

Meperia Strategic Sourcing Monthly Customer Training

January 2020

Presenter: Michele Fox-Hoke

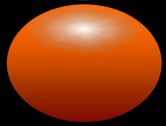


Agenda

- 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.

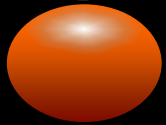
The Matrix • The Library • Administration • Content Mgmt. • VAP Summaries • Requisition & Procurement Mgmt. • Insight Driven				
My Account • Delegations • My Groups • Preferences • My Org. • My OS • User Group Mgmt. • User Mgmt. • Address • UST • Location • Country				
Common Settings Special Settings				
Common Settings are configuration parameters which are applied to all organizations.				
No.		Section	Name	Value
1		Requisition_Management_Approval_Inbox	New_Non_Description_Limit_Character	60

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.

The screenshot displays a web form titled "Edit New Non-Catalog Item". It contains several input fields for item details. The "Item Description (*)" field is highlighted with a red border and contains the text "RUBBER BANDS BLUE 3IN". A character counter at the bottom right of this field indicates "21 / 255 characters allowed". Other fields include "GL Account (*)", "Vendor Name (*)", "Vendor Catalog Number (*)", "Manufacturer Name", "Manufacturer Catalog Number", "UOM/QOE (*)", "ISO Currency Code", and "Estimated Unit Price (*)". The form has "Save" and "Cancel" buttons at the bottom.

Hint: Live search requires a minimum of 2 characters			
GL Account (*)	100-1610-71000 (GENERAL MEDICAL SUPPLIES)		
Vendor Name (*)	3M (M0067005)		
Vendor Catalog Number (*)	dafaefaf		
Manufacturer Name	3M COMPANY (2168)		
Manufacturer Catalog Number	fafae		
Item Description (*)	RUBBER BANDS BLUE 3IN 21 / 255 characters allowed		
UOM/QOE (*)	BX - Boxes	/ 1	Quantity (*) 2
ISO Currency Code	USD - U.S.Dollar	Estimated Unit Price (*) 1000	



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

General Information		User List
Note: * Indicates required field		
User Group (*)	<input type="text" value="Organization Approver"/>	
Status	<input checked="" type="radio"/> Enabled <input type="radio"/> Disabled	
Global Function List		
<input type="checkbox"/>	No.	
Manage Approval Inbox		
<input type="checkbox"/>	1	Edit New Non-Catalog Item
<input type="checkbox"/>	2	Full Access on Approval Inbox
<input type="checkbox"/>	3	View Target Price and Item Replacement signals

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.

Organization Item ID		Quantity	Add
#	<input type="checkbox"/>	Org. Item ID	Item Description
1	<input type="checkbox"/>		<div><div>RUBBER BANDS BLUE 3IN</div><div>Corporation = REGIONAL MEDICAL CENTER UOM/QOE/VCN = BX/1 Supplied By 3M (dafaefaf) Mfr. By 3M COMPANY (fafae)</div></div>



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 Item

Hint: Live search requires a minimum of 2 characters

GL Account (*)

100-1610-71000 (GENERAL MEDICAL SUPPLIES)

Vendor Name (*)

3M (M0067005)

Vendor Catalog Number (*)

dafeafaf

Manufacturer Name

3M COMPANY (2168)

Manufacturer Catalog Number

fafae

Item Description (*)

RUBBER BANDS BLUE 3IN

21 / 255 characters allowed

UOM/QOE (*)

BX - Boxes

/

1

Quantity (*)

2

ISO Currency Code

USD - U.S.Dollar

Estimated Unit Price (*)

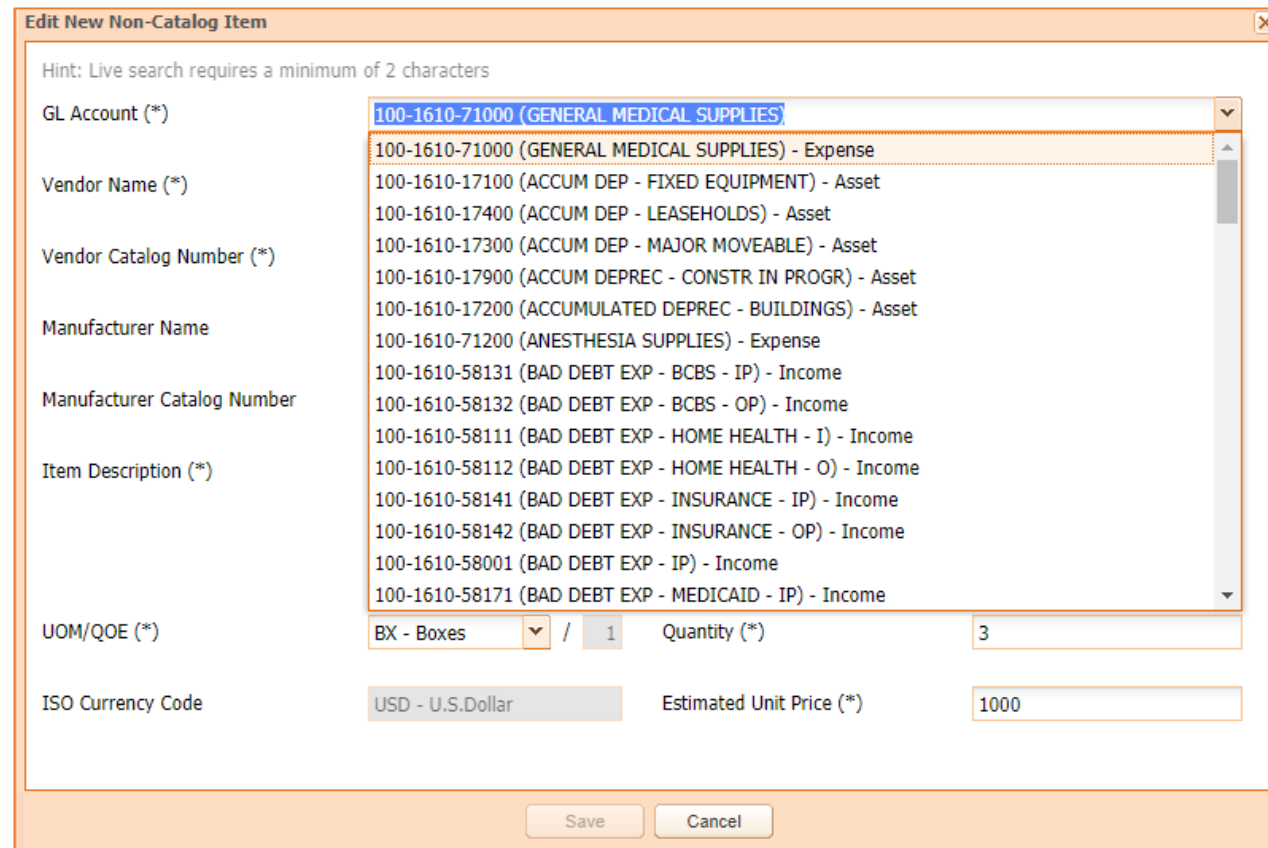
1000

Save

Cancel

Edit New Non-Catalog

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

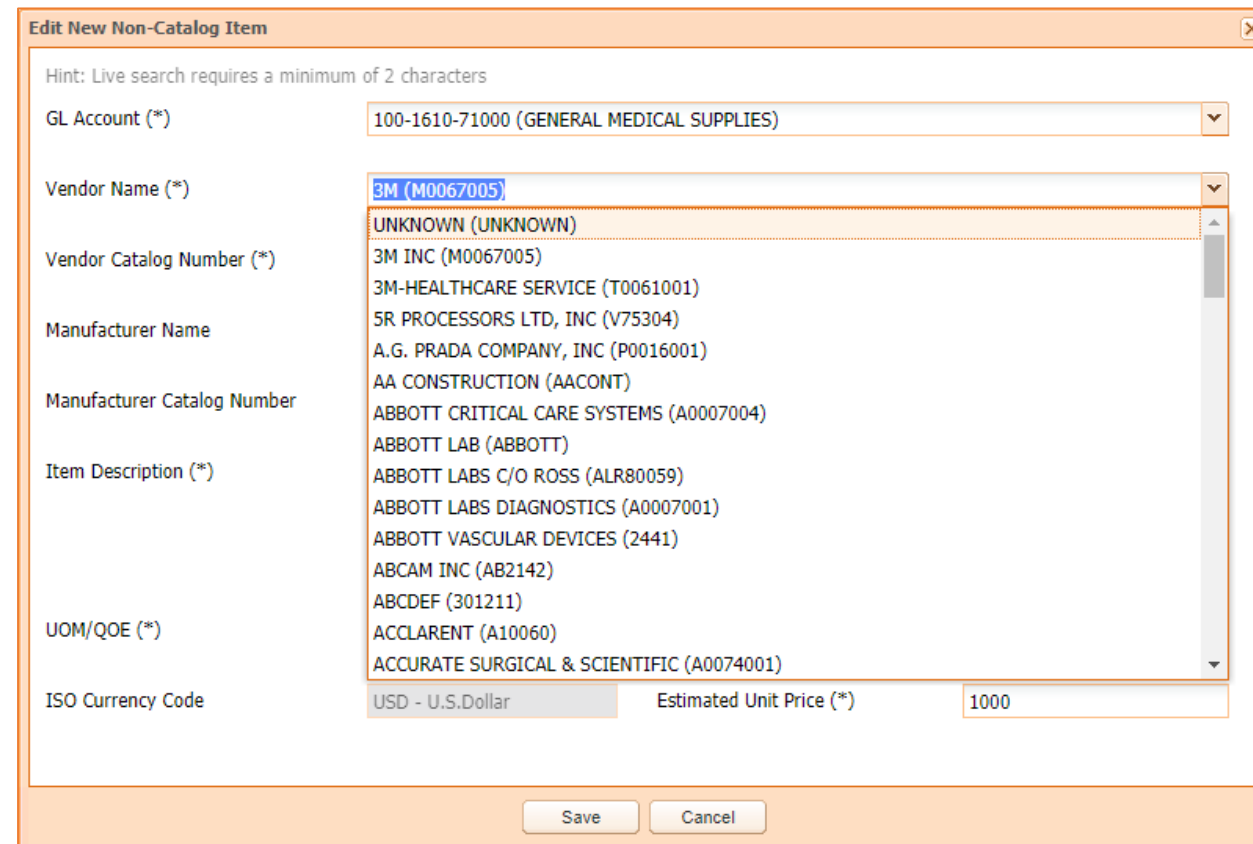


The screenshot shows a software window titled "Edit New Non-Catalog Item". At the top, a hint reads: "Hint: Live search requires a minimum of 2 characters". Below this, there are several input fields on the left and a large list box on the right. The list box contains a search result for the "GL Account (*)" field, showing "100-1610-71000 (GENERAL MEDICAL SUPPLIES)". Other fields include "Vendor Name (*)", "Vendor Catalog Number (*)", "Manufacturer Name", "Manufacturer Catalog Number", "Item Description (*)", "UOM/QOE (*)" (set to "BX - Boxes" with a quantity of "1"), "Quantity (*)" (set to "3"), "ISO Currency Code" (set to "USD - U.S.Dollar"), and "Estimated Unit Price (*)" (set to "1000"). At the bottom are "Save" and "Cancel" buttons.

Field	Value
GL Account (*)	100-1610-71000 (GENERAL MEDICAL SUPPLIES)
Vendor Name (*)	
Vendor Catalog Number (*)	
Manufacturer Name	
Manufacturer Catalog Number	
Item Description (*)	
UOM/QOE (*)	BX - Boxes / 1
Quantity (*)	3
ISO Currency Code	USD - U.S.Dollar
Estimated Unit Price (*)	1000

Edit New Non-Catalog

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



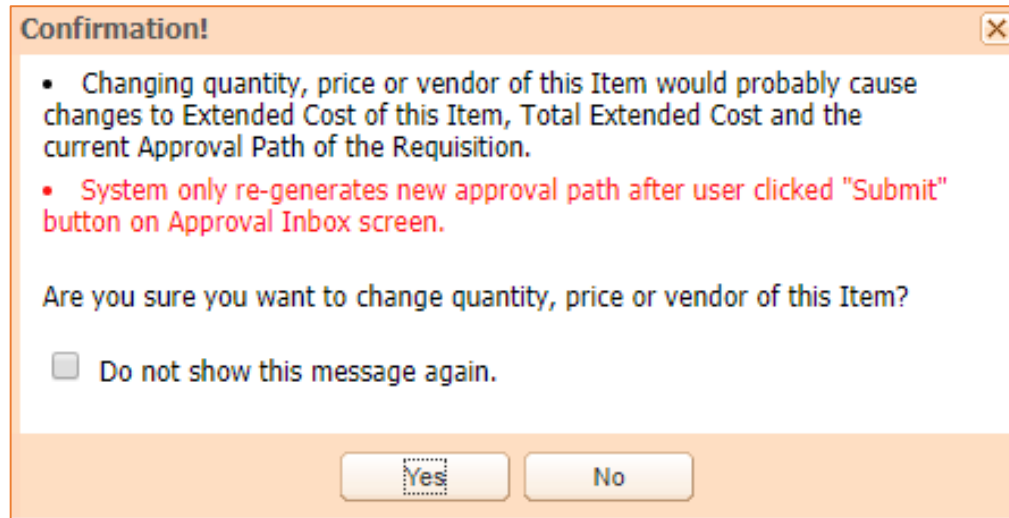
The screenshot shows a web-based form titled "Edit New Non-Catalog Item". It contains several input fields and a large search dropdown. The fields are: GL Account (*), Vendor Name (*), Vendor Catalog Number (*), Manufacturer Name, Manufacturer Catalog Number, Item Description (*), UOM/QOE (*), and ISO Currency Code. The search dropdown is currently open, displaying a list of vendor and manufacturer entries. The first entry, "3M (M0067005)", is highlighted. The "Estimated Unit Price (*)" field is set to "1000". At the bottom of the form are "Save" and "Cancel" buttons.

Field	Value
GL Account (*)	100-1610-71000 (GENERAL MEDICAL SUPPLIES)
Vendor Name (*)	3M (M0067005)
Vendor Catalog Number (*)	3M INC (M0067005)
Manufacturer Name	3M-HEALTHCARE SERVICE (T0061001)
Manufacturer Catalog Number	5R PROCESSORS LTD, INC (V75304)
Item Description (*)	A.G. PRADA COMPANY, INC (P0016001)
UOM/QOE (*)	AA CONSTRUCTION (AACONT)
ISO Currency Code	USD - U.S.Dollar
Estimated Unit Price (*)	1000



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.



A confirmation dialog box with an orange border and a close button (X) in the top right corner. The title bar reads "Confirmation!". The main content area contains two bullet points: the first is black text stating that changing quantity, price, or vendor will likely change the extended cost, total extended cost, and the current approval path; the second is red text stating that the system only re-generates the new approval path after the user clicks "Submit" on the Approval Inbox screen. Below the bullets is the question "Are you sure you want to change quantity, price or vendor of this Item?". At the bottom left is a checkbox labeled "Do not show this message again.". At the bottom right are two buttons: "Yes" and "No".

Confirmation!

- Changing quantity, price or vendor of this Item would probably cause changes to Extended Cost of this Item, Total Extended Cost and the current Approval Path of the Requisition.
- System only re-generates new approval path after user clicked "Submit" button on Approval Inbox screen.

Are you sure you want to change quantity, price or vendor of this Item?

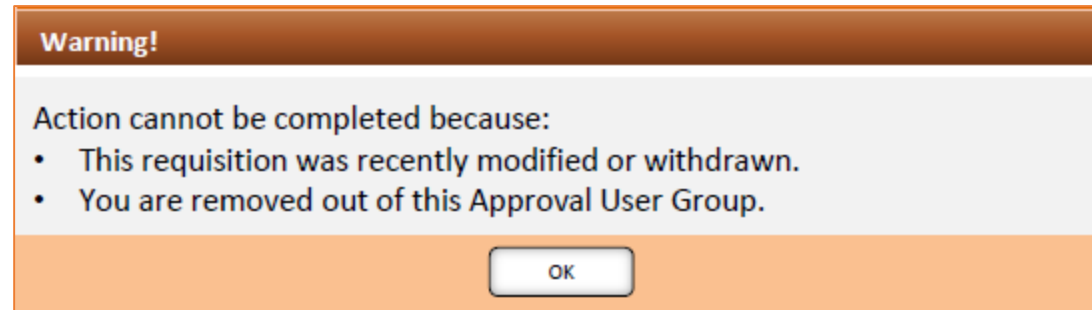
☐ Do not show this message again.

Yes No



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.

Approval Request List													Filter	Search	Enter the search term
No.		Requisition Number	Requisition Name	Corporation	Cost Center	Line Count	Submitted By	Submitted Date	Approval Rule	Status					
1											Total Extended Cost: \$2,000.0000 This List's Cost Savings Opportunity: \$0.0000				
		MSSS191226160654908105	Edit New Non-Catalog Test	REGIONAL MEDICAL CENTER (100)	3 EAST (1610)	1	Admin Training	Dec 26, 2019		Awaiting Approval	<div> <div>Submit</div> <div>Approve All</div> <div>Reject All</div> </div>				
<div> <div>Organization Item ID</div> <div></div> <div>Quantity</div> <div>1</div> <div>Add</div> </div> <div>Remove</div>															
#	<input checked="" type="checkbox"/>	Org. Item ID	Item Description	Expense Code	UOM/QOE	Price (\$)	Quantity	On Order Quantity	Extended Cost (\$)	Approval Rule	Status / Note				
1	<input checked="" type="checkbox"/>		<u>RUBBER BANDS BLUE 3IN</u> Corporation = REGIONAL MEDICAL CENTER UOM/QOE/VCN = BX/1 Supplied By 3M (dafaefaf) Mfr. By 3M COMPANY (fafaefaf)	GENERAL MEDICAL SUPPLIES (71000)	BX/1	1,000.0000	2	4	2,000.0000	Formulary Level 4	To Be Approved	<div> <div></div> <div></div> <div></div> </div>			

Remove Items

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

Approval Request List

Filter

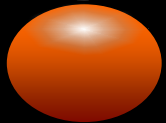
Search

Enter the search term

No.	Requisition Number	Requisition Name	Corporation	Cost Center	Line Count	Submitted By	Submitted Date	Approval Rule	Status		
1											
	MSSS191226160654908105	Edit New Non-Catalog Test	REGIONAL MEDICAL CENTER (100)	3 EAST (1610)	1	Admin Training	Dec 26, 2019		Awaiting Approval		
<div>Organization Item ID <input type="text"/> Quantity <input type="text" value="1"/> <input type="button" value="Add"/></div>											
#	<input checked="" type="checkbox"/>	Org. Item ID	Item Description	Expense Code	UOM/QOE	Price (\$)	Quantity	On Order Quantity	Extended Cost (\$)	Approval Rule	Status / Note
1	<input checked="" type="checkbox"/>		RUBBER BANDS BLUE 3IN Corporation = REGIONAL MEDICAL CENTER UOM/QOE/VCN = BX/1 Supplied By 3M (dafaefaf) Mfr. By 3M COMPANY (fafaef)	GENERAL MEDICAL SUPPLIES (71000)	BX/1	1,000.0000	2	4	2,000.0000	Formulary Level 4	To Be Approved

Total Extended Cost: \$2,000.0000

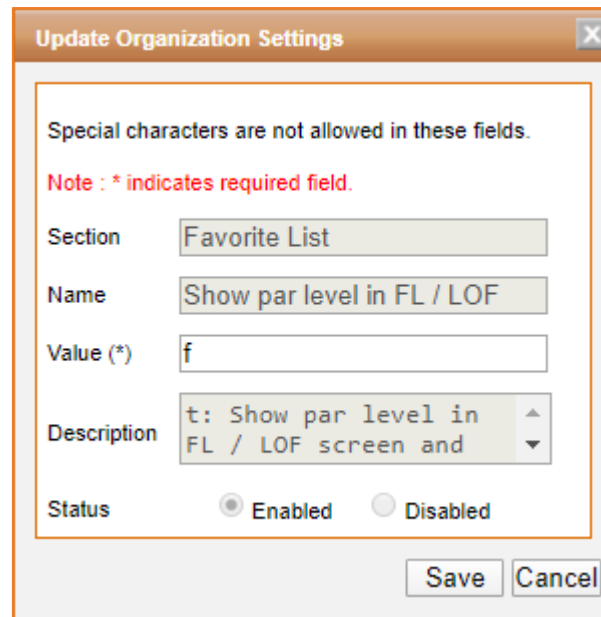
This List's Cost Savings Opportunity: \$0.0000



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”.



The screenshot shows a dialog box titled "Update Organization Settings" with a close button (X) in the top right corner. Inside the dialog, there is a warning message: "Special characters are not allowed in these fields." followed by a note: "Note : * indicates required field." The form contains the following fields:

- Section:** A text box containing "Favorite List".
- Name:** A text box containing "Show par level in FL / LOF".
- Value (*):** A text box containing "f".
- Description:** A text box containing "t: Show par level in FL / LOF screen and".
- Status:** Two radio buttons, "Enabled" (which is selected) and "Disabled".

At the bottom right of the dialog are two buttons: "Save" and "Cancel".

Par Level Column

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

Meperia Development

Welcome Admin at GENERAL TRAINING | Preferences | About | What's New | Learning Center | Sign Out

The Matrix | The Library | Administration | Content Mgmt. | VAP Summaries | Requisition & Procurement Mgmt. | Insight Driven

Requisition Mgmt. | Item Family Mgmt. | Favorite Lists | Approval Inbox | Purchasing Inbox | 855 Viewer | Activity Log

View By: Location Order Forms

Search: Enter the search term

View by: REGIONAL MEDIC | CATH LAB | 100 CATH LAB

Print | Remove | Add Item(s) From | Add Selected Item(s) To | Export | Setting | View

Organization Item ID: Quantity: 0 Add

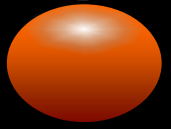
Total Extended Cost: \$0.00

List Name	Created By	No. of Items	Action	No.	Action	Order Quantity	Par Level	UOM/QOE	Sequence Number	Organization Item ID	Item Description	Vendor Item ID	Price	Manufacturer Item ID	Extended Cost	Vendor Item ID (Corporation Level)
100 2120 CATH...	Admin Training	68		1		0	0	BX/100 (stocked)	1	10492	GLOVE EXAM LATEX NS SM	1211	\$3.65	1211	\$0.00	
100 2120 CATH...	Admin Training	3		2		0	0	BX/50 (stocked)	2	29	BANDAGE BANDAID X-LG TEST	JJ5716	\$4.50	776	\$0.00	
100 2120 CATH...	Admin Training	5		3		0	0	CS/1 (stocked)	3	11010	TRAY EPIDURAL	1088-555066	\$213.00	555066	\$0.00	
ICU SUPPLY C...	Admin Training	48		4		0	0	EA/1 (stocked)	4	11053	TUBE FEEDING 8FR 16IN	06200036410	\$1.40	1825-003641	\$0.00	
ICU SUPPLY C...	Admin Training	4		5		0	0	EA/1 (stocked)	5	11097	TUBE TRACH PED 4.5	4130045PED	\$35.00	4.5PED	\$0.00	
ICU SUPPLY C...	Admin Training	4		6		0	0	EA/1 (stocked)	6	10281	CATH FOLEY IRRIG 50C LATEX 22FR	06200119L22	\$8.42	119L22	\$0.00	
ICU SUPPLY C...	Admin Training	6		7		0	0	EA/1 (stocked)	7	10545	KIT CATH CENTRAL VENOUS 16GA X 8 IN	1088331901	\$16.80	331901	\$0.00	1088-331901-2

Page 1 of 1

Review Order | Submit | Checkout

[1 - 50 of 68] | Page 1 of 2



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.

Edit Contract Item Packaging For AMPLIA MRI CRT-D DEVICE

Please select corporation which you want to set up contract item packaging. You have to save your changes before going to set up other corporations.

Available Corporations

Search

No.	<input type="checkbox"/>	Contract Priority	Corporation ID	Corporation
1	<input type="checkbox"/>	1	100	REGIONAL MEDICAL CENTER

Total no. Corporations: 1

Add Corporation

Available Packagings

☐ Auto calculate price for other UOMs
☐ Apply Packaging to all selected Corp(s)

No.	<input type="checkbox"/>	UOM	QOE	Price(\$)
1	<input type="checkbox"/>	BX	2	39,550.0000
2	<input type="checkbox"/>	EA	1	19,775.0000

Total no. Packagings: 2

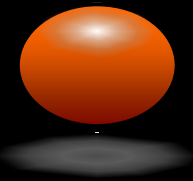
Add Packaging

Other Related Contracts' Information

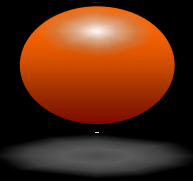
No.	GPO Names	Contract Supplier Type	Contract Vendor Name	Contract Mfr Name	Contract ID	Contract Priority	Corporation ID	Contract Item Start Date	Contract Item End Date	UOM	QO
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Save

Close



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 Submitted 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