Meperia

Meperia Strategic Sourcing Monthly Customer Training

January 2020

Presenter: Michele Fox-Hoke

Agenda

- Welcome
- Enhancements
  - New Requisition – Restrict Item Description Length
  - Approval Inbox – Edit New Non-Catalog Item
  - Approval Inbox – Add Item Using Org. Item ID
  - Approval Inbox – Remove Item
  - Location Order Form – Par Level Column
  - Contract Management – Integrate Contract w/o Items
  - Contract Management – Edit Contract Item Packaging

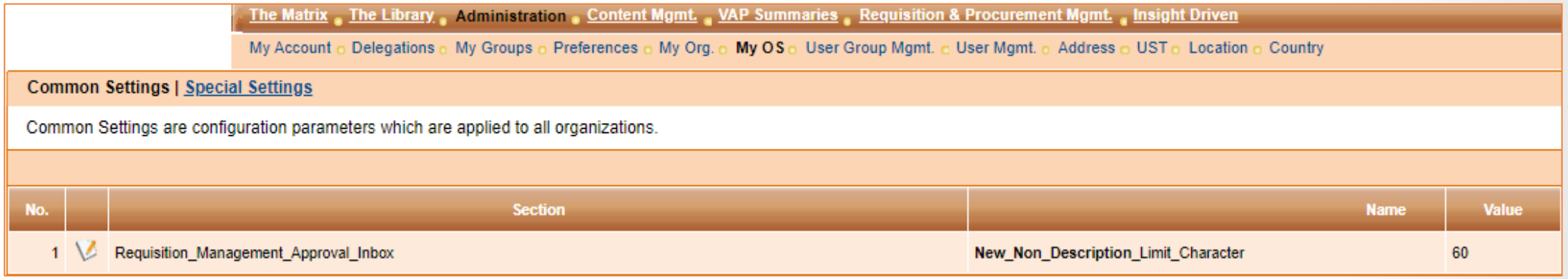
NEW REQUISITION –RESTRICT ITEM DESCRIPTION LENGTH

Restrict Item Description Length

Current Challenge – In the New Non-Catalog screen, Item Description was not restricted to the number of characters allowed by the MMIS. While the description was being truncated in the interface, the result was at times less than useful item descriptions flowing to the buyers.

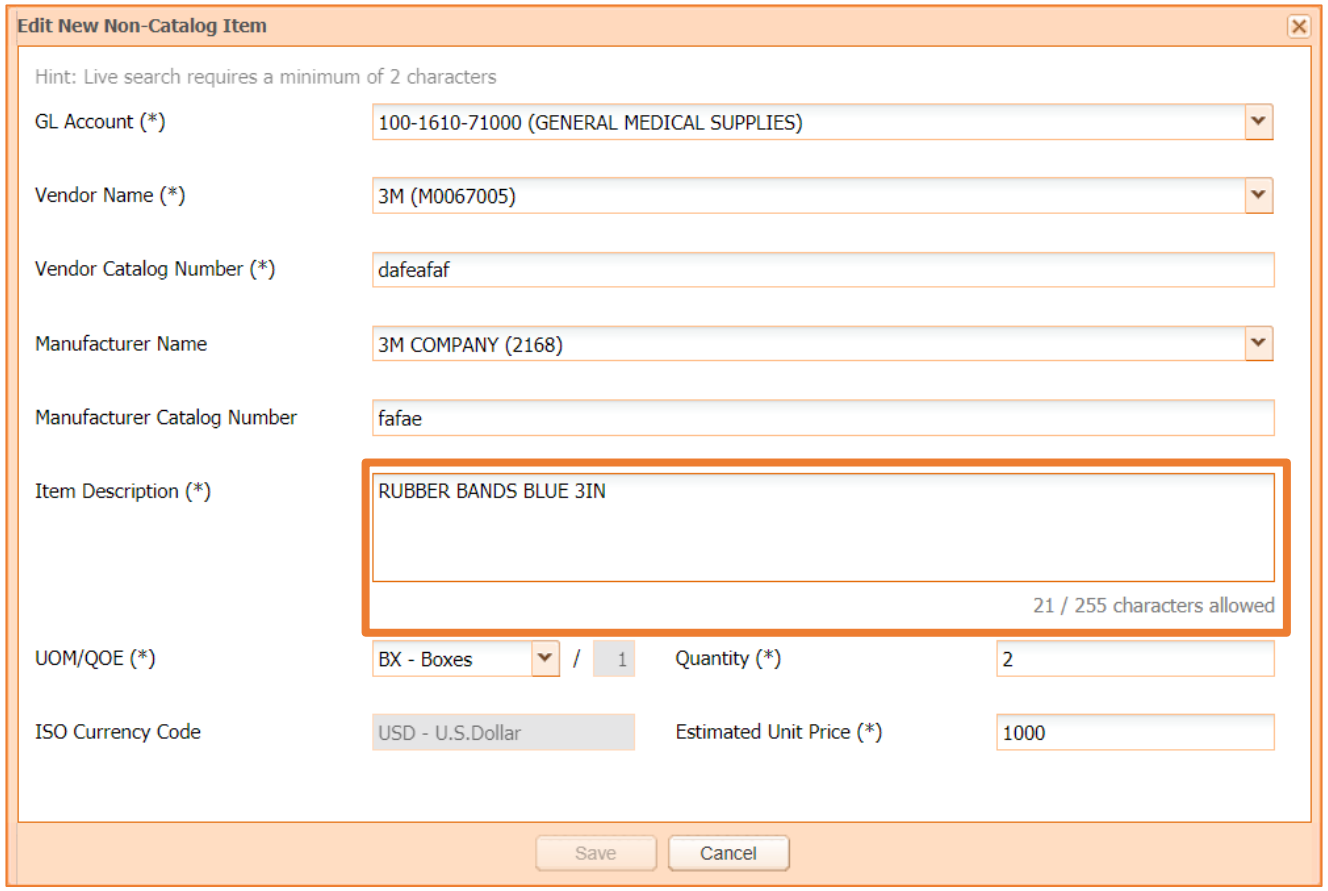
Restrict Item Description Length

Enhancement – The Item Description field can now be configured in MyOS to restrict entry to 3 to 255 characters in the New Non-Catalog screen. The default setting is “f”, false.



Restrict Item Description Length

Enhancement – The Item Description field has a character counter at the lower right corner to help users better manage the description quality. This will eliminate the descriptions being truncated in the interface.



APPROVAL INBOX – EDIT NEW NON-CATALOG

Edit New Non-Catalog

Current Challenge – When a requisitioner enters incorrect or incomplete information in the new non-catalog screen, it can not be edited the approver. And, only certain data elements can be changed in the Purchasing Inbox.

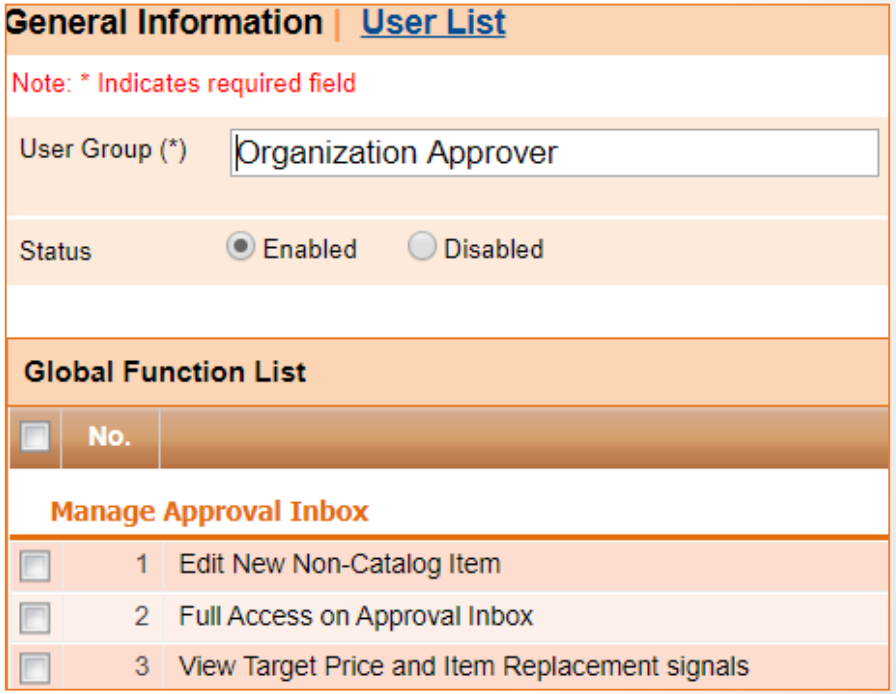
In most cases, the requisition must be sent back to the requisitioner for them to make the required changes.

Edit New Non-Catalog

Enhancement – A new Functional User Group task has been added under Manage Approval Inbox called “Edit New Non-Catalog Item”. Members of groups with this privilege will be allowed to edit new non-catalog items in the Approval Inbox.

By default the new task will be added to the following groups:

- Organization Approver
- Organization Administrator
- Organization Administrator of Division 1
- Organization Administrator of Division 2



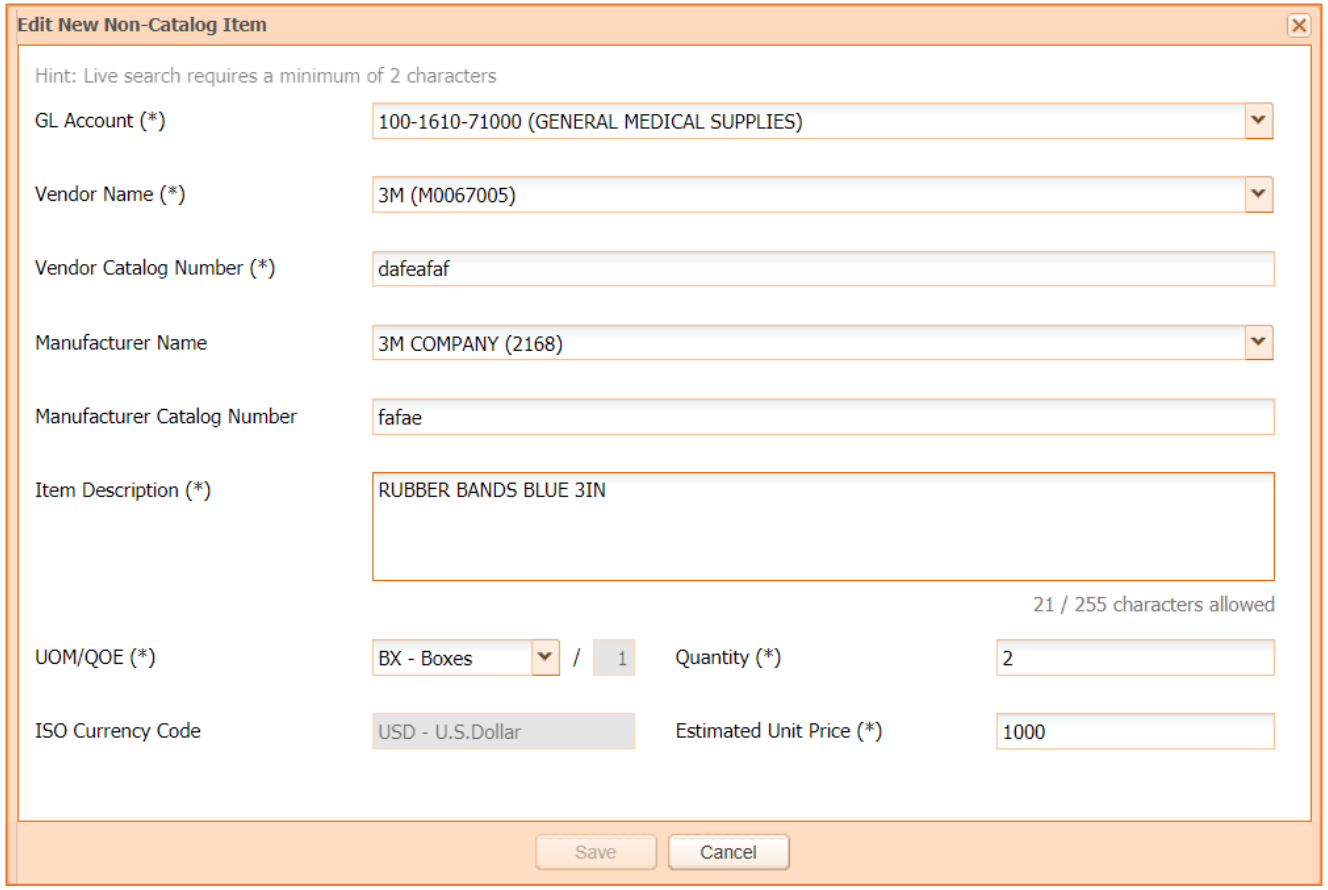
Edit New Non-Catalog

Enhancement – New non-catalog items in the Approval Inbox with at status of To Be Approved or To Be Rejected can be edited by users with the appropriate privilege.

Click on the new non-catalog item description to open a pop-up for editing.

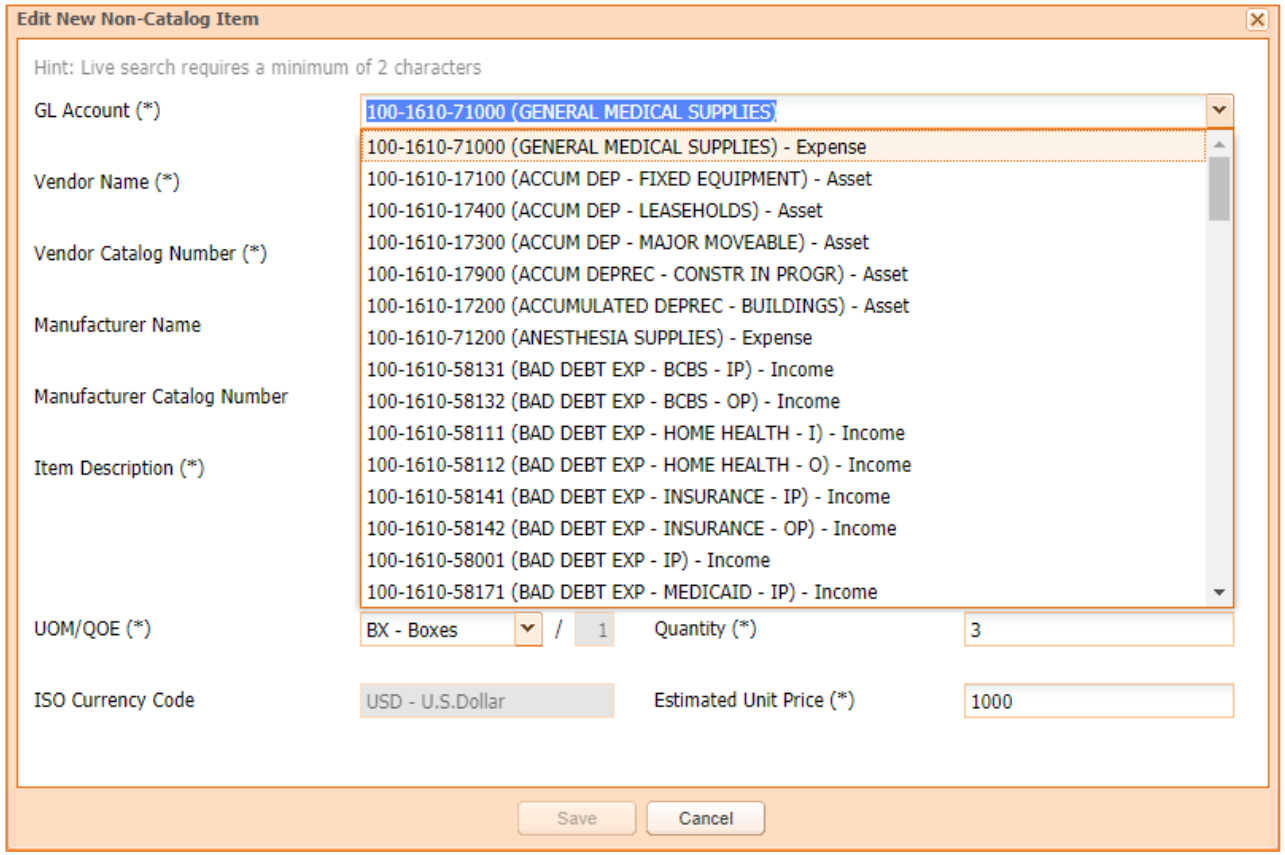
Edit New Non-Catalog

Enhancement – All data entry fields in the Edit New Non-Catalog Item dialog box can be edited.



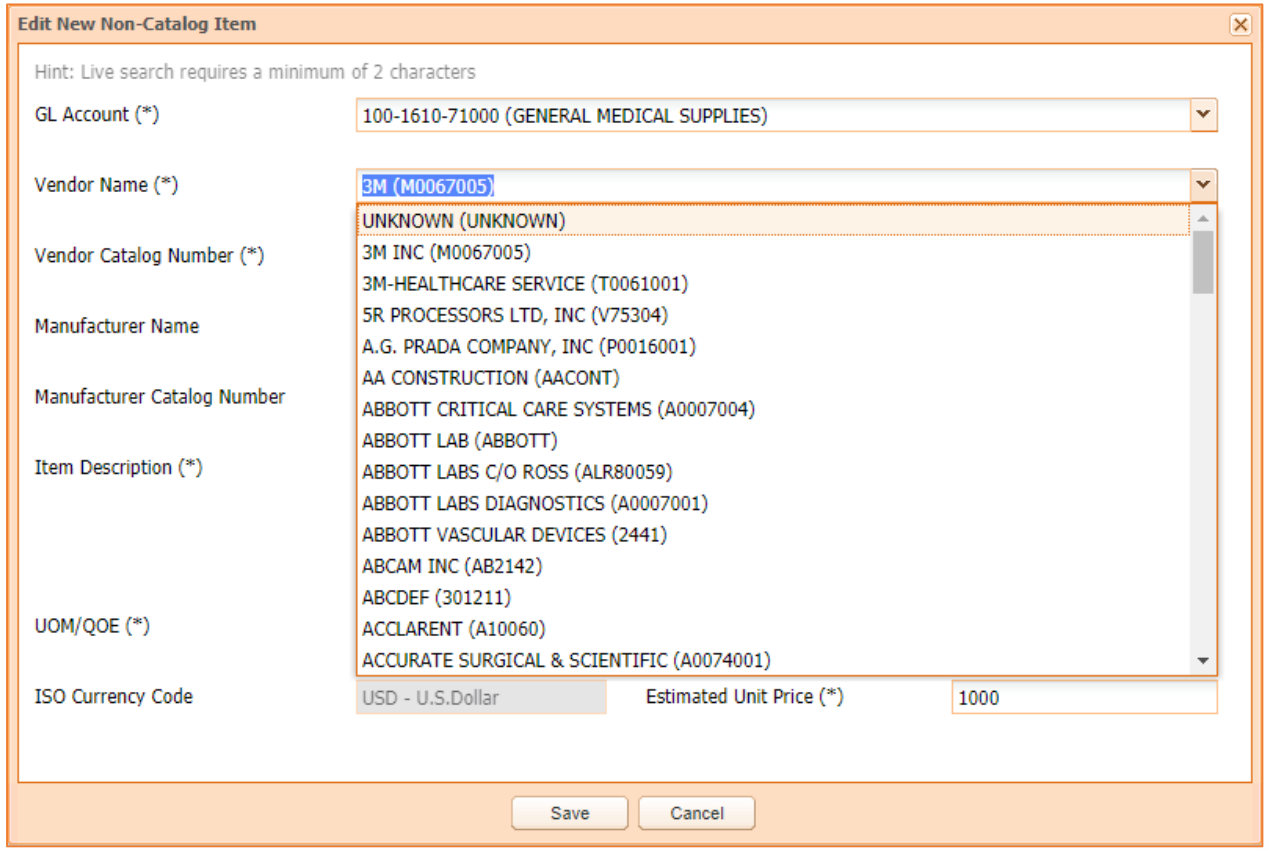
Edit New Non-Catalog

GL Search – Full GL Account is displayed. User can do partial search on GL Account or GL Account Name.



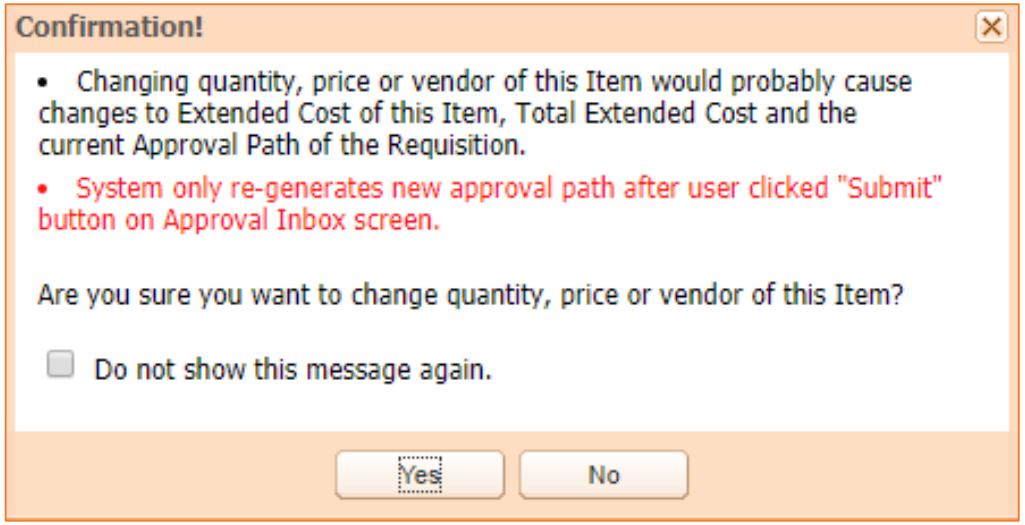
Edit New Non-Catalog

Vendor or MFR Search –User can do partial search on vendor and manufacturer name or code.



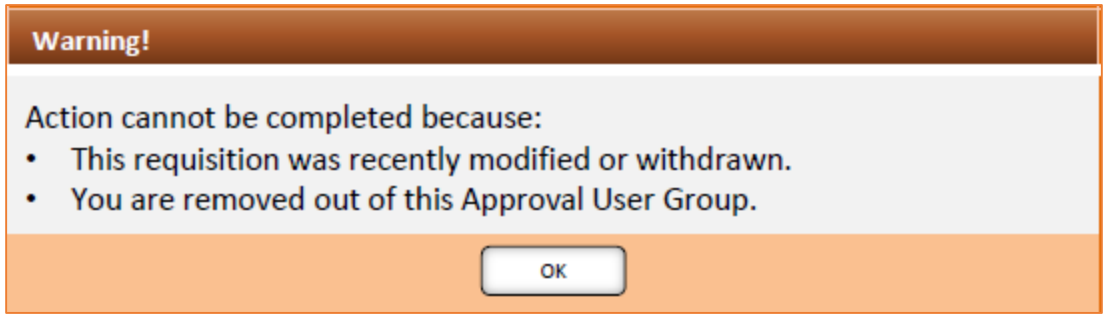
Edit New Non-Catalog

Regenerate Approval Path – the approval path will be regenerated if the user changes the Vendor, Quantity or Price. This is also true if the Quantity is changed in the Approval Inbox screen. The approval that is regenerate when the user clicks Submit.



Edit New Non-Catalog

Enhancement – New warning message if save can not be completed.



Add Item Using Org. Item ID.

Enhancement – Items can be added to a requisition in the Approval Inbox using the Org. Item ID.

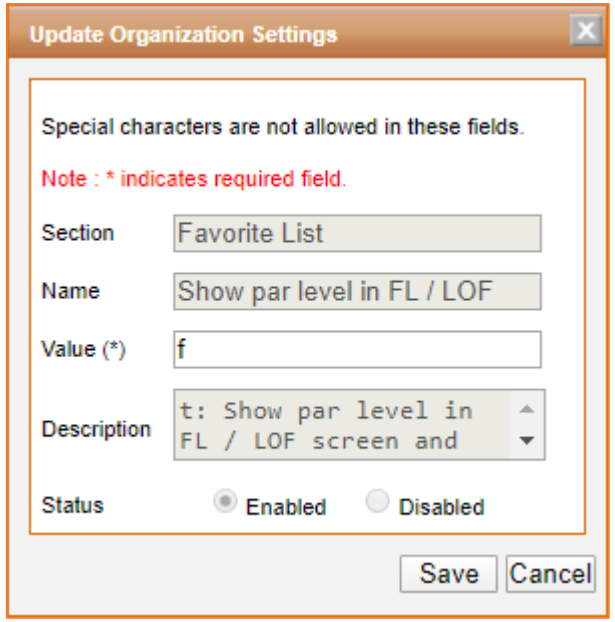
Remove Items

Enhancement – Items can be removed from a requisition in the Approval Inbox.

LOCATION ORDER FORMS

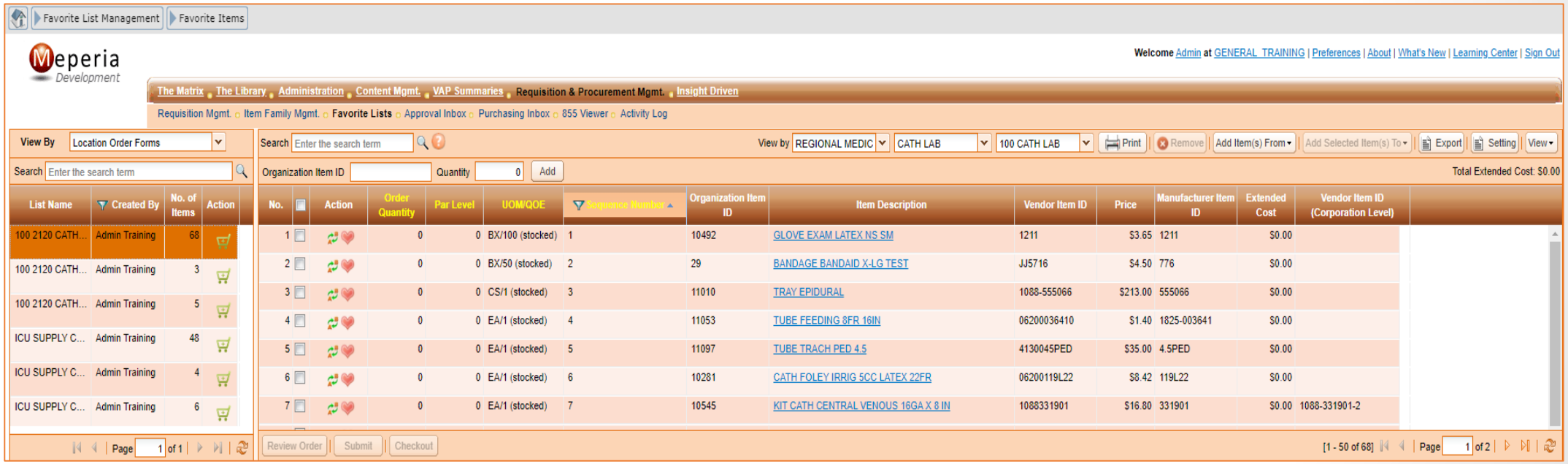
Par Level Column

Enhancement – A new option in MyOS allows organizations to add a Par Level column to LOF/FL to show desired on hand quantities. The new setting is called ***Show par level in FL/LOF***. The default value is "f".



Par Level Column

Enhancement – When enabled, the column will always be displayed next to the Order Quantity column in the LOF/FL.



CONTRACT MANAGEMENT

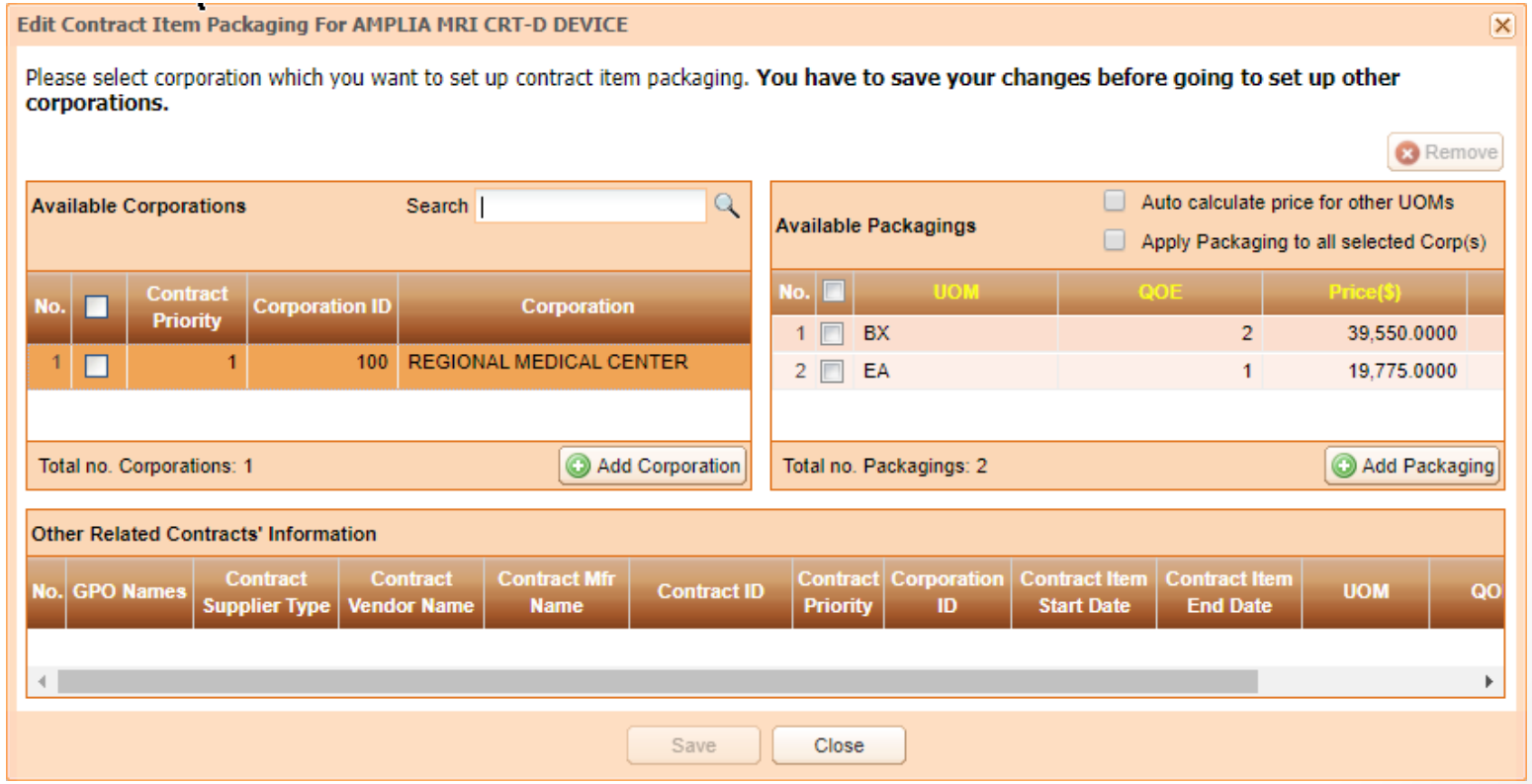
Contract Header Only (ASCM Only)

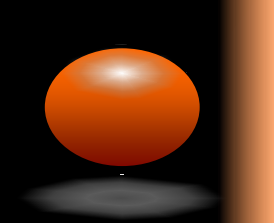
Enhancement – Contact Headers can be built in MSS and integrated to your MMIS without items being added. This is useful for service agreements or other contracts that are not item specific. Sync every 15mins.

- Updated Integration Triggers
  - Create new local contract
  - Update Start or End Date
  - Update Contract Description
  - Update Contract Status
  - Update Corporation List
  - Update Contract Number
  - Remove all items from local contract
  - Add items to a local agreement w/no previous items

Edit Contract Item Packaging

Enhancement – User can edit QOE for both non-catalog and catalog items on both local agreements and loaded contracts. QOE maximum length is 4 digits.





DEMONSTRATION

WORK ITEMS IN MARCH 2019 REVISION

Work Items in January 2020 Revision

Work Item #	Description	Type
50323 / 206503 / 206973	Add audit log and improve reporting in the Data Load screen.	Enhancement
206934 / 206935	In the mobile application, when searching by Req. Name, Req. No or Submtted by results are	Enhancement
207122	Updated the email message for unsuccessful approval or reject processing in Contract Matching Approval.	Enhancement
205878	User are not able to apply pricing or packaging updates to all selected corporations.	Enhancement
206946	When using Add Item Using Org. Item ID in the Approval Inbox, the user will receive a warning when the item is not valid for the corporation and cost center.	Bug fixed
206939	System now display a warning that there are no lines requiring approval by the user and the requisition will continue in the approval path.	Bug fixed
206388	Contracts are no longer being removed during the duplicate resolution process when identical contract information is present.	Bug fixed
206391	The correct breadcrumb trail is now displayed when viewing an FDA recall.	Bug fixed
206930	Resolved user setting issue that was preventing some users from viewing all columns an LOF/FL .	Bug fixed