



SIMS eProcurement

User Guide

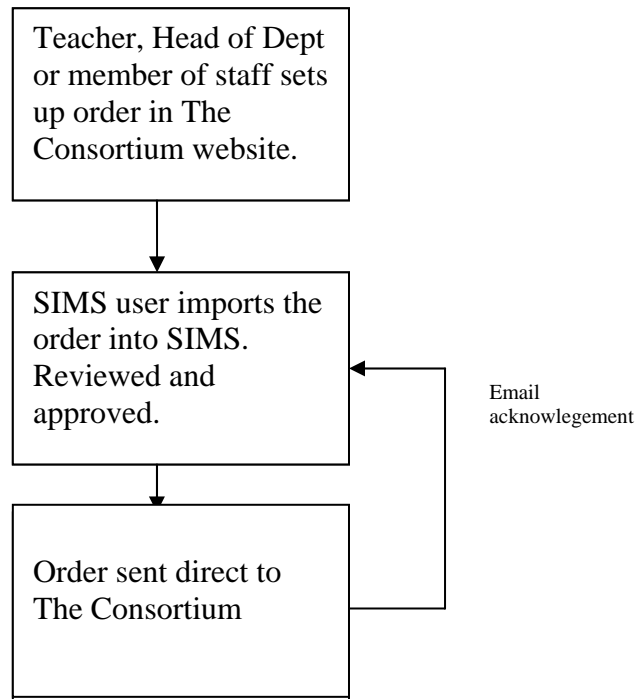
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1. Introduction

With SIMS eprocurement, you can create the content of an order on The Consortium website and then import it directly into SIMS for review and authorisation. Once authorised, the order is sent to The Consortium in a machine readable format – XML. The Consortium then processes it and sends an email acknowledgement back to you. Alternatively, an order can be typed directly into SIMS and emailed to The Consortium.

Using the Website allows authorised people (e.g. Heads of Department) to set up their requirements using any Internet connected PC, at home or at work, with an up-to-date view of stock and prices. The SIMS administrator can then import these for review and authorisation.



This guide will take you through the steps required to create xml content orders and import them into SIMS, along with the steps required to authorise these and send them to The Consortium. Before using this guide please ensure all the necessary SIMS eProcurement set up has been performed by referring to the set up guide. These instructions assume you are using version 6.77 of SIMS FMS.

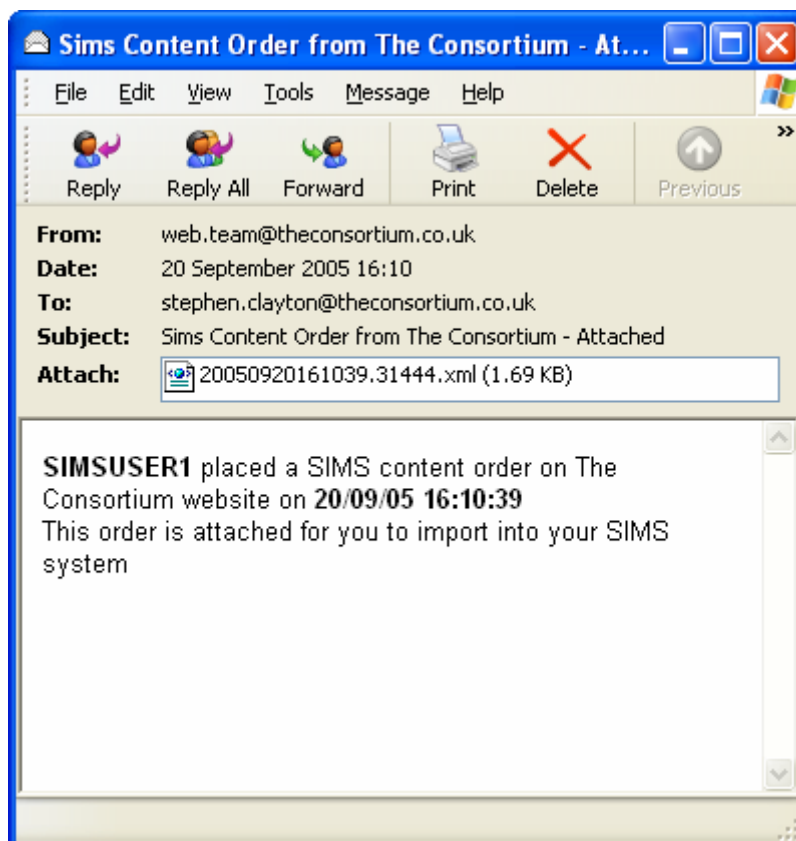
1. Creating orders

Create the content of an order on the website, in the usual way, but when completing the order click this button:

SIMS

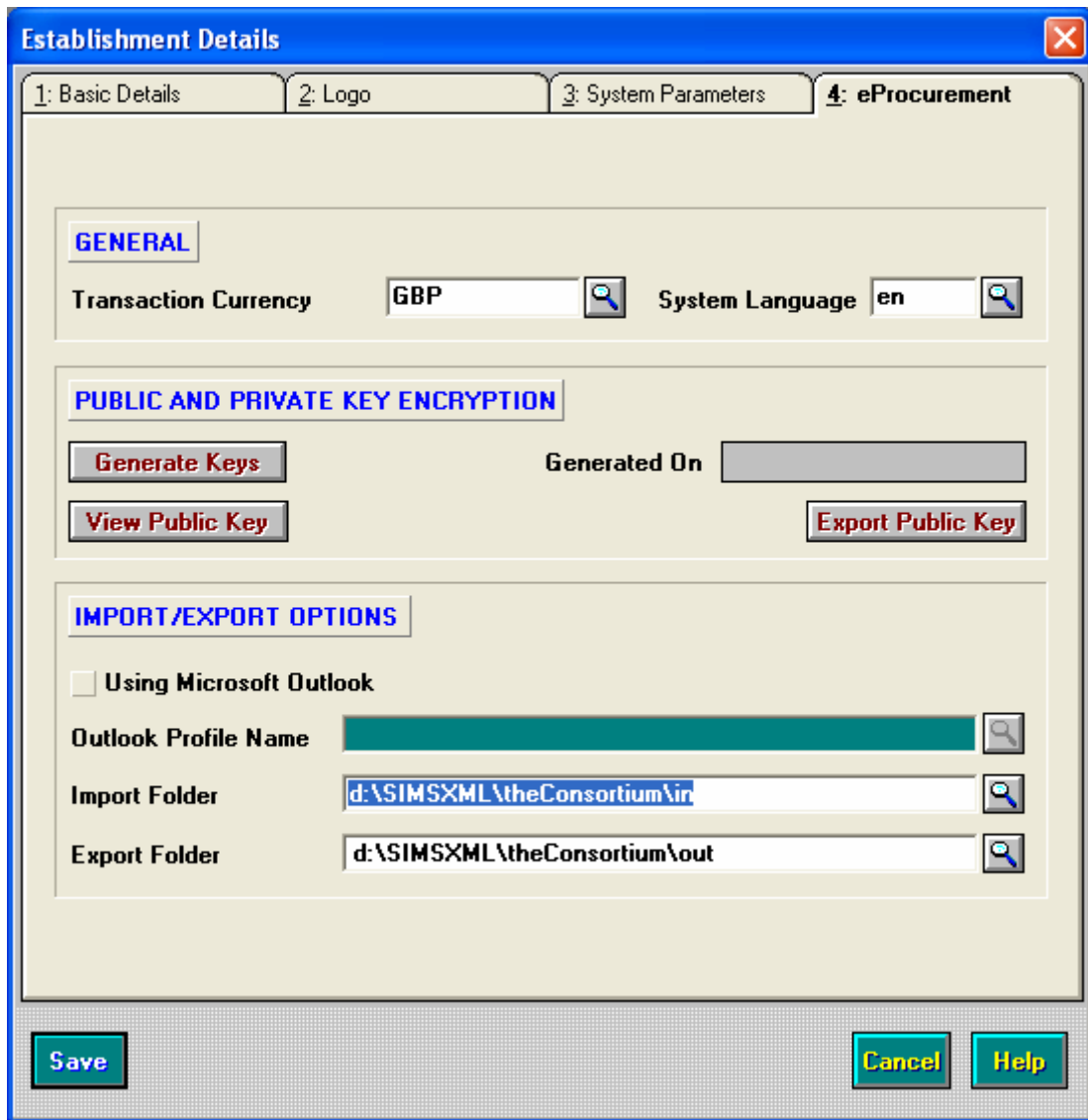
2. Importing Orders

When a content order has been created on the Consortium web site you will be sent an email containing a file attachment. The file attachment is an xml file containing the content order.



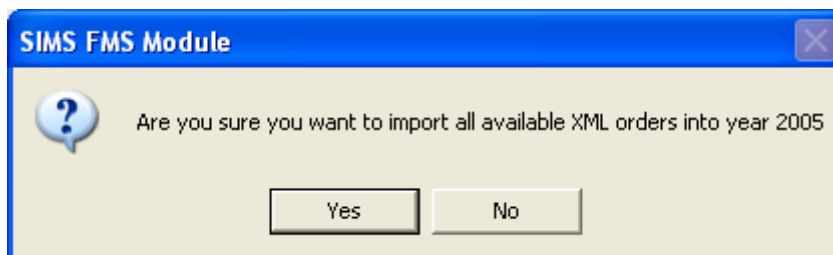
The attachment should be saved to the relevant folder on your PC. If you are unsure of the correct folder then do the following:-

- Start SIMS
- From the Tools Menu select Establishment details
- Select tab 4 eProcurement
- Save the xml file to the location specified in the import folder field. In the example below d:\SIMSXML\theConsortium\in.

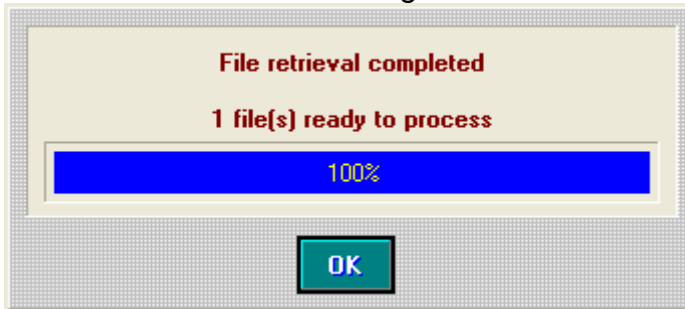


After the file has been saved in the folder it can then be imported.

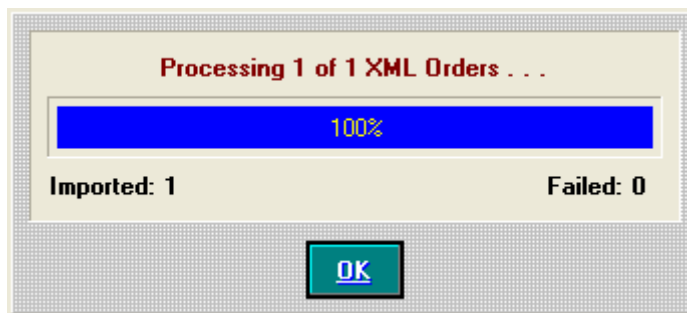
- Start Sims
- From the Focus menu select Accounts Payable / Purchase Order
- From the Purchase Order menu select import xml
- Select Yes from the following window



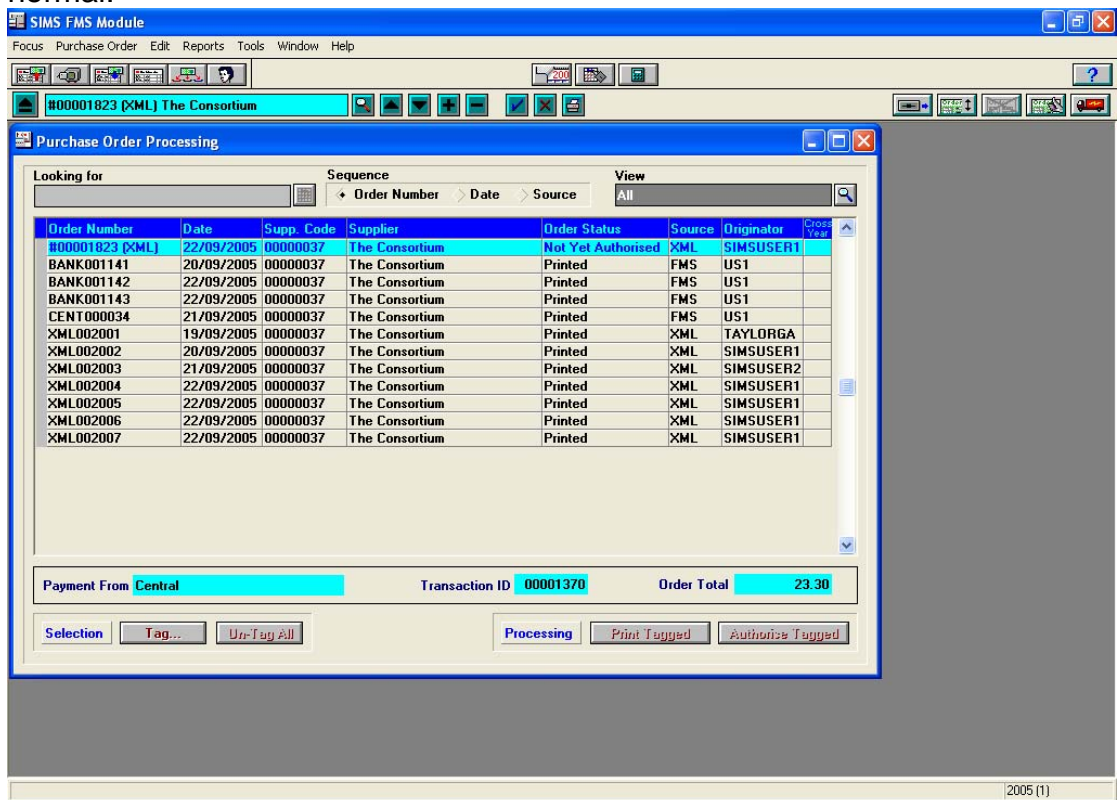
- Select OK from the following window



- You should then receive the following window informing you of the number of files that were successfully imported and the number of files that failed the import process.

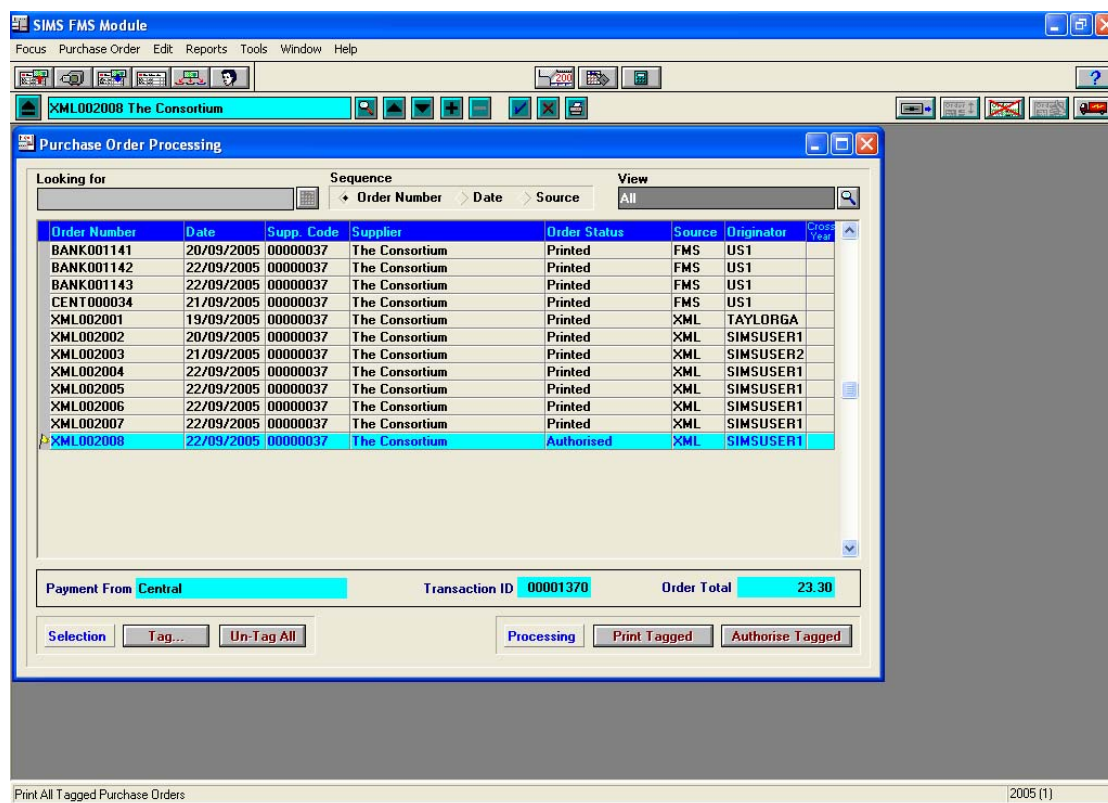


- After the order has been successfully imported it should appear in the Purchase Order processing window. It can now be processed as normal.



3. Sending/Authorising Orders

Tag the authorised purchase order you wish to send to the Consortium. Then click the 'Print Tagged' button. As the ordering method for the Consortium is set to 'X' - xml file, an XML file will be created.



The xml file will be created in the relevant folder defined within SIMS.

If you are unsure of the location of this folder then do the following:-

- Start SIMS
- From the Tools Menu select Establishment details
- Select tab 4 eProcurement
- The file will be saved in the location specified in the export folder field. In the example below this location is d:\SIMSXML\theConsortium\out.

Establishment Details [X]

1: Basic Details 2: Logo 3: System Parameters **4: eProcurement**

GENERAL

Transaction Currency: [Search] System Language: [Search]

PUBLIC AND PRIVATE KEY ENCRYPTION

 Generated On:

IMPORT/EXPORT OPTIONS

Using Microsoft Outlook

Outlook Profile Name: [Search]

Import Folder: [Search]

Export Folder: [Search]

The file can then be attached to an email and should be sent to the following address sims@theconsortium.co.uk. When the order has been entered in to the Consortium System you will be sent an email Order Acknowledgement.

4. How to Input Orders directly into SIMS

Even if SIMS has been setup to allow the importing of XML content orders you can still create orders directly within SIMS in the usual way.

When the order has been keyed and authorised the Print option can be used. As the ordering method for the Consortium is set to 'X' xml file, an XML file will be generated.

The xml file will be created in the relevant folder.

If you are unsure of the location of this folder then do the following:-

- Start SIMS
- From the Tools Menu select Establishment details
- Select tab 4 eProcurement
- The file will be saved in the location specified in the export folder field.

The file can then be attached to an email and sent to the following address sims@theconsortium.co.uk for processing by the Consortium.