Meperia

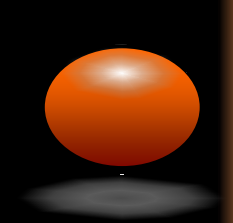
Meperia Strategic Sourcing Monthly Customer Training

March 2019

Presenter: Michele Fox-Hoke

Agenda

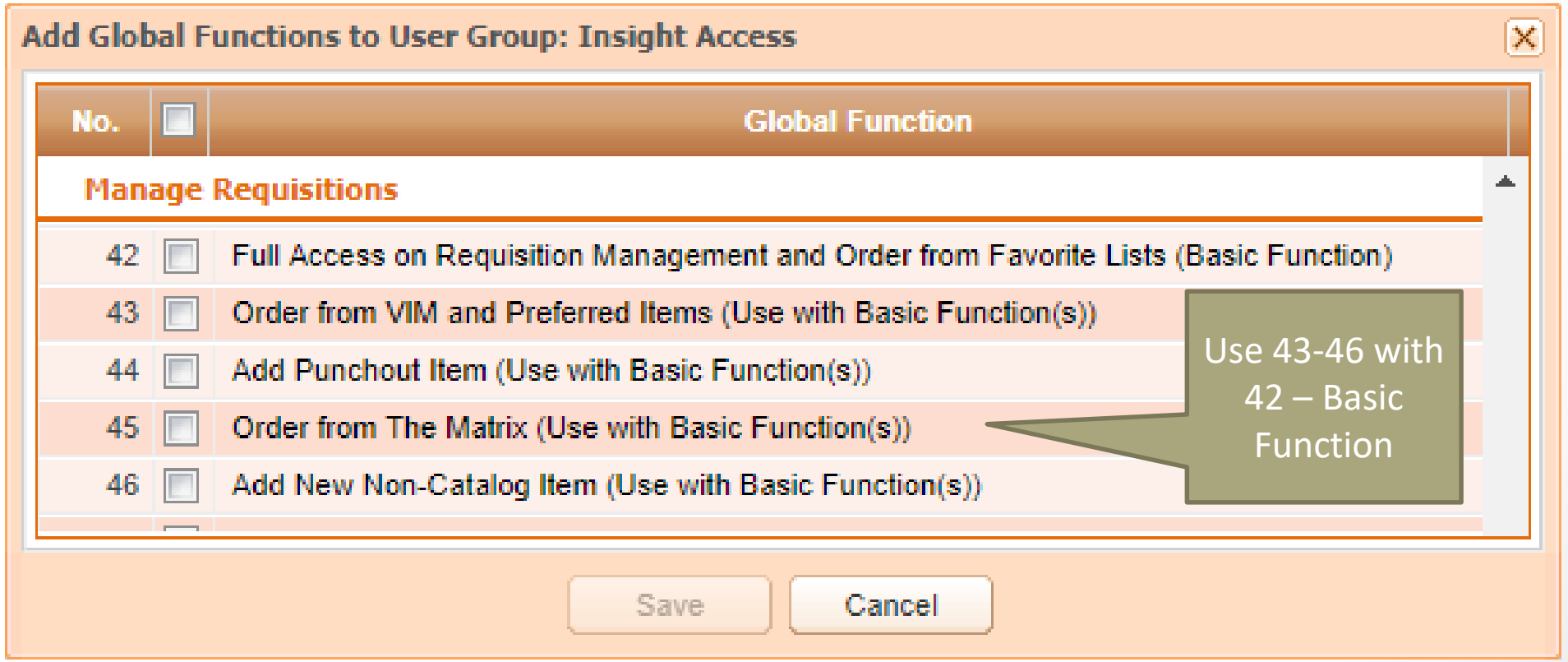
- Welcome
- March Enhancements
  - Restrict Ordering from VIM
  - Ability to Delete Open Requisitions
  - Auto-Numbering for LOF/FL Lines
  - Facility Level Export in Insight
  - New Contract Management Widgets
  - Update Par Forms from the VIM
- March Revision Release Cycle



RESTRICT ORDERING FROM VIM

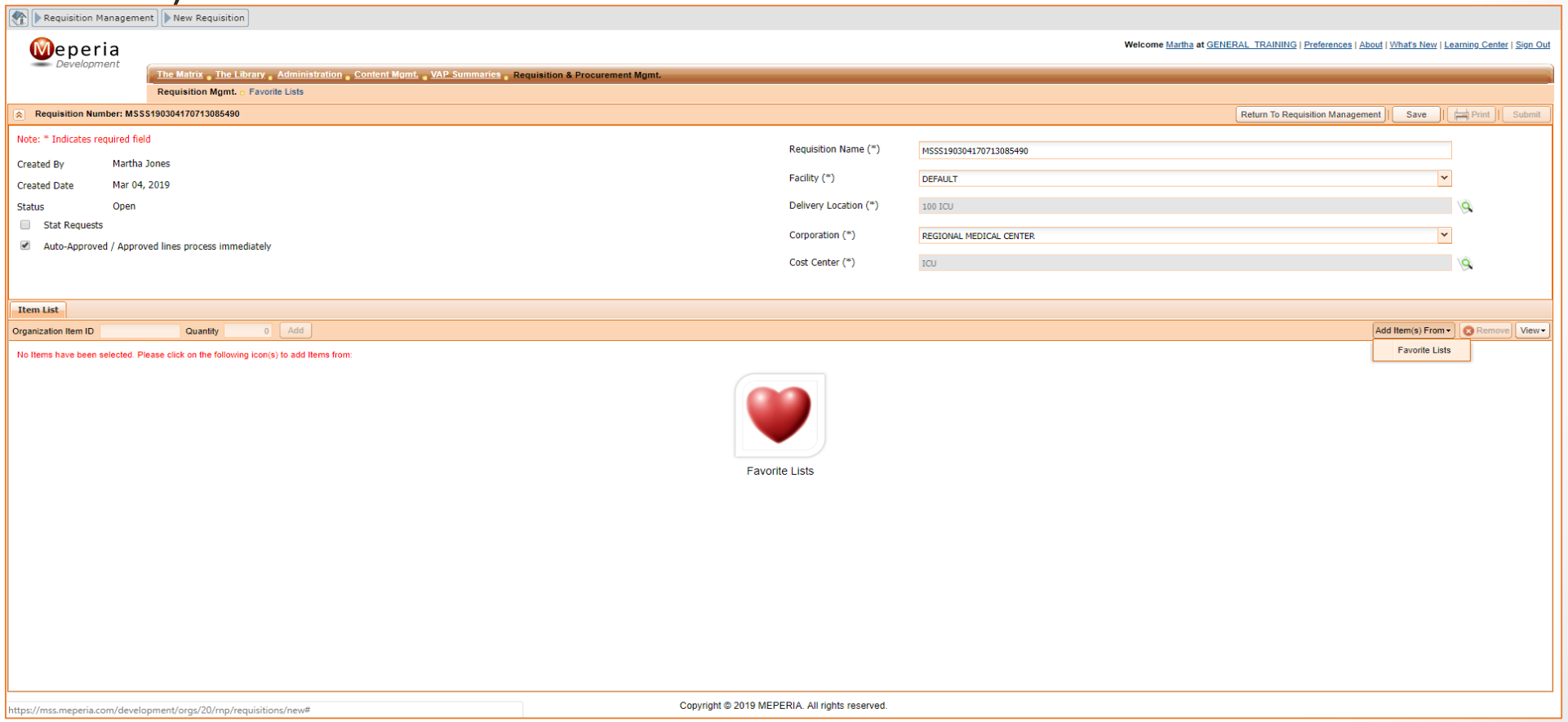
Restrict Ordering from VIM

Additional global functions have been added to allow administrators to better control how end users can requisition in MSS.

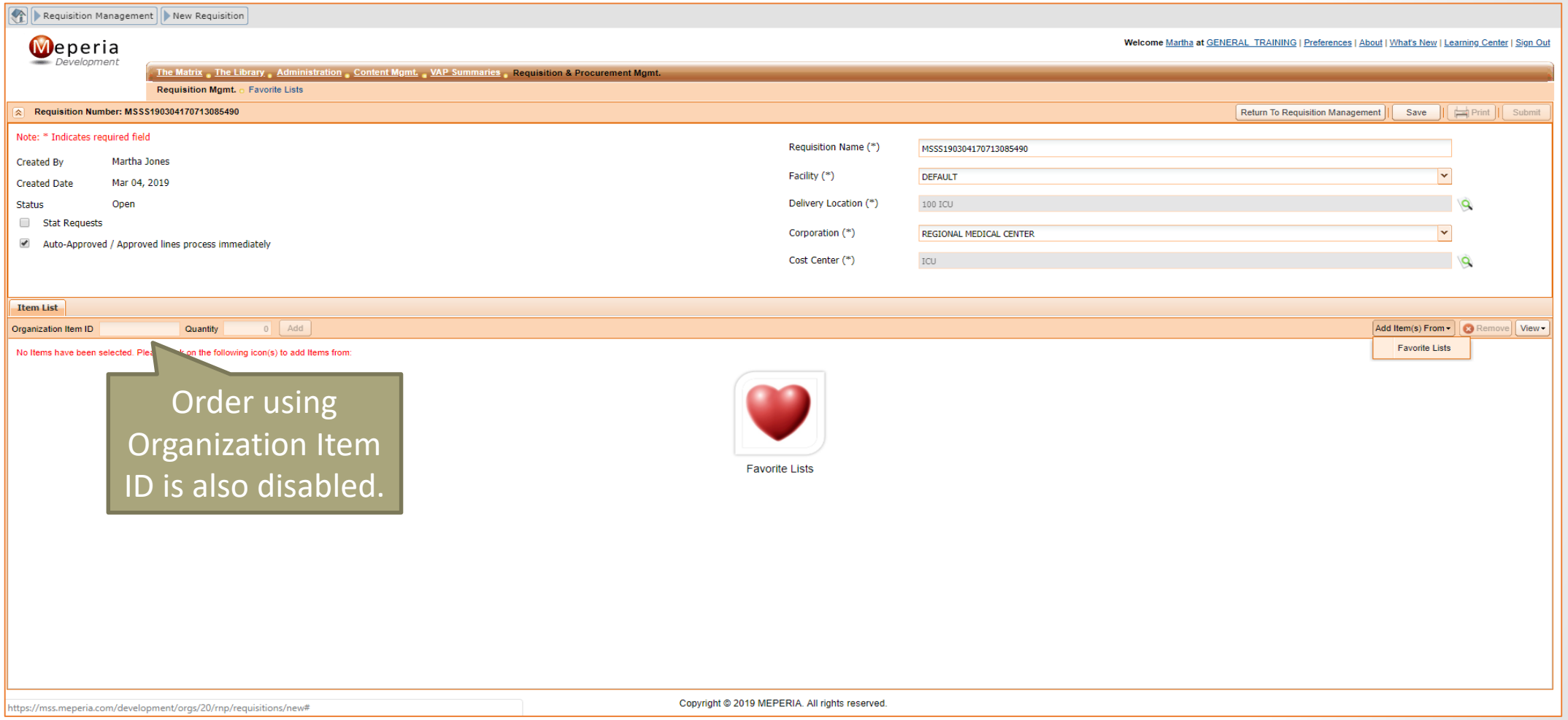


Restrict Ordering from VIM

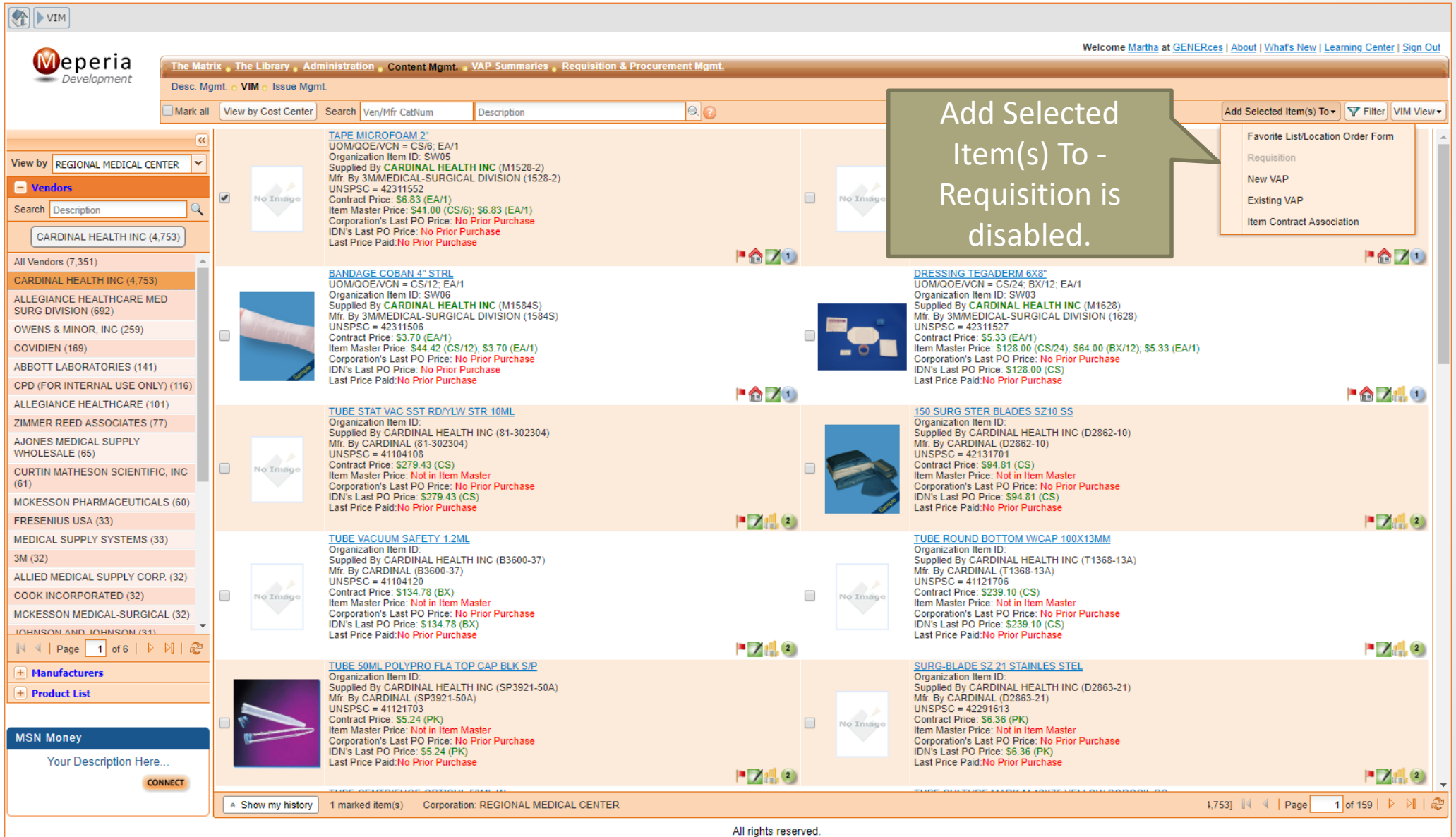
Full Access on Requisition Management and Order from Favorite Lists (Basic Function) can be used alone.



Restrict Ordering from VIM

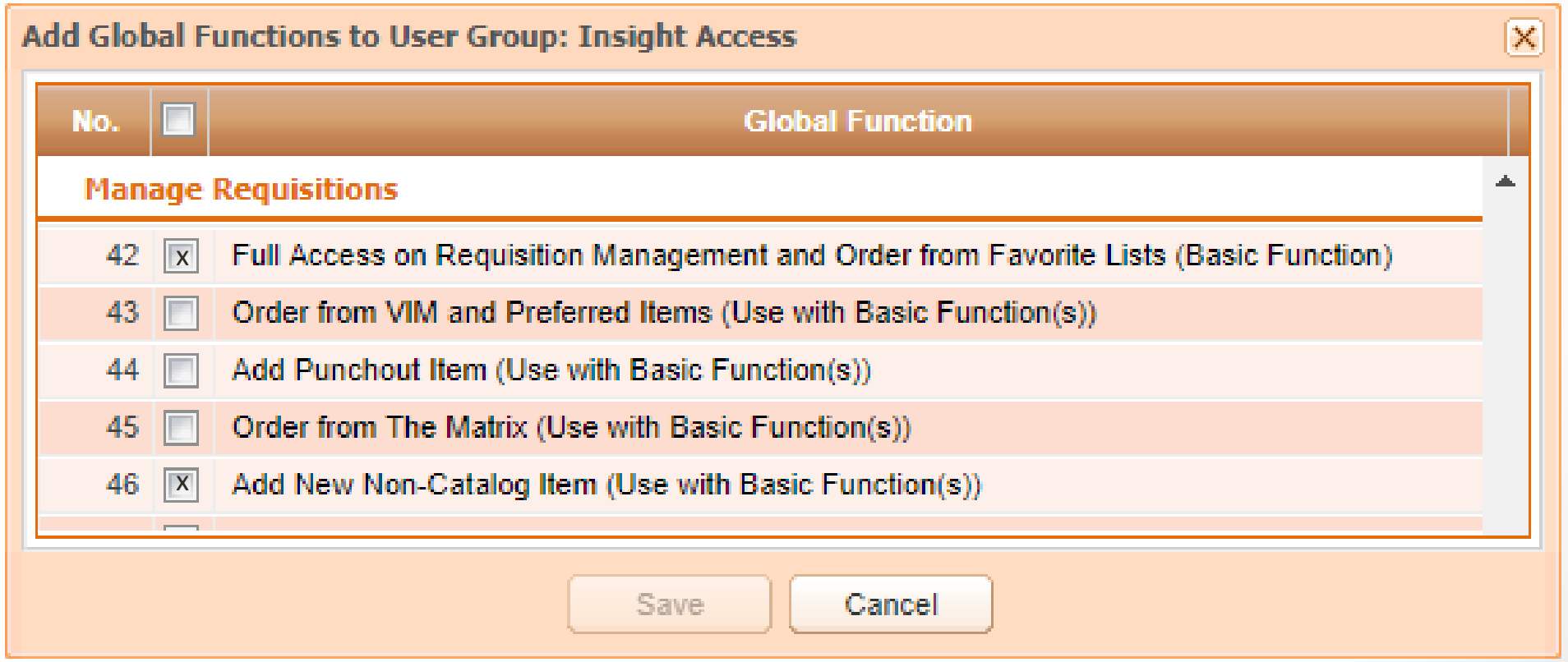


Restrict Ordering from VIM



Restrict Ordering from VIM

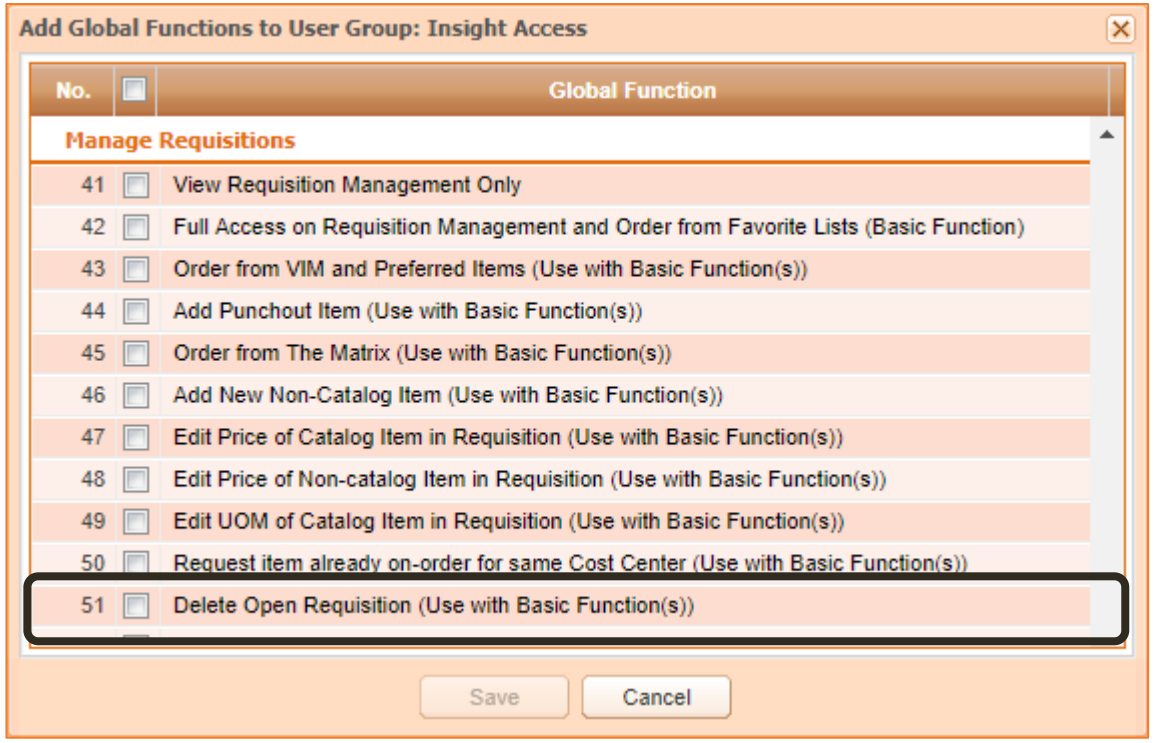
If they have both 42 and 46 below, they will have the ability to search the VIM in New Non-Catalog. This ability is to reduce or eliminate duplicate item creation in the VIM.



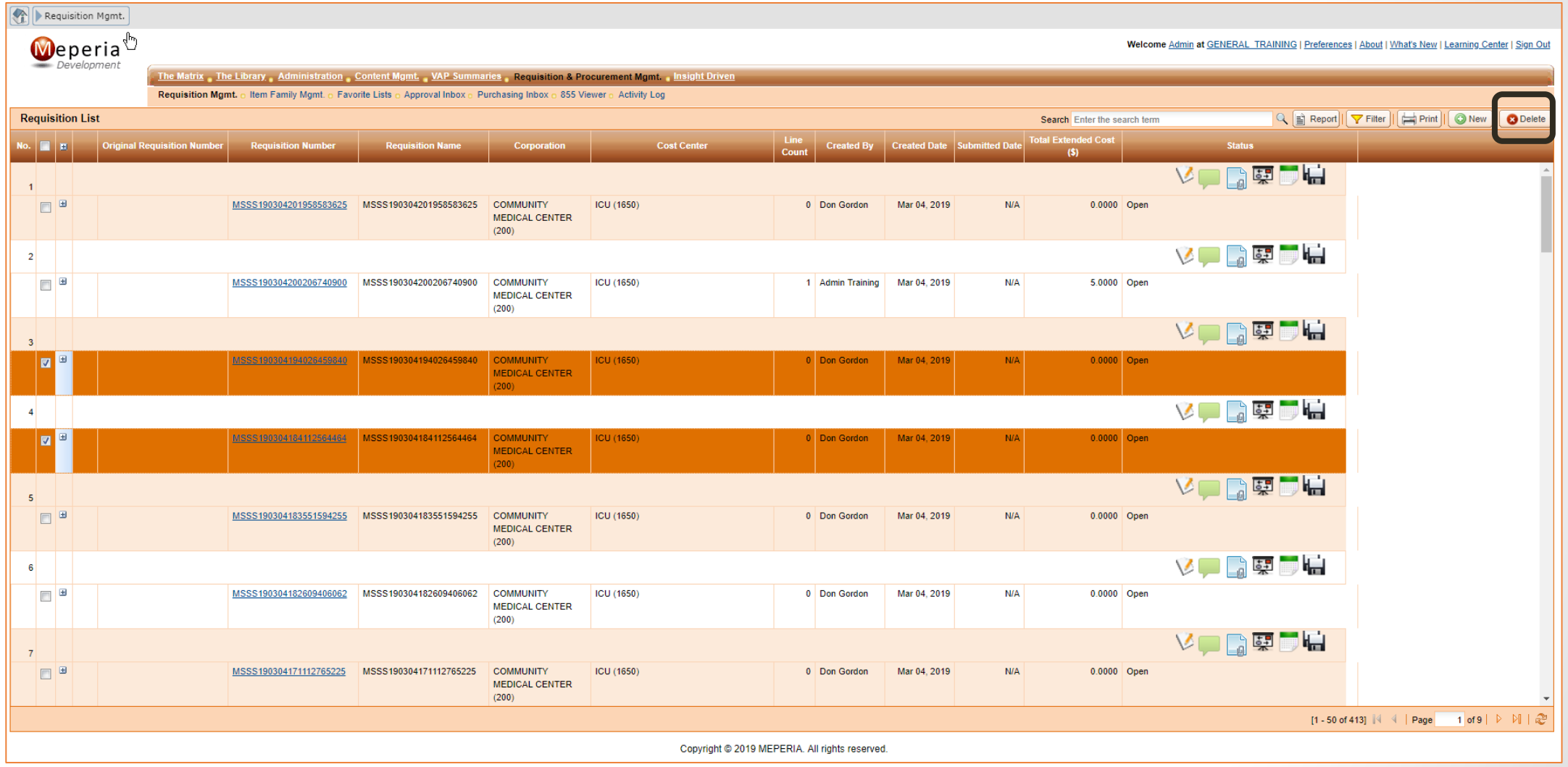
DELETE OPEN REQUISITIONS

Delete Open Requisitions

- New global function called Delete Open Requisitions (Use with Basic Function(s))
  - Allows group members to delete open requisitions of other users

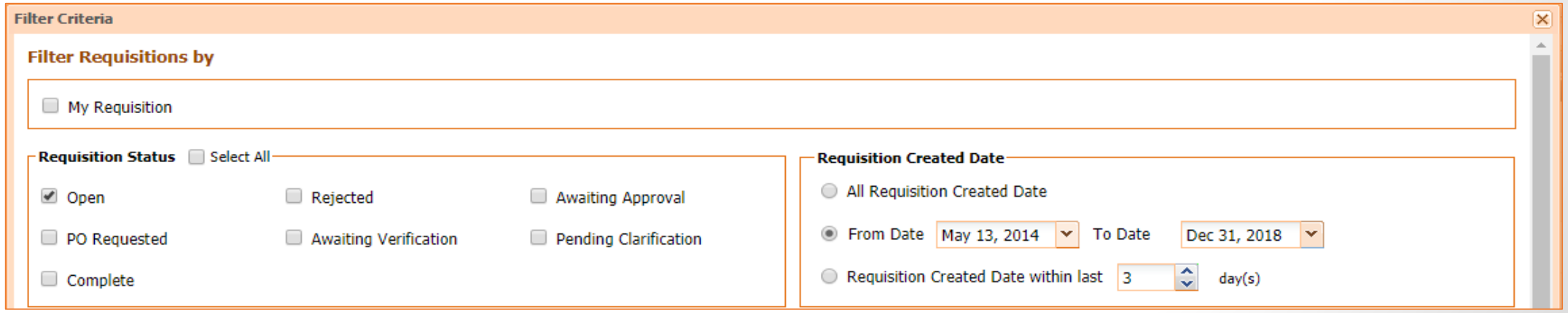


Delete Open Requisitions



Delete Open Requisitions

- Use Requisition Management tools to identify requisitions to be deleted.
  - Search
  - Filter
    - Requisition Status “Open”
    - Requisition Created Date, use From / To Date
- User is only allowed to delete requisitions for the corporations and cost centers they have rights to in their Requisitioner or Approver / Purchaser group.
- User can delete up to 50 requisitions at a time (page)



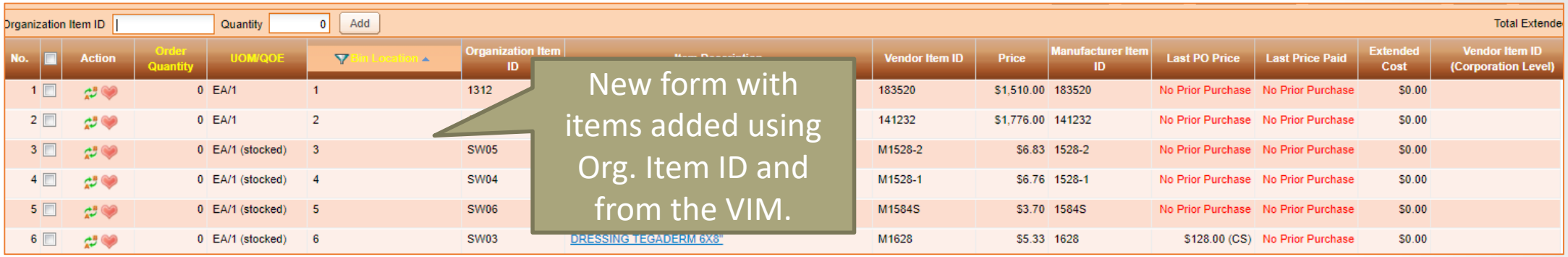
AUTO-NUMBERING FOR LOF / FAVORITE LIST LINES

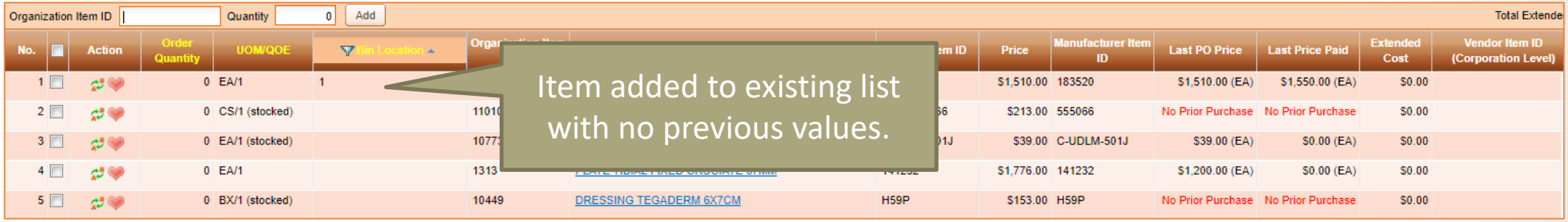
Auto-Numbering for LOF / favorite list Lines

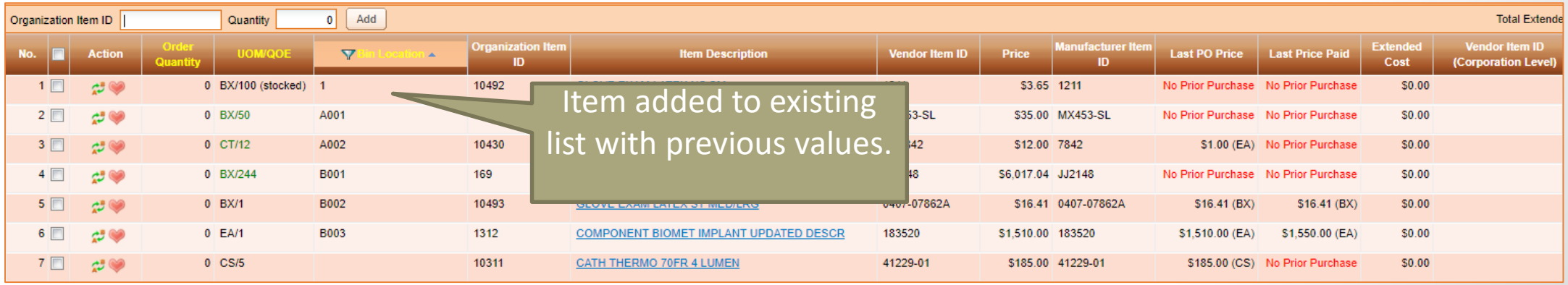
A Sequence numbering feature has been added to favorite lists and location order forms using the Location Ranking column.

- When a new list is created, numbering will begin at 1 and increment by 1 as additional items are added to the list. Location ranking will be the default sort order.
- When adding items to an existing list, auto-numbering will begin at 1. This field can be edited to a desired value.
- Existing values in the Location Ranking column will not be changed. To maintain a custom numbering schema, values will need to be manually entered (A001, A003, B011).

Auto-Numbering for LOF / favorite list Lines





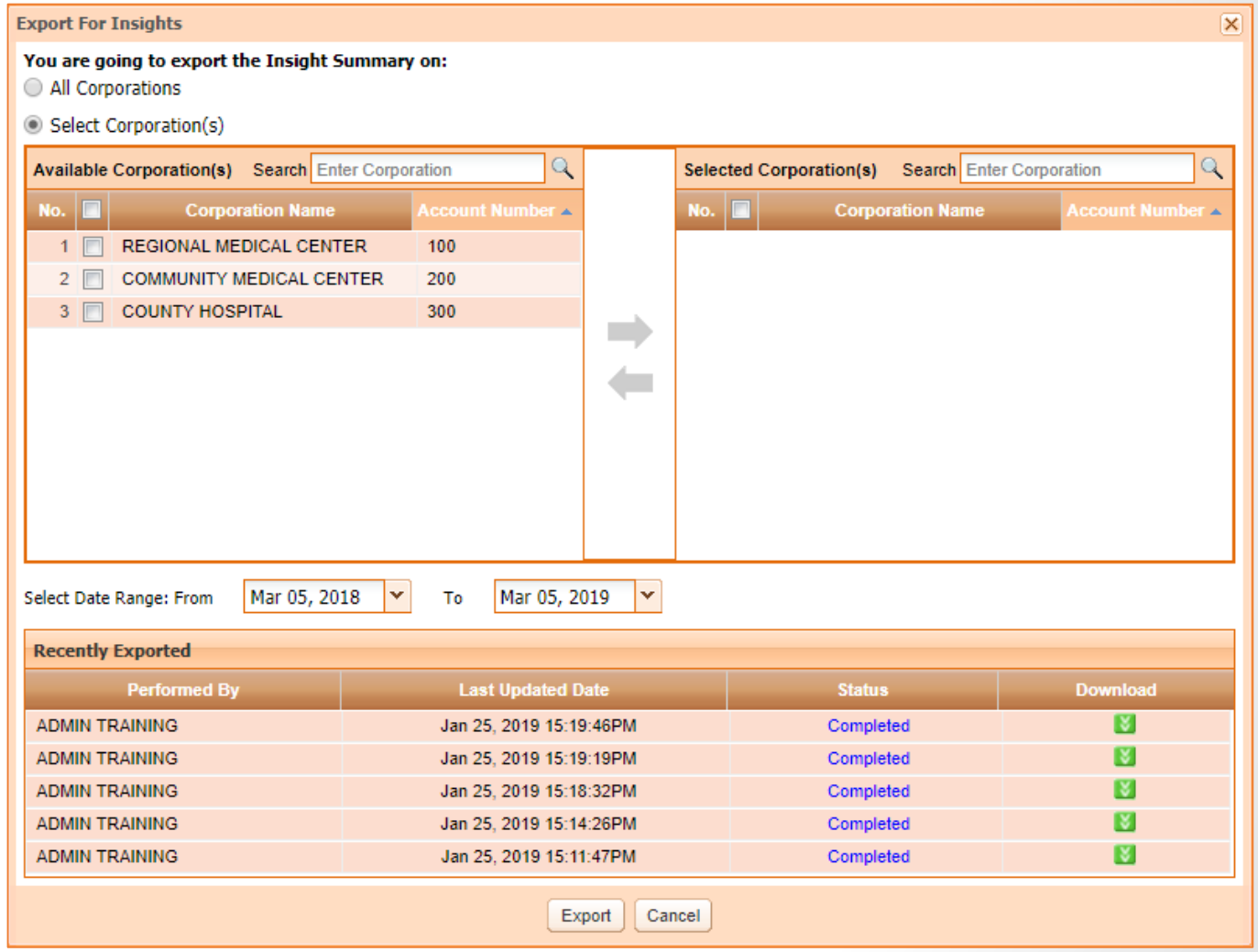


FACILITY LEVEL EXPORT FROM INSIGHT

Facility Level Export from Insight

In a multi-corporate environment, organizations needed the ability to export from Insight by facility and by a user defined data range.

- The default date range is a year back from the current date.



Facility Level Export from Insight

Include reports:

- Impacted Contract Spend Detailed
- No Available Contract Spend Detailed
- Savings Capture by Vendors
- Under Contract Spend Detailed

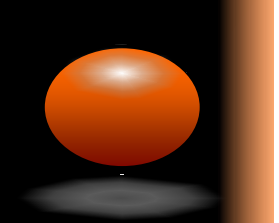
NEW CONTRACT MANAGEMENT WIDGETS

New Contract Management Widgets

The new widgets take the user to the Contract View in Contract Management.

Main Panel

Bottom Panel



UPDATE PAR FORMS FROM THE VIM (ASCM)

Update Par Forms from the VIM (ASCM)

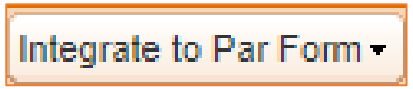
In those organizations using ASCM where location order forms / favorite lists and par forms are maintained by a single individual, it is more efficient to allow the user to update those forms from a single location. This can now be done from the VIM.

To enable this function:

- In My OS, set Integration to Par Forms to "t".
- In User Groups under Manage VIM, assign the global function *Manage Item in Par Form*

Update Par Forms from the VIM (ASCM)

Using this feature, a user can add, remove or replace items on par forms. Once a corporation is selected in the VIM, a new option will be displayed on the list header: Integrate to Par Form.



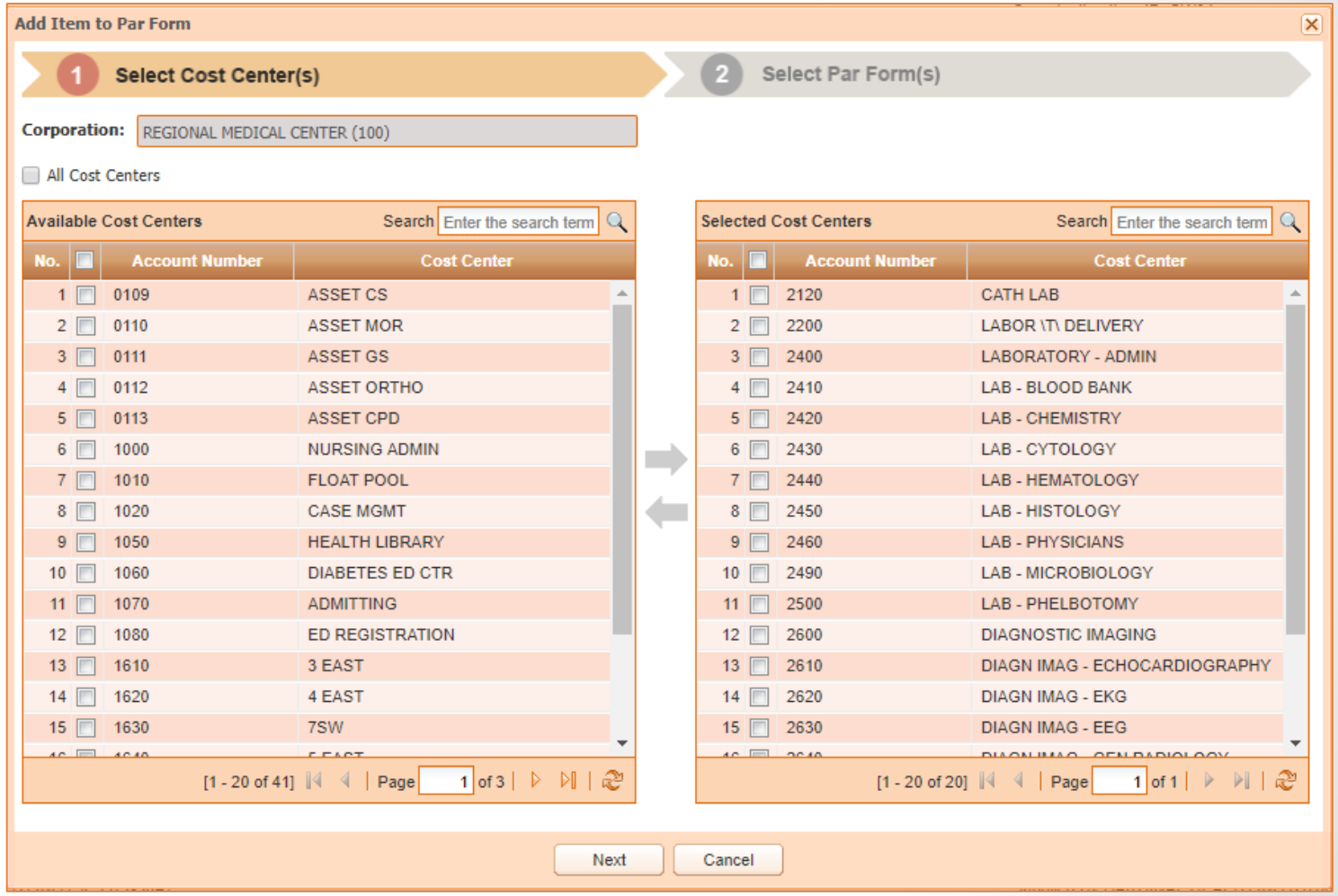
Available options in the drop down list:

- Add an Item to Par Form
- Replace an Item on Par Form
- Remove an item from Par Form
- View Sync Log

Update Par Forms from the VIM (ASCM)

Add Item to Par Form

1. Select Corporation
2. Select item
3. From the Integrate to Par Form dropdown select, Add an item to Par Form
4. Select Cost Centers
5. Click Next
6. Select Par Forms
7. Enter Quantity & UOM
8. Click Sync



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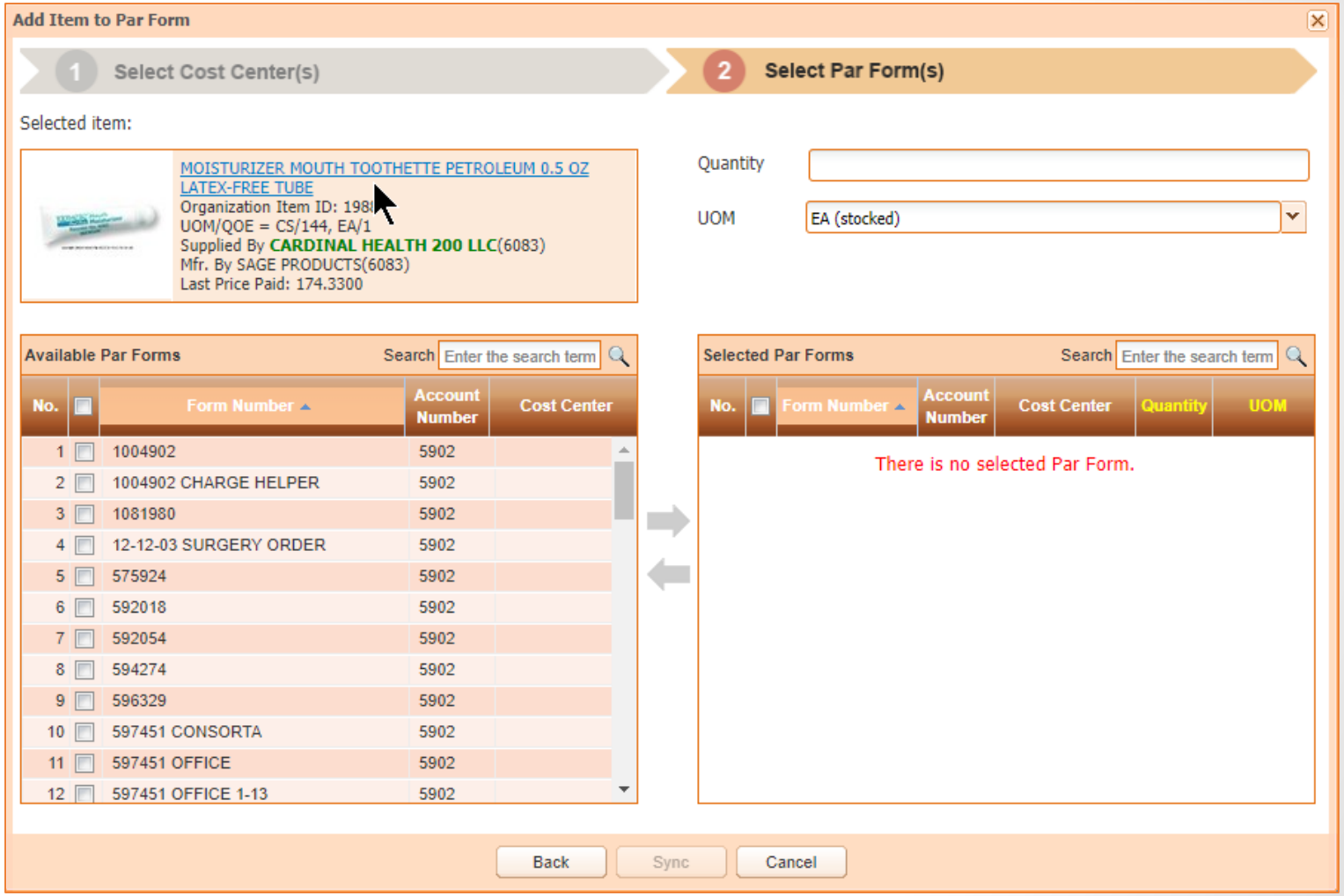


Update Par Forms from the VIM (ASCM)

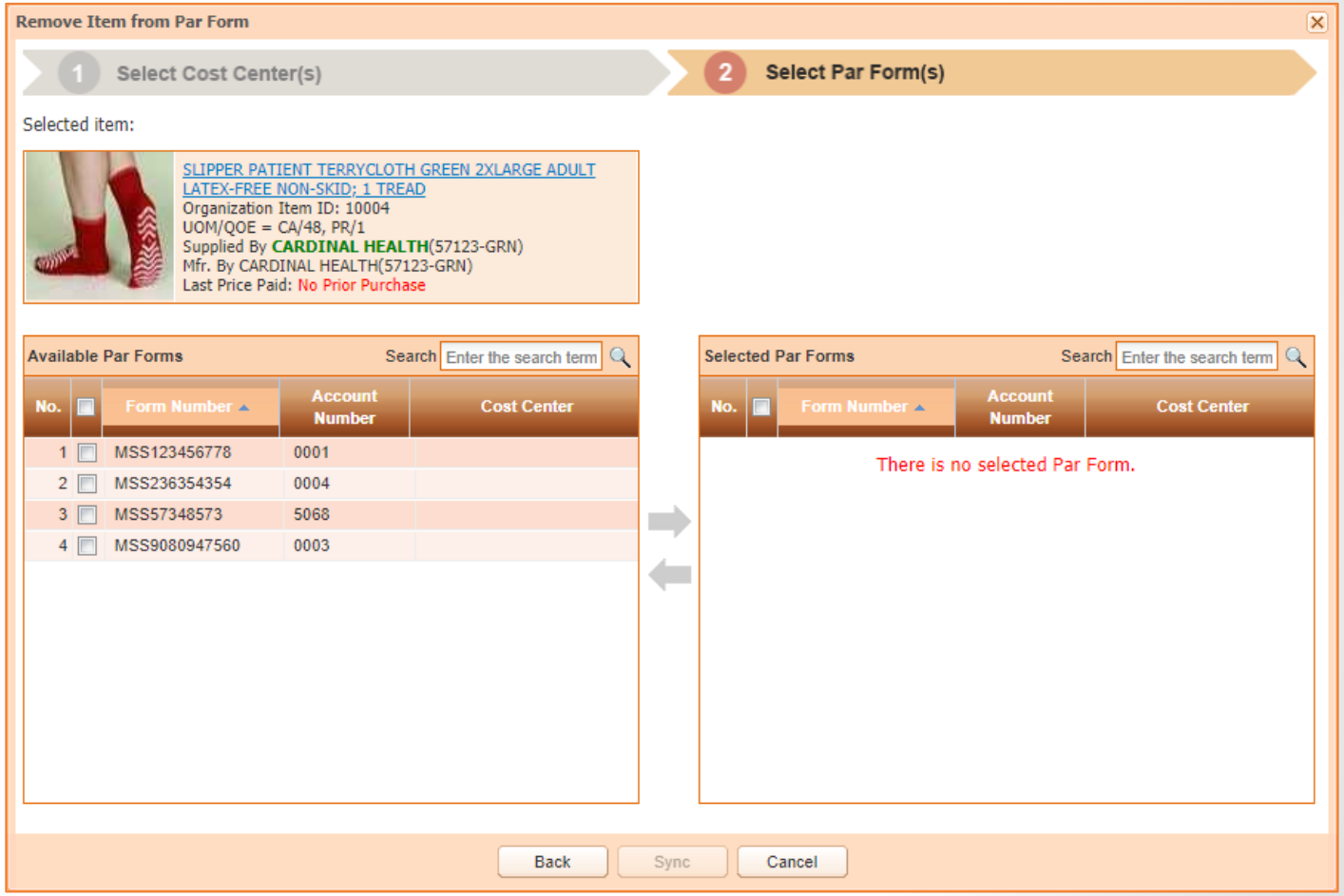
Replace Item on Par Form

1. Select Corporation
2. Select item
3. From the Integrate to Par Form dropdown select, Replace an item on Par Form
4. Select Cost Centers
5. Click Next
6. Select replacement item
7. Select Par Forms
8. If needed, update Quantity & UOM
9. Click Sync

Update Par Forms from the VIM (ASCM)

Remove Item from Par Form

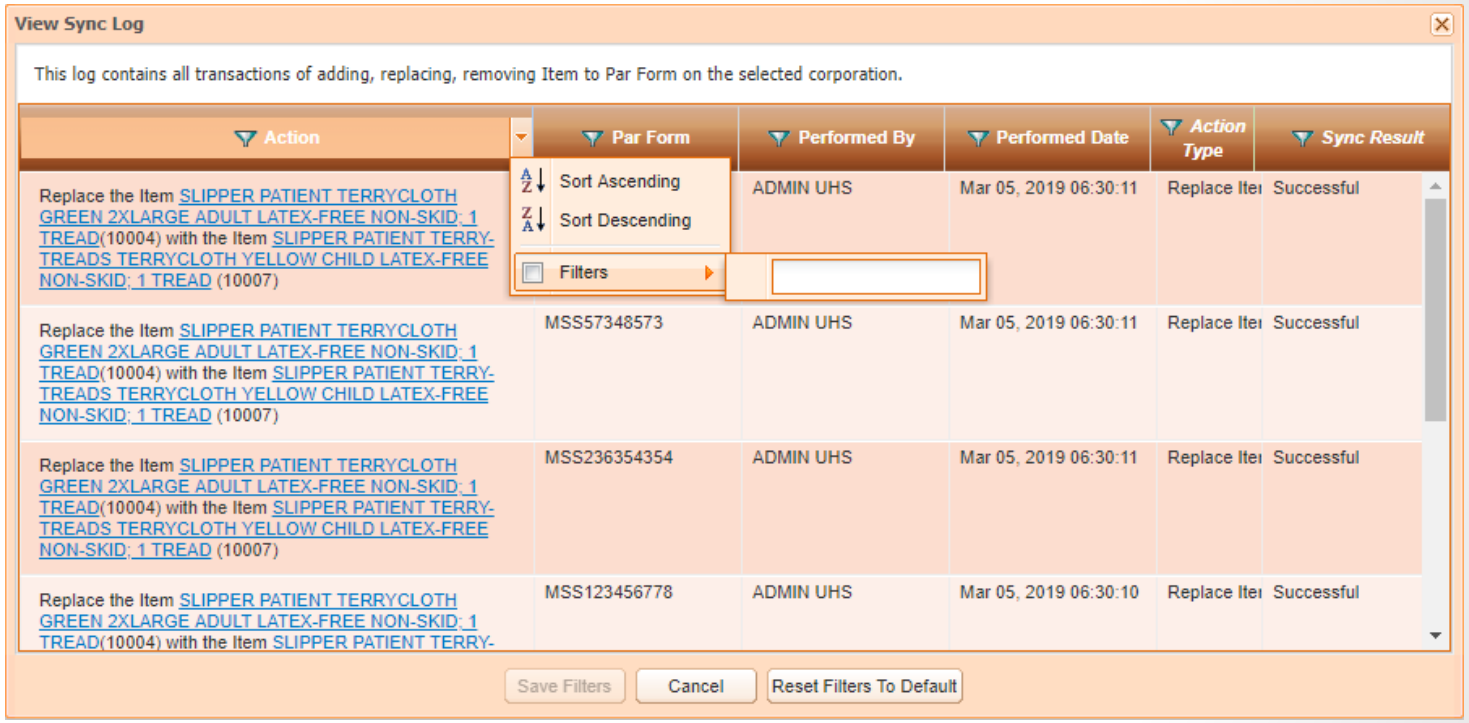
1. Select Corporation
2. Select item
3. From the Integrate to Par Form dropdown select, Remove an item from Par Form
4. Select Cost Centers
5. Click Next
6. Select Par Forms
7. Click Sync



Update Par Forms from the VIM (ASCM)

View Sync Log, filter by

- Action
- Par Form
- Performed By
- Performed Date
- Action Type
- Sync Result



UPDATING VENDOR CATALOG AT UOM LEVEL

Updating Vendor Catalog Number

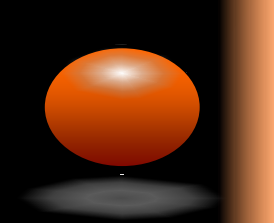
MSS stores the vendor catalog number at the Item level and UOM level. Improvements have been made in Attribute Refinement and Approval Workflow to update the vendor catalog numbers at both levels based on the following logic:

- If the existing vendor catalog number is the same at the item and UOM, UOM will be updated to new catalog number.
- If the existing vendor catalog number is NOT the same at the item and UOM, UOM will NOT be updated to new catalog number.
- If the existing vendor catalog number at the item and UOM level are both “blank”, only the item level catalog number will be updated.

Updating Vendor Catalog Number

MSS stores the vendor catalog number at the Item level and UOM level. Improvements have been made in Attribute Refinement and Approval Workflow to update the vendor catalog numbers at both levels based on the following logic:

Original VCN (in VIM)			New VCN			Vendor Catalog Number Update
VCN Item	VCN EA (Default UOM)	VCN BX	VCN Item	VCN EA (Default UOM)	VCN BX	In Attribute refinement/ Approval Workflow:
VCN01	VCN01	VCN01	VCNA	VCNA	VCNA	Case 1: Approve **VCNA** as new ITEM VCN
VCN01	VCN01	VCN02	VCNB	VCNB	VCN02	Case 2: Approve **VCNB** as new ITEM VCN
VCN01	VCN01	Blank	VCNC	VCNC	Blank	Case 3: Approve **VCNC** as new ITEM VCN
Blank	Blank	VCN02	VCND	Blank	VCN02	Case 4: Approve **VCND** as new ITEM VCN
VCN01	VCN01	Blank	VCNE	VCNE	Blank	Case 5: Approve **VCNE** as new ITEM VCN
Blank	Blank	Blank	VCNF	Blank	Blank	Case 6: Approve **VCNF** as new ITEM VCN



DEMONSTRATION

MARCH RELEASE CYCLE

March Release Cycle

- Release to Testing – March 12th
- Release to Sproduction (Pilots) – March 19th
- Release to Production – TBD

WORK ITEMS IN MARCH 2019 REVISION

Work Items in March 2019 Revision

Items To Be Released

Date in Testing:	Mar 12, 2019
Version	1.8.14

#	Work Item #	Descrtiption	Type
1	50362	Requisition Management security now allows organizations to limit users to favorite lists and location order forms for ordering.	Enhancement
2	162567	Update ASCM par forms from the VIM. User can add, replace or remove par form items.	Enhancement
3	169246	Location Ranking will auto-number items added to a favorite list or location order form. The value can be edited to a user defined value.	Enhancement
4	173310	Allow users to delete open requisitions for the corporations and cost centers they have rights to in their requisitioner or approver/purchaser group.	Enhancement
6	201196	The Insight export function can export reports at the facility or organization level.	Enhancement
7	202941	New widgets have been added to the Home page to allow users to access the Contract View from the main or bottom panel.	Enhancement
8	202978	Enhanced logic to update UOM vendor catalog number when Item level vendor catalog number is changed.	Enhancement
9	200619	When loading contract file some items were being marked as Not Applicable in error. This is fixed.	Bug Fixed
10	201206	Data not showing in Approval Workflow screen. This is fixed.	Bug Fixed
11	204399	Improved handling of requisition integration issues when the file contains data errors. This is fixed.	Bug Fixed
12	204401	Get wrong order of QOE when approving item in Price Discrepancy View. This is fixed.	Bug Fixed