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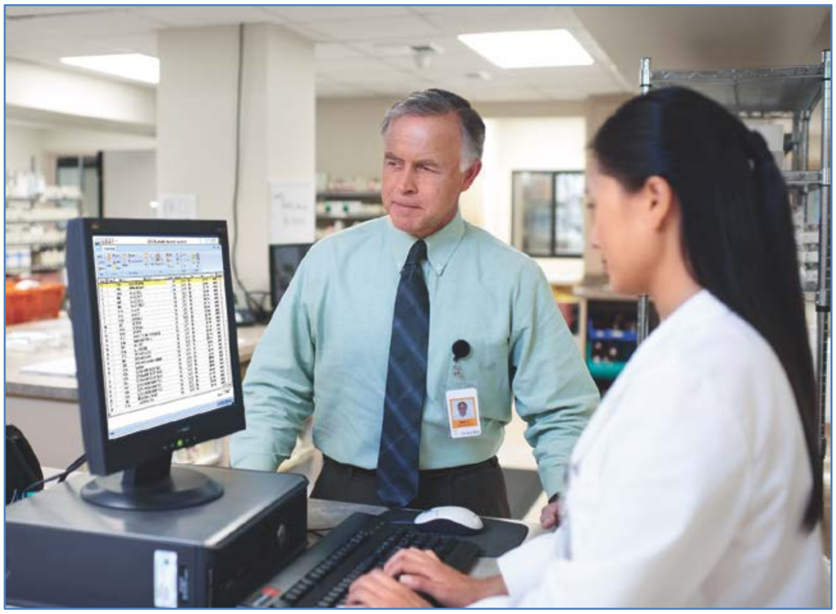

McKesson Strategic Supply Sourcing™
Strategic Supply Sourcing Help

August 2016

BUSINESS
CARE
CONNECTIVITY

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Reader comments

Any comments or suggestions regarding this publication are welcomed and should be forwarded to the attention of

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Contents

Overview

What is McKesson Strategic Supply Sourcing?

McKesson Strategic Supply Sourcing™ (Strategic Supply Sourcing) is a fully integrated Virtual Item Master (VIM) that helps subscriber organizations dramatically reduce overspending on supply items.

The VIM integrates and normalizes the subscriber organization's Item Master and supply item spending data as a SaaS (Software as a Service) offering hosted by Amazon Web Services ™. The VIM provides access to critical medical-surgical items, physician preference items (PPIs) and group purchasing organization (GPO) or self-contract items through a private marketplace.

Strategic Supply Sourcing uses an artificial intelligence engine and patented technology to normalize data from the entire supply chain marketplace to provide its subscriber organizations the ability to compare items across a virtually unlimited set of attributes. Automated data normalization reduces the need for item maintenance and provides enhanced item descriptions including images of supply items.

Strategic Supply Sourcing integrates with your materials management information system (MMIS), such as McKesson Supply Chain Management™ or Paragon Materials Management™, but it works just as well with any GPO.

Strategic Supply Sourcing's Content Exchange proactively retrieves data from manufacturer, vendor, and GPO online databases and assimilates that data into its catalog to normalize and enhance data retrieved from the item master databases of its subscriber organizations. This data can be used to identify functionally equivalent and alternate items.

You can use Strategic Supply Sourcing to

- enforce your organization's defined formulary levels
- standardize Physician Preference Items
- provide Preferred Item Recommendations when requesting supplies
- support multiple value analysis projects concurrently

Strategic Supply Sourcing is compatible with Internet Explorer 8 or later.

System Components...

Strategic Supply Sourcing is made up of the following components:

- The Matrix
- Administration - Users, User Groups, Locations, Preferences, etc.
- Content Management - Contracts, VIM, VVM, VMM, Attribute Refinement, etc.
- Value Analysis Project Summaries
- Requisition and Procurement Management - Reqs and POs, Item Family Mgmt, Favorite Lists, etc.
- The Library
- Insight Summary Reporting

Data Normalization

In Strategic Supply Sourcing, Data Normalization is the process of comprehensive enrichment and standardization of the subscriber organization's item and vendor records.

Data Normalization includes...

- **Normalization** - Making data consistent for comparison, including word order, abbreviations, and mapping of the same items across vendors.
- **Cleansing** - Validating transactional fields such as Item ID, Price, and Unit of Measure.
- **Enhancement** - Adding needed information so users can make informed decisions.

Data Normalization...

- Categorizes items by *United Nations Standard Products and Services Code (UNSPSC)*, creating a hierarchical classification of items by segment, family, class, and commodity to improve reporting criteria and identify cost saving opportunities .
- Validates contracts by comparing items to Group Purchasing Organization (GPO) contract catalogs to identify contract and off-contract items.
- Displays photographic images of items whenever they are provided by the item manufacturer.
- Assigns Level II *Health Care Financing Administration Common Procedure Coding System (HCPCS)* codes to items not included in Current Procedural Terminology (CPT) codes for better insurer reimbursement.

In the Vendor Master, Data Normalization...

- validates and enriches standardized Purchasing Vendor Names.
- creates hierarchical parent-child relationships of purchasing vendors for better contract negotiations.

In the Item Master, Data Normalization...

- identifies duplicate item records (based on normalized vendor association) and recommends which item to retain in the Virtual Item Master.
- validates item part numbers against The Matrix.
- validates item unit of measure against The Matrix or against direct supplier data.
- develops normalized (attributed) item descriptions for better reporting, product searching and sourcing.
- abbreviates item descriptions with user input to support MMIS character limitations.

Content Exchange

Content Exchange is the integration between your materials management information system (MMIS) and Strategic Supply Sourcing. Content Exchange is used to send and receive updates to shared data files.

Shared Data Points and update frequency are listed in the following tables.

Supply Chain Management Interfaces...

Data Point	Direction	Max Tran Time	Master	Trigger Event
Items	MMIS to MSSS	Every 50 minutes	MMIS	Create new, modify existing
GL Chart	MMIS to MSSS	Every 45 minutes	MMIS	Create new, activate or deactivate existing
Contracts	MMIS to MSSS	Daily	MMIS	Create new, modify existing
Locations	MMIS to MSSS	Every 45 minutes	MMIS	Create new, modify existing
Manufacturers	MMIS to MSSS	Every 45 minutes	MMIS	Create new, modify existing
Vendors	MMIS to MSSS	Every 45 minutes	MMIS	Create new, modify existing
Invoices	MMIS to MSSS	Daily	MMIS	Match new, rematch existing Invoice
Purchase Orders	MMIS to MSSS	Daily	MMIS	Completed PO
Requisition Status	MMIS to MSSS	Every 55 minutes	MMIS	Requisition line status updates
Requisitions	MSSS to MMIS	Constantly listening for new messages from MSSS	MSSS	Requisition Management - submit requisition (approved or rejected)
Manufacturers (Merge)	MSSS to MMIS	Constantly listening for new messages from MSSS	MSSS	VMM - Solve MFR Duplicates
Items	MSSS to MMIS	Constantly listening for new messages from MSSS	MSSS	1) Attribute Refinement - Update Description, catalog number (mfr or vnd item id); change manufacturer (assign diff mfr name)

				2) VIM - Setup new item - Corporation relationship. 3) Approval Workflow - update item description, catalog number, vendor or manufacturer item id.

Supply Chain Management Web Services...

Data Point	Direction	Max Tran Time	Master	Trigger Event
Manufacturer (New, updates)	MSSS to MMIS	Dynamic	Bi-Directional	VMM - update mfr record (Approve slightly/significantly different; address, etc). Create new manufacturer. Request new Manufacturer ID.
Vendor (New, updates)	MSSS to MMIS	Dynamic	Bi-Directional	VVM - modify vendor name (Approve slightly/significantly different, address, etc.) Create new vendor. Request new Vendor ID.
Items (price, UOM and packaging)	MSSS to MMIS	Dynamic	Bi-Directional	Attribute Refinement - modify approved Vendor Item Price, Approved Vendor UOM, or Approved Vendor QOE. Changes to UOM and QOE initiate's SLOC Conversion in MSCM. Purchasing Inbox - changes to Item Price
Stock Status	MMIS to MSSS	Dynamic	MMIS	VIM - view stocked items, displays the house icon and primary vendor

Paragon Materials Management Interfaces...

Data Point	Direction	Max Tran Time	Master	Trigger Event
Items	MMIS to MSSS	Every 50 minutes	MMIS	Create new, modify existing
Purchase Orders	MMIS to MSSS	Daily	MMIS	Completed PO

Requisition Status	MMIS to MSSS	Every 55 minutes	MMIS	Requisition line status updates
Requisitions	MSSS to MMIS	Constantly listening for new messages from MSSS	MSSS	Requisition Management - submit requisition (approved or rejected)
Items	MSSS to MMIS	Constantly listening for new messages from MSSS	MSSS	1) Attribute Refinement - Update Description, catalog number (mfr or vnd item id); change manufacturer (assign diff mfr name) 2) Approval Workflow - update item description. 3) Contract Management – Price Discrepancy, approve contract price

Paragon Materials Management Web Services...

Data Point	Direction	Max Tran Time	Master	Trigger Event
Manufacturer (New, updates)	MSSS to MMIS	Dynamic	Bi-Directional	VMM - update mfr record (Approve slightly/significantly different; address, etc). Create new manufacturer. Request new Manufacturer ID.
Items (price, price and packaging)	MSSS to MMIS	Dynamic	Bi-Directional	Attribute Refinement - modify approved Vendor Item Price, Approved Vendor UOM, or Approved Vendor QOE. Changes to UOM and QOE not allowed if on hands > 0.
Stock Status	MMIS to MSSS	Dynamic	MMIS	VIM - view stocked items, displays the house icon and primary vendor.

Initial Data Load

In the Initial Data Load (IDL), data from your MMIS is used to build a Strategic Supply Sourcing environment for your organization.

You can see a list of IDL elements here...

- Contract Master

- GL Account
- Inventory
- Invoice History
- Item and Default Expense Account
- Item Cost Center Acct Exceptions
- Item Master
- Location List
- Manufacturer Master
- Purchase Order History
- Purchaser Group
- Purchaser Group Users
- Requisition Approver Group
- Requisition Approver Group Users
- Requisition History
- Requisitioner Group
- Requisitioner Group Users
- Template and User
- User and Cost Center List
- User Defaults
- Vendor Master

After the initial data is loaded, your implementation team leads you through a review of the data and provides assistance with any required updates.

Content Exchange is enabled in both the test and production environments. Enabling Content Exchange sends any changes made in your MMIS after the data was extracted for the Initial Data Load to Strategic Supply Sourcing and captures any changes to shared data thereafter.

Administration

Help

Current User

My Account Info

You can access account information in Administration by clicking **My Account Info**.

You can use My Account Info to change...

- the user's Email address.
- the user's password.
- the user's name, title, phone number, ID photo, and Instant Messenger contact data.

My Account Info is also where you must set the following default values for the user...

- Default Deliver-To
- Default Free Standing Unit
- Default Department
- Default Corporation
- Default Cost Center

To change your account information,

1. In Administration, click **My Account Info**.
2. Change the Email address as needed and click **Check Validity** to verify the new address.
3. If you want to generate a new password and have it emailed to the new address, click Change Password.
4. Change the First Name, Last Name, Title, and Phone number as needed.
5. If you want, select a new Default Facility, Default Delivery Location, Default Corporation, or Default Cost Center.
6. If you want a different Photo associated with the account, click Change image, browse to the image file you want to use, and then click **Upload**.
7. Change the contact's Instant Messenger ID and type as needed.
8. Click **Save**.

Delegate Authority

If you are a requisition approver and you are going to be unavailable, you can delegate your authority to approve requests to an another user using the **Delegations** function in Administration.

You can determine if anyone's approval authority has been delegated to you by clicking **Delegated To Me** at upper left.

A bold letter **D** is used to identify delegated approval in the following locations:

- On the line of delegated requisitions pending approval in the delegated approver's Approval Request list
- After a delegated approver's name in the list of members of an Approval Group
- After the delegated approver's name in Performed By in the Requisition History of an approved requisition

To delegate your approval authority to another user,

1. In Administration, click **Delegations**.
2. Click **New** at right, and then search for and select the user to whom you want to delegate.
3. Indicate Start and End Dates and type a short Note.
4. Click **Save**.

You can delete a delegation by selecting it and clicking **Delete** at right.

You can change or disable a delegation by selecting it and clicking the **Edit** icon.

My Groups

My Groups is a listing of all the Functional User Groups, Requisition User Groups, and Approver-/Purchaser User Groups to which the logged-in user belongs.

You can access My Groups by selecting **My Groups** in Administration.

You can review the functions available to each user group by clicking the group name.

Global User Mgmt

User Group Management

You can click **User Group Mgmt.** in Administration to maintain Strategic Supply Sourcing user security.

An authorized user at your organization can create users and associate them with a Functional User Group that includes global functions (not dependent on a corporation or cost center) and Corporation functions (dependent on corporation and cost center).

Note: For a complete list of available functions, see the Security Groups Excel spreadsheet.

Functional User Groups...

Default Functional User Groups include the following:

- Organization Administrator
- Organization Content Manager
- Organization Requisitioner
- Organization Approver
- Organization Purchaser
- Organization Reviewer
- Business Analyst

If the default Functional User Groups are not enough, your organization can create its own Functional User Groups.

Besides Functional User Groups, there are:

Requisitioner User Groups...

You can create Requisitioner User Groups with settings for Product Approval Formulary Setup and Approval Setup including spending limits and available cost centers. You can click the Requisitioner User Group name to access **General Information** options for Product Approval Formulary Setup, Spending Limits, and Available Cost Centers.

Caution: Requisitioning users must belong to an Organization Requisitioner Functional User Group and at least one Requisitioner User Group.

Configuration options available per formulary level for a Requisitioner User Group are:

- No Approval Required Regardless of Dollar Limit Values
- Approval Required and Dollar Limit Values Constrained
- Approval Required Regardless of Dollar Limit Values

When you select either of the Approval Required options, you must click the Configure Approval Setup icon  and select an additional configuration option.

For **Approval Required and Dollar Limit Values Constrained**, select from these options:

- Only Require the Lowest Approval Level Having Authorized Dollar Limits
- Require All Available Approval Levels Having Authorized Approval Dollar Limits
- Require All Available Approval Levels Until the First Approval Level with the Authorized Approval Dollar Limits

For **Approval Required Regardless of Dollar Limit Values**, select Require All Available Approval Levels Regardless of Dollar Limits.

You can click to select **Can Be Overridden** if you want higher approval levels to be able to override the decision of a lower approval level.

After you select a Configure Approval Setup option, you must click **Save**, and then repeat this task for every formulary level.

Approver/Purchaser User Groups...

You can create Approver User Groups with settings for Approval Rules and Scope. Approval Rules cover Product Approval Formulary Setup, Approval Dollar Limits, and Available Cost Centers. Scope can be set for **All Requisitions**, **Normal Requisitions**, or **Stat Requisitions**. The approval level for each group is based on approval dollar limits for the line.

Caution: Approver users must belong to an Organization Approver Functional User Group and at least one Approver User Group.

You can create Purchaser User Groups with settings for Purchasing Rules and Scope. Purchasing Rules cover Product Approval Formulary Setup, Approval Dollar Limits, and Available Cost Centers. Scope can be set for **All Requisitions**, **Normal Requisitions**, and **Stat Requisitions**.

Caution: Purchaser users must belong to an Organization Purchaser Functional User Group and at least one Purchaser User Group. All requisitions must be verified by a Purchaser User Group except when item information on the requisition is all valid and no items on the requisition need to be approved.

Add, Change, or Delete a Functional User Group

Click **User Group Mgmt.** in Administration to maintain Strategic Supply Sourcing user security.

If the default Functional User Groups are not enough, your organization can create its own.

To add a Functional User Group,

1. Click **New** at right, and then type a unique User Group name and Description. Click **Save & Continue**.
2. On the Functions page, in the Global Function List, click **Add**, select functions, and then click **Save**.
3. In the Corporation Functions List, click **Add**, select functions, and then click **Save**.

   Tip: You can select all available functions by clicking the checkbox in the header.

4. Click **Save & Continue**.
5. Add one or more users to the Functional User Group by clicking **Add** to search for and select a user.
6. Click **Close**.

To change a Functional User Group,

1. Click the Functional User Group name to display the **General Information** page.
2. Change the User Group Name, Description, or Status as needed.
3. Add and remove Global and Corporate Functions from the group as needed.
4. Click **User List** and add or remove users from the group as needed.

To quickly change the status of the selected Functional User Group, click **Enable** or **Disable** at right.

To delete the selected Functional User Group, click **Delete** at right.

Add, Change, or Delete a Requisitioner User Group

Click **User Group Mgmt.** in Administration, and then click **Requisitioner User Groups** under All User Groups.

To add a Requisitioner User Group,

1. Click **New** at right, and then type a unique User Group name and Description.
2. Select Product Approval Formulary Setup options and Configure Approval Setup options, and then set Spending Limits for the group.

   Note: When you select **Route Requisitions Sequentially**, requests that require approval start at the first approval level in the approval path. When approved, the request is sent to the next level in the path for approval, and then to the next and the next. If you do not route requisitions sequentially, requests that require approval are sent to all levels in the approval path at the same time.

3. Click **Save & Continue**.
4. On the Cost Centers page, click **Add**, select the corporations and cost centers the group can access and click **Save**. When you are finished, on the Cost Centers page, click **Save & Continue**.
5. Add one or more users to the group by clicking **Add** to search for and select a user.
6. Click **Close**.

To change a Requisitioner User Group,

1. Click the Requisitioner User Group name to display the **General Information** page.
2. Change the User Group Name, Description, or Status as needed.
3. Change Product Approval Formulary Setup options, Configure Approval Setup options , and Spending Limits as needed.
4. Add and remove cost centers from the Cost Center List as needed.
5. Click **User List** and add or remove users from the group as needed.
6. When you are finished, click **Save**.

To quickly change the status of the selected Requisitioner User Group, click **Enable** or **Disable** at right.

To delete the selected Requisitioner User Group, click **Delete** at right.

Add, Change, or Delete an Approver/Purchaser User Group

Click **User Group Mgmt.** in Administration, and then click **Approver/Purchaser User Groups** under All User Groups.

To add an Approver/Purchaser User Group,

1. Click **New** at right, and then type a unique User Group name and Description.
2. Select Scope (**All**, **Normal**, or **Stat Requisitions**) and click to select **Is Purchaser?** if this is a Purchaser User Group. Click **Save & Continue**.
3. On the Approval/Purchasing Rules page, select the Product Approval Formulary Setup options for the group and set Approval Dollar Limits.
4. Under Cost Center List, click to select **Cost Centers**. Then click **Add** to select the corporations and cost centers the group can access. Click **Save**.
5. Under Vendor List, click to select **Vendors**. Then click **Add** to select the vendors the group can access. Click **Save**.
6. When you are finished providing General Information, click **Save & Continue**.
7. Add one or more users to the group by clicking **Add** to search for and select a user.
8. When you are finished, click **Finish**.

To change an Approver/Purchaser User Group,

1. Click the Approver/Purchaser User Group name to display the **General Information** page.
2. Make changes as needed.
3. Click **User List** and add or remove users from the group as needed.
4. When you are finished, click **Save**.

To quickly change the status of the selected Approver/Purchaser User Group, click **Enable** or **Disable** at right.

To delete the selected Approver/Purchaser User Group, click **Delete** at right.

User Management

You can click **User Mgmt.** in Administration to maintain Strategic Supply Sourcing user security.

An authorized user at your organization can create users and associate them with a Functional User Group that includes global functions (not dependent on a corporation or cost center) and Corporation functions (dependent on corporation and cost center).

To create a new user,

1. Click **New** at right, and complete the following required fields:
   - Email (Validated)
   - Password
   - Confirm password
   - First name
   - Last name
   - Phone
2. Click **Save & Continue**.
3. Assign one or more User Groups to the user by clicking **Add** to search for and select a group.
4. Click **Finish**.

> **Note:** You can click to select **Direct Login** when you want a user in an SSO environment to access Strategic Supply Sourcing using the traditional Sign In page rather than through SSO.

To change an existing user's data,

1. Click the user's Full Name to display the **General Information** page.
2. Change the user's Email, Password, Name, Phone and other data as needed.
3. Click **User Groups** and add or remove the user from groups as needed.

To quickly change the status of the selected user, click **Enable** or **Disable** at right.

To delete the selected user, click **Delete** at right.

To generate the User Access Report in Microsoft Excel format,

1. In Administration, click **User Mgmt**.
2. At upper right, click 

.
3. When asked to confirm that you want to export user records, click **Yes**.
4. After all user data is formatted, click the displayed link to download the Excel file to your work-station.
5. After you have opened or saved the User Access Report, click **OK** to close the Download dialog box.

UST - User Settings Template

(UNDER CONSTRUCTION)

Single Sign-On (SSO)

Through Single-Sign-On, Strategic Supply Sourcing uses the Azure Access Control Service (ACS) as a Federation Provider so that subscriber organizations that have their own Identity Provider can use it to access Strategic Supply Sourcing.

The subscriber organization's AD FS (Active Directory Federation Services) Server acts as an Identity Provider in the SSO process, validating the user's identity and passing the security token to the Amazon Cloud Server.

When your organization uses Strategic Supply Sourcing's Single Sign-On (SSO) process:

- Users access the system via a URL that directs them to an AD FS Sign In page.
- The AD FS Server validates the user's Active Directory login ID and password.
- After the user's entries are validated, the Access Control Service redirects the user to the Strategic Supply Sourcing home page, bypassing the system's traditional Sign In page.

In order to use Single Sign-On, your organization's technical staff must complete the following tasks to configure a trust relationship between the Amazon Cloud Server and your organization's AD FS Server.

> **Note:** McKesson technical staff must also complete several SSO configuration tasks. Work with your McKesson representative to coordinate your efforts.

Add the Strategic Supply Sourcing ACS as a Trusted Relying Party

1. On your AD FS server, start **AD FS 2.0 Management Console**.
2. In the console tree at left, under the Trust Relationships node, right-click **Relying Party Trusts** and select **Add Relying Party Trust**.
3. In the Welcome dialog box, click **Start**.
4. In the Select Data Source dialog box, select **Import data about the relying party from a file**. Browse to and select the WS-Federation metadata xml document provided by McKesson. Click **Next**.
5. In the Specify Display Name dialog box, type a unique display name and click **Next**.
6. In the Choose Issuance Authorization Rules dialog box, select **Permit all users to access this relying party** and click **Next**.
7. In the Ready to Add Trust dialog box, confirm all the data you've entered, and then click **Next**.
8. In the Finish dialog box, click to select **Open the Edit Claim Rules dialog for this relying party trust when the wizard close**s, and then click **Close**.
9. In the Edit Claim Rules dialog box, click **Add Rule**.
10. In the Select Rule Template dialog box, under Claim Rule Template, select **Send LDAP Attribute as Claims**, and then click **Next**.
11. Type a unique claim rule name and select **Active Directory** as the attribute store. Add the following five claims.

LDAP Attribute	Outgoing Claim Type
Display-Name	Name
E-Mail-Addresses	E-Mail Address
User-Principal-Name	UPN
Surname	Surname
Given-Name	Given Name

12. Click **Finish** to save the change, and then click **OK** to close the dialog box.

Change the AD FS login prompt (optional)

By default, AD FS uses a popup dialog box for user name and password entry. If you want, you can change this to a standard web form.

1. On the AD FS Server, open the **C:\InetPub\adfs\ls** folder.
2. Open the **web.config** file in Notepad.
3. Look for the **localAuthenticationTypes** elements.

```
<microsoft.identityServer.web>
  <localAuthenticationTypes>
    <add name="Integrated" page="auth/integrated/" />
    <add name="Forms" page="FormsSignIn.aspx" />
    <add name="TlsClient" page="auth/sslclient/" />
    <add name="Basic" page="auth/basic/" />
  </localAuthenticationTypes>
  <commonDomainCookie writer="" reader="" />
  <context hidden="true" />
  <error page="Error.aspx" />
```

4. If you want to use a web form to login, move the line for "Forms" above the line for "Integrated" as shown below.

```
<microsoft.identityServer.web>
  <localAuthenticationTypes>
    <add name="Forms" page="FormsSignIn.aspx" />
    <add name="Integrated" page="auth/integrated/" />
    <add name="TlsClient" page="auth/sslclient/" />
    <add name="Basic" page="auth/basic/" />
  </localAuthenticationTypes>
  <commonDomainCookie writer="" reader="" />
  <context hidden="true" />
```

> **Note:** This forces AD FS to use Login Page authentication before trying to use Integrated Authentication.

Organization Mgmt

Preferences

You can access a listing of system preferences by clicking **Preferences** in Administration.

On the **Preferences Information** tab, you can change basic preference data such as the Prefix and Suffix codes used for requisition numbers.

Default Bill-To Address and Default Ship-To Address are populated from your MMIS.

System preferences are listed on the **Common Settings** and **Special Settings** tabs.

To change preferences,

1. In Administration, click **Preferences**.
2. On the **Preferences Information** tab, change the Requisition Prefix and Requisition Suffix as needed.
3. Change whether Vacation Coverage is approved by Email, SMS Message, or both.
4. Click **Save**.

My Org.

My Organization Info provides basic information about your organization.

You can access organization information by clicking **My Org.** in Administration.

On the **General Information** tab, you can review and maintain the organization info listed here...

- Organization Name, Abbreviation, Description, and Logo
- Parent Organization
- No. of Licensed Beds
- Max. Number of Users
- Subscription Expiration Date
- Financial Year Starts On date
- Organization Type
- EID
- Status (Enabled or Disabled)
- Demo System Indicator
- SSO Indicator
- SSO Domain

You can also review and maintain the organization's Address List and list of system administrators.

On the **Child Organizations** tab, you can perform the tasks listed here...

- Review the child organizations that are part of the parent organization.
- Add a new child organization to the parent.
- Edit a child organization's general information.
- Delete a child organizations from the parent.
- Enable or disable a child organization.

On the **Financial View** tab, you can review and maintain the following corporation and cost center info for your organization:

Under **General Information**, you can review and maintain the general ledger data listed here...

- Corporation Name and Description
- Parent Organization (Read Only)
- Account Number
- Requisition Prefix and Suffix

- Punch Out Support Indicator for access to online vendors
- Status (Enabled or Disabled)
- PO Prefix and Suffix
- EID
- GLN
- Partner ID
- General Ledger Account Format

Under **Cost Center**, you can review the cost centers associated with the selected corporation and add and remove User Groups that can access the cost center. When you click the Cost Center name, the cost center's expense codes are displayed.

Under **Expense Code**, you can review the expense codes associated with the selected cost center. When you click the Expense Code name, the expense code's sub accounts are displayed.

Under **Sub Account**, you can review the sub accounts associated with the selected expense code.

Maintain Organization Info

To change your organization information,

1. In Administration, click **My Org.**.
2. On the **General Information** tab, make changes to basic organization data.
3. If you want to change the logo, click Change Logo at right, browse to the image file you want to use, and then click **Upload**.
4. If you want to change an administrator's contact data, under Admin List, click the administrator's email address link. Make changes and click **Save**.
5. If you want to add a new address, under Address List, click **New** at right, and add address and contact data.
6. If you want to edit an existing address, select the address, click  at right, and then change address and contact data.
7. If you want to delete an address, select the address, click **Delete** at right, and then confirm the deletion.
8. When you are finished changing organization info, click **Save**.

To add a new child organization,

1. In Administration, click **My Org.**, and then click the **Child Organizations** tab.
2. Click **New** at upper right.
3. Complete at least the required fields on the **General Information** tab.
4. If you want to add a new address, under Address List, click **New** at right, and add address and contact data.
5. When you are finished, click **Save**.

To change a child organization's information...

1. In Administration, click **My Org.**, and then click the **Child Organizations** tab.
2. If you want to change the child organization's active status, select the organization, and then click **Enable** or **Disable** at upper right. Confirm the active status change.
3. If you want to change other child organization information, click the child organization name, and make changes on the **General Information** tab.

4. If you want to change the child organization's logo, click Change Logo at right, browse to the image file you want to use, and then click **Upload**.
5. If you want to change an administrator's contact data, under Admin List, click the administrator's email address link. Make changes and click **Save**.
6. If you want to add a new address, under Address List, click **New** at right, and add address and contact data.
7. If you want to edit an existing address, select the address, click at right, and then change address and contact data.
8. If you want to delete an address, select the address, click **Delete** at right, and then confirm the deletion.
9. When you are finished changing child organization info, click **Save**.

To delete a child organization,

1. In Administration, click **My Org.**, and then click the **Child Organizations** tab.
2. Select the child organization you want to delete and click **Delete** at upper right.
3. When prompted, confirm the deletion.

Configure Bypass Purchasing Inbox

To configure the Bypass Purchasing Inbox feature for the organization,

1. In Administration, click **My Org**.
2. Under Bypass Purchasing Inbox, select the formulary levels allowed to bypass the Purchasing Inbox, and then click **Save**.
3. When prompted to override bypass exceptions, determine how you want to apply these settings.
- If you want these settings to override corporation and cost center exceptions for the formulary levels you selected, click **Yes**.
- If you do not want these settings to override corporation and cost center exceptions for the formulary levels you selected , click **No**.

Corporation Exceptions

To configure Corporation Exceptions to Organization Bypass Purchasing Inbox settings,

1. In Administration, click **My Org.**, and then click **Financial View**.
2. Select the corporation to be configured, and under Action, click .
3. Under Configure Bypass Exceptions, click to select the checkbox next to any formulary level in the corporation that is not allowed to bypass the Purchasing Inbox.
4. Click **Save**.
5. When prompted to override bypass exceptions, determine how you want to apply these settings.
- If you want these settings to override cost center exceptions for the formulary levels you selected, click **Yes**.
- If you do not want these settings to override cost center exceptions for the formulary levels you selected, click **No**.

Cost Center Exceptions

Cost Centers inherit their Bypass Purchasing Inbox settings from the organization (or from the corporation when an exception is configured).

To configure Cost Center Exceptions to Organization (and Corporation) Bypass Purchasing Inbox settings,

1. In Administration, click **My Org.**, and then click **Financial View**.
2. Select the Corporation, and then click **Cost Center**.
3. Select the cost center to be configured, and under Action, click .
4. Under Configure Bypass Exceptions, click to select the checkbox next to every formulary level in the cost center that is not allowed to bypass the Purchasing Inbox.
5. Click **Save**.

Maintain Corp and Cost Center Info

To change corporation info,

1. In Administration, click **My Org.**.
2. On the **Financial View** tab, click the Corporation you want to change, and make changes on the **General Information** tab. Click **Save**.
3. If you want to change the User Groups that can access the corporation's cost center, on the **Cost Center** tab, select the cost center you want to edit and click at right. Then, **Add** or **Remove** user groups from the cost center as needed.
4. When you are finished, click the **Cost Center** tab to return.

My OS - My Organization Settings

You can access a listing of organization configuration parameters by clicking **My OS** in Administration.

Under **Common Settings**, you can review configuration parameters that apply to all your organizations.

Section	Name	Description
855_Export_File_Size	855_Export_File_Size	Number of lines in the export file. When lines are less than or equal to this number, the system exports a .txt file. Otherwise, the system exports a .zip file.
All	Security_restricted_by_corporation	Restricts the All Corporations and All Contracts Views in the Virtual Item Master to display only those items available to the user's corporation. Applies during requisitioning, during the approval process, and when the user accesses the VIM directly.
All_Schemes_Default_Sequence	Min_Length	Minimum length of the default attribute sequence. For example, 3_4_5_6_7_8_9_10.
AR_AW_Setting	AR_AW_Setting	Determines whether attributes for Attribute Refinement (Approved Manufacturer Name, Approved Vendor Name) and Approval Workflow (Vendor Name, Manufacturer

		Name, UOM/QOE) are **enabled** or **disabled**.
Contract_Com- pliance	Contract_Com- pliance	Price Histogram and Contract Compliance dashboard. Auto- populate contracts based on price per contract standard UOM and item packaging. Otherwise, difference between Contract Price and PO Price must fall within defined threshold. When changed from **f** to **t,** system displays waits until the following day and updates data after daily loading.
Contract Match- ing	catnumScheme	Catalog number normalization scheme used by the sys- tem's contract matching service.
Contract Match- ing	Max Matching Score	Number representing the best contract match. For example, 10.
Contract Match- ing	Min Matching Score	Number representing the lowest contract match. For example, 0.
contract_mgmt	last_updating_ time	Date and time the contract was last updated. Format is YYYY-MM-DD HH:MM:SS.SSSSSS.
contract_price_ approval	discrespancy_ settings	Default contract management price discrepancy view set- tings for contract price approvals. Can be changed in Con- tract Management. For example, {"price_deviation": 0.03, "spend_upperbound": 2200.0, "auto_calculation": "true"}
Create_po	Special_char- acter_paragon	Special characters the system removes from POs from Par- agon. For example, %|_|~|\^|\\||:|\n|\r
Description_ Management	Default_Sync_ Descr	ID of the description scheme used for synchronization.
Description_ Management	Max_Facility_ Scheme_Num- ber	Maximum number of description schemes in each facility.
Description_ Management	Per_Page_Num- ber	Number of schemes displayed per page in Description Man- agement.
Deviation_ amount	Deviation_ amount	Insight Contract Compliance default configuration setting. Can be changed in Insight. For example, 10.
Deviation_per- centage	Deviation_per- centage	Insight Contract Compliance default configuration setting. Can be changed in Insight. For example, 20.
excluded_ period_auto_ fl_setting	excluded_ period_auto_ fl_setting	Default Excluded Period in months. Items removed or replaced from auto-generated Favorite Lists by users are not reviewed again for Favorite Lists for this number of months after the items were removed or replaced.
First_Word	Min_Full_Form	Minimum length of full form for Organization Dictionary.
Histogram_	Histogram_	Start of date range for an item in Price Histogram. Format

Start_Date	Start_Date	YYYY-MM-DD.
Library	Active	Enables (**t**) or disables (**f**) the Library.
Load Data	Notification Email	Email address the system uses to notify user of data load results.
Load_Data	Contract_Type_ Priority	Contract Priority within Contract Type.
Load_Data	get_default_ UOM_at_ZIT_1	Get default unit of measure from ZIT.1 (**t**) or get default unit of measure from ZIN.6 (**f**).
Location_Rank-ing	Location_Rank-ing	Used to rename the customizable Location Ranking column in Favorite Lists.
Reflected_ Update	Reflected_ Update	Item changes update Approval Workflow and Attribute Refinement. Enabled (**t**) or Disabled (**f**).
Refresh Time Period	Refresh Time Period	Frequency in minutes with which the system automatically refreshes the screen.
rewiewed_ week_auto_ fl_ setting	rewiewed_ week_auto_ fl_ setting	Default period (in months) for auto-generating published Favorite Lists.
RnP	Allow_Adding_ Item_ Not_ Valid_For_ CC_ As_Non_Cat	**t**: Users have the option to order items as non-catalog when not valid for their cost centers. **f**: Users are prevented from ordering items not valid for their cost centers.
RnP	Auto_Approve_ Req	Enable (**t**) or disable (**f**) the Auto-Approve Requisition func-tion when the requester is also an approver.
RnP	Auto_Update_ Favorite_List	Enable (**t**) or disable (**f**) the Auto-Update Auto-Generated Favorite Lists Monthly function.
RnP	Max_1_for_ requisitioning	Number at or over which the system asks the user to con-firm adding multiple items to a requisition.
RnP	Max_2_for_ requisitioning	Number at or over which the system warns the user when adding items to a requisition.
RnP	Query_Requis-itions	Enable (**t**) or disable (**f**) Corporation/Cost Center section in Requisition Filter.
RnP	Require_MFR_ For_Catalog_ Items_During_ Requisitioning	Require or do not require Manufacturer or Manufacturer Item ID for Paragon catalog items during the requisitioning process.
RnP	Require_MFR_ For_Non-Cata-log_Items_Dur-	Require or do not require Manufacturer or Manufacturer Item ID for Paragon non-catalog items during the requis-itioning process.

	ing_Requis-itioning	
RnP	Requisitioning_Type	Requisition type used for organization. **1**: Supply Chain Management, **2**: Paragon Materials Management
RnP	Requisition_Number_Format	Format of Requisition Number. **1**: '%y%m%d%H%M%S', **2**: sequence number (for example: 0000001)
RnP	Requisition_Number_Length	Default length of a requisition number.
RnP	Requisition_Number_Prefix	Default prefix of a requisition number.
RnP	Send requisition lines to MMIS immediately	**t**: Send requisition lines that do not require approval to the MMIS immediately. **f**: Send requisition lines to the MMIS after all lines have been approved. Can be overridden by deselecting **Auto-Approved/Approved lines process immediately** on the requisition header. Requisition lines processed immediately are grouped under a new requisition number that is associated with the Original Requisition Number in the Requisition List.
RnP	SyncPrice	Enable (**t**) or disable (**f**) request to update packaging in Supply Chain Mgmt.
RnP	Use RnP	Enable (**t**) or disable (**f**) use of Requisition and Procurement Management.
RnP	Validate_Item_Corp_CC	System validates Corporation/Cost Center/Expense Account when requisitioning. Enable (**t**), Disable (**f**)
RnP	Validate_Item_via_Web_Service	Use web service to validate item data and to get the stocked item UOM when requisitioning. Enable (**t**), Disable (**f**)
Show_Requisitions_Approved	Show_Requisitions_Approved	Number of past days to display approved requisitions in the Approval Request List.
Specific_Scheme_Default_Sequence	Min_Length	Minimum length of default attribute sequence. For example, 3_4_5_6_7_8_9_10.
Submit_Data	Invalid_Value_Count	
Synchronization	Synchronization	Enable (**t**) or disable (**f**) synchronization with Supply Chain Mgmt.

Target_Price_ Period	Target_Price_ Period	Number of months used to calculate Target Price. **6**, **12**, or **18**
VIM	org_web_link	URL for the organization's customized web link found in the top right panel of Virtual Item Master.
VIM	org_web_link_ description	Description of the organization's customized web link found in the top right panel of Virtual Item Master.
VIM	org_web_link_ text	Text displayed for the organization's customized web link displayed in the top right panel of Virtual Item Master.
VIM	Show_Spread-sheet_View	Show Spreadsheet View option in VIM. Enabled=**t**, Dis-abled=**f**
VMM	Max_Length_ Manufacturer_ Name	Maximum length of Manufacturer Name.
VVM	Max_Length_ Vendor_Name	Maximum length of Vendor Name.

Under **Special Settings**, you can review configuration parameters that apply to specified organizations only.

Section	**Name**	**Description**
contract_ price_approval	last_checking_ timestamp	Date and time of last contract price approval. Format is YYYY-MM-DD HH:MM:SS.SSSSSS
price_his-tograms	std_deviation_ threshold_of_price	Threshold of price deviation percentage. Decimal format. For example: 0.9

You can click the Edit icon next to any Common or Special Setting section to change the con-figuration parameters value for that section.

Change My Organization Settings (My OS)

To change your organization settings,

1. In Administration, click **My OS**.
2. On the **Common Settings** or **Special Settings** tab, click next to the setting (Section/Name) you want to change.
3. Type a new Value for the setting , and then click **Save**.

Set a customized web link

To set a customized web link for your organization in the top right panel of the Virtual Item Master,

1. In Administration, click **My OS**.
2. Search for **web_link** to access web link settings.
3. Under org_web_link, type the URL you want to use in Value. Click **Save**.
4. Type an org_web_link_description of the URL. Click **Save**.
5. Type the label you want to display in the VIM panel in org_web_link_text. Click **Save**.

Address Management

You can click **Address Mgmt.** in Administration to review and maintain all of your organization's postal addresses.

You can add or change the address data listed here...

- Company Type
- Company Name
- Address lines 1, 2, and 3
- City
- State/Province
- ZIP
- Country
- Email
- Phone
- Fax

When you click **Save & Continue**, you can add or change the contact data listed here...

- Contact Name
- Contact Role
- Email
- Phone
- Fax

To add a new address...

1. In Administration, click **Address Mgmt**.
2. Click **New** at upper right.
3. Complete at least the required fields on the **Address Details** tab, and then click **Save & Continue**.
4. On the **Contacts** tab, click **New** and complete at least the required fields of the New Contact dialog box. Click **Save** (or **Save and New Another** to add another contact).
5. When you are finished adding contacts, click **Finish**.

To change an existing address...

1. In Administration, click **Address Mgmt**.
2. Select the address you want to change, and click  at right.
3. Make changes on the **Address Details** tab, and then click **Save & Continue**. Click **Skip** if you only want to change contact data.
4. On the **Contacts** tab, select the contact you want to change and click  at right. Make changes and click **Save**.
5. If you want to add a contact, click **New** and complete at least the required fields of the New Contact dialog box. Click **Save** (or **Save and New Another** to add another contact).
6. If you want to remove a contact, select the contact and click **Delete**. Confirm the deletion.
7. When you are finished making changes, click **Finish**.

To delete an address...

1. In Administration, click **Address Mgmt**.
2. Select the address you want to delete, and click **Delete**.
3. Confirm the deletion.

Location

You can click **Location** in Administration to review all the locations defined for your organization.

Click the Location Name to review the following data...

- Facility Code
- Location name
- Location Type (Consumable, Supply, None)
- Bill To, Ship To, Stockless
- Inventory Path
- GLN
- Status (Enabled or Disabled)
- Address
- Supply Route

Add, Change, or Delete a Country

You can click **Country Mgmt** in Administration to review and maintain all the countries defined for your organization.

To add a new country,

1. Click **Create a New Country** at left.
2. In the New Country dialog box, type a unique Country Code and a Country Name.
3. Click **Save**.

To change a country name,

1. On the Country Code row, click in Country Name.
2. Change the country name.
3. Click **Apply Changes** at left.
4. Confirm your changes.

To delete a country,

1. Click to select the Country Code you want to delete.
2. Click **Delete Selected Country** at left.
3. Confirm your deletion.

Content Management

Help

Contract Mgmt

Contract Management

You can use Contract Management to review and approve pricing to be shared with your organization's MMIS, helping to ensure contract pricing is available for comparison to invoice pricing. On-going contract uploads and maintenance ensure that critical contract data is part of your formulary management and that accurate pricing is displayed for all items, even outside your Item Master.

In addition to the default Item View and the Contract View, Contract Management offers the Price Discrepancy View, where you can approve or reject price discrepancies, and the Approved/Rejected Price View, where you can see your price discrepancy modifications.

You can access Contract Management by selecting **Contract Mgmt** in **Content Mgmt.**.

You can use the Load Data feature under Content Management to load contracts into Strategic Supply Sourcing. The Load Data feature is especially helpful if you do not have a direct feed from your GPO or from the system maintaining your local contracts.

You can add, change, or delete local contracts in Strategic Supply Sourcing.

Note: McKesson recommends loading any large number of contracts into Strategic Supply Sourcing using the CSV format McKesson Contract Interface.

Contract Matching Approval...
When a new contract is loaded into Strategic Supply Sourcing, the system uses an algorithm to match the contract items to items in the VIM.

Item matching keys are...

- Item Description
- Vendor Name
- Vendor Item ID
- Mfr. Name
- Mfr. Item ID

Results are sorted to display those with greatest matching success first and are broken into three groups...

Group	Description
Good	All keys match. No user review is required. The system creates a relationship between the contract and the VIM items.
Potential	Some keys match. The system displays results to the user for review in Contract Matching Approval.
Bad	No keys match. No user review is required. The system does not create a relationship between the contract and VIM items. Instead, the system create new items

	in the VIM and associate the contract with the new items.

You must use the Contract Matching Approval function to approve potential contract matches.

Contract Header Information...

In Contract View, you can click to view and edit Contract Header Information or to view and edit packaging for the items on the contract. When you are finished, you can click **Close** at the bottom of the page to return to Contract View.

Contract item detail...

In Item View (the default Contract Management view), you can view an item's description, packaging, vendor and manufacturer data, pricing, and indicators.

The contract indicator alerts you that an item is on contract.

- Green means the item is on an effective contract with an Active status.
- Orange means the item is on an effective contract with an Inactive status.
- Red means the item is on an ineffective/expired contract.

You can designate all items on the contract as Preferred or Non-Preferred by clicking **Mark All** on the toolbar at top left and then selecting **Add Selected Item(s) To Preferred Item(s)** or **Non-Preferred Item(s)** on the toolbar at top right.

When you click the item description, the system opens the item in the VIM, where you can view the contract price, item master price, and the last PO price for a similar item. Contract header and detail data is displayed below the VIM item detail.

Item View filter criteria...

You can narrow the data displayed in Item View by clicking Filter on the toolbar at top right, selecting filters, and clicking **Apply**.

Available filters are...

- Contract Effectiveness (by number of days)
- Contract Status
- Contract Supplier Type
- Contract Item with/without POs
- Contract Price Discrepancy

Selected filters remain in effect until you change them.

Note: The filter icon is yellow when a filter is in use.

Price Discrepancy...

While in Price Discrepancy View, an authorized user can click Settings on the toolbar at top right to set the criteria for what is displayed as a contract price discrepancy.

Discrepancy criteria can be set for a percentage deviation between the contract price and the current item price and for the total dollar amount spent on the item by the corporation in the past 12 months.

You can also set the system to automatically calculate the contract price for units of measure of the item that are not specifically included in the contract but are listed in the Strategic Supply Sourcing database.

You can narrow the data displayed in Price Discrepancy View by clicking on the toolbar at top right, selecting filters, and clicking **Apply**.

Available filters are...

- Ready To Approve (contract items that meet Price Discrepancy criteria)
- Need Review To Approve (contract items that DO NOT meet Price Discrepancy criteria)
- All

Selected filters remain in effect until you change them.

Note: The filter icon is yellow when a filter is in use.

Approved/Rejected Price View...

You can review contract items that have been approved or rejected by changing to **Approved/Rejected Price View**.

You can narrow the data displayed in Approved/Rejected Price View by clicking on the toolbar at top right, selecting filters, and clicking **Apply**.

Available filters are...

- Approved Price, Rejected Price, All
- Approved/Rejected Price Date Range

Selected filters remain in effect until you change them.

Note: The filter icon is yellow when a filter is in use.

Changing the current vendor item price...

Because an item can be listed on many contracts, Strategic Supply Sourcing compares the contract item's unit of measure (UOM) to the approved vendor item's UOM in all contracts that include the item.

When the contract price is one cent ($0.01) or more greater than the current vendor item price, Strategic Supply Sourcing recommends that you review and approve the contract item price to replace the current vendor item price for Item Master items.

When you approve updating the vendor item price to match the contract price, Strategic Supply Sourcing updates the current vendor item price in your organization's MMIS.

After the MMIS is updated, Strategic Supply Sourcing also updates the vendor item price for the item in Attribute Refinement, the VIM, Insight, Contract Management, and Requisition Management (including on all Open requisitions), and recalculates item replacement recommendations based on the new vendor item price.

Note: You can manually update the vendor item price in Attribute Refinement.

Exporting contract items...

In Contract Management, you can export items from contracts you have selected by clicking on the toolbar at top right. You can export all items or only items with required MMIS fields populated.

Expiring contracts...

You can configure Contract Management to send nightly email notification of expired or soon-to-expire contracts to email recipients that you determine. The email summarizes expiring contracts by GPO, by vendor, and by manufacturer. A Contract Expiration Report is attached to the email.

You can maintain Email Notification Settings in Contract Management's Contract View.

Approve or Reject Contract Price Discrepancies

Access Contract Management by selecting **Contract Mgmt** in **Content Mgmt.**.

To review the price discrepancy listing and determine whether to approve or reject the suggested contract price,

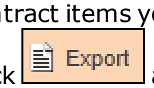
1. On the toolbar at top right, change **Item View** to **Price Discrepancy View**.
2. Review price discrepancies, and select the rows you want to approve or reject.
3. Click **Approve** or **Reject**.
4. Click **Yes** to confirm your action (and update the current vendor item price if you clicked **Approve**).

Note: After 30 minutes of inactivity, Strategic Supply Sourcing closes the Price Discrepancy Viewer and returns you to the home page.

Export Contract Items

In **Content Mgmt.**, click **Contract Mgmt**.

To export contract items...

1. In the left-hand navigation panel, use the filters to narrow the display as close as you can to the contract items you want to export.
2. Click 

at right to open the Export for Contract Management dialog box.
3. Click to select to export all items or only those items with your MMIS fields populated.
4. Change the columns to export as needed.
5. If you want to save the current settings for your next export, click **Save**.
6. When you are ready to generate the export file, click **Export**.

Approve Potential Contract Matches

After a contract is loaded into Strategic Supply Sourcing, to approve potential contract matches,

1. From the main menu, click **Contract Matching Approval**.

   Note: You can also access Contract Matching Approval from the Item View list in Contract Management.

2. In the Contract Matching Approval list, expand each contract item to compare its details to potential matches from the VIM.
3. Approve or reject the potential match by clicking to select the box on the contract line and then clicking **Approve** or **Reject** at bottom left.

Add, Change, or Delete a Local Contract

To add (create) a new local contract,

1. In Contract Mgmt, click **New** on the toolbar at upper right.
2. On the Contract Header Information tab, type or select contract header data, and then click **Save**.
3. On the Item List tab, click **Add New Items** on the toolbar at upper right.
4. In the View Items window, click to select the items you want to add to the local contract, and then click **Apply**.
5. When you have selected all items for the local contract, click **Close**.
6. On the Item List tab, click **Save**.
7. If you want to remove an item from the local contract, click to select the item's checkbox, and then click **Remove** on the toolbar at upper right.
8. If you want to change an item's local contract price or packaging, click  on the item line to open the Edit Contract Item Packaging window.
   - For catalog items, you can edit contract pricing for any displayed UOM. You can select **Auto calculate price for other UOMs** for the system to update all other UOMs.
   - For non-catalog items, you can add any UOM from the list of valid UOMs.
   - You can remove contract UOMs by selecting the UOM and clicking **Remove** at upper right. The default UOM cannot be removed.

     Note: Price discrepancies created by your changes are displayed in Price Discrepancy View the following day.
9. When you are finished changing packaging and pricing for all corporations, click **Save** to save changes, and then click **Close**.
10. Click **Close** to exit the window and close the local contract.

To change a local contract,

1. In Contract Mgmt, in Contract View, click  for the local contract you want to edit.
2. Make changes on the Contract Header Information tab, and then click **Save**.
3. Add, remove, or edit items on the Item List tab, and then click **Save**.
4. When you are finished making changes, click **Close**.

To delete a local contract,

1. In Contract Mgmt, in Contract View, click to select the checkbox for the local contract you want to remove.
2. Click **Delete** on the toolbar at upper right.

Maintain Email Notification Settings

To establish or change settings for email notification of expiring or soon-to-expire contracts...

1. In **Content Mgmt.**, click **Contract Mgmt** and select **Contract View**.
2. In the center of the toolbar, click **Notification Settings**.
3. On the Notification Settings page, type the email addresses you want to receive email notification of expiring contracts. Be sure to separate email addresses with a comma.

4. Under Contract Expiration Notification, select the options (expired, soon-to-expire, or both) and the number of days to include in notifications.
5. When you are finished, click **Save**.

Description Mgmt

Description Management

You can create, change, and delete custom descriptions for your Virtual Item Master (VIM) items. Custom descriptions can be used when items are interfaced to a third-party system. For example, you can use a nurse’s common nickname for an item when interfacing that item to a surgery system.

Based on your organization’s recommendations, you can use Description Management to set up a format for item descriptions.

You can access Description Management by clicking **Desc. Mgmt.** in **Content Mgmt.**.

Tip: All items added to the Item Master use the item description formats in the system. If your organization has multiple corporations and more than one materials management information system, you may want to create a custom description.

Note: Generated descriptions must be approved using the Approval Workflow function before they can be used.

If you want to change the sequence of attributes associated with the selected Description, you can click **Default Ontology Sequence**, select the Noun/Family, and make changes.

You can click **Description Settings** to change the global sequence of attributes.

Abbreviation Dictionary

Strategic Supply Sourcing provides a listing of pre-determined abbreviations commonly used when creating descriptions for your items. Your organization can adopt the commonly used descriptions provided by Strategic Supply Sourcing or you can customize them to better reflect your needs.

The customized code displayed in the Organization's Abbreviation column is used when you create system-based descriptions.

You can sort Terms by the term's first word or by its remaining attributes.

Attribute Refinement

You can use the Attribute Refinement page to edit attribute data and use abbreviations for approved descriptions related to the same item family. Refining attributes allows you to compare similar items.

You can change the Attribute Refinement column order by clicking 

at far right of the toolbar to display the Attribute Refinement Settings page. Change the order of displayed columns and then click **Save**.

You can click 

to view a history of enriched items that have been exported to your MMIS.

You can click 

to review and maintain settings for Functionally Similar and Functionally Equivalent Item Families.

You can click 

to export enriched items to your MMIS or another system.

Add, Change, or Delete a Custom Description

Access Description Management by clicking **Desc. Mgmt.** in **Content Mgmt.**.

To add a description,

1. On the Description Management page, click **New** at right.
2. Complete the Description Scheme Details page.
    - Description Name
    - Description Type
    - Abbreviation Dictionary - standard or customized allowed
    - Description Max Length - Determined by the MMIS or third-party application
    - Corporation
    - Description Scheme Abbreviation
3. If you want to save your work without generating the description at this time, click **Save** at right.
4. If you are ready to send the completed description for approval, click **Generate**.
5. When prompted, confirm your actions.
6. After the description is generated, click **OK**.

To change a description,

1. On the Description Management page, click the Description Scheme Name you want to change.
2. Make changes on the Description Scheme Details page.
3. If you want to save your work without generating the description at this time, click **Save** at right.
4. If you are ready to send the completed description for approval, click **Generate**.
5. When prompted, confirm your actions.
6. After the description is generated, click **OK**.

Caution: Generating descriptions during peak working hours can impact system performance.

Note: Generated descriptions must be approved using the Approval Workflow function before they can be used.

To delete a description,

1. On the Description Management page, click to select the Description you want to delete.
2. Click **Delete** at right.
3. When prompted, confirm your actions.

Customize an Abbreviation

To customize an abbreviation for your organization's use,

1. In **Content Mgmt.**, select **Abbr. Dict.**.
2. Select the Term you want to change and click its **Edit** icon .
3. Change the Organization's Abbreviation and then click **Save**.

The updated content displayed in the Organization's Abbreviation column is used when you create system-based descriptions.

Approve a Description

You can use the Approval Workflow function to approve generated descriptions for use. After a description is approved, it is available as the custom description when searching the VIM.

To approve a pending description,

1. In Content Mgmt., click **Aprv. Workflow**.
2. Select the description you want to approve in the lower part of the left pane.
3. Click **Approve** and **Selected Description(s)** at the bottom of the left pane.

Tip: If you don't see the left pane, click at the left edge of the screen to expand it.

To approve a description for a single item,

1. In Content Mgmt., click **Aprv. Workflow**.
2. Select the description you want to approve from the Description drop-down list in the top of the left pane.
3. Narrow your item search results by selecting the tab for **Client Vendor**, **MSSS Vendor**, **Client MFR**, **MSSS MFR**, or **Noun/Family**.
4. Select the item from the tree at the bottom of the left pane.
5. In the right pane, click the item's link to open the Pending Approval Item Description Modification dialog box.
6. Click **Approve** at the bottom of the dialog box.

Edit Attribute Data

In **Content Mgmt.**, click **Attr. Refinement**.

You can filter data in any column marked with the Filter icon.

1. Click Filter at top right to select items from the Item Master, POH (PO History), The Matrix, and Contract with Process Status of Unidentified or Enriched.
2. In the left-hand navigation panel, use the right and left arrows to move from tab to tab, reviewing items by Vendor, Manufacturer, and Noun/Family.

3. In the right-hand navigation panel, open an item's description by scrolling right to the Approved Description column and clicking the item's hyperlink.
4. Use the Approved Description Modification page to:
    - add a new attribute,
    - modify the order of the attributes that make up the generated description, and
    - select abbreviations.
5. When you are finished, click **Save & Apply Formatting to All Functional Similar Item(s)**.

Note: You can modify any approved attribute column (with header displayed in yellow font) just as you can Approved Description.

Manually Update Vendor Item Price

You can manually update the vendor item price in Attribute Refinement.

1. In Attribute Refinement, click Settings on the toolbar at upper right, and verify that Approved Vendor Item Price is checked to **Show**. Click **OK**.
2. In the left pane, select a corporation.
3. Find the vendor item you want to edit.
4. Click the Approved Vendor Item Price to open the Edit Item Price/UOM/QOE dialog box.
5. In the top half of the dialog box, double-click the Approved Vendor Item Price, and type the new price.
6. When you are finished, click **Save**.
7. Click **Yes** to confirm your actions.

Tip: If you don't see the left pane, click at the left edge of the screen to expand it.

Load Data

Load Data

In **Content Mgmt.**, you can click **Load Data** to upload items, PO history, and contracts into Strategic Supply Sourcing.

Note: Items, PO History, and Contracts are usually loaded through system integration or by using the IDL (Initial Data Load) process, so Load Data is most commonly used to load local contract data.

Load Data

In the upper portion of the Load Data page, click **Browse** to locate and select the files for the type of data you want to load, and then click **Upload**.

Tip: You can obtain a sample data file for reference by clicking at left.

Summary data from uploaded files is displayed in the lower portion of the page including number of skipped lines, number of partially loaded lines, and uploaded file status value.

Tip: After you have uploaded data, you can hide the upper portion of the page by clicking  at top right.

Tip: You can use the Filter Files By options at lower left to limit the display to selected file types, statuses, and received dates.

Tip: You can click **Email Notification Settings** at top right to send interested parties a daily file load summary email notification. Type a valid email address for each recipient (separating entries with a comma), and then click **Save**.

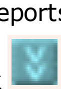
Uploaded file status values are explained here...

Status	**Description**
Pending	Valid file has been uploaded but not mapped or loaded into Strategic Supply Sourcing.
Ready to Process	File is loaded and fields have been mapped but data has not been loaded into Strategic Supply Sourcing.
Partially Processed with Error	At least one line loaded and at least one line was skipped or was partially loaded.
Partially Process with Error - Resolved	Set by the user adding comments for resolution of file errors.
Processed	All file lines have been loaded into Strategic Supply Sourcing.
Failed	Wrong file format, missing required fields, or a valid file format but all lines have been skipped due to invalid values.
Failed – Resolved	Set by the user adding comments for resolution of file errors.

Tip: You can delete files with a status of Pending or Ready to Process by selecting the file's checkbox and clicking **Delete** at top right.

Review Load Audit Reports

Review the Load Audit Reports for every uploaded file that has errors.

1. Under Actions, click .
2. When the Load Data message box is displayed, click the word **here** to download a zip file of available Load Audit Reports in Excel format.
3. Open the file named summary_report.xls for a summary of lines skipped and partially loaded.
4. Open the file named error_details.xls for data on the specific lines skipped.

Resolve errors

After you review the Load Audit Reports to identify errors that need to be resolved, you can make corrections in the error_details.xls file.

1. Open the error_detail.xls file
2. Locate all skipped rows and resolve the errors reported.
3. Delete all rows where the impact is **Loaded**. These rows loaded without any error.
4. Delete the columns headed **No.**, **Impact**, and **Errors Name**. These columns are not used when reprocessing the file.
5. Save the file as a tab-delimited file (.txt) using the original file name with something appended to designate it as the corrections file. For example, ABCVendorContract20150501*CORRECTIONS*.txt.
6. In the lower portion of the Load Data page, find the original file and click R under Actions. Type comments as to how you resolved errors in the file, noting the name of the corrections file.
7. Repeat the Load Data procedure to load the corrections file.

VIM - Virtual Item Master

Virtual Item Master - VIM

In contrast to The Matrix (which is a globally recognized database of almost every item a Strategic Supply Sourcing user can access), the Virtual Item Master (VIM) houses items related to a specific subscriber organization.

You can add items to the VIM from The Matrix and from these other sources...

- Spend POH (Purchase Order History) Invoice Information
- Contract Data (GPO and local contracts)
- New normalized items added to your Supply Chain Management Item Master

You can access the Virtual Item Master by clicking **VIM** in **Content Mgmt.**.

You can use the **VIM View** menu at top right to determine how items are displayed and what item description is used. VIM View options are listed here...

- Full Item Description
- Abbreviated Item Description (default)
- Spreadsheet View (can be hidden using the Show_Spreadsheet_View option in My OS)
- Detail View (default)

You can search the VIM in the same manner you search The Matrix. In the search results window, you can view item detail data and the data fields listed here ...

- Contract Price information
- Item Master Price
- Last Price Paid (Invoice)
- Last PO Price
- Catalog Information
- Detailed description based on user description preference

Tip: When searching by Organization Item ID, the search operator **id=** returns items matching the Org Item ID entered. The search operator **id:** returns items where the Org Item ID contains the value entered.

The key indicators described here display along with the item description to help you select an item...

Indicator	Description
	Library Catalog Item. Click to see the item as it is listed in its supplier catalogs.
	Inventory Item
	Contract Item
	Contract Item with Spend
	Preferred Item
	Formulary Status
	Favorite List Item
	Set Up New Item-Corporation Relationship

The four Formulary Levels are described here...

Level	Description
1	Preferred and/or inventory items
2	Tied to effective contract and has PO spend.
3	Tied to effective contract without PO spend.
4	Non-preferred, non-inventory, and not tied to an effective contract with or without PO spend.

You can filter VIM items by their origin, status, preference, and other characteristics before you export them for data synchronization in your MMIS. Export formats include Text and HL7.

You can drill into an item by clicking its description link to view additional item details, such as the MMIS item number and item packaging.

Description Details, created during the data normalization process, identify the associated item attributes. For contract items, Contract Information is listed below the Description Details.

You can click **View Price Histogram** at right to view the PO History.

Under More Choices at far right, you can Add the Item to a Favorite List or Mark the item as a Preferred Item.

You can customize the top right panel of the VIM with a link for your organization's employees. For example, you could include a link to your organization's MMIS bulletin board. For instructions, see "Set a customized web link" in Change My Organization Settings .

Issue Management

You can report issues (errors) encountered in the VIM ...

- in Content Management,
- from the VIM page, or
- on the item’s Report an Issue page.

All issues for the item posted by all users are displayed in the Reported Issues List.

When more than 100 characters are listed in the Issue Details column, the **More** link is displayed. Up to 1024 characters are allowed.

Status and Priority Types are defined here...

Status	**Definition**
New	User recently posted an issue.
Confirmed	Administrator has received the issue and is investigating.
Invalid	Administrator has determined the issue is invalid .
Resolved	Administrator has fixed the issue.
Pending	Issue is under investigation with no resolution at this time.

Priority types include...

- Immediate
- Urgent
- High
- Normal
- Low

To view all issues, click **View Reported Issues of All Items** at the bottom of the Report an Issue page.

You can sort reported issues as explained here...

Sort By	**Definition**
Recently Reported	Sort by time reported with most recently reported issue first.

Latest Comment	Sort by the time a comment was entered with most recent comment first.
Group: By Items	Sort issues by same item. Then sort by reported time.
Priority increasingly	Sort by priority Low to Immediate. Then sort by reported time.
Priority decreasingly	Sort by priority Immediate to Low. Then sort by reported time.

The Administrator accesses the Reported Issues list through **Content Mgmt.**, **Issue Mgmt**.

The Administrator can...

- remove an issue from the list,
- change the issue status,
- add comments, and
- change the priority type.

When the Administrator changes a status to Resolved, a confirmation message is displayed, and the Administrator can enter a comment. The system then sends an email notification to the user who reported the issue.

Add Matrix Items to the VIM

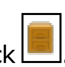
To add items to the VIM from The Matrix,

1. In **The Matrix**, select items and click **Add to VIM**.
2. In the **Shopping Cart**, select the items you want to add to the VIM and click **Add Items to VIM**.
3. Select from the Add Item options available to your organization, and then click **OK**.

Associate an Item with a Corporation

Access the Virtual Item Master by clicking **VIM** in **Content Mgmt.**.

To associate a VIM item with a corporation,

1. From the VIM item details, click .
2. Select the corporations you want to associate with the item, and then click **Next**.
3. Select the existing packaging combination you want to use or click **New** to create packaging and click **Save**. Then, click **Next**.
4. Select cost centers or a default expense code, and then click **Save**.

Export VIM Items

Access the Virtual Item Master by clicking **VIM** in **Content Mgmt.**.

To filter and export VIM items,

1. Click Filter at right.
2. In the Filter Criteria window, select criteria and click **Apply**.
3. Click Export at right.
4. In the Export for VIM dialog box, set column names, select the export file format, and change the columns to export as needed.
5. When you are finished, click **Export**.

Report a VIM Error

You can report an error you encounter in the VIM...

In Content Management...

Select **Issue Mgmt**, and then drill into a problem item and click the Report Issue red flag icon. Type a description of the problem you encountered, and then click **Post**.

From the VIM page...

Select a problem item and click the Report Issue red flag icon. Type a description of the problem you encountered, and then click **Post**.

On the item's Report an Issue page...

Type a description of the problem and click **Report**.

Export Enriched Items

In **Content Mgmt.**, click **Attr. Refinement**.

To export enriched items...

1. In the left-hand navigation panel, use the filters to narrow the display as close as you can to the enriched items you want to export.
2. Click Export at right to open the Export for Attribute Refinement dialog box.
3. Complete the **Packaging Information** tab...
   - Click to select to export all items or only those items with your MMIS fields populated.
   - If you select to export all items, select the options you want to export.
4. Complete the **Others** tab...
   - Set the Column Names and File Format.
   - Specify Field Delimiter and Text Delimiter as needed.
   - Change the columns to export as needed.
5. If you want to save the current settings for your next export, click **Save**.
6. When you are ready to generate the export file, click **Export**.

Add a VIM Item to a Favorite List

Access the Virtual Item Master by clicking **VIM** in **Content Mgmt.**.

To add a VIM item to a Favorite list...

1. Click the VIM item name to open the Item Details page.
2. Click **Add Item to Favorite List** at right.
3. In the Add To My Favorite List dialog box, click to select the Favorite list or lists where you want to add the VIM item, and then click **Save**.

Mark/Un-Mark VIM Item as Preferred

Access the Virtual Item Master by clicking **VIM** in **Content Mgmt.**.

To mark a VIM item as Preferred...

1. Click the VIM item name to open the Item Details page.
2. Click **Mark as Preferred Item** at right.
3. When prompted, confirm your actions.

To unmark a Preferred VIM item...

1. Click the VIM item name to open the Item Details page.
2. Click **Un-mark Preferred Item** at right.
3. When prompted, confirm your actions.

VMM - Virtual Manufacturer Master

Virtual Manufacturer Master - VMM

You can use the Virtual Manufacturer Master to review and standardize all the manufacturer records available to your organization. You can access the Virtual Manufacturer Master by clicking **VMM** in **Content Mgmt.**.

In the VMM, you can view the manufacturers available to all or to a selected corporation.

You can use the View By filters at left to display......

- All Manufacturers
- Manufacturers with ID
- Manufacturers without ID
- Potential New Manufacturers
- Potential Duplicate Manufacturers
- Recommended Manufacturer Name Changes

You can click any field with a yellow column header to make changes to it.

You can click the **+** by the Current Manufacturer Name to review and select from Recommended Manufacturer Names to replace the current name.

To help you decide on a recommended name, you can click  to display items associated with the recommended manufacturer name in the pane at far right.

Click  to clear the associated items list.

If you want to accept the recommended manufacturer name as a replacement for the current manufacturer name, click  on the Recommended Manufacturer Name line.

Available Actions for the VMM (displayed at lower left of the page) are explained here...

Action	**Allows you to...**
Apply Changes	Apply all changes on the grid whether the manufacturer is selected or not.
Approve Manufacturer Names	Approve recommended manufacturer names for the selected manufacturers.
Reject Manufacturer Names	Decline recommended manufacturer names for the selected manufacturers.
Create a New Manufacturer	Create a new manufacturer record.
Request New Manufacturer IDs	Obtain Manufacturer IDs for Potential New Manufacturers you have selected.
Solve Manufacturer Duplicates	Resolve duplicate manufacturer records.
Export Manufacturers	Export manufacturer records to be accessed in another system, such as your MMIS.
Edit Column Settings	Change the VMM data displayed for manufacturers and associated items.
View Sync Log	View a history of manufacturer records that have been exported to your MMIS.
Clear All Items	Clear the list of items associated with all displayed manufacturers.

Resolve Duplicate Manufacturer Records

Access the Virtual Manufacturer Master by clicking **VMM** in **Content Mgmt.**.

To resolve duplicate manufacturer records,

1. Under Filter at left, click to select **Potential MFR Duplicates**.
2. In the list at right, click to select the manufacturer you want to resolve.

3. In the lower left pane, click **Solve MFR Duplicates** to display the Solve Manufacturer Duplicates dialog box.
4. If a listed manufacturer is *not* a duplicate of the other records in the list, click **Remove** to remove it from the list.
5. Click to select the correct and unique manufacturer record from the remaining records in the list.
6. Click **Apply** to merge all other listed manufacturer records (the duplicate records) into the record you have selected.

Tip: If you don't see the left pane, click at the left edge of the screen to expand it.

Create a New Manufacturer

To create a new manufacturer,

1. Access the Virtual Manufacturer Master by clicking **VMM** in **Content Mgmt.**.
2. From Available Actions at lower left, click **Create a New MFR**.
3. In the New Manufacturer dialog box, provide as much information as you can about the new manufacturer.

   Notes: Required fields are marked with an asterisk (*). The system provides a Manufacturer ID automatically when you click **Save**.

4. Click **Save** when you are finished.

Request a New Manufacturer ID

To request a new manufacturer ID from your MMIS for a potential new manufacturer,

1. Access the Virtual Manufacturer Master by clicking **VMM** in **Content Mgmt.**.
2. Use the filters at left to display Potentially New MFRs.
3. Select the potential new manufacturer or manufacturers you want to add to your MMIS.
4. From Available Actions at lower left, click **Request New MFR IDs**.
5. When prompted, click **Yes** to confirm that you want to add the selected manufacturer to the MMIS.

   The system requests a new ID for the selected manufacturer from the MMIS.

Export Manufacturers

To export manufacturer records,

1. Access the Virtual Manufacturer Master by clicking **VMM** in **Content Mgmt.**.
2. From Available Actions at lower left, click **Export MFRs**.
3. Complete the Export Manufacturer(s) dialog box:

   - Specify Field Delimiter and Text Delimiter as needed.

- Change the columns to export as needed.

4. If you want to save the current settings for your next export, click **Save**.
5. When you are ready to generate the export file, click **Export**.

VVM - Virtual Vendor Master

Virtual Vendor Master - VVM

You can use the Virtual Vendor Master to review and standardize all the vendor records available to your organization. You can access the Virtual Vendor Master by clicking **VVM** in **Content Mgmt.**.

In the VVM, you can view the vendors available to all or to a selected corporation.

You can use the View By filters at left to display...

- All Vendors
- Vendors with ID
- Vendors without ID
- Potential New Vendors
- Potential Duplicate Vendors
- Recommended Vendor Name Changes

You can click any field with a yellow column header to make changes to it.

You can click the **+** by the Current Vendor Name to review and select from Recommended Vendor Names to replace the current name.

To help you decide on a recommended name, you can click  to display items associated with the recommended vendor name in the pane at far right.

Click  to clear the associated items list.

If you want to accept the recommended vendor name as a replacement for the current vendor name, click  on the Recommended Vendor Name line.

Available Actions for the VVM (displayed at lower left of the page) are explained here...

Action	**Allows you to...**
Apply Changes	Apply all changes on the grid whether the vendor is selected or not.
Approve Vendor Names	Approve recommended vendor names for the selected vendors.
Reject Vendor Names	Decline recommended vendor names for the selected vendors.
Create a New Vendor	Create a new vendor record.
Request New Vendor IDs	Obtain Vendor IDs for Potential New Vendors you have selected.
Export Vendors	Export vendor records to be accessed in another system, such as

	your MMIS.
Edit Column Settings	Change the VVM data displayed for vendors and associated items.
View Sync Log	View a history of vendor records that have been exported to your MMIS.
Clear All Items	Clear the list of items associated with all displayed vendors.

Create a New Vendor

To create a new vendor,

1. Access the Virtual Vendor Master by clicking **VVM** in **Content Mgmt.**.
2. From Available Actions at lower left, click **Create a New Vendor**.
3. In the New Vendor dialog box, provide as much information as you can about the new vendor.

    Notes: Required fields are marked with an asterisk (*). The system provides a Vendor ID automatically when you click **Save**.

4. Click **Save** when you are finished.

Request a New Vendor ID

To request a new vendor ID from your MMIS for a potential new vendor,

1. Access the Virtual Vendor Master by clicking **VVM** in **Content Mgmt.**.
2. Use the filters at left to display Potentially New Vendors.
3. Select the potential new vendor or vendors you want to add to your MMIS.
4. From Available Actions at lower left, click **Request New Vendor IDs**.
5. When prompted, click **Yes** to confirm that you want to add the selected vendor to the MMIS.

    The system requests a new ID for the selected vendor from the MMIS.

Export Vendors

To export vendor records,

1. Access the Virtual Vendor Master by clicking **VVM** in **Content Mgmt.**.
2. From Available Actions at lower left, click **Export Vendors**.
3. Complete the Export Vendor(s) dialog box:
    - Specify Field Delimiter and Text Delimiter as needed.
    - Change the columns to export as needed.
4. If you want to save the current settings for your next export, click **Save**.
5. When you are ready to generate the export file, click **Export**.

Insight Summary Reporting

Insight Summary Reporting

You can use Insight Summary Reporting to find the best values for your organization using Item Replacement and Cost Savings Opportunity Analyses.

When you click **Insight Summary** from the home page, the system displays a summary level view of these Insight Summary reports:

- Savings Capture
- Vendor Performance Summary
- Product Family Performance Summary

These summary reports are run using the most current Insight Settings.

When you click the link to view more details of any of these summary reports, the system displays the Insight Summary Reporting feature.

You can also access the Insight Summary Reporting feature by clicking **Insight Driven** at far right of the main menu bar.

Savings Capture...

The Insight Summary Savings Capture Report can be run as a Summary, by Vendor, by Product Family, or by Cost Center.

The **Savings Capture Summary** can be viewed by Savings Capture on IDN or by My Savings Capture and displays Realized Savings, Target Savings, and Missed Opportunity. Charts of Savings Capture and realized Savings over a Period are also provided and can be clicked for more detailed information.

The **Savings Capture by Vendor** Report lists Realized Savings, Missed Opportunity, and Target Savings by Vendor. Charts of Savings Capture, Realized Savings by Vendor, Missed Opportunity by Vendor, Realized Savings over a Period, and Realized Savings per Category are also provided and can be clicked for more detailed information. You can run the report for all corporations or a specific corporation, and you can filter results to display All Users or only My Savings Capture.

The **Savings Capture by Product Family** Report lists Realized Savings, Missed Opportunity, and Target Savings by Functionally Similar or Functionally Equivalent Item families. A chart of Savings Capture is also provided and can be clicked for more detailed information. You can run the report for all corporations or a specific corporation, and you can filter results to display All Users or only My Savings. You can view results for items by noun or family, or you can view results for entire item families.

The **Savings Capture by Cost Center** Report lists Realized Savings, Missed Opportunity, and Target Savings by Cost Center. Charts of Savings Capture, Realized Savings by Cost Center, Missed Opportunity by Cost Center, and Realized Savings over a Period are also provided and can be clicked for more detailed information. You can run the report for all corporations or a specific corporation, and you can filter results to display All Users or only My Savings Capture.

Vendor Summary Report...

You can run the All Vendors Performance Summary Report for all Corporations or for a specific corporation. You can view results for Total Spend, Under Contract Spend, Impacted (Off-Contract) Spend, or No Available Contract Spend.

The Introduction pane at right displays:

- Building a Strong Foundation (Summary Data)
- Highest Range Product(s)
- Lowest Range Product(s)
- Statistics
- Product & Contract Compliance Chart
- Vendor Chart
- Spend & Contract Compliance Chart

You can click links in Building a Strong Foundation or click on a chart for more detailed information.

Product Summary Report...

You can run the Product Performance Summary Report by Noun, by Functionally Similar Item Family, or by Functionally Equivalent Item Family.

You can run the report for all Corporations or for a specific corporation. You can view results for Total Spend, Under Contract Spend, Impacted (Off-Contract) Spend, or No Available Contract Spend.

The Introduction pane at right displays:

- Building a Strong Foundation (Summary Data)
- Highest Range Product(s)
- Lowest Range Product(s)
- Statistics
- Product & Contract Compliance Chart
- Vendor Chart
- Spend & Contract Compliance Chart

You can click links in Building a Strong Foundation or click on a chart for more detailed information.

Insight Settings...

Using Insight Settings, you can maintain the values used for Insight Summary Reporting.

Setting	Description
Inflation Rate	Anticipated price inflation rate by noun over the next several years.
Target Savings Percent	Savings you want to achieve as a percentage.
Target Line Configuration	Product(s) Purchased Under Contract - Percentage of all products purchased that you want purchased under contract. Realized Savings - Percentage of target savings to be realized. Under Contract Spend - Percentage of all amounts spent that you want spent under contract.
Target Price Configuration	Period of time over which to calculate Target Price.

Requisition and Procurement Management

Help

About

Requisition Management

To access Requisition Management, from the home page, click **Requisition Management**.

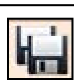
From the Requisition List page, you can create requisitions, maintain requisitions, and view general information about requisitions such as requisition number, requisition name, corporation, cost center, created date, submitted date and status.

You can click 

on the toolbar at top right to filter the contents of the requisition list by requisition status, requisition created date, and by corporation and cost center.

A requisition with a status of Awaiting Approval, Pending Clarification, or Awaiting Verification cannot be changed or deleted. If you want to change and resubmit or delete a requisition with one of these statuses, you must first withdraw the requisition from the approval process.

You can view or add information to the requisition using the icons explained here...

Icon	Function
	Edit requisition
	View/add comment
	View/add attachment **Note:** In a Supply Chain Management integrated environment where Supply Chain Management's Electronic Document Attachment feature has been configured, Strategic Supply Sourcing requisition attachments are integrated to the MMIS and can be viewed from the requisition there.
	View approval path
	View requisition history. **Tip:** Approvers and buyers can review requisition history for requests they are approving or verifying.
	Save requisition as

	Refresh

You can print one or more requisitions from the requisition list by selecting the requisition and clicking  on the toolbar at top right.

At the requisition line level, you can drill through to the VIM to perform the actions explained here...

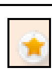
Action	**Description**
One-Click Checkout	Moves the item to the shopping cart and checks out at the same time.
Add Item to Requisition	Adds the selected item to the requisition.
Add Item to Favorite List	Adds the item to one or more of your favorite lists.
Mark/Un-Mark Preferred Item	Changes a preferred item to an unmarked item or vice versa.
Mark as Formulary Level #	Changes the formulary level for the item.

You can view and maintain additional data by clicking the requisition number and then clicking  at top left to display the Requisition Header.

On the **Item List** tab, you can view the item description, GL account, unit of measure, price, quantity, and line status.

Tip: From the **View** menu at upper right, you can select to view the Item List in Panel or Spreadsheet View.

Item description icons are explained here...

Icon	**Meaning**
	Inventory item
	Contract item
	Preferred item
	Formulary level
	Spend/Price Histogram. Used to review cost savings data at the requisition or item line level.

	You can also view spending performance through the Insight Summary.

You can click the **Approval Path** tab to view the approval path.

Replacing an item with a preferred item...

When you request (or are asked to approve) a non-preferred item that does not provide the most cost savings, a message is displayed on the **Item List** tab alerting you that at least one item does not have the lowest price or is not preferred.

Click the displayed **red** price to find the best item.

The system displays the **Item Replacement** tab, showing a recommended functionally equivalent item that provides more cost savings.

Cost savings calculation with different Contains quantities...

When calculating recommended item cost savings, if the Contains quantity of the recommended item does not match the Contains quantity of the requested item, the system determines the price of the requested item as if it contained the same quantity as the recommended item and subtracts the recommended item's price for that quantity.

For example...

> The requested item comes in cases of 25 for a price of $141.84 per case.
>
> The recommended item comes in cases of 2000 for $635.50 per case.
>
> The system determines that 25 of the requested item at $141.84 per case comes to $5.67 per item.
>
> At $5.67 per item, 2000 of the requested item would cost $11,347.20.
>
> The system subtracts the cost of one case of 2000 of the recommended item ($635.50) from the calculated cost of 2000 of the requested item ($11,347.20) to determine the recommended item cost savings ($10,711.70).
>
> $11,347.20 - $635.50 = $10,711.70

Strategic Supply Sourcing Requisitions and Supply Chain Management...

In both Supply Chain Management Requisitioning and eRequisitioning, a Strategic Supply Sourcing indicator (**Strategic**) displays in the header of Strategic Supply Sourcing requisitions.

In Supply Chain Management Purchasing, a Strategic Supply Sourcing indicator (**Strategic**) displays on any PO line generated from a Strategic Supply Sourcing requisition.

In McKesson ERP Solutions Reports, a Strategic Supply Source indicator (**Strategic**) is included in the line detail of the Requisition Item Report and the Stock Order Reports for every Strategic Supply Sourcing requisition.

Requisition line status values sent to Strategic Supply Sourcing from Supply Chain Management are explained here...

Status	**Description**

1 - Open	Submitted but not issued.
2 - Pending Approval	Submitted and requires approval based on dollar amount.
3 - Approved	Approved.
4 - Denied/Removed	Denied by an approver.
5 - Pending PO	Routed to Purchasing to be put on a purchase order.
6 - Open Stock Order	Routed to a supply location for picking.
7 - Delivery	Can query by delivery but returns open stock order items.
8 - Draft	Saved but not submitted.
9 - On Order	Placed on a purchase order.
10 - Killed	Cannot be filled because the supply location does not have enough of the item on-hand and does not track backorders. Undelivered quantities are canceled.
11 - Complete	Received.
12 - Backordered	Backordered due to insufficient quantity available in the supply location.
13 - Stock Return	Returns completed items.
14 - Stockless	Submitted as a stockless item and has been sent to the vendor using the Auto PO function.
15 - Auto PO	Ready to be added to an automatic purchase order.
16 - Pat Committed	Submitted with a patient associated and is waiting to be processed by the supply location.
17 - Pending Commodity	Submitted and requires approval based on commodity code.
18 - Pending Stock Order	Submitted to the supply location pending its order day.
22 - Pending Interface	To be exported to a third-party system via the Requisitions Outbound Interface.
23 - Interface Sent	Exported to a third-party system via the Requisitions Outbound Interface.

24 - Pending Information	Waiting for informational approval.
25 - Pending Allocation Approval	Waiting for allocation approval.
26 - Pending Bid	Placed on a bid request and is waiting to be awarded.
1000 - Invalid Packaging	Saved with invalid packaging data
1001 - Invalid Inter-Company Transfer	Inter-company error
1002 - Invalid supply location	Invalid supply location
1003 - Inactive Supply Location	Inactive supply location
1004 - Invalid Par Quantity	Invalid par quantity
1005 - Process Pending Killed	Killed by Process Pending Requests function because of zero on-hand quantity
1006 - Inactive GL	Inactive GL account
1007 – Invalid GL	Invalid GL Expense Account or SubAccount
1008 – Zero Quantity Item	Zero quantity
1009 –Invalid UM	Invalid Unit of Measure
1010 – Invalid UM and Neg Qty	Invalid Unit of Measure and negative quantity
1011 – Non-Cat with zero quantity	Non-catalog item with zero quantity
1012 - Non-Cat with negative quantity	Non-catalog item with negative quantity (no returns on non-catalog items)
1013 – Non-Cat with Invalid Price	Non-catalog item with an invalid price
1014 – Non-Cat with invalid/missing description	Non-catalog item and description is missing or invalid

1015 – Unknown Error	Unknown error
1016 – Header validation failed	Not validated because the header failed validation
1017 – Passed Validation	Passed validation but at least one other line on the requisition did not pass validation.

Strategic Supply Sourcing Requisitions and Paragon Materials Management...

In the requisition header in Paragon Materials Management, the Strategic Supply Sourcing requisition number is displayed in Reference # and a Strategic Supply Sourcing indicator (**strategic**) displays in Submitted By.

Requisition line status values sent to Strategic Supply Sourcing from Paragon Materials Management are explained here...

Status	**Description**
O - Open	Line status during creation and after approval. If a line is Open after Issuing, that line has not yet been processed.
F - Filled	Requested quantity has been completely filled in Receiving.
C - Canceled	Line canceled during Issuing or Purchase Orders function.
B - Backordered	Insufficient quantity on-hand to fill the request.
L - Picklist	A pick list for the item has been generated at the supply location.
K - Picklist from Backorder	A pick list for the item has been generated from Backorder Maintenance.
P - On System PO	Item is on a purchase order linked to the requisition.
M - On Manual PO	Item is on a purchase order not linked to the requisition.

Item Family Management

Functional Equivalent or Functional Similar items are items that your organization has determined are acceptable substitutes for the item selected. This can help you fill backordered items and can also provide more economical options to expensive items.

You can maintain functionally equivalent and functionally similar items in Item Family Management. You can access Item Family Management by clicking **Item Family Mgmt** in Requisition & Procurement Mgmt. or from the home page.

You do not have to build Functional Equivalent or Functional Similar items from scratch. McKesson provides a template of recommended settings for each item family for every organization that subscribes to Strategic Supply Sourcing. Your organization's clinicians must review the settings for functionally equivalent items and make changes as necessary. Functionally similar settings never change and are always noun/type.

Items displayed in the Virtual Item Master (VIM) list information about items that are "similar" and "like for like" to the item selected.

You can access **Functional Equivalent Items** and **Functional Similar Items** from the bottom of the Item Details page.

Favorite Lists

In Strategic Supply Sourcing, you can create templates of frequently requested items called Favorite Lists. Favorite Lists are best suited to requests for stocked items in key departments. You can even publish Favorite Lists so that other users can access them.

You can access Favorite Lists by clicking **Favorite Lists** from the main page or from Requisition & Procurement Mgmt. For everyone but the Organization Administrator, **Published Favorite Lists** are displayed on their own tab separate from **My Favorite Lists**.

You can click the Action Log icon to review activity on a favorite list.

You can use the Location Ranking column to sort Favorite List items by criteria you define, such as bin or drawer location, most frequently ordered, etc. An administrator can customize the column name for your organization in My OS.

System-Generated Department Favorite Lists

The system also generates and maintains Department Favorite Lists based on the supplies requested by each Corporation-Cost Center during a specified review period from Strategic Supply Sourcing Requisition History.

Note: If your organization does not want the system to automatically update favorite lists based on department requisition history, you can disable the **Auto_Update_Favorite _List** setting in My Organization Settings (My OS).

Tip: If you want to prevent specific system-generated department favorite lists from being automatically updated, in **My Favorite Lists**, you can click in the Action column to enable or disable that list's automatic update.

Contents of system-generated Department Favorite Lists are based on the My Organization Settings (My OS) explained here...

Total number of reviewed weeks - When the Organization Administrator changes this setting, it goes into effect for the next period. Default: 6 months. Minimum: 3 months. Maximum: 24 months.

Excluded period for user-actions -When a user removes or replaces an item from the list, the item is excluded from review for inclusion in the list for the number of months specified. When the Organization Administrator changes this setting, it goes into effect for the next period. Default: 3 months. Minimum: -1 months (Exclude Forever). Maximum: 24 months. Zero (0) months puts the item back into review in the next period.

Three Department Favorite Lists are generated for every Corporation-Cost Center combination that has at least one requisitioned item in the period...

CORP NAME (CORP ID) - CC NAME (CC ID) - Weekly - Contains all items requested for the Corporation-Cost Center every week during the review period.

CORP NAME (CORP ID) - CC NAME (CC ID) - Bi-weekly - Contains all items requested for the Corporation-Cost Center every other week during the review period.

CORP NAME (CORP ID) - CC NAME (CC ID) - Monthly - Contains all items requested for the Corporation-Cost Center every month during the review period.

In **Favorite Lists**, the Organization Administrator sees their own and all published favorite lists.

Published lists display the Published icon . System-generated lists are listed as being Created By **MSSS**.

All users can add, replace, and remove items from department favorite lists, but no one can change a department favorite list's name or security access.

Approval Inbox

The Approval Inbox is a listing of requisitions pending your approval.

You can access your **Approval Inbox** to approve requisitions from the home page or from Requisition & Procurement Mgmt.

The number next to the approval inbox link on the home page indicates the number of requisitions awaiting approval.

Approval paths

You can view the approval path of an item on a requisition by drilling into the item, and then clicking the **Approval Path** tab. You can preview the approval path before your requisition is approved and any orders are created.

Approval paths are defined in Administration as part of User Group Management. The requisition approval path can contain multiple approval levels. For example, a path can require approvals at the Stat, Dollar, Commodity and Vendor levels.

> **Tip:** You can hover over the Approval Level box to view the required approver and the requisition's approval status.

Any requisitioner can send an email notification to the Approver Group for each requisition for the number of times specified in a Settings screen. The email explains whether all lines were rejected, some lines were rejected and some approved, or all lines were approved.

Delegating approval authority

If you are an approver and you are going to be unavailable, you can delegate requests to an alternate approver in **Administration** using the **Delegations** function.

Purchasing Inbox

The Purchasing Inbox is where buyers find approved requests awaiting purchase. You can access the **Purchasing Inbox** from the home page or from Requisition & Procurement Mgmt.

After a request is approved, the system routes it to a buyer for verification. The buyer clicks **Finish Verification** to verify the accuracy of the request or **Reject** to send the request back for modification.

After a request is verified, the system sends it to the Purchasing Profile or makes it available for pick-up by the Supply Chain Management Auto PO feature.

The buyer can filter results in the Purchasing Inbox by formulary status and vendor by clicking **Filter** and selecting from the following status options:

- Awaiting Verification - Approved but waiting for a buyer to verify the request so it can be placed on a PO.
- PO Requested - Buyer-verified and sent to the MMIS system. Awaiting PO.
- Rejected – Requests rejected for the corporation/cost center.

Bypass Purchasing Inbox

As part of the requisition approval process, after being approved by all required levels, requisitions are routed to the Purchasing Inbox for final approval. The purchaser confirms that data requiring approval is correct before sending the requisition to the MMIS.

For some formulary levels, when item data is correct, your organization may want to bypass the Purchasing Inbox review step.

The Bypass Purchasing Inbox feature is configured in My Organization Information and is set by formulary level with exceptions set for corporations and cost centers. By default, no formulary levels are set to bypass the Purchasing Inbox.

You must belong to a functional security group with rights to Edit Organization Information to set Bypass Purchasing Inbox configuration.

When a requisition is eligible to bypass the Purchasing Inbox, the Purchaser User Groups for the requisition Approval Path display the status Bypassed.

When a requisition bypasses the Purchasing Inbox, the bypass activity is recorded in requisition history.

855 Viewer

You can use the 855 Viewer to review vendor acknowledgment of purchase orders you have transmitted to them electronically.

You can access the **855 Viewer** from the home page or from Requisition & Procurement Mgmt.

Purchase order data is displayed in the grid with confirmation data. PO values are displayed in **blue** and confirmation values in **red**.

You can search the 855 Viewer by Vendor Item ID, Mfr Item ID, and PO Number. You can sort the 855 Viewer contents by clicking on one of several 855 Viewer column headers.

When you first open the 855 Viewer, only the past three days' confirmations are displayed. You can change the number of days displayed using the **Filter** function. Your 855 Viewer filter selections are retained for use with your next session.

You can filter results displayed in the 855 Viewer by clicking **Filter** and selecting from the following status options...

- PO Date range
- PO Confirmation Date range
- Item Acknowledgment Status
- Confirmed POs, Unconfirmed POS, or Both
- Buyer Name
- Vendor Name

The Item Acknowledgment Status codes (listed here) are grouped to identify discrepancies no matter what code the vendor sends...

- Accepted With No Variance
- Price Variance
- Backorder
- UOM Variance
- Vendor Item ID Variance
- Manufacturer Item ID Variance

You can use the **Export** function to export the 855 Viewer contents in .txt format. The system exports 855 Viewer contents (in .txt format) in a .zip file if the number of confirmation lines exceeds the 855_Export_File_Size value in My Organization Settings.

You can use the **Settings** function to set the 855 Viewer columns displayed for the Purchase Order List and for Confirmation Lines.

You can change the rate at which Strategic Supply Sourcing refreshes the 855 Viewer (**Refresh Time Period**) in **Administration**, **My OS**.

Activity Log

The Activity Log displays all actions taken related to requisitions.

The Activity Log includes history from:

- Requisition Management
- Approval Inbox
- Purchasing Inbox

You can view activity for all requisitions from the corporations and cost centers to which you belong.

You can click 

to filter the requisition list.

You can click  at right to view an individual requisition's activity.

You can click 

to export all the contents of the Activity Log for review in Microsoft Excel.

How To

Create a Requisition

Access Requisition Management from the home page by clicking **Requisition Management**.

You can create a requisition with catalog items from the Matrix or from the Virtual Item Master and non-catalog items.

To create a new requisition,

1. From the home page, click **New Requisition** or click **+ New** at upper right in Requisition Management.
2. Complete the requisition header, including Requisition Name, Deliver To, Corporation, Cost Center, and Stat Request and Auto-Approved/Approved lines process immediately designation.
3. When you select an Add Item(s) From value or click **+ New Non-Catalog Item** on the **Item List** tab, the requisition header is saved and collapsed and the requisition is created.

   Note: Fields displayed with an asterisk are required. The number of Stat Requests you can submit in a month is determined by your organization.

   Note: You can click  at top left to re-display the requisition header.

To add a catalog item to a requisition...

1. On the **Item List** tab, search for the item by Organization Item ID, or click an icon to Add Item(s) From My Favorites, Preferred Items, VIM, The Matrix, or Punch Out).
2. Search for the item by description or vendor/manufacturer.
3. Select an item by dragging and dropping it into the Shopping Cart's Item List.
4. When you are finished adding items to the requisition, click **Checkout**.

   Tip: You can click **Review Order** before you check out to see a larger editable view of the Shopping Cart.

   The Item List is displayed again, this time with item rows.
5. Change the GL account, unit of measure, or quantity as needed, and then click **Save**.

   Tips: Yellow column headers indicate editable fields. A red triangle indicates that a field was modified but has not yet been saved.

To add a non-catalog item to a requisition...

An item not in the online catalog is known as a non-catalog item. After a non-catalog item has been ordered three times, it is added to the VIM and normalized within 30 days.

To add a non-catalog item to a requisition,

1. From the **Item List** tab, click **+New Non-Catalog Item** at upper right.
2. Complete the **New Non-Catalog Item** tab. Required fields are marked with an asterisk.

- GL Account (scroll for the account or search by expense cost name)
- Item Description
- Manufacturer Catalog Number
- Vendor Catalog Number

- UOM/QOE (scroll or search by first letter to locate unit)
- Quantity
- Estimated Unit Price (minimum value is $1)

3. Click **Save**.
4. If you want, add an item image, comment, or attachment.
5. Click the **Item List** tab to view the item data.

Note: Supply Chain Management processes Strategic Supply Sourcing requisitions using the Auto PO processing feature even when those requisitions contain non-catalog items and line notes.

To add items from the VIM...

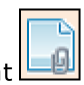
1. From the home page, click **Virtual Item Master**.

2. Find items using the Search field or through the **Add Selected Item(s) To** function, and then drag and drop items into the Shopping Cart Item List.

3. Click **Checkout**.

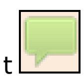
Tip: You can click **Review Order** before you check out to see a larger editable view of the Shopping Cart.

To add an attachment to a requisition line...

1. On the item's row, scroll to the right and click the Attachment  icon.
2. In the View Attachment List dialog box, click the **Attach A File** link.
3. In the Choose File to Upload dialog box, browse to and select the document, and click **Open**.

    The file is attached and the Attached Date, Attached By, and Attachment Name are displayed. The number **1** is displayed on the Attachment icon to indicate one attachment exists.

To add a comment to a requisition line...

1. On the item's row, scroll to the right and click the Comment  icon.
2. Type your comment and then click **Save**.

    The number **1** is displayed on the Comment icon to indicate that one comment exists.

When you are finished adding all items, attachments, and comments, click **Submit**.

Modify a Requisition

Access Requisition Management from the home page by clicking **Requisition Management**.

To edit an item on a requisition,

1. Select an open requisition from the Requisition List.
2. Click the Quantity field, change the value, and then click **Save**.

To remove an item from an open requisition,

1. Select the item and click **X Remove** at upper right.
2. Confirm the remove item message.

Maintain Functionally Equivalent and Functionally Similar Items

To maintain functionally equivalent and functionally similar items,

1. From the home page or from Requisition & Procurement Mgmt., click **Item Family Mgmt.**
2. Search for and then click the name of the Noun you want. For example, *Syringe.*
3. Click a specific Family Name. For example, *Syringe Ear*. Noun *Syringe* + Type *Ear* = Family Name *Syringe Ear*.
4. Select a functionally similar item from the displayed list.
5. Click **All Functionally Similar Item Families** to review noun settings and determine what attributes must match for items to be functionally equivalent (a "like-for-like" match).
6. Change functionally *equivalent* noun settings by clicking **All Functionally Equivalent Item Families**, selecting the noun, and making changes.
7. Click **Save & Continue** to return to your current saved selection of attributes.
8. Click **Save** and then **Generate** to refresh the results.

Create a Favorite List

To create a Favorite List,

1. From the home page or from Requisition & Procurement Mgmt., click **Favorite Lists**.
2. Click **+ New** at upper right.
3. Type a unique List Name.
4. If you want other users to be able to access the list, click to select **Publish this List**.
5. Click **Save**.
6. Click the new List Name to start adding items to it.
7. At upper right, search for an item by Organization Item ID, or click **Add Item(s) From** and select **Preferred Item List**, **VIM**, or **The Matrix**.
8. Search for and select items to add to the list.
9. When you are finished adding items to the Favorite List, click **Close**.
10. Confirm the system message.

Add a VIM Item to a Favorite List

Access the Virtual Item Master by clicking **VIM** in **Content Mgmt.**.

To add a VIM item to a Favorite list...

1. Click the VIM item name to open the Item Details page.
2. Click **Add Item to Favorite List** at right.
3. In the Add To My Favorite List dialog box, click to select the Favorite list or lists where you want to add the VIM item, and then click **Save**.

Replace an Item on a Favorite List

To replace an item on a Favorite List,

1. From the home page or from Requisition & Procurement Mgmt., click **Favorite Lists**.
2. Under My Favorite Lists at left, select a list where you want to replace the item.
3. At right, find the item you want to replace and click .
4. In the Confirm Replace Item dialog box, search for or type the replacing item's Organization Item ID.
5. After you have designated the replacing item, select to replace the item on:
   - the current Favorite List,
   - the current Favorite List and all others you are authorized to manage, or
   - the current Favorite List and other lists that you select.
6. When you are finished, click **Yes** to confirm the item replacement.

Remove an Item from a Favorite List

To remove an item from a Favorite List,

1. From the home page or from Requisition & Procurement Mgmt., click **Favorite Lists**.
2. Open the Favorite List.
3. Select the item, and then click **Remove** at upper right.
4. When prompted, select whether you want to remove the item from:
   - the current Favorite List,
   - the current Favorite List and all others you are authorized to manage, or
   - the current Favorite List and other lists that you select.
5. After you have made your selections, click **Yes** to confirm the item removal.

Create a Requisition from a Favorite List

To create a requisition from a Favorite List,

1. From the home page , click **New Requisition** or click **+ New** at upper right of the Requisition List page.
2. Complete the Requisition Header.
3. In **Add Item(s) From**, select and **My Favorite List**.
4. At left, select items to include from your Favorite Lists.
5. Drag and drop the selected items into the shopping cart at right.
6. When you are finished, click **Checkout**.
7. On the **Item List** tab, modify selected items as needed. For example, you can change the Quantity.
8. When you are finished, click **Submit**, and then confirm the system message.

Approve a Requisition

To approve a requisition,

1. Click **Approval Inbox**.
2. After you review the requisition and determine that it meets your approval, click **Submit**.

Approving a department requisition is the same as approving an individual requester's requisition.

To approve a department requisition,

1. Review the requisition.
2. If you want to approve the entire requisition, click **Submit**.
3. If you want to review the requisition lines, click the **Expand** icon. Requisition lines that are pending approval have a status of *To Be Approved*.
4. After you click the **Expand** icon, you can click **Submit** to approve the pending lines or select a line Status and then click **Submit**.
- To reject the request, select **To Be Rejected**.
- To ask for more information, select **Pending Clarification**. Type a note asking the requester for more data. The system assigns the request back to the requester for a response.

Withdraw a Requisition

To withdraw a requisition Awaiting Approval, Pending Clarification, or Awaiting Verification from the approval process,

1. In Requisition Management, click to select the requisition you want to withdraw.
2. Click  to view the requisition.
3. Click **Withdraw** on the toolbar at upper right.

   The requisition status is changed to Open.

The Library

Help

About

The Library

The Library is a repository of supplier (vendor and manufacturer) product catalogs in PDF format. It is a valuable reference resource integrated with your VIM and Value Analysis Projects.

When you belong to a User Group that has **Manage The Library** global function rights, you can...

- Search The Library by catalog or by supply item,
- Add a new supplier to The Library, and
- Upload a PDF format supplier catalog to The Library.

When you belong to an Organization Administrator User Group that has **Full Access on Catalog Approval Inbox** global function rights, you can approve or reject unapproved catalogs uploaded to The Library.

Note: McKesson reserves the right to remove any document or content from The Library at its sole discretion.

From **The Library** main menu option, you can select to review the **Community Library** or the **Organization Library** as defined here...

View	Description
Community Library	Catalogs in the Community Library can be viewed by authorized users at any organization that subscribes to McKesson Strategic Supply Sourcing. You can change information for and delete those catalogs that you uploaded to the Community Library. Authorized users (Organization Administrators) can change or delete any catalog added to The Library by anyone in their organization.
Organization Library	Catalogs in the Organization Library can only be viewed by authorized users at your organization. You can change information for and delete those catalogs that you uploaded to the Organization Library. Authorized users (Organization Administrators) can change or delete any catalog added to The Library by anyone in their organization.

You can use the Search function and Supplier list at left to find and select a supplier and display the supplier's catalog in the center of The Library page. The number next to the supplier name is the number of available catalogs for that supplier. When more than one catalog is associated with a supplier, Filter Options are displayed at right to help you narrow your search.

Tip: Your recent search history is displayed at the bottom of the page as **Your Recent History**.

Available Filter Options are explained here...

Option	Description
All Catalogs	Displays all catalogs in the current library view (Community or Organization).
My Catalogs	Displays only those catalogs in the current library view that you uploaded.
Read-only Catalogs	Displays only those catalogs in the current library view uploaded by other users.

You can view a supplier catalog in The Library from the VIM as explained here...

Any item in your VIM that is associated with a catalog in The Library displays the Library Catalog Indicator.

When you click the Indicator, the catalog is opened to the page where the first word of the item name is found.

When the item is associated with more than one catalog, a list of those catalogs is displayed for your selection.

Catalog Approval is explained here...

When you upload a catalog, it is automatically submitted for approval, and Strategic Supply Sourcing sends an email to potential approvers (Organization Administrators with **Full Access on Catalog Approval Inbox** global function rights). The approver clicks a link in the email to open the unapproved catalog in the Catalog Approval Inbox in The Library. Under Available Actions at right, the approver can choose to **Approve Catalog** or **Reject Catalog**.

When a catalog is uploaded but not yet approved, it is only displayed as enabled for the user who uploaded it and for potential approvers. Unapproved catalogs are not included when you **Search for an item** in The Library. Other users see the unapproved catalog as disabled, and they can use Library Filter Options to include or exclude Approved, Unapproved, and Rejected Catalogs. Items in the VIM do not display as catalog items if the catalog has not been approved.

When a catalog pending approval is rejected, Strategic Supply Sourcing sends an email notification to the submitter. A rejected catalog is displayed as enabled for the user who uploaded it and for potential approvers. Rejected catalogs are not included when you **Search for an item** in The Library. Other users see the rejected catalog as disabled, and they can use Library Filter Options to include or exclude Approved, Unapproved, and Rejected Catalogs. Items in the VIM do not display as catalog items if the catalog has been rejected.

In the Catalog List, you can click the View Action Log icon to review all approval activity for the catalog.

When you have approval authority, you can upload a new catalog and **Submit & Approve Catalog** with one click. You can also Edit Catalog Information for an unapproved catalog and then **Save & Approve Catalog** with one click.

Mailing List Management

You can use Mailing List Management to set up mailing groups who receive emails when key actions such as those listed here take place in The Library...

- Creation of a new supplier in the Community Library
- Creation a new supplier in the Organization Library
- Problem reported in the Community Library
- Problem reported in the Organization Library

You must select the email addresses of those users to be notified of any of the actions listed.

Supplier Management

You can use Supplier Management to create, edit, or delete suppliers in the Community Library or the Organization Library.

You can also view a listing of suppliers by Community or Organization.

How To

Search the Library by Catalog Name or Description

From **The Library** main menu option, select the **Community Library** or the **Organization Library.**

To search The Library by catalog name or description,

1. In Available Actions, type the catalog name or description in Search for a Catalog, and then click .
2. When a list of catalogs (in the current library view) that match your input is displayed, select a catalog.
3. When the catalog is displayed, use the PDF's functions to search through or print the catalog, to save a copy of the catalog locally, or to email the catalog.

When a catalog is displayed, more functions are added to the Available Actions list. You can:

- **Share via Email** to share the catalog hyperlink.
- **Report a Problem** if the catalog displayed is not correct for the catalog link you selected.
- **Edit Catalog Information** or **Delete Catalog** if the catalog is one you uploaded.

Tip: Your recent search history is displayed at the bottom of the page as **Your Recent History**.

Search the Library by Item Name

From **The Library** main menu option, select the **Community Library** or the **Organization Library.**

To search The Library by item name,

1. In Available Actions, type the item name in Search for an Item, and then click .
2. When a list of catalogs (in the current library view) that contain the item is displayed, select a catalog.
3. When the catalog is displayed, use the PDF's functions to search through or print the catalog, to save a copy of the catalog locally, or to email the catalog.

When a catalog is displayed, more functions are added to the Available Actions list. You can:

- **Share via Email** to share the catalog hyperlink.
- **Report a Problem** if the catalog displayed is not correct for the catalog link you selected.
- **Edit Catalog Information** or **Delete Catalog** if the catalog is one you uploaded.

Tip: Your recent search history is displayed at the bottom of the page as **Your Recent History**.

Search the Internet for a Supplier Catalog

From **The Library** main menu option, select the **Community Library**.

To search the Internet for a supplier catalog,

Use the **Search Google** option to search for a supplier's catalog on the Internet.

When you use **Search Google**, you have the option to add one or more supplier catalogs to the Community Library.

Tip: Your recent search history is displayed at the bottom of the page as **Your Recent History**.

Upload a Supplier Catalog to the Library

From **The Library** main menu option, select the **Community Library** or the **Organization Library.**

To add a (PDF format) supplier catalog to the The Library,

1. From Available Actions at right, click **Upload a PDF Catalog**.
2. Type a unique Catalog Name to be displayed beside the PDF file.
3. Type a Catalog Description to provide users with an overview of catalog contents.

4. If you are in the Organization Library, select the Corporation (or **All Corporations**) associated with the catalog.
5. Select a Supplier.
6. Browse to and select the catalog's PDF File (less than 100 MB).
7. If you want, select an Image to go with the PDF file. The image must be a JPEG, PNG, GIF or BMP file less than 4 MB in size.
8. Click **Submit Catalog**.

> **Note:** An authorized user can **Submit & Approve** a catalog in one click. If you are not an authorized user, the system automatically submits every catalog you upload for approval.

Approve or Reject an Unapproved Catalog

You must belong to an Organization Administrator User Group that has **Full Access on Catalog Approval Inbox** global function rights to approve or reject a catalog in The Library.

To approve or reject a catalog awaiting approval in the Catalog Approval Inbox,

1. Click **The Library** and **Catalog Approval Inbox**.
2. At left, click to select the catalog you want to approve or reject.
3. At upper right, click **Approve** or **Reject**.
4. If you click **Reject**, you are prompted for a Reject Reason. Type your reason and click **Submit**.

To approve or reject a catalog awaiting approval in The Library,

1. Click **The Library** and select **Community Library** or **Organization Library**.
2. At left, click to open the catalog you want to approve or reject. (Catalog Status: Unapproved)
3. Under Available Actions at right, click **Approve Catalog** or **Reject Catalog**.
4. If you click **Reject Catalog**, you are prompted for a Reject Reason. Type your reason and click **Submit**.

Change or Delete a Catalog

You can change or delete any catalog that you added to The Library. Authorized users (Organization Administrators) can change or delete any catalog added to The Library by anyone in their organization.

From **The Library** main menu option, select the **Community Library** or the **Organization Library.**

To change information about a supplier catalog,

1. Find and select the catalog you want to change.
2. In Available Actions, click **Edit Catalog Information**.
3. On the Edit Catalog Information page, make changes, and click **Save** when done.

> **Note:** An authorized user can **Save & Approve** an unapproved catalog in one click.

To remove a supplier catalog,

1. Find and select the catalog you want to remove.
2. In Available Actions, click **Delete Catalog**.

3. Click **Yes** to confirm your actions.

Set up a Mailing Group

To set up a mailing group,

1. From **The Library** menu, click **Mailing List Mgmt**.
2. In All Mailing Groups at left, select an Action Mailing Group.
3. Type the first few characters of the user's email address in the field at right.
4. Select the correct email address from the list of matching addresses displayed.
5. Repeat until all users to be notified of the action have been entered.
6. Click **Save**.

To remove an email address from a mailing group, click the **Delete** icon next to the user's email address.

Add, Change, or Delete a Supplier

You can create, edit, or delete suppliers in the Community Library or the Organization Library.

To add a new supplier,

1. From **The Library** menu, click **Supplier Mgmt**.
2. Select the tab of the library view where you want to add a new supplier; **Supplier – Community Library** or **Supplier – Org Lib**.
3. Click **New** at top right, and enter the new Supplier Name. Click **OK**.

To change a supplier's data,

1. From **The Library** menu, click **Supplier Mgmt**.
2. Select the tab of the library view where you want to change a supplier; **Supplier – Community Library** or **Supplier – Org Lib**.
3. Search for and select the supplier.
4. Click the supplier's **Edit** icon in the Action column at right.
5. Change the Supplier Name, and click **OK**.

To delete a supplier,

1. From **The Library** menu, click **Supplier Mgmt**.
2. Select the tab of the library view where you want to delete a supplier; **Supplier – Community Library** or **Supplier – Org Lib**.
3. Search for and select the supplier.
4. Click **Delete** at top right.
5. Click **Yes** to confirm your actions.

The Matrix

Help

The Matrix

Introduction

The Matrix is a globally recognized database of practically all items that exist. Organizations that subscribe to Strategic Supply Sourcing have access rights to The Matrix.

In addition to storing over one million items for viewing, The Matrix is used for:

- Filling manufacturer backorders - Looking for alternative manufacturers with a similar item
- Researching like items - For example, finding all manufacturers that offer Foley catheters or determining the defining attributes of a specific type of item
- Viewing product detail information

New items are always being added to The Matrix by the subscribers' data normalization process and by McKesson Partner analysts assimilating manufacturer and vendor catalogs.

In order to access The Matrix, a user must belong to a User Group with **Order from The Matrix** included as part of the global function **Manage Requisitions**.

Finding items in The Matrix

From the Strategic Supply Sourcing home page, you can find items in The Matrix by entering item data (such as Description, Vendor or Manufacturer Name or Number) in Quick Search on The Matrix at left, or by clicking **The Matrix** link at lower right.

You can search The Matrix using a Vendor/Manufacturer Catalog and Description combination.

> For example, if you want to find a Bone Screw with "32" in its catalog number, search by **Ven/Mfr** with *32* in the first Search field and *bone screw* in the second Search field.

When you submit your search, The Matrix populates the screen below the Search fields with your results.

You can perform item searches by specific Product, Department, Manufacturer, and Vendor using the Search field or by selecting from the categories listed in the navigation panel at left.

You can select a displayed item by clicking its highlighted description. A detailed view of the selected item is displayed. You can use this detailed item data, for example, to select a substitute when a manufacturer backorder does not exist in your VIM.

Search results data...

The Matrix provides Strategic Supply Sourcing full normalized item descriptions as well as AKA descriptions. The AKA in the Matrix is created by an Artificial Intelligence (AI) engine based on the search criteria of the collective group of users.

> For example, three separate users from three separate organizations search for Christmas Tree and select a tubing adapter. The Matrix AI engine creates an AKA of Christmas Tree for the tubing adapter.

The Matrix lists the item's UNSPC code and HCSPC code (when available) in the item's Category section along with item packaging details and the item attributes that make up the description. Item attribute detail is used to normalize your item data before items populate your VIM.

Below your search results, The Matrix also lists items that are Related or Like your search results.

When you find one or more items in The Matrix that you want to add to your organization's Virtual Item Master, you can add the Matrix items to the VIM.

You can report any error you find in The Matrix.

Add Matrix Items to the VIM

To add items to the VIM from The Matrix,

1. In **The Matrix**, select items and click **Add to VIM**.
2. In the **Shopping Cart**, select the items you want to add to the VIM and click **Add Items to VIM**.
3. Select from the Add Item options available to your organization, and then click **OK**.

Report a Matrix Error

To report an error you encounter in The Matrix,

1. In The Matrix or Shopping Cart, select the red flag Report Issue icon next to the item details.
2. Type a description of the problem you encountered, and then click **Post**.

Value Analysis Project Summaries

Create a Value Analysis Project and Export Data

You can use the Value Analysis Project (VAP) application to gather item data critical to Value Analysis initiatives or Product Standardization teams and export it in Excel or Text format.

To create a VAP and export data...

1. From the home page, click **Value Analysis Project**.
2. On the Value Analysis Project Summaries page, click **New** at right.
3. Enter your project's name, a description of the project, and the project Kickoff Date, and then click **Save**.
4. Add the items you want to analyze by going to the **VIM** in **Content Mgmt.**, selecting items, and adding them to the VAP using the **Add Selected Items To** option.
5. Back in **VAP Summaries**, click the VAP name to review its contents.
6. When all items have been added to the VAP, click **Export**.
7. In the Export for VAP window, set the date range and column names, select the export file format, and change the columns to export as needed.
8. When you are ready, click **Export**.

Tip: You can **Filter** VAP contents to look for items with Purchase Orders or Items with No Purchase Orders.

Tip: You can obtain item pricing history for any selected item by clicking the **Price Histogram** icon.

Hayes

Tip: At bottom left of the VAP page is a link to Hayes Inc.

Hayes can provide evidence-based medical technology assessments to help determine clinical and comparative effectiveness, safety, and impact. A Hayes subscription can provide even more in-depth analysis of your data.

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