



MSS Release Training – January 2024

MEPERIA STRATEGIC SOURCING



1/3/2024

Today's Discussion

- Requisition Management
- Insight Dashboard
- Contract Management
- Release Schedule



Requisition Management



Copy Requisitions

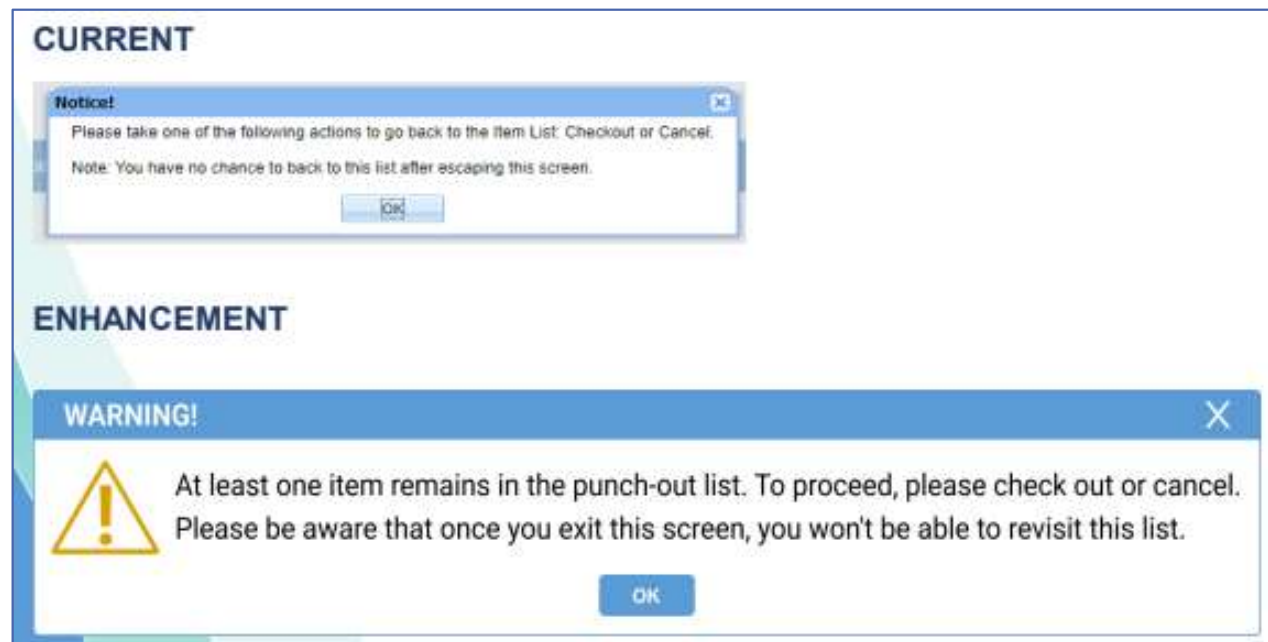
- Update item packaging information on new requisition
- Add message wording to remind users to verify item quantities.





Punch Out

Larger more detailed warning messages to alert users if they try to leave the Punch Out screen without checking out.





Punch Out

- Disabled “Submit” and “Return to Requisition Management” buttons.
- Changed “Checkout” and “Cancel” button size and color.

CURRENT	ENHANCEMENT
<div>Checkout Cancel</div>	<div>Checkout Cancel</div>



General Enhancements

- Enhance document attachment retry mechanism
- Added additional logging during submit process
- Correct grammar issues in approval and verification emails

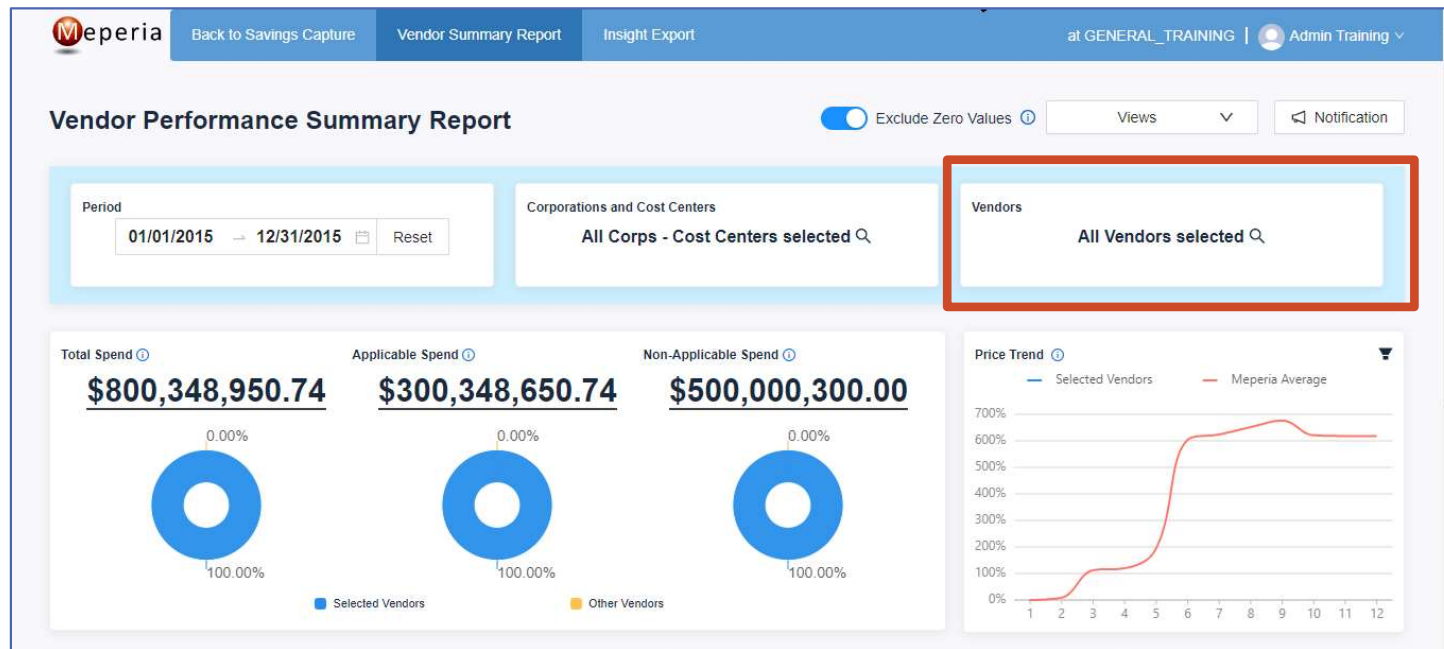


Insight Dashboard



Dashboard

Change default vendors from “Top 20” to “All Vendors”





Dashboard – Vendor Summary

Add current contract indicator to non-contract spend.

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Back to Savings CaptureVendor Summary ReportInsight Export

at GENERAL_TRAINING | Admin Training

Vendor Summary > Item Summary (Non-Contract Spend)

Contract/Non-Contract Spend Report

ExportHistoryFilter

Vendor Name	Vendor Item ID	MFR Name	MFR Item ID	Spend	Item Has Contract	No. of Purchases
				\$800,338,551.95		
3M INC		UNKNOWN		\$500,000,000.00	NO	
3M INC		3M COMPANY		\$300,000,000.00	NO	
GUIDANT CORPORATION	CRT-D-H175	GUIDANT CORPORATION	CRT-D-H175	\$65,627.96	NO	
GUIDANT CORPORATION	CRT-D-H170	GUIDANT CORPORATION	CRT-D-H170	\$65,627.96	NO	
ES... BIOMET ORTHOPEDICS INC	183520	BIOMET ORTHOPEDICS INC	183520	\$40,770.00	YES	
GUIDANT CORPORATION	CRT-D-H177	GUIDANT CORPORATION	CRT-D-H177	\$32,813.96	NO	
GUIDANT CORPORATION	CRT-D-H177	GUIDANT CORPORATION	CRT-D-H177	\$32,813.96	NO	

[showing 1-20 of 343]12345...1820 / page



Insight Export – Distinct Item by Zone

Users can now interact with corporation list after using “Select All”.

Corporation Filter

☒ Select All

Search

Selected: 3

<input checked="" type="checkbox"/>	No.	Account Number	Corporation Name
<input checked="" type="checkbox"/>	1	200	COMMUNITY MEDICAL CENTER
<input checked="" type="checkbox"/>	2	300	COUNTY HOSPITAL
<input checked="" type="checkbox"/>	3	100	REGIONAL MEDICAL CENTER



Insight Export – Spend Under Management

- **New export!**
- Period < 12 months
- All or selected corporations

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Back to Savings Capture Vendor Summary Report Insight Export

Virtual Item Master Data ⓘ

Distinct Item By Zone Report ⓘ

Spend Under Management... ⓘ

Export

Period

01/01/2015 → 12/31/2015 ⓘ

Corporation

3 Corporations selected +

Export

History

Name	Status	Action
gen_SUM_20240103_174012 ⓘ	Complete	⬇️ ✎️ 🗑️



Insight Export – Spend Under Management

Managed spend is spend on catalog items or on non-catalog items that are on contract.

	A	B	C	D	E	F	G
1	Total Spend						
2		Total	Contract	% Contract	Non-Contract	% Non-Contract	PO Lines
3	Total	\$19,385,729.68	\$6,501,827.33	33.54%	\$12,883,902.35	66.46%	22,894
4	Catalog	\$10,110,388.42	\$6,159,165.52	60.92%	\$3,951,222.90	39.08%	17,750
5	Non-Catalog	\$9,275,341.26	\$342,661.81	3.69%	\$8,932,679.45	96.31%	5,144
6							
7		Spend	% Spend				
8	Managed Spend	\$10,453,050.23	53.92%				
9	Non-Managed Spend	\$8,932,679.45	46.08%				
10							
11							
12	Applicable Spend						
13		Total	Contract	% Contract	Non-Contract	% Non-Contract	PO Lines
14	Total	\$9,604,296.19	\$5,512,273.11	57.39%	\$4,092,023.08	42.61%	17,125
15	Catalog	\$8,952,269.80	\$5,275,332.75	58.93%	\$3,676,937.05	41.07%	15,963
16	Non-Catalog	\$652,026.39	\$236,940.36	36.34%	\$415,086.03	63.66%	1,162
17							
18		Spend	% Spend				
19	Managed Spend	\$9,189,210.16	95.68%				
20	Non-Managed Spend	\$415,086.03	4.32%				
21							
22							
23	Non-Applicable Spend						
24		Total	Contract	% Contract	Non-Contract	% Non-Contract	PO Lines
25	Total	\$9,781,433.49	\$989,554.22	10.12%	\$8,791,879.27	89.88%	5,769
26	Catalog	\$1,158,118.62	\$883,832.77	76.32%	\$274,285.85	23.68%	1,787
27	Non-Catalog	\$8,623,314.87	\$105,721.45	1.23%	\$8,517,593.42	98.77%	3,982
28							
29		Spend	% Spend				
30	Managed Spend	\$1,263,840.07	12.92%				
31	Non-Managed Spend	\$8,517,593.42	87.08%				



Contract Management



Contract Matching Trigger Events

- Item Master updates
- Approval Workflow
- Attribute Refinement
- Resolve Duplicates
Processing



Contract Items – Inactive/Hidden in VIM

If the item has just been associated with a single contract and has expired within the contract, the system will check if this item meets the criteria to be inactive/ hidden in the VIM below:

- The item was loaded into the VIM from the contract file (Contract source).
- The item has no purchase order history.
- The item is not in the item master.
- The item has no matrix item ID (the item was not pulled from the matrix to VIM).

The item will be hidden in the VIM but still show up in the contract management/ item view.

Items will be retained if they retain effectiveness within another contract.



Contract Items – Other Impacted Screens

- Attribute Refinement
- Approval Workflow
- VAP
- VMM/VVM
- Favorite list / Item Family / LOF (if any)
- Issue Management
- VIM and Attribute Refinement Exports



Demo



Work Items



Work Items - Enhancements

Work Item #	Description	Type
219168	Users can export Spend Under Management Reports.	Enhancement
219169	Default vendor selection changed to "All Vendors" on New Insight Dashboard.	Enhancement
219170	Users can interact with the Corporation filter in the Distinct Item By Zone report after selecting the "Select All" checkbox.	Enhancement
217874	Vendor Summary displays current contract information on non-contract spend.	Enhancement
219023	When copying a requisition, new message wording reminds the user to verify requisition quantities.	Enhancement
205055 / 214293	When on the Punch-out check out screen, a warning prompt will alert the user if they attempt to leave the screen without completing the check out process.	Enhancement
219292	Provide more triggers to hide or show the expired contract items in expired or inactive contracts.	Enhancement
219333	Do not show the rejected recommended vendor item id / mfr item id in AW screen	Enhancement
207163	Remove Contract Items from the VIM when contract is expired or inactive for non-item master items.	Enhancement
219018	Enhance document attachment retry mechanism.	Enhancement
209883	To display the recommended Vendor Item ID/Mfr Item ID when different from Approved Vendor Item ID/Mfr Item ID in Approval Workflow screen.	Enhancement
218398	Add more logs to the submission process to enable better troubleshooting.	Enhancement
217302	When copying a requisition, get the latest item packaging.	Enhancement
219014	To correct grammar issue for approval / verification emails.	Enhancement
218732	Mobile Application - Add additional error messaging to inform users why a requisition can not be submitted.	Enhancement



Work Items - Defects

Work Item #	Description	Type
219215	Unable to filter Data contains or Data is exactly on some columns of Price Variance report - Purchase History level.	Defect
219171	Mobile Application - The 'You are not authorized to submit the requisition. Please contact your Organization Administrator!' message should be shown when submit the requisition by an approver that has been removed from the AUG on the Approval Path.	Defect
218666	Mobile Application - Should not allow updating the quantity of requisition line that has "Approved" status or "No Permission" status.	Defect
217914	During contract loading, prevent infinite looping when bad data is encountered.	Defect
217232	Wrong error name when loading ebuilder requisition that includes an IM item with invalid UOM.	Defect
218484	When copying a new non-catalog item the Commodity ID will be blank.	Defect
218658	Improve process for updating the Master Items Table for stock status changes.	Defect
218742	The item's formulary level displayed incorrectly in FE/FS section in VIM	Defect
217896	Need to rebuild Contract Matching Approval screen to not show the potential match for items that no longer exist in MSS.	Defect
218739	To get primary vendor information from the list of corps to display in 'All Corporations' view	Defect
219047	Sort of Org item ID is not working as expected in Item List in Contract Management.	Defect



Release Schedule



Release Schedule

Test – January 2

Sproduction – January 9

Production – January 16



Questions
