



South Carolina Enterprise Information System

SRM – Tips and Reminders

MM User Group Meeting

January 31, 2014

STATE INFORMATION
TECHNOLOGY



SC BUDGET AND CONTROL BOARD

Tips and Reminders- Shopping Cart

🌀 “Unknown” Account Assignment Category

- Approver who adds the account information **MUST** add the account assignment information to each line item.
 - If the account assignment information is not added to each line item, the shopping cart will be returned to the shopping cart creator.
 - Shopping cart creator will have to create a new shopping cart.

🌀 Shopping carts should be created by using the ESS folder

🌀 Editing a Rejected Shopping Cart

- User must click on “Show my Task” button after selecting the rejected shopping cart from your work list.
- SRM200U Online Training Course - Manage a Rejected Shopping Cart
- uPerform Business Process Procedure (BPP): SRM ESS Manage Rejected Shopping Cart

Tips and Reminders – Purchase Order

🔄 Select “Limit Item” ONLY when creating a Framework Purchase Order

🔄 “Save” button

- Use to save the document before completion. The “Save” button holds but does not order the purchase order.

🔄 “Check” button

- Use the “Check” button before clicking on the “Order” button.
- Fix “Backend” errors before “Order.” Otherwise “Edit” button disappears.

Tips and Reminders – Purchase Order



“Order” button

- Use to advance when the PO is complete and ready to send to the vendor.

Tips and Reminders – RFx

- ☞ “Use “Close” button in published version of RFx
 - Do not click on “Close RFx.” Using this could result in marking the document “Transaction Complete.”

Display RFx :

 Edit |
  |
 Close | Copy | Check | Close RFx | Responses and Awards | Create F

RFx Number 5400007016 Smart Number Computer Replacement Parts Type
 Version Number 2 Version Type Active Version External Version Nu

RFX Information | Bidders | Items | Notes and Attachments | Weight

RFx Parameters | Questions | Notes and Attachments | Table Extension

Contracts

- Release: Use this button after all information on contract has been entered.