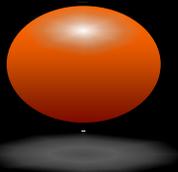


Meperia

Meperia Strategic Sourcing Monthly Customer Training

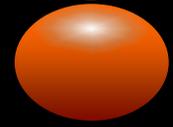
March 2020

Presenter: Michele Fox-Hoke

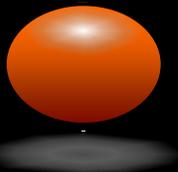


Agenda

- Welcome
- Enhancements
 - Requisition Types
 - Normal, Stat, and Capital (new)
 - Project and Sub-Project fields
 - Contract Load Audit



REQUISITION TYPES



Requisition Types

Current Challenge – Approval Groups only support 2 approval paths: Normal and Stat. Customers need the ability to support a variety of paths depending on what was being requisitioned.

Requisition Types

Enhancement – Organizations can now add new requisition types to the existing categories of Normal and Stat, and a new category has also been added called Capital. A new icon  displays in Requisition Management when a capital Requisition Type is selected on the requisition header.

Requisition List												Search	Report	Filter	Print	New	Delete
No.			Original Requisition Number	Requisition Number	Requisition Name	Corporation	Cost Center	Line Count	Created By	Created Date	Submitted Date	Total Extended Cc (\$)					
1				MSSS200303000040703705	MSSS200303000040703705	REGIONAL MEDICAL CENTER (100)	ICU (1650)	0	Admin Training	Mar 03, 2020	N/A						
2				MSSS200121174102128992	MSSS200121174102128992	REGIONAL MEDICAL CENTER (100)	ICU (1650)	1	Admin Training	Jan 21, 2020	Jan 21, 2020	22,08					
3				MSSS200110190712331457	MSSS200110190712331457	REGIONAL MEDICAL CENTER (100)	ICU (1650)	1	Admin Training	Jan 10, 2020	N/A						

Requisition Types

Security – New global function called *Full Access on Req. Types*. It has been added to all Organization Administrator Functional User Groups. This functional enables the Req. Types menu option under Administration.



No.	Global Function
	Manage Req. Types
40	Full Access on Req. Types

Save Cancel

[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](#) • **[Req. Types](#)**

Requisition Types

- Required
 - Normal / Normal Requisition
 - Stat / Stat Requisition

These are greyed out and can not be deleted or disabled. Additional types can be created under the Normal, Stat and Capital categories.

Requisition Type List		Search <input type="text" value="Enter the search term"/>		 New	 Delete	 Enabled	 Disabled
No.		Requisition Category	Requisition Type Name	Description	Status		
1		Normal	Normal Requisition		Enabled		
2		Stat	Stat Requisition		Enabled		
3		 Capital	Capital		Enabled		
4		 Normal	IT		Enabled		

Requisition Types

To use Requisition Types

1. Create the new requisition type.
2. Build approval paths for the new requisition type.
3. Update existing approval groups to account for the new type.
4. During requisitioning, select the new requisition type on the requisition header.

New Approver/Purchaser User Group

1 General Information **2 Approval/Purchasing Rules**

Note: * Indicates required field

User Group (*)

User group's name must be from 3 to 255 characters

Status Enabled Disabled

Scope

Is Purchaser?

IT

Normal Requisition

Stat Requisition

Save

Requisition Number: MSSS200303060434028428

Note: * Indicates required field

Created By Admin Training

Created Date Mar 03, 2020

Status Open

Requisition Type (*)

Capital

IT

Normal Requisition

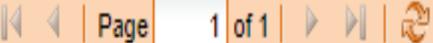
Stat Requisition

Auto-Approved / Approved

Requisition Types

The Scope field has been added in the Approver/Purchaser User Group view in User Group Management.

Approver/Purchaser User Groups		Search <input type="text" value="100 2100"/>		 New	 Delete	 Enable	 Disable	
No.	<input type="checkbox"/>	Approver/Purchaser User Group	Group Type	 Scope	No. of Corporations	No. of Users	Status	Action
1	<input type="checkbox"/>	100 2100 I/P SURGERY Approver Level 1	Approver User Group	Normal Requisition	1	10	Enabled	
2	<input type="checkbox"/>	100 2100 I/P SURGERY Approver Level 1 STAT	Approver User Group	Stat Requisition	1	5	Enabled	
3	<input type="checkbox"/>	100 2100 I/P SURGERY Approver Level 2	Approver User Group	Normal Requisition	1	9	Enabled	
4	<input type="checkbox"/>	100 2100 I/P SURGERY Approver Level 2 STAT	Approver User Group	Stat Requisition	1	4	Enabled	

Page of 1 



Requisition Types – Sample Build

Build a STAT approval path for Surgery. STAT is an existing type.

1. Rename all existing approval groups for 100-2120 Surgery (currently set to All Requisitions) to 100-2120 Surgery NORM. Change the Scope to Normal Requisitions.
2. Copy one of the NORM groups for 100-2120 Surgery. Rename 100-2120 Surgery STAT. Change the Scope to Stat Requisitions.
3. Edit approval dollars and users.
4. Repeat to create additional Stat approval levels as needed. You want Stat to only have 1 – 2 approval levels to expedite processing.

Requisition Types

To create a new type:

1. Go to Administration / Req. Types
2. Click **New**.
3. Select a **Requisition Category**.
4. Enter a **Requisition Type Name** (2-50 characters, no special characters).
5. Enter a **Description** (up to 100 characters), *optional*.

New Requisition Type

Note: * Indicates required field

Requisition Category (*)

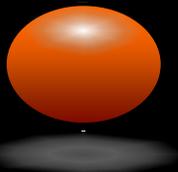
Capital
Normal
Stat

Requisition Type Name (*)

Status Enabled Disabled

Description

Save Cancel



Requisition Types – Additional Information

- Make sure all types in use are included in an approval path.
- You can only edit a type with no requisitions or requisitions in an open status associated with it.
- User can change the status from Enabled to Disabled when all requisitions related the req. type are **Open, PO Requested, Completed, Rejected**; but not when there is at least one requisition that is pending approval.
- User can change the status from Disabled to Enabled regardless of the requisition status.
- If a type is disabled
 - Any requisition in an open status with the disabled type selected on the header will default to Normal Requisition.
 - All other statuses will retain the type used when the requisition was processed.
 - AUG/PUG with the disabled type will default to All Requisitions.
- **Test, Test, Test!!!!**

Requisition Types – Warning Messages

Warning!

You can't edit this requisition type because there is at least one requisition related to this type that is pending approval/verification or has completed the approval path. See the list below:

No.	Req. Category	Req. Type Name	Requisition Number
1	Capital	Capital Requisition	[Req. Number 1], [Req. Number 2] [Req. Number 3], [Req. Number 4] [Req. Number 5], [Req. Number 6]

OK

Warning!

You can't delete selected requisition types because there is at least one requisition related to them that is pending approval/verification or has completed the approval path. See the list below:

No.	Req. Category	Req. Type Name	Requisition Number
1	Capital	Capital Req	[Req. Number 1], [Req. Number 2] [Req. Number 3], [Req. Number 4] [Req. Number 5], [Req. Number 6]
2	Capital	IT Req	[Req. Number 7], [Req. Number 8] [Req. Number 9], [Req. Number 10] [Req. Number 11], [Req. Number 12]
3	Capital	Facility Req	[Req. Number 13], [Req. Number 14] [Req. Number 15], [Req. Number 16] [Req. Number 17], [Req. Number 18]

OK

Requisition Types – Warning Messages

Requisition Number: MSSS120912155011000123 Return To Requisition Management Save Print Submit

Note: * Indicates required field

Created By: Admin
Created Date: Jan 1, 2020
Status: Open

Org. Requisition Number
Requisition Name (*) MSSS200101155011000123
Facility (*)
Delivery Location (*)

Project:
Sub-project:

Requisition Type: Normal Requisition

Auto-Approved / Approved lines process

Confirm To Continue As A Normal Requisition

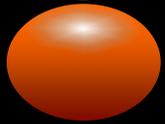
The requisition type has been changed to Normal Requisition because the selected requisition type was disabled/deleted.
Do you want to continue with the change?

Yes No

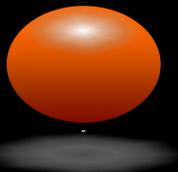
Item List Approval Path Catalog Item Remove View

Organization Item ID

No.	Item Description	GL Account	UOM/QOE	Price (\$)	Quantity	Extended Cost (\$)	Line Status
-----	------------------	------------	---------	------------	----------	--------------------	-------------



ADDITIONAL FIELDS IN REQUISITION MANAGEMENT



Additional Fields in Req. Mgmt.

Current Challenge – Customers are unable to capture project and sub-project information on requisitions.

Additional Fields in Req. Mgmt.

Enhancement – Project and Sub-Project fields have been added to the requisition header and are available for all requisition types. Project and Sub-Project fields have also been added to the Requisition Reports in the last 2 columns of the report.

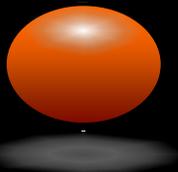
Requisition Number: MSSS200303060434028428 Return To Requisition Management Save Print Submit

Note: * Indicates required field

Created By	Admin Training	Requisition Name (*)	MSSS200303060434028428	Project	<input type="text"/>
Created Date	Mar 03, 2020	Facility (*)	DEFAULT	Sub-project	<input type="text"/>
Status	Open	Delivery Location (*)	100 2 EAST CCU		
Requisition Type (*)	Normal Requisition	Corporation (*)	REGIONAL MEDICAL CENTER		
<input checked="" type="checkbox"/> Auto-Approved / Approved lines process immediately		Cost Center (*)	ICU		



CONTRACT AUDITS



Contract Audits

Current Challenge – When contracts are loaded or processed in Contract Matching Approval, no detailed information is available to indicate how the contract was dispositioned in MSS.



Contract Load Audit

Enhancement – A detailed audit now indicates how items were dispositioned. If the loaded file type is HL7 or Tubular, the file name will have a hyperlink to access details of how the lines were processed.

An additional column has been added to the Load Data screen to support the new load details: Partially / Pending Loaded Line Count.

An additional status Partially Processed with Pending Mapping.

Filter files by

File Type

Contract

Item Master

POH

Invoice

Status

Failed

Failed - Resolved

Ready To Process

Pending

Partially Processed with Error

Partially Processed with Error - Resolved

Partially Processed with Pending Mapping

Processed

Received Date

From: ▼

To: ▼

Contract Load Audit

Contract Details

File Name:	MSSS_TRAIN_C...	Total Line Count:	3	Total Good Matched Line Count:	3	Total Inactive Manufacturer:	0
Received Date:	Feb 20, 2020	Total Loaded Line Count:	3	Total Bad Matched Line Count (created contract item):	0	Total Inactive Vendor:	0
Logged Date:	Feb 20, 2020	Total Skipped Line Count:	0	Total Potential Matched Line Count:	0		
Generated Report Date:	Feb 20, 2020	Total Pending Mapping Line Count:	0	Total Deleted Line Count:	0		

This report was only generated first time at the contract loaded date. Therefore, these number may not reflect correctly at the current time.

Search

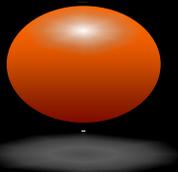
No.	Supplier Type	Contract Number	GPO ID	Manufacturer Name	Vendor Name	Associated Contract Number	Loaded Line Count	Good Matched Line Count	Bad Matched Line Count	Potential Matched Line Count	Deleted Line Count
1	M	TEST01	NON-GPO	3M COMPANY	3M INC		3	3	0	0	0

A color code is applied to the Manufacturer and Vendor Names: **Black** means the manufacturer or vendor is active, **Grey** means the manufacturer or vendor is inactive.

Use the Search field to search for data in the following columns: Contact Number, Manufacturer Name, Vendor Name and Associated Contract Number. Partial or full search text is supported.

[1 - 1 of 1] | Page 1 of 1

Close



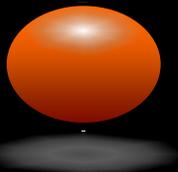
Contract Load Audit

Field Name	Description
Total Line Count	Total number of contract lines in the load file.
Total Loaded Line Count	Total number of lines successfully loaded to MSS.
Total Skipped Line Count	Total number of lines not loaded to MSS due to errors.
Total Pending Mapping Line Count	Total number of lines in a queue waiting to be loaded to MSS pending vendor or manufacturer mapping.
Total Matched Line Count	Total number of lines matching existing MSS items.
Total Potential Matched Line Count	Total number of lines with potential matches to MSS items.
Total Deleted Line Count	Total number of lines with a delete action in the load file.
Total Inactive Manufacturer	Total number of distinct inactive manufacturers in the load file.
Total Inactive Vendors	Total number of distinct inactive vendors in the load file.
Loaded Line Count	Count of lines loaded successfully without error.
Good Matched Line Count	Count of lines matched to items in MSS.
Bad Matched Line Count	Count of lines not matched to items in MSS and new items were created.
Potential Matched Line Count	Count of line that are a potential match to MSS items. These items will appear in Contract Matching Approval.
Delete Line Count	Lines successfully disassociated with MSS items (removed from the contract).

Contract Load Audit

The detail report file (detail_report.txt) will show the data load impact of each line. If a line was skipped, a specific error name will be displayed. This file includes information from the contract load and the MSS item to which the contract item was matched. Maximum lines 500K. If file is larger than 500K it will be broken into parts with files names detail_report_part_x.txt. Detailed audit files are stored for a maximum of 6mos.

No. ID	Impact	MSS Action	Matched Status	Error Name	Manufacturer Name	Manufacturer ID	EID	Contact Name	Contract Type	Contract Associate	Contract
1	Loaded	CREATED	Good Match	DJO SURGICAL	9661			DJO SURGICAL	NON-GPO	M	2019-02-
2	Loaded	CREATED	Good Match	DJO SURGICAL	9661			DJO SURGICAL	NON-GPO	M	2019-02-
3	Loaded	CREATED	Good Match	DJO SURGICAL	9661			DJO SURGICAL	NON-GPO	M	2019-02-
4	Loaded	CREATED	Good Match	DJO SURGICAL	9661			DJO SURGICAL	NON-GPO	M	2019-02-
5	Loaded	CREATED	Good Match	DJO SURGICAL	9661			DJO SURGICAL	NON-GPO	M	2019-02-
6	Loaded	CREATED	Good Match	DJO SURGICAL	9661			DJO SURGICAL	NON-GPO	M	2019-02-
7	Loaded	CREATED	Good Match	DJO SURGICAL	9661			DJO SURGICAL	NON-GPO	M	2019-02-
8	Loaded	CREATED	Good Match	DJO SURGICAL	9661			DJO SURGICAL	NON-GPO	M	2019-02-
9	Loaded	CREATED	Good Match	DJO SURGICAL	9661			DJO SURGICAL	NON-GPO	M	2019-02-
10	Loaded	CREATED	Good Match	DJO SURGICAL	9661			DJO SURGICAL	NON-GPO	M	2019-02-
11	Loaded	CREATED	Good Match	DJO SURGICAL	9661			DJO SURGICAL	NON-GPO	M	2019-02-
12	Loaded	CREATED	Good Match	DJO SURGICAL	9661			DJO SURGICAL	NON-GPO	M	2019-02-
13	Loaded	CREATED	Good Match	DJO SURGICAL	9661			DJO SURGICAL	NON-GPO	M	2019-02-
14	Loaded	CREATED	Good Match	DJO SURGICAL	9661			DJO SURGICAL	NON-GPO	M	2019-02-
15	Loaded	CREATED	Good Match	DJO SURGICAL	9661			DJO SURGICAL	NON-GPO	M	2019-02-
16	Loaded	CREATED	Good Match	DJO SURGICAL	9661			DJO SURGICAL	NON-GPO	M	2019-02-
17	Loaded	CREATED	Good Match	DJO SURGICAL	9661			DJO SURGICAL	NON-GPO	M	2019-02-
18	Loaded	CREATED	Good Match	DJO SURGICAL	9661			DJO SURGICAL	NON-GPO	M	2019-02-
19	Loaded	CREATED	Good Match	DJO SURGICAL	9661			DJO SURGICAL	NON-GPO	M	2019-02-
20	Loaded	CREATED	Good Match	DJO SURGICAL	9661			DJO SURGICAL	NON-GPO	M	2019-02-
21	Loaded	CREATED	Good Match	DJO SURGICAL	9661			DJO SURGICAL	NON-GPO	M	2019-02-
22	Loaded	CREATED	Good Match	DJO SURGICAL	9661			DJO SURGICAL	NON-GPO	M	2019-02-
23	Loaded	CREATED	Good Match	DJO SURGICAL	9661			DJO SURGICAL	NON-GPO	M	2019-02-



Contract Load Audit

New columns in detail_report.txt

No.	Column Name	Description	Current Column	Note
41	Item Source	There are 4 item sources: <ul style="list-style-type: none">- IM- Contract Item- POH- The Matrix	New	
42	Approved Org Item ID		New	
43	Approval Item Description	System will get the Original Item Description to show in this column. If there is no Original Item Description, system will get Full Item Description then Short Item Description.	New	
44	Approval Manufacture Name	The manufacturer name of matched item.	New	
45	Approval Manufacturer ID	The manufacturer ID of matched item.	New	
46	Approve Manufacturer Item ID	The manufacturer item ID of matched item.	New	
47	Approval Vendor Name	The vendor name of matched item.	New	
48	Approval Vendor ID	The vendor ID of matched item.	New	
49	Approved Vendor Item ID	The vendor item ID of matched item	New	
50	Item Viewable in VIM	If item is inactive, it cannot be displayed in VIM. However, in Contract Management, user still can see this item but cannot access or view the item detail.	New	This column has 2 value: <ul style="list-style-type: none">- Yes- No

Contract Matching Approval

A new option is available on the toolbar called View Audit Log. It provides detailed information on approved and rejected items.

No.	+	Source	<input type="checkbox"/>	Contract ID	Org Item ID	Item Description	Vendor Name	Vendor Item ID	Mfr Name	Mfr Item ID
1	+	Contract	<input type="checkbox"/>	 CM1012015		TUBE CULT BS GLASS 16X100M...	CURTIN MATHESON S...	339-309	BECTON DICKINSON	339-309
2	+	Contract	<input type="checkbox"/>	 CM1012015		TUBE CULTURE 12 X 75MM BLUE	CURTIN MATHESON S...	362-079	BECTON DICKINSON	362-079

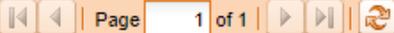
Contract Matching Approval

View Contract Matching Approval Audit Log ✕

Audit Log contains history of Contract Matching Approval screen when users approve or reject contracts & items.

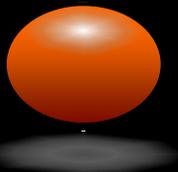
Search 

 Action	Contract ID	Contract Item Information	MSS Item Information	 Source	Performed By	 Performed Date
Approved	CM1012015	Item Description: TUBE CULT BS GLASS 13X100MM DISP VCN: 339-283 Vendor Name: CURTIN MATHESON SCIENTIFIC, INC MCN: 339-283 Mfr Name: BECTON DICKINSON	Org Item ID: 11522 Item Description: TUBE CULT BS GLASS 13X100MM DISP VCN: 339-283 Vendor Name: CURTIN MATHESON SCIENTIFIC, INC MCN: 339-283 Mfr Name: CURTIN MATHESON SCIENTIFIC, INC	IM	Admin Training	Mar 03, 2020 17:18:01

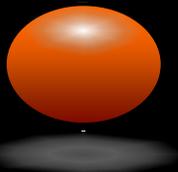
[1 - 1 of 1]  Page of 1 



DEMONSTRATION



WORK ITEMS IN MARCH 2019 REVISION



Work Items in March 2020 Revision

Work Item #	Description	Type
50323	Allow for the audit of contracts loaded in Load Data.	Enhancement
51041	Requisition Types can be added to support additional approval paths for requisitions. Available categories for requisition types are Normal, Stat, and Capital.	Enhancement
171847	[Infor] Stocked items remain FL1 when placed on a requisition.	Enhancement
202983	A new icon is displayed in Requisition Management to identify Capital requisitions. Two additional fields have been added to the Requisition Header , Project and Sub-Project.	Enhancement
207547	Performance improvements to the Search function in the New Non-Catalog screen in Requisition Management.	Enhancement
207548	Improvements to the search and filtering functions in The Library.	Enhancement
206695 / 207377	When the current best contract is deleted or inactivated, the price discrepancy check is run and discrepancies are presented in the Price Discrepancy View.	Defect
207526	Item Master price changes sent from MSS no longer reappear in the Price Discrepancy View.	Defect