

Supplier Relationship Management (SRM) 7.2

SRM Purchasing Display Role Navigation Guide

Purpose:

A new role, SRM Purchasing Display, has been created for users who are not Supplier Relationship Management (SRM) “Buyers” to display SRM purchasing information (purchase orders and related documents including attachments). This guide provides navigation steps in SRM for users assigned the SRM Purchasing Display role.

1. Log onto SRM by selecting “**SCEIS Logins**” from the SCEIS website.



The screenshot shows the SCEIS website homepage. The browser address bar displays 'http://www.sceis.sc.gov/'. The page features a navigation menu with links for Home, SCEIS Help, Meetings, News & Updates, FAQs, Links, and SCEIS Logins. A sidebar on the left contains a list of categories: About SCEIS, Agency Support Teams, SCEIS Treasury Projects, Training, Finance, HR & Payroll, Materials Management, Reporting, Imaging, and Technical. Below this is a 'MySCEmployee' section with the BICB logo and contact information for the Inspector General's Fraud Hotline. A central banner reads 'Streamlining Business Processes within the Government of South Carolina' with an image of a pen on a document. To the right, a 'Reminders & Tools' section lists links for SCEIS Password Management, troubleshooting tips, and help requests. At the bottom, there is a section for 'SRM 7.2 Microsite' and a description of the South Carolina Enterprise Information System.

2. From the SCEIS Logins page, select the “SRM State Employee Login” link.

The screenshot shows a web browser window with the URL <http://www.sceis.sc.gov/page.aspx?id=93>. The browser's address bar and tabs are visible. The page content includes a navigation menu with links for Home, SCEIS Help, Meetings, News & Updates, FAQs, Links, and SCEIS Logins. The main content area is titled "SCEIS Logins" and features a sidebar with a list of categories: About SCEIS, Agency Support Teams, SCEIS Treasury Projects, Training, Finance, HR & Payroll, Materials Management, Reporting, Imaging, and Technical. The main content area lists several login options: MySCEmployee (with a link to MySCEmployee Tools and a quick reference guide for changing passwords), Citrix (with a quick reference guide for the SCEIS Production System Login), Supplier-Relationship Management (SRM) (with a notice about the system upgrade from version 5.0 to 7.2 and links for SRM State Employee Login and SRM Vendor Login), and Business Objects Reporting Tool (with a link for Business Objects). A footer section contains a list of all site navigation links and a note about the Inspector General's Fraud Hotline.

View Favorites Tools Help

Snipping Tool ANCI uPerform

SCEIS South Carolina Enterprise Information System
SC Budget and Control Board

Site Map | Privacy | Disclaimer

Home | SCEIS Help | Meetings | News & Updates | FAQs | Links | SCEIS Logins

Home » SCEIS Logins

SCEIS Logins

MySCEmployee
(MySCEmployee Tools - Link)
(Quick Reference Guide: Changing Your Password with Identity Management (IdM) - 457kb PDF)
(Comptroller General's Office Payroll Schedule - Click this link for details about how your MySCEmployee access may be affected.)

Citrix
(Quick Reference Guide: SCEIS Production System Login - 466kb PDF)

Supplier-Relationship Management (SRM)
On November 25, 2013, SCEIS upgraded the SRM system from version 5.0 to version 7.2. Below are the new login links for SRM 7.2. Please save the appropriate new link as a favorite.

SRM State Employee Login

SRM Vendor Login

Business Objects Reporting Tool

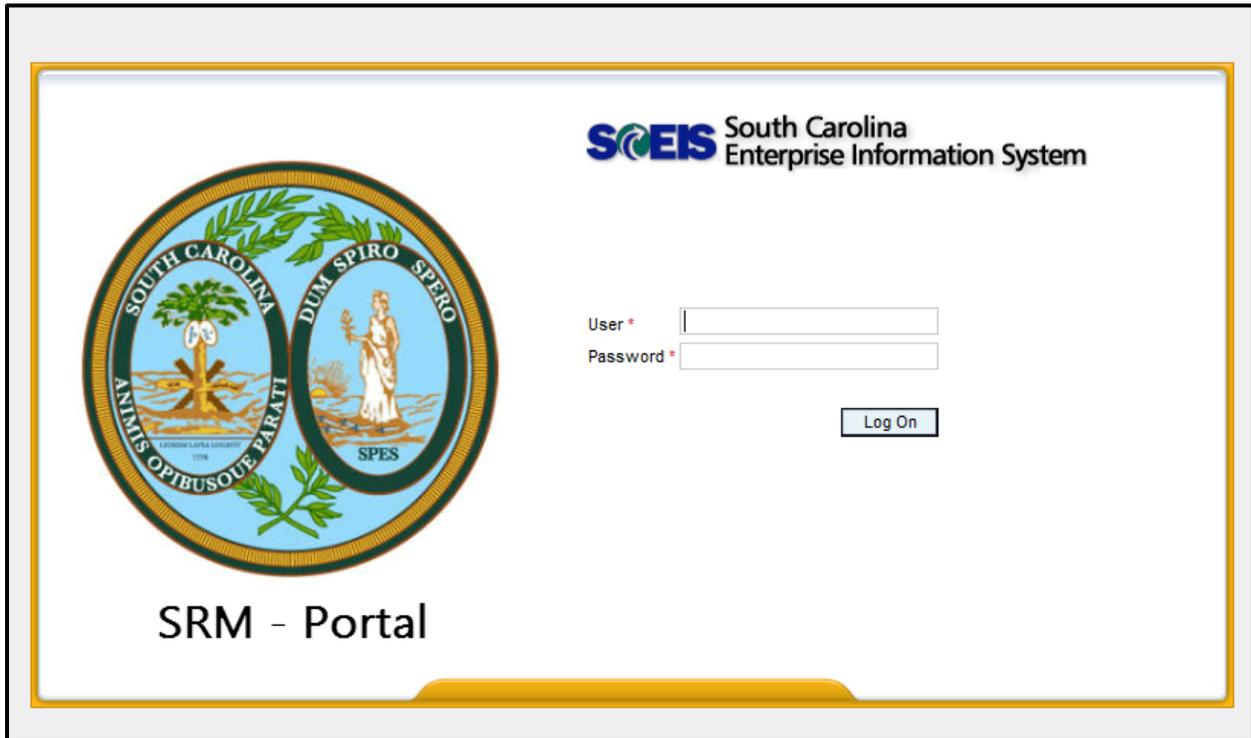
Business Objects

If you're having trouble logging into any portion of SCEIS, try these troubleshooting tips to get back in business. If you still have trouble logging in, click here to submit a help request to the SCEIS Service Desk.

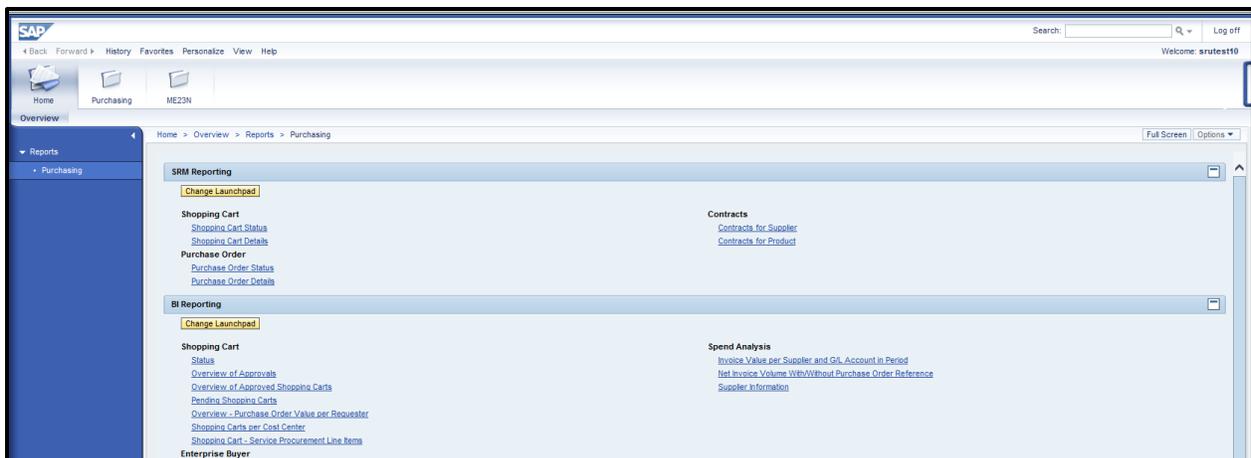
INSPECTOR GENERAL'S FRAUD HOTLINE
(State Agency fraud only)
1-855-SCFRAUD
or
1-855-723-7283

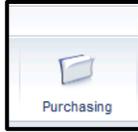
SCEIS Help | Meetings | News & Updates | FAQs | Links | SCEIS Logins
About SCEIS | Agency Support Teams | SCEIS Treasury Projects | Training | Finance | HR & Payroll | Materials Management | Reporting | Imaging | Technical

3. The following SRM Portal Log On screen will appear. Enter your **User ID** and **Password**. Then click the “**Log On**” button.

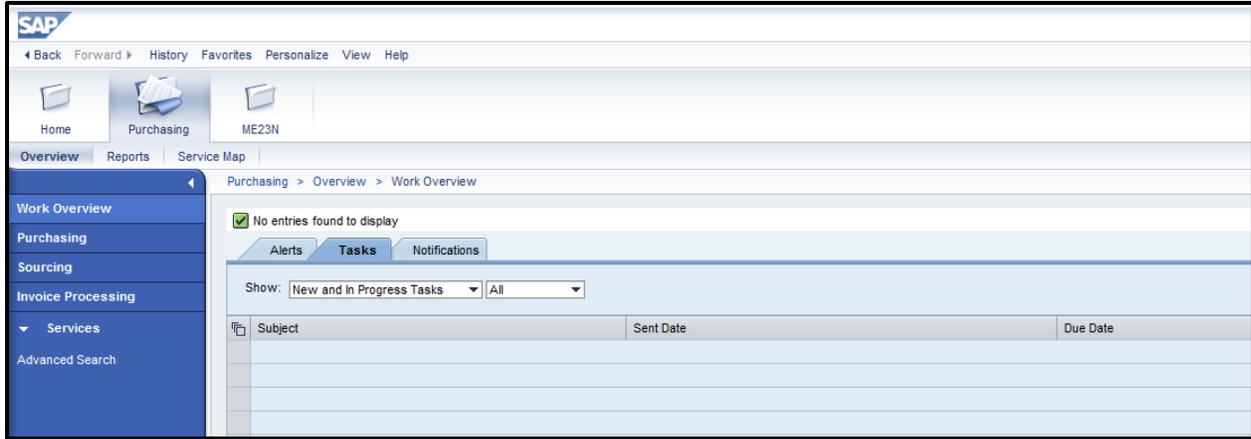


Note: The folders displayed in SRM coincide with the roles the user has in SRM. In the example below, the user has only the SRM Purchasing Display role and no other SRM role.

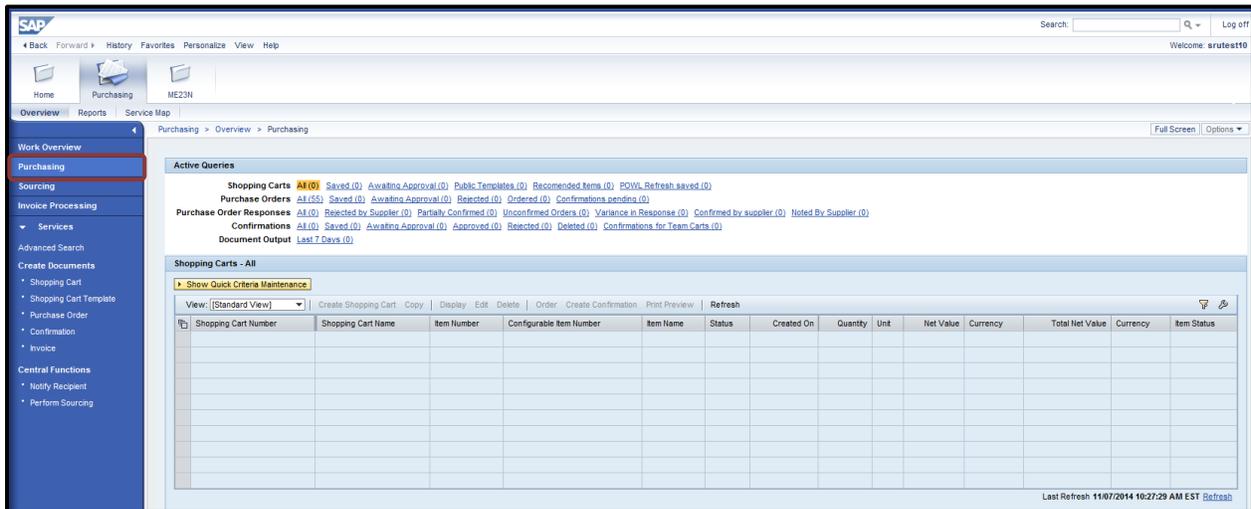




4. Click the **“Purchasing”** folder.



5. Click **“Purchasing”** from the blue detailed Navigation Pane on the left of the screen.



- Click **“All”** under **“Purchase Orders”** from the **“Active Queries”** options. The numerical values in the parenthesis, All (55), shown in the example below, will be different for each user and will change as the buyers process purchase orders. After **“All”** is selected under **“Purchase Orders,”** notice how the screen will open to display search criteria fields and purchase order links.

Next, **enter the purchase order number in the “Number:” field** or select one of the search fields to enter criteria. Click the **“Apply”** button. In this example, 4600347377 was entered.

Note: After a purchase order number has been entered for the first search, the system will default to the previous purchase order that was displayed the next time of search.

The screenshot shows the SAP Purchasing interface. The 'Active Queries' section is expanded to 'Purchase Orders - All', showing a count of 55. The search criteria form is populated with the number 4600347377. Below the form, the 'Apply' button is visible. The resulting table shows the following data:

| Purchase Order Number | Purchase Order Name | Item Number | Item Name | Status | Supplier Name | Total Value | Currency |
|-----------------------|-------------------------------------|-------------|--|---------|------------------------|-------------|----------|
| 4600347377 | Cascade Water 2000779898 Facilities | 1 | ALLEDALE CORRECTINAL INSTITUTION | Ordered | CASCADE WATER SERVICES | 20,114.00 | USD |
| 4600347377 | Cascade Water 2000779898 Facilities | 2 | BROAD RIVER CORRECTONAL INSTITUTION | Ordered | CASCADE WATER SERVICES | 20,114.00 | USD |
| 4600347377 | Cascade Water 2000779898 Facilities | 3 | CAMILLE GRFFIN GRAMAM CORRECTONAL INST | Ordered | CASCADE WATER SERVICES | 20,114.00 | USD |
| 4600347377 | Cascade Water 2000779898 Facilities | 4 | CATANBWA PRE-RELEASE CENTER | Ordered | CASCADE WATER SERVICES | 20,114.00 | USD |
| 4600347377 | Cascade Water 2000779898 Facilities | 5 | COASTAL PRE-RELEASE CENTER | Ordered | CASCADE WATER SERVICES | 20,114.00 | USD |
| 4600347377 | Cascade Water 2000779898 Facilities | 6 | EVANS CORRECTONAL INSTITUTION | Ordered | CASCADE WATER SERVICES | 20,114.00 | USD |
| 4600347377 | Cascade Water 2000779898 Facilities | 7 | FACILITIES MANAGEMENT DIVISION | Ordered | CASCADE WATER SERVICES | 20,114.00 | USD |
| 4600347377 | Cascade Water 2000779898 Facilities | 8 | GOODMAN CORRECTONAL INSTITUTION | Ordered | CASCADE WATER SERVICES | 20,114.00 | USD |
| 4600347377 | Cascade Water 2000779898 Facilities | 9 | HEADQUARTERS ADMINISTRATION BLDG | Ordered | CASCADE WATER SERVICES | 20,114.00 | USD |

7. To display the purchase order line item, click the **blue** hyperlink under the “**Purchase Order Number**” column. In this example, “Item Number 1” of “Purchase Order Number 4600347377” was selected.

| Purchase Order Number | Purchase Order Name | Item Number | Item Name | Status | Supplier Name | Total Value | Currency |
|----------------------------|-------------------------------------|-------------|---|---------|------------------------|-------------|----------|
| 4600347377 | Cascade Water 2000779898 Facilities | 1 | ALLEDALE CORRECTIVAL INSTITUTION | Ordered | CASCADE WATER SERVICES | 20,114.00 | USD |
| 4600347377 | Cascade Water 2000779898 Facilities | 2 | BROAD RIVER CORRECTIVAL INSTITUTION | Ordered | CASCADE WATER SERVICES | 20,114.00 | USD |
| 4600347377 | Cascade Water 2000779898 Facilities | 3 | CAMILLE GRIFFIN GRAHAM CORRECTIVAL INST | Ordered | CASCADE WATER SERVICES | 20,114.00 | USD |
| 4600347377 | Cascade Water 2000779898 Facilities | 4 | CATAWBA PRE-RELEASE CENTER | Ordered | CASCADE WATER SERVICES | 20,114.00 | USD |
| 4600347377 | Cascade Water 2000779898 Facilities | 5 | COASTAL PRE-RELEASE CENTER | Ordered | CASCADE WATER SERVICES | 20,114.00 | USD |
| 4600347377 | Cascade Water 2000779898 Facilities | 6 | EVANS CORRECTIVAL INSTITUTION | Ordered | CASCADE WATER SERVICES | 20,114.00 | USD |
| 4600347377 | Cascade Water 2000779898 Facilities | 7 | FACILITIES MANAGEMENT DIVISION | Ordered | CASCADE WATER SERVICES | 20,114.00 | USD |
| 4600347377 | Cascade Water 2000779898 Facilities | 8 | GOODMAN CORRECTIVAL INSTITUTION | Ordered | CASCADE WATER SERVICES | 20,114.00 | USD |
| 4600347377 | Cascade Water 2000779898 Facilities | 9 | HEADQUARTERS ADMINISTRATION BLDG | Ordered | CASCADE WATER SERVICES | 20,114.00 | USD |
| 4600347377 | Cascade Water 2000779898 Facilities | 10 | KERSHAW CORRECTIVAL INSTITUTION | Ordered | CASCADE WATER SERVICES | 20,114.00 | USD |

Last Refresh 11/06/2014 05:51:45 PM EST [Refresh](#)

8. The purchase order will **display** with access to the “Overview,” “Header,” “Items,” “Notes and Attachments,” “Approval” and “Tracking” tabs. Each tab continues specific and different data.

Display Purchase Order

Check Close Export Related Links

Purchase Order Number: 4600347377 Purchase Order Type: SCEIS Standard PO Status: Ordered Document Date: 07/03/2014 Total Value (Gross): 20,114.00 USD Smart Number Supplier: [CASCADE WATER SERVICES](#)

Overview Header Items Notes and Attachments Approval Tracking

General Header Data

Smart Number: Note to Supplier: Contract # 4400001468 (Expires 9/13/14)
 Smart Number is External Replaces PO# 4600278004
 Contract Extended until 12/31/14 (Letter)

Purchase Order Number: Internal Note:

Supplier: * [CASCADE WATER SERVICES](#)

Requester: * [Ms. TAMMELA GRAVES](#)

Recipient: [Ms. TAMMELA GRAVES](#)

Location: [Department of Corrections](#)

Ship-To Address: [multiple](#)

Purchasing Organization: *

Purchasing Group: * [Show Members](#)

Total Value (Net): USD

Default Settings: Set Values

Item Overview

Details Add Item Copy Paste Duplicate Delete Undelete Propose Sources of Supply Add Condition Remove Condition Exercise Option Order as Direct Material Process All Items Filter Settings

| Line Number | Deleted | Item Type | Item Number | Product ID | Description | Product Category | Quantity | Unit | Currency | Per | Net Price | Option Type | Order Type | Condition | Option Status | Delivery Date | Account Assignment Type | Account Assignment Number |
|-------------|---------|-----------|-------------|------------|---|------------------|----------|------|----------|-----|-----------|-------------|------------|-----------|---------------|---------------|-------------------------|---------------------------|
| 1 | | Material | 1 | | ALLENDALE CORRECTINAL INSTITUTION | 03127 | 3 | MON | USD | 1 | 140.00 | | | | | 08/01/2014 | Cost Center | N040334113 |
| 2 | | Material | 2 | | BROAD RIVER CORRECTINAL INSTITUTION | 96223 | 3 | MON | USD | 1 | 150.00 | | | | | 08/01/2014 | Cost Center | N040322113 |
| 3 | | Material | 3 | | CAMILLE GRIFFIN GRAHAM CORRECTINAL INST | 96223 | 3 | MON | USD | 1 | 75.00 | | | | | 08/01/2014 | Cost Center | N040323315 |

9. To display any “Accounting Document” and “Clearing Document” numbers, from the “Header” tab, click “**Expended PO History.**” The document details cannot be displayed.

Display Purchase Order

[Check](#) | [Close](#) | [Export](#) | [Related Links](#)

Purchase Order Number: 4800347377 | Purchase Order Type: SCEIS Standard PO | Status: Ordered | Document Date: 07/03/2014 | Total Value (Gross): 20,114.00 USD | Smart Number: | Supplier: CASCADE WATER SERVICES

Overview | **Header** | Items | Notes and Attachments | Approval | Tracking

General Data | Notes and Attachment | Output | Budget | Document Totals | **Expended PO History** | Payment | Synopsis | User-Specified Status

[Send To Records Management](#) [Expand All](#) [Close All](#)

| Item/Header > Description | ObjectID in Back-End | Document Date | Quantity | Base Unit | Value in FM area | Currency in FM area | Value | Currency | Accounting Document | Clearing Document | Invoice Reference | Partial/Residual | Complete | Other PO |
|---|----------------------|---------------|----------|-----------|------------------|---------------------|----------|----------|---------------------|-------------------|-------------------|------------------|--------------------------|--------------------------|
| PO Information | | | | | | | | | | | | | | |
| • Total Goods receipt | | | | | | | 0.00 | USD | | | | | <input type="checkbox"/> | <input type="checkbox"/> |
| • Total Invoice - gross | | | | | | | 10767.75 | USD | | | | | <input type="checkbox"/> | <input type="checkbox"/> |
| • Total Value in Purchase Order | | | | | | | 20114.00 | USD | | | | | <input type="checkbox"/> | <input type="checkbox"/> |
| Item 1 / ALLENDALE CORRECTINAL INSTITUTI | | | | | | | | | | | | | | |
| • Total Goods receipt | | | 2 | MON | | | 0.00 | USD | | | | | <input type="checkbox"/> | <input type="checkbox"/> |
| • Goods receipt | 5000753649 | 08/11/2014 | 1 | MON | | | 0.00 | USD | | | | | <input type="checkbox"/> | <input type="checkbox"/> |
| • Goods receipt | 5000770482 | 09/09/2014 | 1 | MON | | | 0.00 | USD | | | | | <input type="checkbox"/> | <input type="checkbox"/> |
| • Total Invoice - gross | | | 3 | MON | | | 451.20 | USD | | | | | <input type="checkbox"/> | <input type="checkbox"/> |
| • Invoice - gross | 5701152284 | 07/01/2014 | 1 | MON | | | 150.45 | USD | 5701152284 | 1100828089 | | | <input type="checkbox"/> | <input type="checkbox"/> |
| • Invoice - gross | 5701152447 | 07/01/2014 | 1- | MON | - | | -150.45 | USD | 5701152447 | 1100828089 | 5701152284 | | <input type="checkbox"/> | <input type="checkbox"/> |
| • Invoice - gross | 5701157624 | 07/01/2014 | 1 | MON | | | 150.40 | USD | 5701157624 | 3405305566 | | | <input type="checkbox"/> | <input type="checkbox"/> |
| • Invoice - gross | 5701177654 | 08/01/2014 | 1 | MON | | | 150.40 | USD | 5701177654 | 3405406289 | | | <input type="checkbox"/> | <input type="checkbox"/> |
| • Invoice - gross | 5701193168 | 09/01/2014 | 1 | MON | | | 150.40 | USD | 5701193168 | 1100842216 | | | <input type="checkbox"/> | <input type="checkbox"/> |
| • Invoice - gross | 5701198752 | 09/01/2014 | 1- | MON | - | | -150.40 | USD | 5701198752 | 1100842216 | 5701193168 | | <input type="checkbox"/> | <input type="checkbox"/> |

10. Details of line items can also be displayed. From the “Overview” tab of the selected purchase order, **highlight the “Line Number”** for display and click the “**Details**” button. Users will have access to purchase order information from various line item tabs, such as “General Data,” “Prices and Conditions,” “Account Assignment,” “Notes and Attachments,” and “Related Documents” as shown below. Accounting and Clearing Documents (as described in step 9 above) related to each line item are also accessible from the “Extended PO History” tab.

Note that, in this example, under the “Items” then “General Data” tabs, a contract is associated with this purchase order with details accessible to the user by clicking on the “**Show Contract**” link.

Display Purchase Order

Check Close Export Related Links

Purchase Order Number: 4600347377 Purchase Order Type: SCEIS Standard PO Status: Ordered Document Date: 07/03/2014 Total Value (Gross): 20,114.00 USD Smart Number Supplier: [CASCADE WATER SERVICES](#)

Overview Header **Items** Notes and Attachments Approval Tracking

Details for Item 1 ALLENDALE CORRECTIVAL INSTITUTION

General Data Prices and Conditions Account Assignment Notes and Attachments Approval Preview Related Documents Delivery Extended PO History User-Specified Status Subcontracting Payment

Order as Direct Material

Basic

Identification

Item Number: 1
 Item Type: Material
 Product ID:
 Description: ALLENDALE CORRECTIVAL INSTITUTION
 Product Category: 03127 Cooling Tower Water Treatment
 Catalog:
 Contract / Item: 440001468 | 1 [Show Contract](#)

Complete Item on Saving: No

Further Properties

Supplier Product Number:
 Manufacturer Part Number:
 External Manufacturer:
 Subcontracting:

Currency, Values and Pricing

Quantity / Unit: 3 MON (0 MON is equivalent to: 0)
 Gross Price / Per: 140.00 USD 1 MON
 Net Value: 420.00 USD
 Net Price: 140.00 USD
 Guaranteed Purch. Value: 0.00
 Not to Exceed Price:
 Not Separately Priced:
 Incremental Funding Active:
 Tax Code / Amount: ID:AP Tax Exempt 0.00 USD

Service and Delivery

Delivery Date: 08/01/2014
 Tolerance Group:
 Underdelivery/Overdelivery Tolerance: 0.00 % / 0.00 % Unlimited
 Storage Location: 0001 SCDC Admin
 Acceptance at Origin:

Status and Statistics

Item Deleted: No
 Closeout Status:
 Canceled:
 Lock Line Item:

Partner

Details Add Send E-Mail Call Clear Filter Settings

| Function | Number | Name |
|-----------------|--------|---|
| Requester | 20957 | TAMMELA GRAVES |
| Goods Recipient | 20957 | TAMMELA GRAVES |
| Ship-To Address | 94 | |
| Location | 9951 | Department of Corrections |

11. Contract information can also be viewed through the “Items,” then “Related Documents” tabs along with other historical documents such as shopping cart and purchase order information.

The screenshot shows the 'Display Purchase Order' interface. At the top, it displays the Purchase Order Number (4600347377), Purchase Order Type (SCEIS Standard PO), Status (Ordered), Document Date (07/03/2014), Total Value (Gross) (20,114.00 USD), Smart Number, and Supplier (CASCADE WATER SERVICES). The 'Items' tab is selected, showing a table with columns for Item ID, Material, Description, Quantity, Unit, and Value. Below this, the 'Details for Item 1 ALLENDALE CORRECTINAL INSTITUTION' are shown, including 'Document Control' and 'Statistics' sections. The 'Related Documents' tab is also visible, showing a table of historical documents.

| Document | Name | Document Number | Back-End Document Number | Status | Date | Quantity | Unit | Value | Currency |
|------------------|-----------------------------------|-----------------|--------------------------|----------------------------|------------|----------|------|----------|----------|
| Central Contract | ALLENDALE CORRECTINAL INSTITUTION | 4400001468/1 | | Item is Active | 11/14/2013 | 12 | MON | 1,680.00 | USD |
| | Total | | | | | 12 | MON | 1,680.00 | USD |
| Shopping Cart | ALLENDALE CORRECTINAL INSTITUTION | 2000779898/1 | | Follow-on Document Created | 06/20/2014 | 3 | MON | 420.00 | USD |
| | Total | | | | | 3 | MON | 420.00 | USD |
| Purchase Order | ALLENDALE CORRECTINAL INSTITUTION | 4600347377/1 | 4600347377/1 | Ordered | 07/03/2014 | 3 | MON | 420.00 | USD |
| | Total | | | | | 3 | MON | 420.00 | USD |
| Confirmation | | | 20145000753649/1 | | 09/11/2014 | 1 | MON | 0.00 | USD |
| Confirmation | | | 20145000770482/1 | | 09/09/2014 | 1 | MON | 0.00 | USD |
| | Total | | | | | 2 | MON | 0.00 | USD |
| Invoice | | | 20155701152284/1 | | 07/15/2014 | 1 | MON | 150.45 | USD |

12. “Internal Note” and “Vendor Text” entered on the Header section of the document can be viewed under the “Notes and Attachments” tab by clicking on the appropriate link. Any attachments to the purchase order can be viewed by clicking on the link under the “Description” field.

The screenshot shows the 'Display Purchase Order' interface with the 'Notes and Attachments' tab selected. The 'Notes' section displays a table of notes with columns for Assigned To, Category, and Text Preview. The 'Attachments' section displays a table of attachments with columns for Assigned To, Category, Description, File Name, Version, Processor, Visible Internally only, Checked Out, Type, Size (KB), Changed by, and Changed on.

| Assigned To | Category | Text Preview |
|---|---------------|---|
| Document Header | Internal Note | fp |
| Document Header | Vendor Text | Contract # 4400001468 (Expires 9/13/14)Replaces PO# 4... |
| Item01"ALLENDALE CORRECTINAL INSTITUTION" | Internal Note | Funds Block #2-538 |

| Assigned To | Category | Description | File Name | Version | Processor | Visible Internally only | Checked Out | Type | Size (KB) | Changed by | Changed on |
|---|---------------------|---------------------|-------------------------|---------|-----------|-------------------------------------|--------------------------|------|-----------|------------|------------|
| Item01"ALLENDALE CORRECTINAL INSTITUTION" | Standard Attachment | Cascade Water 21-20 | Cascade Water 21-20.pdf | 1 | | <input checked="" type="checkbox"/> | <input type="checkbox"/> | pdf | 114 | TAM41207 | 06/23/2014 |

Other tabs are available for viewing. The tabs mentioned are known to be used most often.

Note: The purchase order cannot be edited, printed or print previewed from this SRM Purchasing Display role.