRM Sourcing (Carry Out Sourcing)

Purchase Order

Areas

None

Help Content

- › ME23N Display Purchase Order
- › ME22N (How to Delete a Purchase Order)
- › ME22N (Add Freight to Purchase Order)
- › ME22N (Blanket Purchase Agreement)
- › ME22N (Blanket Purchase Order)
- › ME22N (Final Invoice)
- › ME22N Change Purchase Order
- › ME22N Change Purchase Order (Add Terms and Conditions)
- › ME22N Change Purchase Order (Print Purchase Order)
- › MIGO_GR Goods Movement

Create a Purchase Order – uPerform Documents (cont.)



Title	uPerform Location	Purpose/Trigger
<u>ME22N (How to Delete a Purchase Order)</u>	Materials Management>Procurement >Purchase Order	You need to delete a purchase order.
<u>ME22N (Add Freight to Purchase Order)</u>	Materials Management>Procurement >Purchase Order	You have created a purchase order and need to add freight (shipping costs) to the Purchase Order.
<u>ME22N (Blanket Purchase Agreement)</u>	Materials Management>Procurement >Purchase Order	You are establishing a Blanket Purchase Agreement with a local vendor to allow authorized individuals from your agency to place calls against it.
<u>ME22N (Blanket Purchase Order)</u>	Materials Management>Procurement >Purchase Order	You have created a purchase order for a repetitive service and would like to ensure that multiple invoices can be placed against it.

Create a Purchase Order – uPerform Documents (cont.)



Title	uPerform Location	Purpose/Trigger
<u>ME22N (Final Invoice)</u>	Materials Management>Procurement>Purchase Order	You have a Purchase Order (PO) that you no longer wish to encumber funds on, but you may receive additional invoices against. Instead of deleting the PO, you can check "Final Invoice" under the "Invoice" tab of the PO.
<u>ME22N Change Purchase Order</u>	Materials Management>Procurement>Purchase Order	A Purchase Order (PO) has been created in SRM. You are the buyer and would like to add taxes and ensure a goods receipt is required on the PO. You would also like to see a print preview of what this PO will look like before it is sent to the Source of Supply (vendor).
<u>ME22N Change Purchase Order (Add Terms and Conditions)</u>	Materials Management>Procurement>Purchase Order	You have created a Purchase Order and would like to add Standard Purchase Order Clause Set .
<u>ME22N Change Purchase Order (Print Purchase Order)</u>	Materials Management>Procurement>Purchase Order	You have completed a Purchase Order and would like to print it or you have made a change to a Purchase Order and need to reprint.

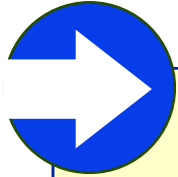


Receive Goods

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Receive Goods - Demonstration Only



- ◆ SRM Shopping Cart (Confirm Goods)

Receive Goods

- Receive Goods scenarios are located in the uPerform “Shopping Cart” and “Purchase Order” sub-area of “Procurement”

Shopping Cart

Areas

Help Content

- › SRM Approval (How to Name a Substitute Shopping Cart Approver)
- › SRM Shopping Cart (Approval)
- › SRM Shopping Cart (Approve Change)
- › SRM Shopping Cart (Catalog Shopping)
- › SRM Shopping Cart (Check the Status of a Shopping Cart)
- › SRM Shopping Cart (Confirm Goods) ←
- › SRM Shopping Cart (Copy an Old Shopping Cart from Template)
- › SRM Shopping Cart (Cost Center Split)
- › SRM Shopping Cart (Create A Shopping Cart)
- › SRM Shopping Cart (Find Shopping Cart Template)
- › SRM Shopping Cart (Monitor Shopping Cart)
- › SRM Shopping Cart (Procuring Asset in SRM)
- › SRM Shopping Cart (Return Delivery) ←

Purchase Order

Areas

None

Help Content

- › ME23N Display Purchase Order
- › ME22N (How to Delete a Purchase Order)
- › ME22N (Add Freight to Purchase Order)
- › ME22N (Blanket Purchase Agreement)
- › ME22N (Blanket Purchase Order)
- › ME22N (Final Invoice)
- › ME22N Change Purchase Order
- › ME22N Change Purchase Order (Add Terms and Conditions)
- › ME22N Change Purchase Order (Print Purchase Order)
- › MIGO_GR Goods Movement ←

Receive Goods – uPerform Documents (cont.)

Title	uPerform Location	Purpose/Trigger
<u>SRM Shopping Cart (Confirm Goods)</u>	Materials Management>Procurement > Shopping Cart	You have received a delivery for an item ordered with a Shopping Cart. A Confirmation of Goods (goods receipt) must be done before payment can be made.
<u>SRM Shopping Cart (Return Delivery)</u>	Materials Management>Procurement > Shopping Cart	A confirmation of goods has been completed. The user realizes that the item(s) were not delivered and wishes to delete the goods confirmation.
<u>MIGO GR Goods Movement</u>	Materials Management>Procurement >Purchase Order	A delivery has been received for Purchase Order #4600001073. A goods receipt must be done before payment can be made.

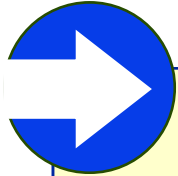


Create Bid Solicitation

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Create a Bid Solicitation - Demonstration Only



- ◆ SRM Carry Out Sourcing (Bidding)
- ◆ SRM Process Bid Invitation (Bidding)
Creating and Publishing a Bid Invitation

Create a Bid Solicitation

- 🌀 The two step scenario for Create Bid Solicitation is located in the uPerform “Bidding” sub-area of “Procurement”

Bidding

Areas

None

Help Content

- › DocBuilder (Bidding) How to Insert a Non-Dialog Clause
- › SRM Process Bid Invitation (How to Create Line Items with Price Limitations Less than a Penny)
- › SRM Carry Out Sourcing (Bidding) ←



Bidding

- › SRM Process Bid Invitation (Bidding) Creating and Publishing a Bid Invitation ←
- › SRM Process Bid Invitation (Bidding) Evaluate and Award Bids - Issuing Multiple Contracts to the Same Vendor
- › SRM Process Bid Invitation (Bidding) How to Create Complex Pricing-Discount Off Line Items
- › SRM Process Bid Invitation (Bidding) How to Issue an Amendment
- › SRM Process Bid Invitation (Bidding) Posting an Award Extension
- › SRM Process Bid Invitation (Bidding) Posting a No Award
- › SRM Process Bid Invitation (Bidding) Surrogate Bidding

Create a Bid Solicitation – uPerform Documents (cont.)



Title	uPerform Location	Purpose/Trigger
<u>SRM Carry Out Sourcing (Bidding)</u>	Materials Management>Bidding>Help Content	This procedure is used when it is determined by the buyer that a bid invitation should be created.
<u>SRM Process Bid Invitation (Bidding) Creating and Publishing a Bid Invitation</u>	Materials Management>Bidding>Help Content	Perform this procedure when the buyer has created a bid invitation number in Carry Out Sourcing and must finish creating the bid invitation in order to publish.

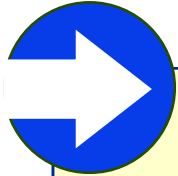


Receive Bids

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Receive Bids - Demonstration Only



- ◆ SRM Process Bid Invitation (Evaluate and Award Bids)

Receive Bids

- Receiving Bids scenario is located in the uPerform “Bidding” sub-area of “Procurement”

Bidding

Areas

Help Content

- › DocBuilder (Bidding) How to Insert a Non-Dialog Clause
- › SRM Process Bid Invitation (How to Create Line Items with Price Limitations Less than a Penny)
- › SRM Carry Out Sourcing (Bidding)
- › SRM Carry Out Sourcing (Bidding) How to Redistribute a Requirement to a SCEIS Agency
- › SRM Carry Out Sourcing (ITMO MMO)
- › SRM Carry Out Sourcing (ITMO MMO) How to Delete a Requirement from Non-SCEIS Agency
- › SRM Process Bid Invitation (Bidding) Complex Pricing- Price Scaling
- › SRM Process Bid Invitation (Bidding) Creating and Publishing a Bid Invitation
- › SRM Process Bid Invitation (Bidding) Evaluate and Award Bids - Issuing Multiple Contracts to the Same Vendor
- › SRM Process Bid Invitation (Bidding) How to Create Complex Pricing-Discount Off Line Items
- › SRM Process Bid Invitation (Bidding) How to Issue an Amendment
- › SRM Process Bid Invitation (Bidding) Posting an Award Extension
- › SRM Process Bid Invitation (Bidding) Posting a No Award
- › SRM Process Bid Invitation (Bidding) Surrogate Bidding
- › SRM Process Bid Invitation (Creating a Fixed Price Bid)
- › SRM Process Bid Invitation (Creating a Fixed Price Complex Pricing-Discount)
- › SRM Process Bid Invitation (Evaluate and Award Bids) ←

Receive Bids – uPerform Documents (cont.)



Title	uPerform Location	Purpose/Trigger
<u>SRM Process Bid Invitation (Evaluate and Award Bids)</u>	Materials Management>Bidding>Help Content	Perform this procedure when a bid invitation has closed and you are ready to evaluate the bids and make the award.

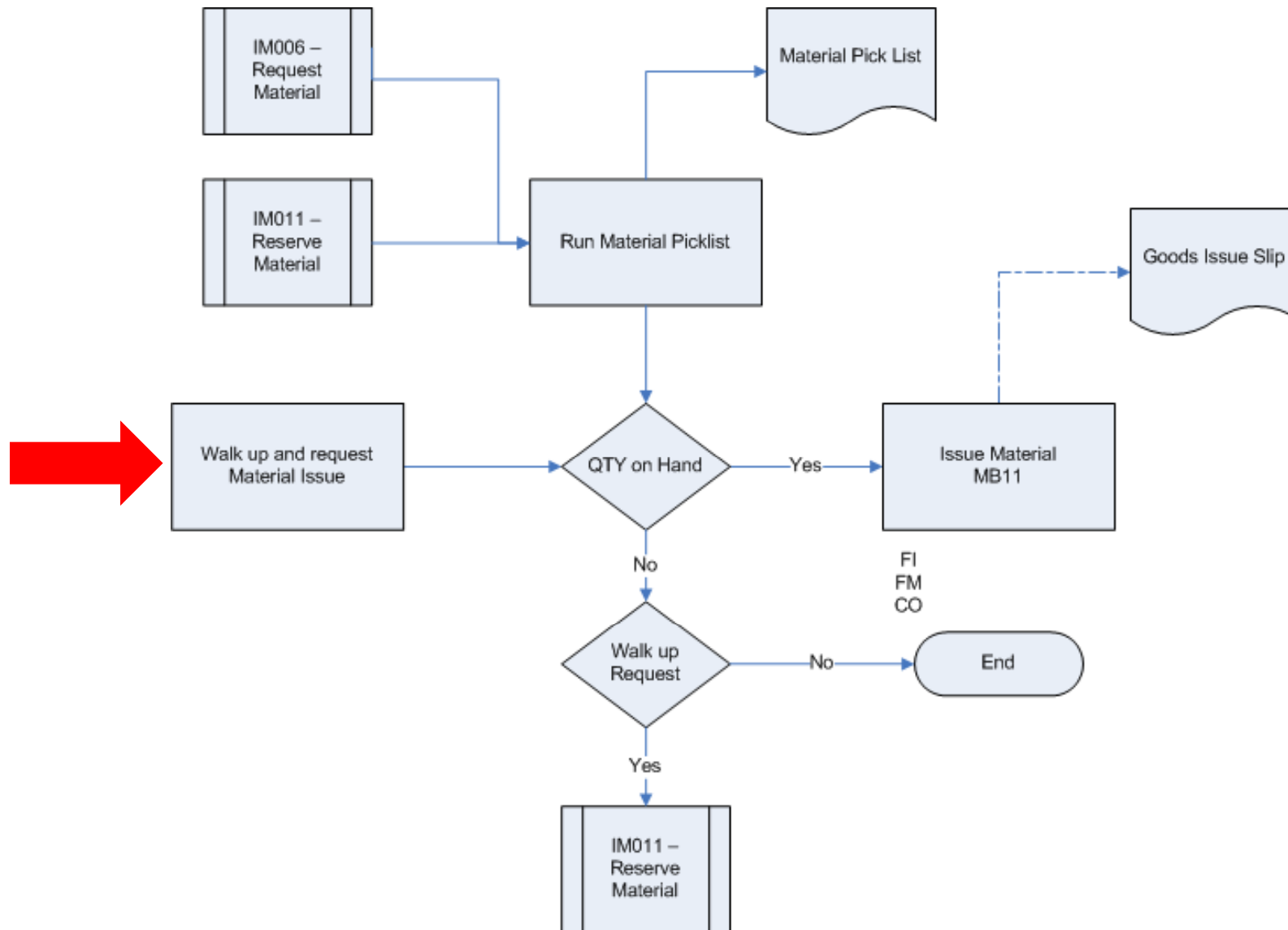


Inventory Management

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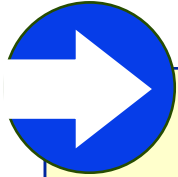
Goods Issue Process



Walk Up Request Form



SOEIS		MATERIALS REQUISITION					Plant: F030	
							SLoc: 001	
							Request Date: 5/19/2009	
EX:	Mvt Type (see below): 261	Material: 311201	Qty: 1	Internal Order: 88343	Fund: 1058207813	Cost Center: 7840420000	Functional Area:	Entry Date: 7/4/2007
Description: BATTERY 12V GRPU1 155-200CCA			Received By:		Entered By:		Material Document #	
G/L Account:		Grant:		WBS Element (Project)		Serial Number:		Personnel Number:
								Vehicle ID:
1	Mvt Type (see below): 201	Material: 100891	Qty: 5	Internal Order:	Fund: 10020000	Cost Center: E160B00019	Functional Area: 9999_9999	Entry Date:
Description: Rubber Bands #20			Received By: Fred Smith		Entered By:		Material Document #	
G/L Account: 5033050000		Grant: Not Relevant		WBS Element (Project)		Serial Number:		Personnel Number:
								Vehicle ID:
2	Mvt Type (see below):	Material:	Qty:	Internal Order:	Fund:	Cost Center:	Functional Area:	Entry Date:
Description:			Received By:		Entered By:		Material Document #	
G/L Account:		Grant:		WBS Element (Project)		Serial Number:		Personnel Number:
								Vehicle ID:
3	Mvt Type (see below):	Material:	Qty:	Internal Order:	Fund:	Cost Center:	Functional Area:	Entry Date:
Description:			Received By:		Entered By:		Material Document #	



- ◆ Goods Issue for Walk Up Request

Goods Issue Transaction

Goods Issue Other - Sonia Beasley

Show Overview | Hold | Check | Post | Help

A07 Goods Issue | R10 Other | GI for cost center 201

General

Document Date 05/14/2009 | Material Slip |
Posting Date 05/14/2009 | Doc.Header Text |
 1 Individual Slip

Line	Mat. Short Text	OK	Qty in UnE	E...	SLoc	Cost Center	Bu...	G/L Account	Batch	Valuation T...	M...	D	Stock Type

Delete | Contents

Material | Quantity | Where

Material | |
Equipment |

Line 1

Enter Material Number

Goods Issue Transaction (cont.)

Goods Issue Other - Sonia Beasley

Show Overview | Hold | Check | Post | Help

A07 Goods Issue | R10 Other | GI for cost center 201

General

Document Date: 05/14/2009 | Material Slip:
Posting Date: 05/14/2009 | Doc.Header Text:
 1 Individual Slip

Line	Mat. Short Text	OK	Qty in UnE	E...	SLoc	Cost Center	Bu...	G/L Account	Batch	Valuation T...	M...	D	Stock Type
1	BAND,RUBBER,#20,3 1/2" X 15"	<input checked="" type="checkbox"/>	0.000								201	-	Unrestrict...

Material | Quantity | Where | Account Assignment

Material: BAND,RUBBER,#20,3 1/2" X 15" | 100891

Equipment:

Item OK | Line 1

Short Text Populates

Goods Issue Transaction (cont.)

Goods Issue Other - Sonia Beasley

Show Overview | Hold | Check | Post | Help

A07 Goods Issue | R10 Other | OI for cost center 201

General

Document Date: 05/14/2009 | Material Slip:
Posting Date: 05/14/2009 | Doc.Header Text:
 1 Individual Slip

Line	Mat. Short Text	OK	Qty in UnE	E...	SLoc	Cost Center	Bu...	G/L Account	Batch	Valuation T...	M...	D	Stock Type
1	BAND,RUBBER,#20,3 1/2" X 15"	<input checked="" type="checkbox"/>	5.000								201		Unrestrict...

Qty in Unit of Entry:

Enter Quantity

Item OK | Line 1

Goods Issue Transaction (cont.)

Goods Receipt Settings System Help

Goods Issue Other - Sonia Beasley

Show Overview Hold Check Post Help

A07 Goods Issue R10 Other GI for cost center 201

General

Document Date 05/14/2009 Material Slip
Posting Date 05/14/2009 Doc.Header Text
 1 Individual Slip

Line	Mat. Short Text	OK	Qty in UnE	E...	SLoc	Cost Center	Bu...	G/L Account	Batch	Valuation T...	M...	D	Stock Type
1	BAND,RUBBER,#20,3 1/2" X 15"	<input checked="" type="checkbox"/>	5	EA	B&C Board						201	-	Unrestrict...

Delete Contents

Material Quantity Where Account Assignment

Movement Type 201 - GI for cost center Stock type Unrestricted use

Plant Budget & Control Board F030
Storage Location B&C Board 0001
Goods recipient
Unloading Point
Text

Plant Information and Goods Recipient if Required

Item OK Line 1

ECS (1) (010) SCEISSBX2 INS 3:22 PM

Goods Issue Transaction (cont.)

SAP Goods Issue Transaction (cont.)

Goods Issue Other - Sonia Beasley

Show Overview | Hold | Check | Post | Help

A07 Goods Issue | R10 Other | GI for cost center 201

General

Document Date: 05/14/2009 | Material Slip: []
Posting Date: 05/14/2009 | Doc. Header Text: []
 1 Individual Slip

Line	Mat. Short Text	OK	Qty in UnE	E...	SLoc	Cost Center	Bu...	G/L Account	Batch	Valuation T...	M...	D	Stock Type
1	BAND,RUBBER,#20,3 1/2" X 15"	<input checked="" type="checkbox"/>	5	EA	B&C Board	E160B00019		5033050000			201	-	Unrestrict...

Material | Quantity | Where | Account Assignment

G/L account: 5033050000
Cost Center: E160B00019
Fund: 10020000 | Grant: NOT RELEVANT
Functional Area: [] | Commitment Item: []
Funds Center: [] | More

Enter Applicable Accounting Information

Item OK | Line: 1

ECS (1) (010) | SCEISSBX2 | INS | 3:29 PM

Goods Issue Transaction (cont.)

Goods Issue Other - Sonia Beasley

Show Overview | Hold | **Check** | Post | Help

A07 Goods Issue | R10 Other | Cost center: 201

Check Entries

Information

Document is O.K.

OK | Help

Line	Stat...	Mat. Short Text	OK	Qty in UnE	E...	SLoc	Cost Center	Bu...	G/L Account	Batch	Valuation T...	M...	D	Stock Type
1	OO	BAND,RUBBER,#20,3 1/2" X 15"	<input checked="" type="checkbox"/>	5	EA	B&C Board	E160B00019		5033050000			201	-	Unrestricti

Document Date: 05/14/2009 | Posting Date: 05/14/2009 | Material Slip | Doc.Header Text

1 Individual Slip

Material | Quantity | Where | Account Assignment

G/L account: 5033050000 | Cost Center: E160B00019 | Fund: 10020000 | Grant: NOT RELEVANT

Functional Area: | Commitment Item: | More

Item OK | Line: 1

Goods Issue Transaction (cont.)

Goods Issue Other - Sonia Beasley

Show Overview | Hold | Check | **Post** | Help

A07 Goods Issue | R10 Other | GI for cost center 201

Post Entries

Information: Material document 4900001054 posted

OK | Help

Line	Mat. Short Text	St Center	Bu...	G/L Account	Batch	Valuation T...	M...	D	Stock Type

Posting Date: 05/14/2009 | 1 Individual Slip

Material: _____ | _____

Equipment: _____

Line 1

Verify Goods Issue

Transaction MB51

Search By Material Number

Material Document List

Item Data

Material	100091	to	
Plant		to	
Storage Location		to	
Batch		to	
Vendor		to	
Customer		to	
Movement Type		to	
Special Stock		to	

Header Data

Posting Date		to	
User Name		to	
Trans./Event Type		to	
Reference		to	

Display Options

Layout

Data Source

- Database
- Short Documents
- Reread Short Docs In Archive

Archive Instruct.

Specification of Database Access for Best Runtime

- Database Determines Optimum Access
- Start Off with Material Number
- Start Off with Posting Date

ECS (1) (010) SCEISSBX2 INS 3:49 PM

Verify Goods Issue (cont.)

Goods Issue Other - Sonia Beasley

Show Overview | Hold | Check | Post | Help

A07 Goods Issue | R10 Other | Information | GI for cost center 201

Material document 4900001054 posted

Document Date: 05/14/2009 | Posting Date: 05/14/2009 | 1 Individual Slip

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Material Document List

Material	Material Description	Plnt Name 1
SLoc MvT S Mat. Doc. Item	Pstng Date	Quantity in UnE EUn
100891	BAND,RUBBER,#20,3 1/2" X 15"	F030 Budget & Control Board
0001 201 4900001052 1	05/14/2009	1 - EA
0001 201 4900001053 1	05/14/2009	1 - EA
0001 201 4900001054 1	05/14/2009	5 - EA
0001 561 4900001051 1	05/14/2009	100 EA

Any Questions?



🌀 Post-work for General Session 3

- Review General Session 3 content
- Conduct Survey Monkey Knowledge Check for General Session 3
- Review Frequently Asked Questions (FAQs)
- Review uPerform documents related to Shopping Cart

Refer to www.sceis.sc.gov. Click on *Knowledge Transfer Program*, then *Materials Management Knowledge Transfer*

MM Knowledge Transfer Breakout Session (Listings show one course with multiple sessions)

At DSS Training Center, Midlands Shopping Center, unless otherwise noted.

● SRM Shopping Cart

- June 3, 2009 at 9:00 a.m. – 12:00 p.m.
- June 3, 2009 at 1:30 p.m. – 4:30 p.m.

● Managing and Submitting Bids, Small Purchases

- June 10, 2009 at 9:00 a.m. – 11:30 a.m.
- June 10, 2009 at 2:00 p.m. – 4:30 p.m.

● Managing and Submitting Bids, Complex Purchases

- June 17 2009 at 9:00 a.m. – 4:30 p.m.
- June 18, 2009 at 9:00 a.m. – 4:30 p.m.

Next Steps (cont.)

- Purchasing (one class with multiple sessions)
 - June 24 2009 at 9:00 a.m. – 3:00 p.m.
 - June 25, 2009 at 9:00 a.m. – 3:00 p.m.
- Inventory Management – Material Planner
 - June 10, 2009 at 9:00 a.m. – 11:00 a.m., *SCEIS office, Room 201*
- Inventory Management – Goods Receiver/Issuer
 - June 17, 2009 at 9:00 a.m. – 11:00 a.m., *SCEIS office, Room 201*
- Inventory Management – Physical Inventory
 - June 24, 2009 at 9:00 a.m. – 11:00 a.m., *SCEIS office, Room 201*

Next Steps (cont.)

🌀 Invitation-only

- Based on Subject Matter Expert list from AST Leads
- Computer station for each participant
- Registration is required to plan and track participation
- Only registered individuals will be allowed to attend

Complete and return today's evaluation

Contact us



SCEIS Project:
SCEIS-AST@sceis.sc.gov



Appendix: SCEIS uPerform

The SC Enterprise Information System is a project of the SC Budget and Control Board, Division of State Information Technology.

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SCEIS uPerform



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- SCEIS uPerforms are found on the SCEIS webpage <http://www.sceis.sc.gov/> under the “Training” section.
 - uPerforms are divided into functional areas and then sub-areas.
 - Materials Management (MM)
 - Inventory Management (IM) – Under construction
 - Sales and Distribution (SD) – Under construction
 - Procurement
 - Bidding
 - Contracts
 - Purchase Order
 - Shopping Cart
 - Vendor Information

SCEIS uPerform (cont.)

After selecting a sub-area, select a process scenario.

The screenshot displays the RWD uPerform web application interface. It is divided into two main sections. The top section, labeled 'Scenario', shows the 'Shopping Cart' area with a list of help content items. The bottom section, labeled 'Sub-Area', shows the 'Procurement' area with a list of sub-areas. A red circle highlights 'Shopping Cart' in the Procurement sub-areas list, and a red arrow points from this circle to the 'SRM Shopping Cart (Create A Shopping Cart)' item in the Scenario help content list.

Scenario

Projects Up

Areas

Glossary

Help

Shopping Cart

Areas

- Text-Only (508 Compliant)

Help Content

- SRM Approval (How to Name a Substitute Shopping Cart Approver)
- SRM Shopping Cart (Approval)
- SRM Shopping Cart (Approve Change)
- SRM Shopping Cart (Catalog Shopping)
- SRM Shopping Cart (Check the Status of a Shopping Cart)
- SRM Shopping Cart (Confirm Goods)
- SRM Shopping Cart (Copy an Old Shopping Cart from Template)
- SRM Shopping Cart (Cost Center Split)
- SRM Shopping Cart (Create A Shopping Cart)
- SRM Shopping Cart (Find Shopping Cart Template)
- SRM Shopping Cart (Monitor Shopping Cart)
- SRM Shopping Cart (Procuring Asset in SRM)
- SRM Shopping Cart (Return Delivery)
- SRM Sourcing (Carry Out Sourcing)

Sub-Area

Projects Up

Areas

Glossary

Help

About

Procurement

Areas

- Bidding
- Contracts
- Purchase Order
- Shopping Cart

SCEIS uPerform (cont.)

- ① The process scenario will open to an area that will give you the business process description. This description will help you decide if you are in the correct scenario.
- ① To follow a step-by-step procedure click the drop down and select “Simulation (Flash)”



SRM Shopping Cart (Create A Shopping Cart)

ASAP BPP

Trigger

An end user has a need for a good or service. This individual will create a shopping cart to begin the procurement process.

Business Process Description Overview

This is the first step in the Purchase Order process. A Shopping Cart is created and pertinent information regarding the item(s) to be procured is entered. The shopping cart will then be workflowed through the appropriate approval process.

The screenshot shows a dropdown menu with the following options: ASAP BPP (XHTML), Simulation (Flash) (circled in red), Work Instruction (XHTML), Work Instruction (Portable Document Format (PDF)), Work Instruction (Microsoft Word (DOC)), Quick Reference (Step) (XHTML), Quick Reference (Step) (Portable Document Format (PDF)), and Quick Reference (Step) (Microsoft Word (DOC)).



SCEIS uPerform (cont.)

- Read the balloons and follow directions in the step
- The step window box can be closed for better viewing by clicking the “X” at the upper right corner

