Attachment J-6
ERB User's Guide

Last edited on November 3, 2005 and reviewed December 7, 2007

Introduction

ERB requests for new hardware and/or software are reviewed by an Engineering Review Board to evaluate compatibility and compliance with CMS hardware and software standards. Requests are ultimately approved or denied by CMS. The process from submittal through approval is automated by using the Remedy Action Request System.

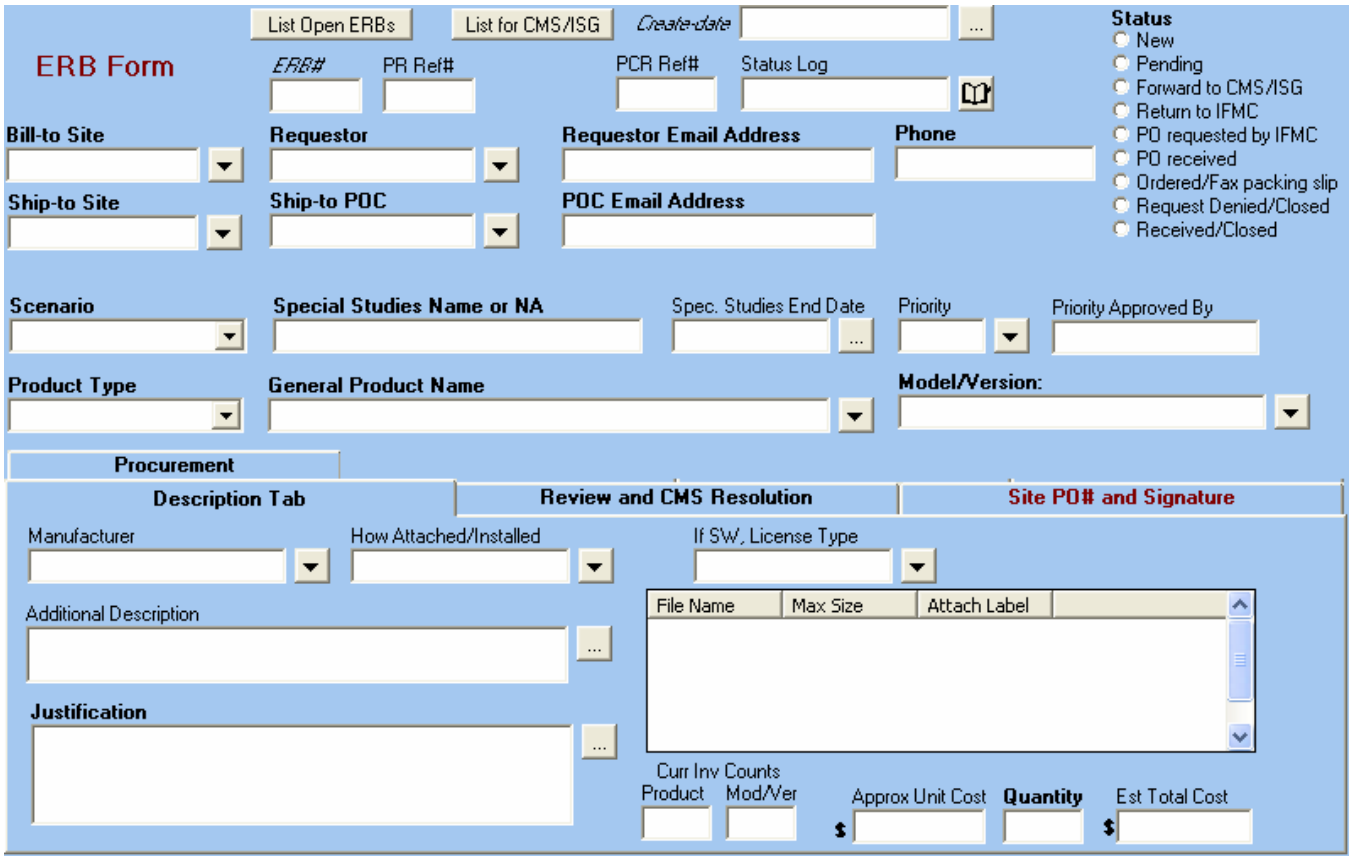
ERB records are automatically created by users as they enter line items in the Purchase Request form (See the Purchase Request User Guide for details). ***Users <u>cannot</u> create an ERB by directly using the ERB form.***

After entering line items in a Purchase Request, users can open and view the ERB records directly by either of two methods:

1. Double-click on the line item shown in the Purchase Request form, or
2. Do a File | Open, select the ERB form in Search mode, and search for the particular record you want either by filling in specific search criteria and clicking Search or by simply clicking the "List Open ERBs" button.

There are only 3 fields that site users can directly edit in the ERB form. All fields are described, however, in this document so users know how to monitor the progression of their ERB requests as they go through the review process.

The ERB Form



Field Descriptions:

List buttons — These buttons automate specific searches based on the Status field. The first, List Open ERBs, displays all ERBs that are available to the user and not closed. Site users can only view their own site's ERBs. "List for CMS/ISG" displays ERBs that have a status of Forward to CMS/ISG.

Create-date — This field is auto-filled by the system at the time of creating the record. The user cannot change its value.

ERB# — The system generates a unique value in this field to identify the record.

PR Ref# — This field corresponds to the PR # identifying the Purchase Request record from which this ERB was created.

Status — This required field is the main field to study for determining where the ERB request is in the process. A Status value of *New* is the default at creation.

The ERB team looks for all ERBs with Status value New. If the ERB team needs additional information they may change the Status to *Pending*. Most often the ERB team records its review comments and advances the request by setting the Status to *Forward to CMS/ISG*.

CMS/ISG reviews all ERBs that have a Status of Forward to CMS/ISG, fills in its approval or denial resolution and comment fields, and advances the request by setting Status to *Return to IFMC*.

If the request was denied by CMS/ISG, the IFMC Procurement team will set the Status to *Request Denied/Closed*. This will trigger an automatic notification to the requestor that the request is denied and to check the ERB for details.

If the ERB is approved, IFMC Procurement sets the Status to *PO requested by IFMC*. This automatically triggers a notification to the Requestor to open the ERB in Remedy and enter a Site PO# and Signature on the "Site PO# and Signature" tab authorizing IFMC to make the purchase for the site.

When the Site PO# and Signature field values are entered by the Requestor, the system automatically changes the Status value to *PO received*. The IFMC Procurement team then places the order and changes the Status to *Ordered/Fax packing slip*. This triggers an automatic notification to the Requestor to Fax the packing slip when the order is received. Also at that time, IFMC Procurement creates Inventory records for the ordered item(s).

When the order is received by the site, the requestor needs to fax the packing slip as indicated in the notification. Also, the Requestor needs to update the Inventory record(s) for the received item(s).

When IFMC receives the packing list, they will set the Status to *Received/Closed*. ***No other purchase orders will be processed for your site if an ERB is not closed.*** The system will automatically notify the requestor that the ticket is closed and remind them that they should update the Inventory record(s) that were created for the received item(s).

Status Log — The system uses this field to record time stamps telling when Status changes are made.

(THE VALUE FOR EACH OF THE FOLLOWING FIELDS IS COPIED FROM THE ORIGINATING PURCHASE REQUEST FORM. IF YOU NEED MORE BACKGROUND INFORMATION ON WHAT THE FIELD REPRESENTS, PLEASE SEE THE USER GUIDE FOR THE PURCHASE REQUEST FORM.)

Bill-to Site

Requestor

Requestor Email Address
Make sure this address is accurate. It is used by the system to communicate to the Requestor various Status changes and processing needs

Phone

Ship-to Site This field allows documenting that a product is to be shipped initially or permanently to a site different than that indicated in the Bill-to Site field.

Ship-to POC If the Ship-to Site is BCSSI-MD, CSC, eDaptive, IFMC-IA, IFMC-MD, or IFMC-VA an appropriate menu showing the 1 or 2 points of contact for these sites should have been used to populate this field. For other ship-to sites, this required field can be assigned the Requestor's name, the name of a shipping/receiving agent, or N/A.

POC Email Address
Accuracy is important because this field is used for certain email notifications.

Scenario This field should be populated from the menu. "Need specific to Site" means the request is for HW or SW within the SDPS set of standards and needed to meet a Site requirement. "New System Wide Standard" means the request is for CMS to consider adding the product as a new standard for the entire community. "Specific Studies/Contract" means the request is the result of a Special Study or Contract approved by CMS. "Prompted by CMS/IFMC" means the request is in response to a CMS memo. "Created by CMS" is to be used by CMS users that are creating the ERB request.

Special Studies Name or NA

Spec. Studies End Date

Priority This field is to give an indication of the time urgency for the request. "Low" implies there is no urgent deadline. "Medium" means there is a date requirement but normal processing should be able to meet it. "High" means the request is under a tight time line and needs to be expedited as much as possible. "High" should only be used if the Priority Approved By field is also populated.

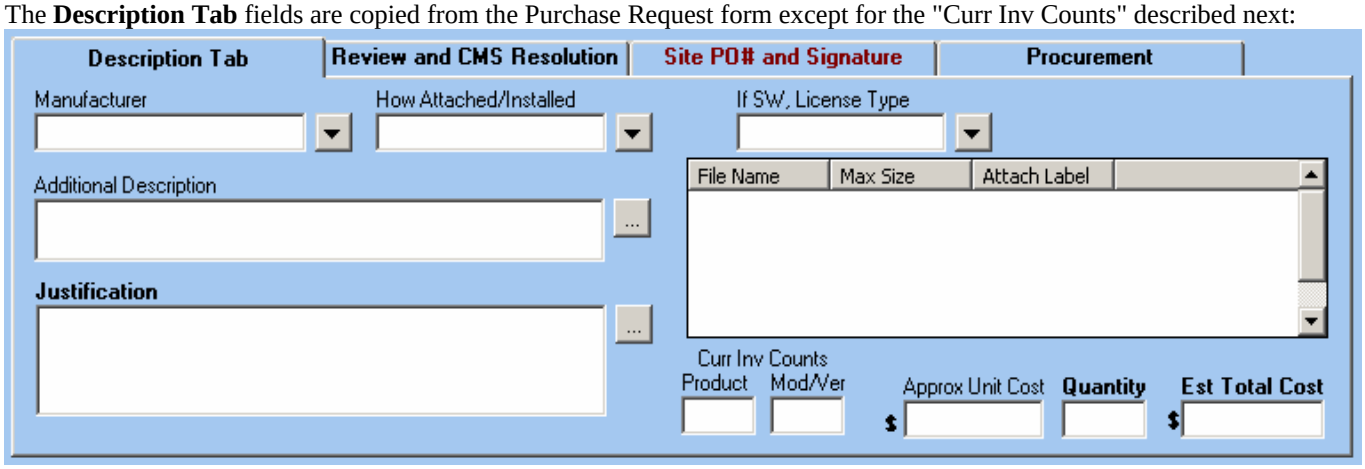
Priority Approved By
This field is only needed if the Priority field is set to "High". In that case this field should have the name of a high-ranking manager or CMS official that approved the "High" priority.

Product Type

General Product Name

Model/Version:

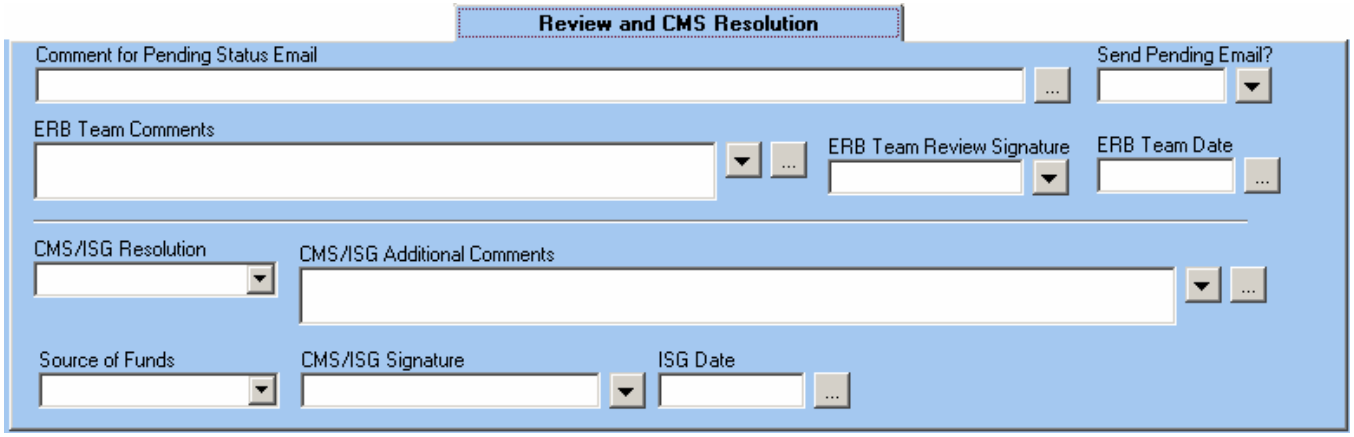
The **Description Tab** fields are copied from the Purchase Request form except for the "Curr Inv Counts" described next:



Product — The system automatically looks in the Site's Inventory and displays a count of records (items) with the same General Product Name as is being requested.

Mod/Ver — The system automatically looks in the Site's Inventory and displays a count of records (items) with the same Model/Version as is being requested.

The **Review and CMS Resolution** tab fields are shown and described next:



Comment for Pending Status Email

The ERB team can populate this to be included in the body of an email to the Requestor. The message content will be in the following format:

> Your ERB# ____ relating to PR# ____ for <u><Gen Product Name></u> has been put in a Pending Status. Please see the following comment:
>
> <Comment for Pending Status Email>

Send Pending Email? — This field is used by the ERB review team to send a "Pending" Status email to the Requestor. Setting its value to "Yes" triggers to sending. The system changes the value to "Sent" when the message is delivered and also logs that the message was sent in the Status Change Log field.

ERB Team Comments — The ERB team reviews the request and gives its recommendation to CMS/ISG in this field.

ERB Team Review Signature

This is the electronic signature of the ERB team member that entered the ERB Team field data.

ERB Team Date — This is the date of the ERB Team Review Signature entry.

CMS/ISG Resolution — CMS/ISG reviews the request and designates either Approved, Denied, Pending, or Partial Approval.

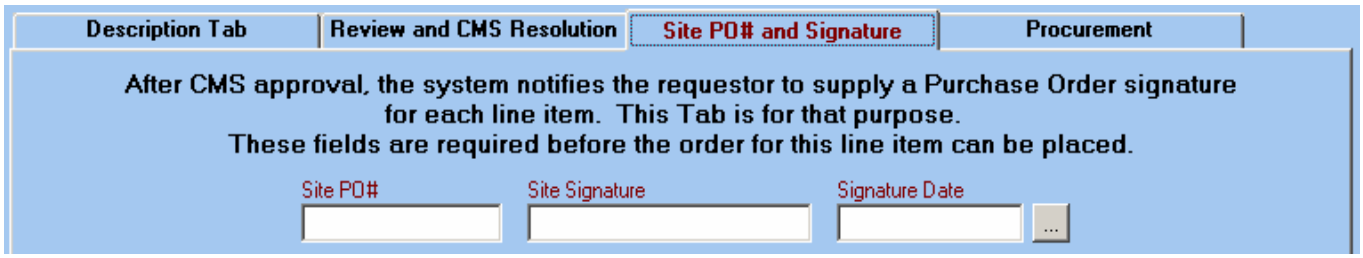
CMS Additional Comments
This field may give more details about the CMS/ISG response to the request.

Source of Funds — This field is for CMS/ISG to clarify how the request is to be funded.

CMS/ISG Signature — This is the electronic signature of the CMS user that entered the CMS fields values.

ISG Date — This is the date the CMS/ISG Signature was entered.

The **Site PO# and Signature** tab fields shown here contain the only fields that the site user (Requestor) can modify.

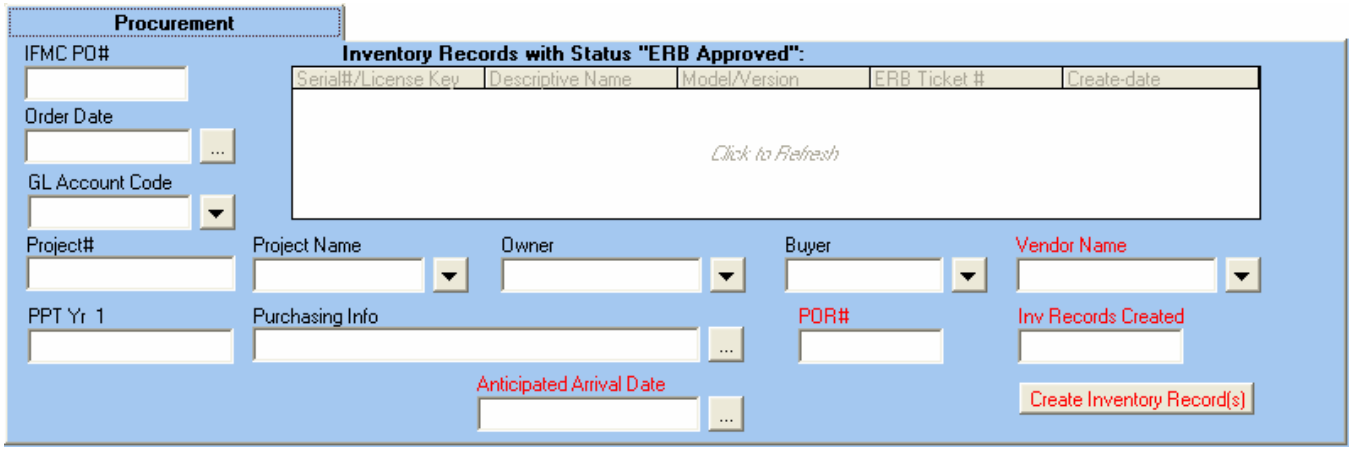


Site PO# — Most sites have an internal purchase order system. This field allows entry of the PO# relating to the internal purchase order system used by the site. Entry in this field can only be done when the Status field value is "PO requested by IFMC".

Site Signature — The Site Signature can only be entered by the Requestor and only when the Status field value is "PO requested by IFMC". Entry is required to authorize IFMC to purchase the requested item(s).

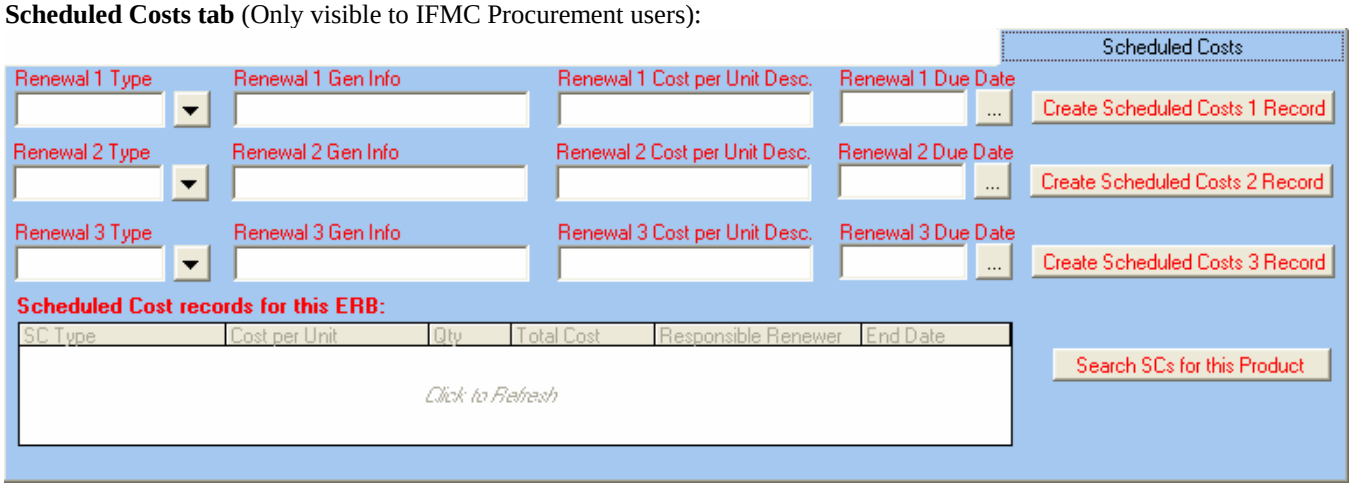
Signature Date — This field is auto-populated when the Site Signature field has been populated.

The **Procurement** tab shown below is mainly used by the IFMC Procurement team to populate IFMC account fields and eventually push into the Inventory records they create. Many of these fields do not have much significance other than to IFMC so are not described here.



The most significant field here for requestor site users is the lookup table showing "Inventory Records with Status ERB Approved". IFMC checks this table and may delay any new orders if records for previously purchase items are not being updated.

Scheduled Costs tab (Only visible to IFMC Procurement users):



Renewal 1, 2, 3 Type — The menu choices for these 3 fields are "Evaluation", "Lease", "Maintenance", "Partial Payment", "Perpetual/None", "Renewal", "SW Subscription", and "Warranty". Default values are copied from the Prod+Model/Version form into the ERB record. These values can be changed if desired but indicate the typical type(s) of renewals that should be scheduled involving future costs relating to the product.

Renewal 1, 2, 3 General Info
Enter what the warranty covers and the length of the warranty such as 3-yr. or 90-day in this 60-character field.

Renewal 1, 2, 3 Cost per Unit Desc.
This field describes the estimated renewal cost or how to determine that cost. For example, "$56 x months remaining to 6/18/2007".

Renewal 1, 2, 3 Due Date — Procurement should enter the date the next renewal will come due. This is the trigger date that will be put in the Scheduled Cost record and will cause 90-day advanced notifications.

Create Scheduled Costs 1, 2, 3 Record

Each of these buttons will create a Scheduled-Costs record for its respective field set. When pressed the renewal field values an other field values from the ERB record are copied into the Scheduled-Costs form and a window opened to allow the user to edit the Scheduled-Costs record.

Note: If Partial Payments are to be setup, this can be done with just one of the Renewal field sets (1, 2, or 3). Multiple Scheduled-Costs records can be created in the ERB form from one Renewal field set by modifying the Renewal x Due Date for each.

Scheduled Cost records for this ERB: table

This table displays all Scheduled-Costs records that have been created for products from this ERB. Procurement users can double click any line in this table to open a Scheduled-Costs record in modify mode if desired.

Search SCs for this Product

Procurement users can use this button to quickly do a search for all Scheduled-Costs records created for products matching those in this ERB. This is handy for those products that all have the same due date regardless of the ERB number. Rather than create another Scheduled-Costs record the already existing record can be incremented and the new ERB# added to the ERB Ref# field in the Scheduled-Costs record.

General Procedures

The general procedures for creating new records and performing simple and complex searches are covered in the **AR System User's Guide**. The process of printing a report is also there. The Crystal reports that are available to submitters are **ERB_Detail** which is for printing an ERB record in detail and **ERB_List** for printing information on several ERB records in a spreadsheet format.

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