

Meperia Strategic Sourcing

Contract Load Utility User Guide

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Contract Load Utility User Guide

Overview

Introduction

This guide explains how to set up and use the Contract Load Utility to import a validated supply item contract file in Microsoft Excel format into your organization's Meperia Strategic Sourcing™ (Strategic Sourcing) Test or Live Production environment.

Contract Load Utility

The Contract Load Utility is a remote desktop application that guides you through the process of mapping your contract file columns to required and optional contract fields in Strategic Supply Sourcing. The remote desktop application is called ContractLoadProd.rdp and will be provided to you by your Meperia Solution Consultant.

The Contract Load Utility also validates the contract data you want to load, checking for invalid date formats and removing unsupported characters such as dollar signs, backslashes, and tabs.

Note: The Contract Load Utility also can implement custom search and replace rules for any input field. Ask your Strategic Supply Sourcing Support representative for details.

Only authorized users at your organization can access the Contract Load Utility. Every subscriber organization is provided with user accounts for access to the contract load utility. Contact your Strategic Supply Sourcing Support representative to set up these accounts for your organization.

Accessing

1. Save the ContractLoadProd.rdp, to your desktop
2. Launch the application by double clicking on the ContractLoadProd.rdp (open)
3. Select **Connect** when the Remote Desktop Connection window displays
4. Enter Credentials – Log in using your current Contract Utility Username and Password. The domain is **STRAT**.
 - a. If the system defaults in a windows user name and password, please select **More Choices** and select **Use a Different Account** and enter your credentials.
5. Once logged in, the Desktop will display the following:
 - a. Contract Load Utility Shortcut (MSSSContractLoad)
 - b. Folder for “**Your Organization**”; this folder will include:
 - Contracts to be Completed (only folder available when you first access)
 - Contracts – once you map a contract the folder will display
 - Exports – once an export is completed the folder will display
 - c. Libre Office 6.1 – this will be used in place of Microsoft Excel when opening the files within the tool

Input File

You must create a Microsoft Excel file (in .xlsx format from Excel 2007 or later) for every contract you want to load into Strategic Supply Sourcing.

Each column in the Excel file should represent a field in the contract. Each row in the column should contain the value for the field.

Make sure there is only one worksheet in the Excel file and that there are no empty rows at the top of the worksheet.

You can gather contract data from the GPO, vendor, and manufacturer. At a minimum, your input file source data must include:

- Manufacturer Item ID
- Vendor Code
- Vendor Item ID (required when the vendor is different than the manufacturer)
- Item Description
- Unit of Measure
- Price
- Quantity of Each

When you are finished creating an input file, place the file in the desktop folder **Your Organization Short Name>\Contracts to be Completed**.

Tip: The full path to your organization's file drop location is listed when you open the Contract Load Utility.

Loading a Contract into Strategic Supply Sourcing

Open the Contract Load Utility

To open the Contract Load Utility,

- 1 Launch the application by double clicking on the ContractLoadProd.rdp (open)
- 2 Select **Connect** when the Remote Desktop Connection window displays
- 3 Enter Credentials – Log in using your current Contract Utility Username and Password. The domain is **STRAT**.
- 4 If the location of the MContracts folder (where input files are stored) has not been specified, the Storage Setup dialog box is displayed for you to select the location.
- 5 After you specify the folder location and click **Select**, the system reports the location successfully confirmed. Click **OK**.

Map the Contract

To map your input file fields to contract fields in Strategic Supply Sourcing,

- 1 When the Select Contract dialog box is displayed, select the contract you want to load in Contracts to be Formatted at left. Click **Format**.
- 2 Change the proposed Contract Name to a unique value (if necessary) and click **OK**.

In the Map Contract dialog box, M Contract Fields are listed at left. Required fields are displayed first and in **bold**.

Tip: If you previously saved a similar contract as a template, you could select that file from Template at lower right and click **Apply** to fill in the mapping values from that contract.

- 3 In the Supplier Contract Fields column, select the column from your input file that contains the data for the corresponding M Contract Field.

When a column header from your input file matches an M Contract Field name, the Supplier Contract Field value is filled automatically.

- 4 If you want the contract field value you are mapping to also be used for the contract field listed in the Field column at right, click to select **Match**.

The Match function is enabled for input fields that are often the same. For example, the same value is often used for Vendor Item ID and Manufacturer Item ID.

- 5 If you want to review the input file in Excel, from the **INPUT FILE** menu, select **Open file**.

- 6 After you have mapped all the required fields, close the input file, and then click **Map Contract** at lower left.

The utility processes your mapping choices and displays the mapped contract file in the right pane of the Contract Manager dialog box.

Correct Validation Errors

Highlighted in the Validation Error column at right are the issues the utility has found in your mapped contract file.

There can be more than one issue listed for each row. You may not have to correct every reported issue.

To correct an issue,

- 1 In the Set Value column, type a new value or, if there is a drop-down list, select a valid value.

Caution: If this is a multi-facility contract, do not specify a value for Facility ID or Facility Name. The utility will prompt you to select facilities (corporations) later.

Note: If you type a value in Set Value but you don't select a value in Set Criteria, the system prompts you to be sure criteria is set.

- 2 If you want the new value to be blank, click to select the checkbox in the Blank column.
- 3 In Set Criteria, select whether you want the new value applied just to fix the reported issue, to **All Rows** in the mapped contract file, or to all **Empty Rows**.
- 4 When you have addressed all the issues you want to address, click **Update Rows** at lower left to update the mapped contract file.

Tip: After you have updated rows, you can still make adjustments to individual rows on the mapped contract. From the **Contract** menu, select **View Contract File** to open the mapped contract. Make necessary changes to individual rows. Then, save and close the mapped contract file.

When you click **Validate** at lower right, the utility reprocesses the mapped contract file and reports any issues that still exist.

Export the Contract to Strategic Supply Sourcing

When you are satisfied with the validity of your mapped contract file, you can export it to Strategic Supply Sourcing.

- 1 In the M Contract Load window, from the **CONTRACT** menu, click **Export**.
- 2 If there are remaining validation errors, the system asks if you want to continue. Click **Yes** to continue with the export (or **No** to cancel the export and go back to correct errors).

Note: Allscripts strongly recommends that you correct all validation errors with the exception of facility values that are left blank to be selected during contract export.

- 3 If more than one corporation (facility) is included in the contract, the utility asks you to select one or more corporations from a list. Select the corporations you want to include in the export file.
- 4 Select an Export Method at lower right, and then click **Export**.

When you select...	Then the utility....
TAB File	creates a tab-delimited mapped contract file you can import using Strategic Supply Sourcing's Load Data function and displays the path to that file for your reference.
M Test	copies your mapped contract file to a location from which Allscripts can load the contents into your TEST environment. Limit 50,000 rows.
M Production	copies your mapped contract file to a location from which Allscripts can load the contents into your LIVE Production environment. Limit 50,000 rows.

- 5 When you are prompted to confirm the export, click **Copy Folder Path** or **Copy File Path** so you can paste the location of the export file into a browser window for later reference. Then, click **Close**.

Save the Contract as a Template

If the contract contains many or all the elements your organization uses in other contracts you want to load, you can save it as a template for future use.

- 1 From the **CONTRACT** menu, select **Set as Template**.
- 2 Type a unique template name (if necessary) and click **OK**.

Load an X12 832 Price/Sales Catalog update file into Strategic Supply Sourcing

You can use the Contract Load Utility to import X12 832 Price/Sales Catalog files to update the pricing of contract items already loaded into Strategic Supply Sourcing.

Before you begin, place all X12 832 files you want to load in the C:\MContracts\\Import folder.

- 1 Log in to the Contract Load Utility.
- 2 In the Select Contract dialog box, click **Import** at lower left.
- 3 In the Import X12 832 Files dialog box, select one or more 832 files to import, and click **Import**.
- 4 Click **OK** to accept the default 832 import file name.
- 5 From Contracts to be Formatted, select an 832 file, and then click **Format** at the bottom of the dialog box.
- 6 Click **OK** to accept the default 832 import file name.
- 7 Map fields as you would for a contract file. When you are finished, click **Map Contract** at lower right.
- 8 Export the 832 file to Strategic Supply Sourcing as you would a contract file.