

Customer: MVI
Consultant: Jeff Stritar
Engagement Type: Customized/Other
Start Date: 2/15/2016

Overall Rating:  4
Technical Rating:  4

1. Overall Impressions:

Pre Go-Live customized engagement to review punch list of questions. The questions were generated from a pre go live audit, Laurie's last trip report and core team questions arising from system tests and procedure validations.

Since questions were written and asked in rapid fire format, I explained that the client would need to take any required notes on process changes required.

2. Topics Addressed:

1. Ran Supplier Purchase Cost Script that Laurie Rounds had recommended is run to both Live and Play2 databases.
2. OCI Items with bad asset G/L numbers. Provided SQL query results.
3. Provided PO Confirmation Portals and created drill downs for Alt F8, item Maintenance and PO Entry.
4. Auto apply credits setting in cash receipts
5. Reviewed inventory cost variances and freight variances.
6. Discussed landed costs. May be a phase II process.
7. Provided documentation to adjust cursor size.
8. Reviewed report requirements for POS report (Doris request). Did not have time on site to complete the report.
9. Accounting – full review of accounting processes and questions. Client felt that this arena was the primary area that training was incomplete.

3. Issues/Risks/Recommendations

- OCI items need to have product groups and/or g/l numbers corrected.
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Common Issues – Choose if Applies

- LMS Courses not being taken
- Employees not engaged in training
- Core Data Issues/Concerns/Missing
- Static Data Issues/Concerns
- Dynamic Data Issues/Concerns
- Possible Customization/Rule Requirement
- Form Changes Required
- Additional Reporting Requirements
- Infrastructure/Hardware related problems

4. Process/Work Flow – Notes/Actions

- PO Confirmation process
- PORG use
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5. System/User Settings – Notes/Actions



- Maximum print threshold change from 0 to 100 per audit.
- User settings for costs were adjusted. Client to perform complete user adjustment in live.
- Reviewed process of commission cost use. Reviewed adjusting base cost for commissions using price pages.

6. Data – Notes/Actions



- Reviewed price service to indicate how item maintenance fields can be updated.

7. Complementary Product Recommendations/Notes/Actions



Reviewed functionality for:

- Portal design
- Forms design

8. Forms/Reports – Notes/Actions



Provided the following forms and crystal reports:

	2/17/2016 9:22 AM	ACKNOWLEDGEMENTS_user.rpt	Crystal Reports
	2/16/2016 5:24 PM	ACKNOWLEDGEMENTS_user2.rpt	Crystal Reports
	2/16/2016 10:38 ...	Item4PriceService.rpt	Crystal Reports
	2/16/2016 10:34 ...	MinMaxbySupplier.rpt	Crystal Reports
	2/16/2016 5:29 PM	Logo_MVI-B.jpg	JPEG image
	2/16/2016 4:57 PM	Logo_MVI-B2.jpg	JPEG image

Created logo file to be used in forms design. Updated acknowledgement to demonstrate the methods to be used in updating forms.

9. Hardware/Technical – Notes/Actions



None

10. Customer may benefit from additional assistance with:



- Portals
- Element – Credit Card scripts not run.
- Crystal report for POS.