



SCEIS PURCHASING PROCESS

PR215

End User Training
Columbia, SC
SRM 7.2 Upgrade
Version 2 – October 16, 2013



Welcome and Introductions



Welcome to SCEIS Purchasing Process PR215

- 🌀 Introductions
- 🌀 Sign-in sheet
- 🌀 Restrooms
- 🌀 Breaks
- 🌀 Parking Lot
- 🌀 Complete course evaluation at end of class

Classroom Logistics

- ④ Classroom etiquette
 - Cell phones off/silence
 - No side conversations
- ④ Feel free to ask questions
- ④ No email or internet usage during class except at breaks

Course Agenda

- ① **Lesson 1:** Navigation in Supplier Relationship Management (SRM) 7.2
- ① **Lesson 2:** Transaction Types and Document Numbers in SRM
- ① **Lesson 3:** Redistribute Workload
- ① **Lesson 4:** Create a Standard Purchase Order (PO)

Course Agenda

- ⑦ **Lesson 5:** Create a Blanket Purchase Agreement and Blanket PO
- ⑦ **Lesson 6:** Create a Framework Purchase Order
- ⑦ **Lesson 7:** Additions to a Purchase Order
- ⑦ **Lesson 8:** Edit a Purchase Order

Course Agenda



- ① **Lesson 9:** Manage No Further Confirmations and No Further Invoice
- ① **Lesson 10:** Print a Purchase Order
- ① **Lesson 11 :** Create a Standard Purchase Order with Retention at the Header and/or Line Item
- ① **Lesson 12:** Create an Inventory Purchase Order

Course Learning Objectives

- Upon completion of this course, you should be able to:
 - Navigate in SRM 7.2 and understand key terms and concepts
 - Understand the SCEIS SRM 7.2 purchasing process
 - Create various PO Transaction Types
 - Redistribute Workload
 - Make additions to and edit a PO

Course Learning Objectives cont.

- Upon completion of this course, you should be able to:
 - Print a PO
 - Understand Extended PO History
 - Create a PO with “Retention”
 - Understand the Inventory PO Replenishment Process



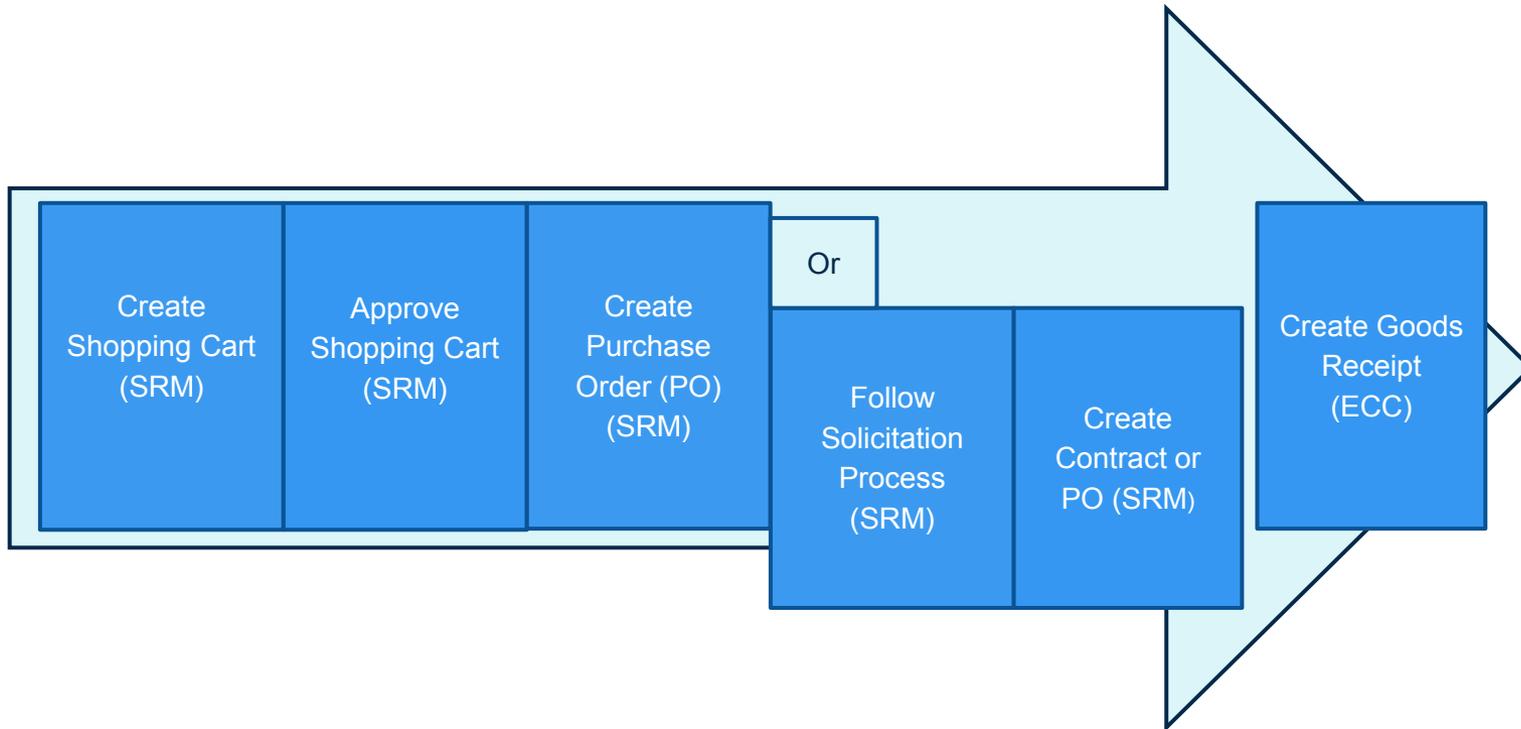
LESSON 1: NAVIGATION IN SUPPLIER RELATIONSHIP MANAGEMENT (SRM) 7.2

Lesson 1 Learning Objectives

- ① Upon completion of this lesson, you should be able to:
 - Understand the procurement process in SCEIS SRM
 - Define SRM 7.2 PO Key Terms and Concepts
 - Log onto SRM using the portal
 - Navigate in SRM using the portal
 - Define the commonly used tool bar buttons
 - Change the “Settings” in step 1

Procurement Process in SCEIS

SRM 7.2



SRM Key Terms and Concepts



Supplier Relationship Management (SRM)	An SAP module that facilitates the full cycle of procurement processes within agencies, and between agencies and suppliers.
Portal	Web-based interface by which users access Supplier Relationship Management (SRM) 7.2.
Perform Sourcing	Transactional process to select and source requests to purchase.
Personalized Object Work List (POWL)	A new feature in SRM 7.2, the POWL serves as home base for SRM users. It contains Active Queries, Quick Criteria Maintenance and document history allowing users to view detailed information about a Shopping Cart at a glance and “check status” of a Shopping Cart.
Active Queries	A predefined list of procurement documents accessible to the user.

SRM Key Terms and Concepts



Quick Criteria Maintenance

A method to filter your inbox and task lists in SRM 7.2.

Match Code

An icon that launches a search for valid values for a particular field.

Transaction Type

Dropdown of PO types which control the number ranges and lists the State's Document Types for selection.

RFx

A general term for the type of solicitation document a buyer sends out to a bidder (Invitation for Bid, RFP, etc.).

Log-on

1. Go to SCEIS.SC.GOV from your browser.
2. Click on “SCEIS Logins” button.
3. Click on the “Supplier-Relationship Management” link.



SCEIS South Carolina Enterprise Information System
SC Budget and Control Board

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Home | SCEIS Help | Meetings | Contact Us | News & Updates | FAQs | Links | **SCEIS Logins**

Home » SCEIS Logins

SCEIS Logins

About SCEIS

Agency Support Teams

"A" Agencies Cutover - HR/Payroll

SCEIS Treasury Projects

Training

Finance

HR & Payroll

Materials Management

Reporting

Imaging

Technical

MySCEmployee

Supplier-Relationship Management (SRM)

Citrix

MySCEmployee
(MySCEmployee Tools - Link)

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

Supplier-Relationship Management (SRM)
(Quick Reference Guide: SRM Production System Login - 170kb PDF)

BSCB
SC Budget and Control Board

INSPECTOR GENERAL'S

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.



Log-on

4. Enter your User ID.
5. Enter your Password.
6. Click “Log On” button.



SAP NetWeaver

User *

Password *

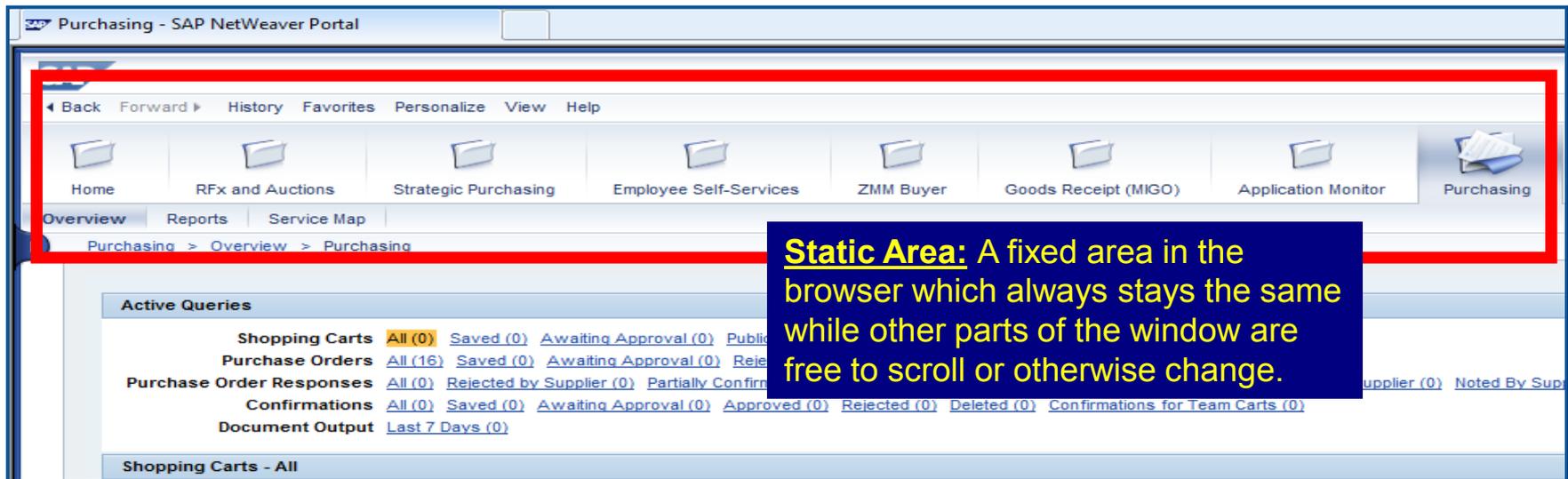
Log On

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SRM Portal – Static Area

- The portal offers a single point of entry. Buyers will have access to procurement processes through the SRM portal, based on their security roles.



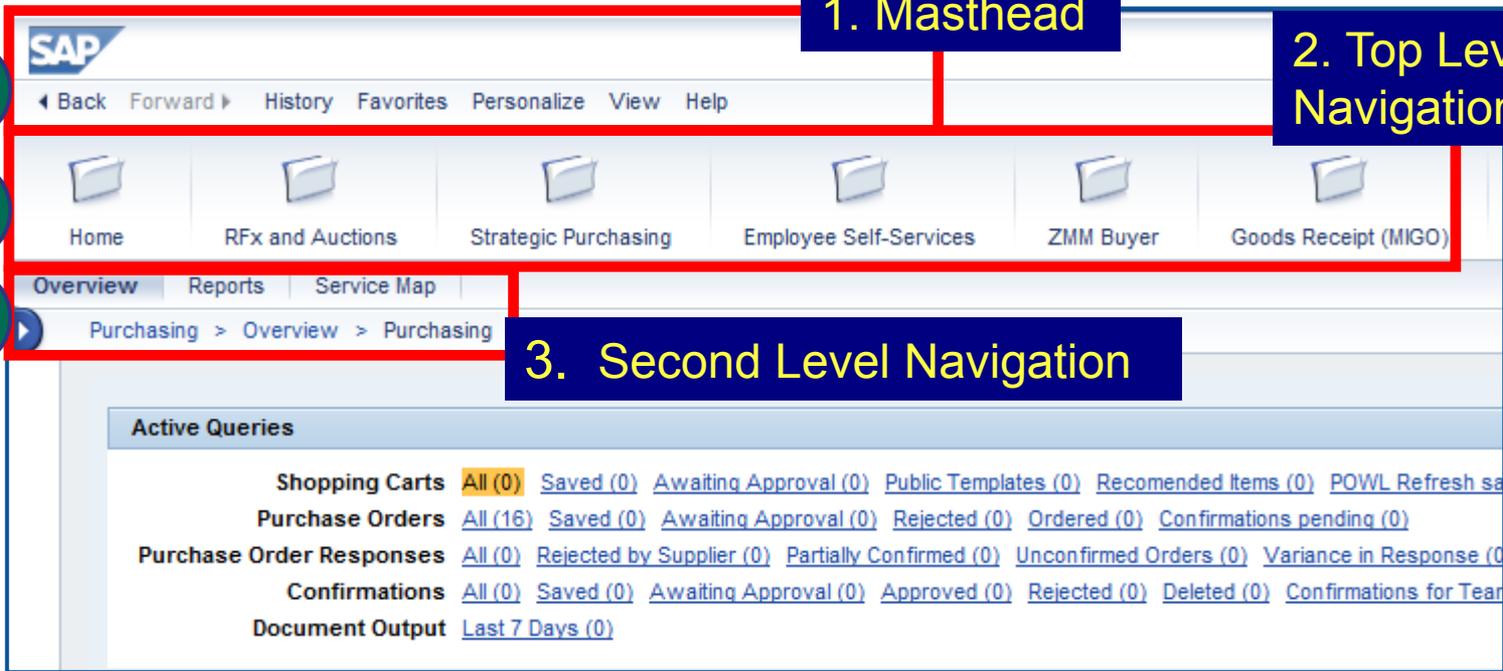
Static Area: A fixed area in the browser which always stays the same while other parts of the window are free to scroll or otherwise change.

Active Queries	
Shopping Carts	All (0) Saved (0) Awaiting Approval (0) Public
Purchase Orders	All (16) Saved (0) Awaiting Approval (0) Reje
Purchase Order Responses	All (0) Rejected by Supplier (0) Partially Confir
Confirmations	All (0) Saved (0) Awaiting Approval (0) Approved (0) Rejected (0) Deleted (0) Confirmations for Team Carts (0)
Document Output	Last 7 Days (0)

- Two main areas in the Portal: dynamic and static.

SRM Portal – Static Area

The distinct static areas are:



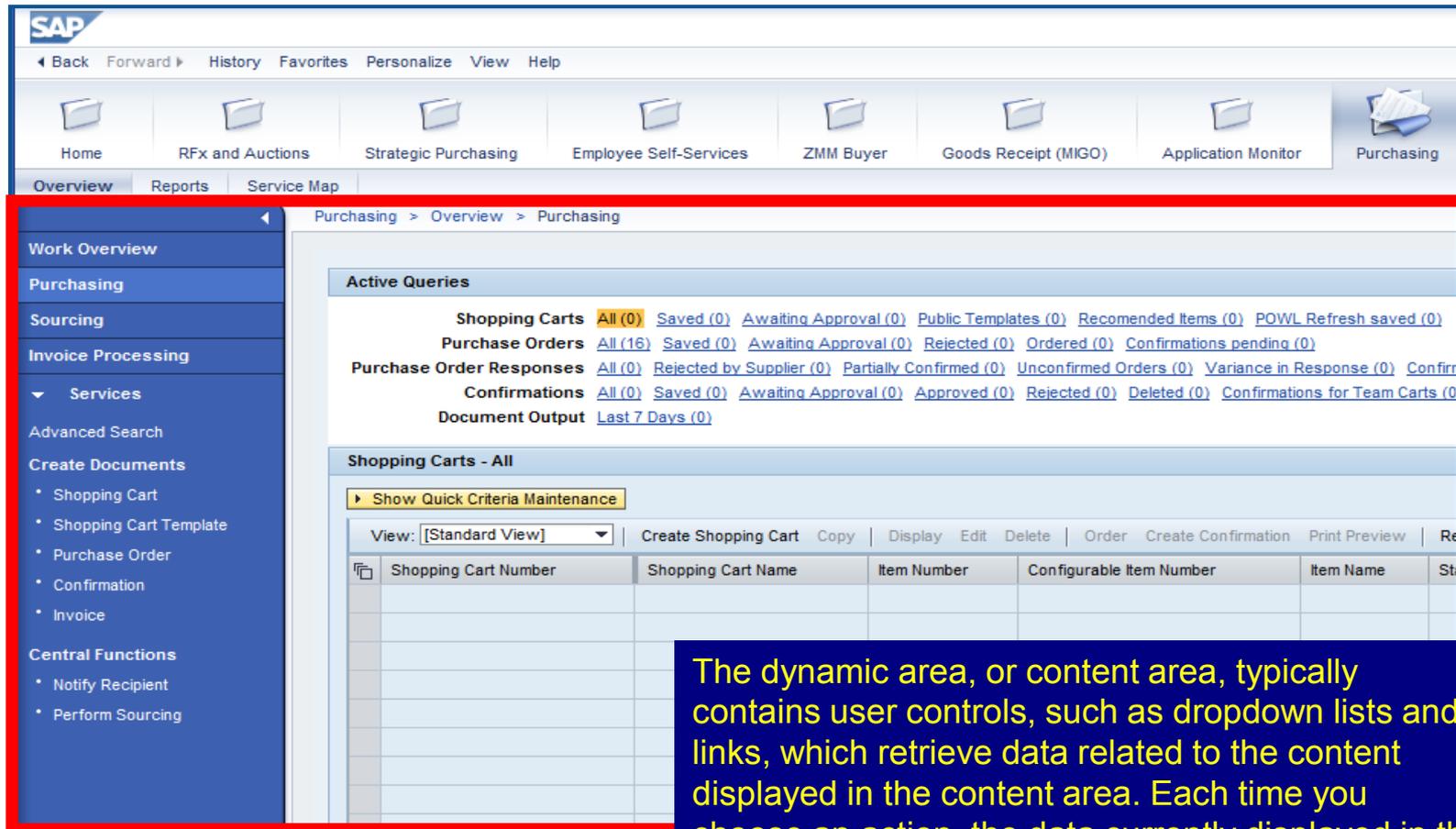
1. Masthead

2. Top Level Navigation (Folders)

3. Second Level Navigation

The screenshot shows the SAP SRM Portal interface. The masthead (1) includes the SAP logo and navigation links: Back, Forward, History, Favorites, Personalize, View, and Help. The top level navigation (2) consists of six folder icons: Home, RFx and Auctions, Strategic Purchasing, Employee Self-Services, ZMM Buyer, and Goods Receipt (MIGO). The second level navigation (3) is shown in the breadcrumb trail: Purchasing > Overview > Purchasing. Below this, the 'Active Queries' section lists various query categories and their counts: Shopping Carts (All (0), Saved (0), Awaiting Approval (0), Public Templates (0), Recommended Items (0), POWL Refresh sa), Purchase Orders (All (16), Saved (0), Awaiting Approval (0), Rejected (0), Ordered (0), Confirmations pending (0)), Purchase Order Responses (All (0), Rejected by Supplier (0), Partially Confirmed (0), Unconfirmed Orders (0), Variance in Response (0)), Confirmations (All (0), Saved (0), Awaiting Approval (0), Approved (0), Rejected (0), Deleted (0), Confirmations for Tear), and Document Output (Last 7 Days (0)).

SRM Portal – Dynamic Area



Active Queries

Shopping Carts [All \(0\)](#) [Saved \(0\)](#) [Awaiting Approval \(0\)](#) [Public Templates \(0\)](#) [Recomended Items \(0\)](#) [POWL Refresh saved \(0\)](#)

Purchase Orders [All \(16\)](#) [Saved \(0\)](#) [Awaiting Approval \(0\)](#) [Rejected \(0\)](#) [Ordered \(0\)](#) [Confirmations pending \(0\)](#)

Purchase Order Responses [All \(0\)](#) [Rejected by Supplier \(0\)](#) [Partially Confirmed \(0\)](#) [Unconfirmed Orders \(0\)](#) [Variance in Response \(0\)](#) [Confir](#)

Confirmations [All \(0\)](#) [Saved \(0\)](#) [Awaiting Approval \(0\)](#) [Approved \(0\)](#) [Rejected \(0\)](#) [Deleted \(0\)](#) [Confirmations for Team Carts \(0\)](#)

Document Output [Last 7 Days \(0\)](#)

Shopping Carts - All

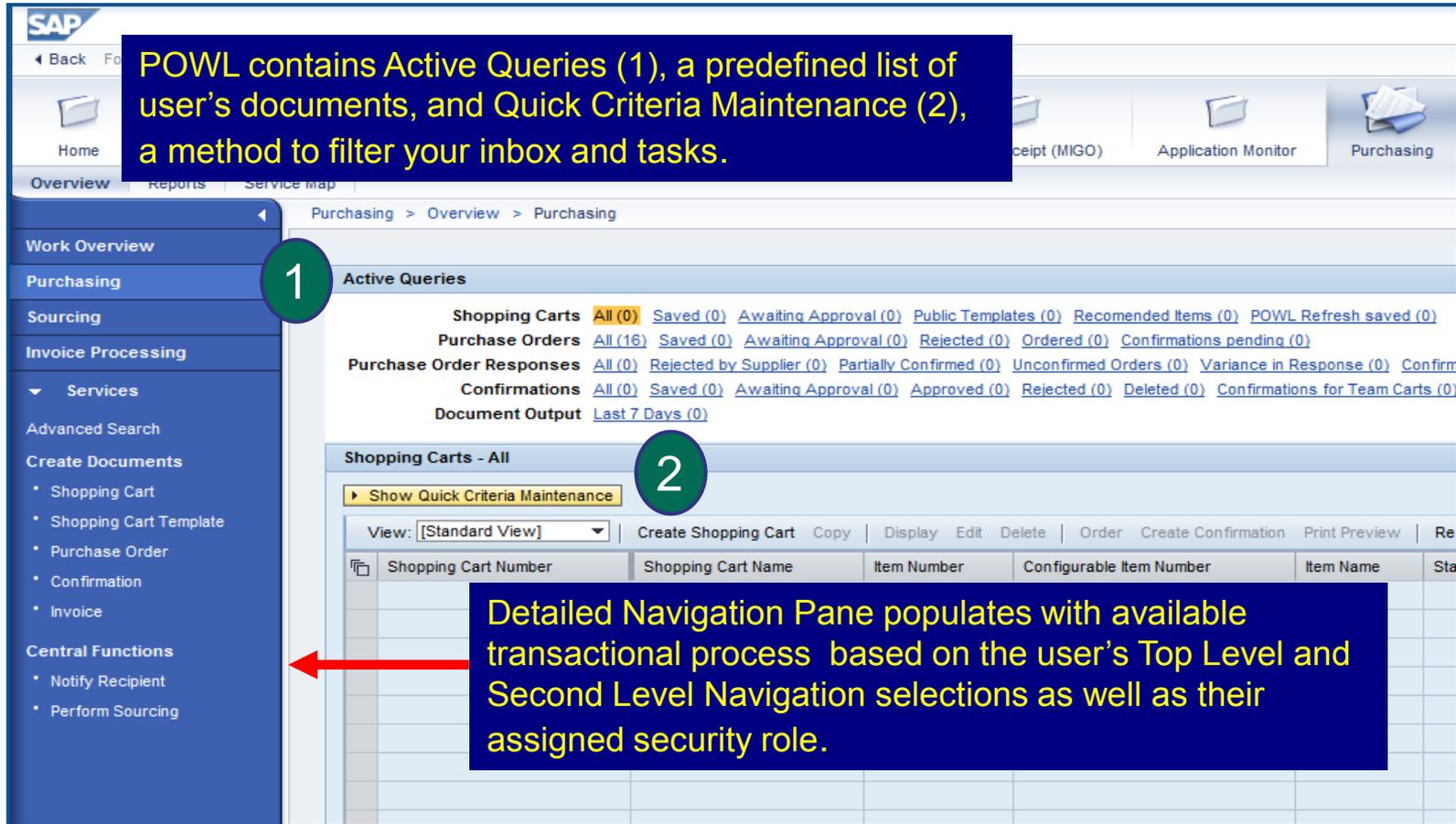
[Show Quick Criteria Maintenance](#)

View: [Standard View] | Create Shopping Cart | Copy | Display | Edit | Delete | Order | Create Confirmation | Print Preview | Re

<input type="checkbox"/>	Shopping Cart Number	Shopping Cart Name	Item Number	Configurable Item Number	Item Name	St

The dynamic area, or content area, typically contains user controls, such as dropdown lists and links, which retrieve data related to the content displayed in the content area. Each time you choose an action, the data currently displayed in the portal content area change accordingly.

SRM Portal – Dynamic Area



POWL contains Active Queries (1), a predefined list of user's documents, and Quick Criteria Maintenance (2), a method to filter your inbox and tasks.

1

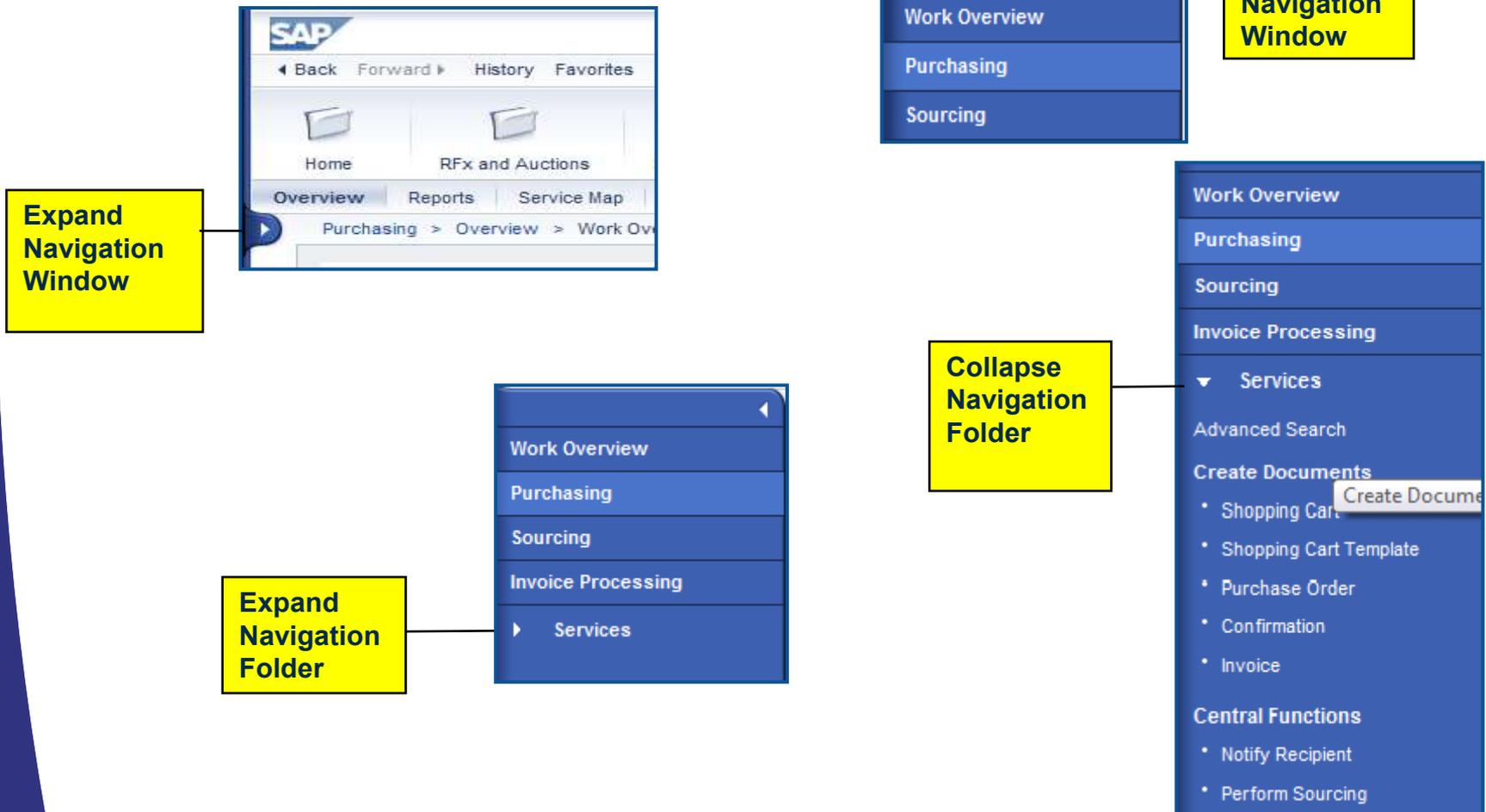
2

Detailed Navigation Pane populates with available transactional process based on the user's Top Level and Second Level Navigation selections as well as their assigned security role.

The screenshot shows the SAP SRM Portal interface. The left sidebar contains a navigation menu with categories like Work Overview, Purchasing, Sourcing, Invoice Processing, Services, Advanced Search, Create Documents, and Central Functions. The main content area displays 'Active Queries' with links for Shopping Carts, Purchase Orders, Purchase Order Responses, Confirmations, and Document Output. Below this is a 'Shopping Carts - All' section with a 'Show Quick Criteria Maintenance' button and a table with columns for Shopping Cart Number, Shopping Cart Name, Item Number, Configurable Item Number, Item Name, and Status. A red arrow points from the 'Detailed Navigation Pane' text to the left sidebar.

SRM Portal – Dynamic Area

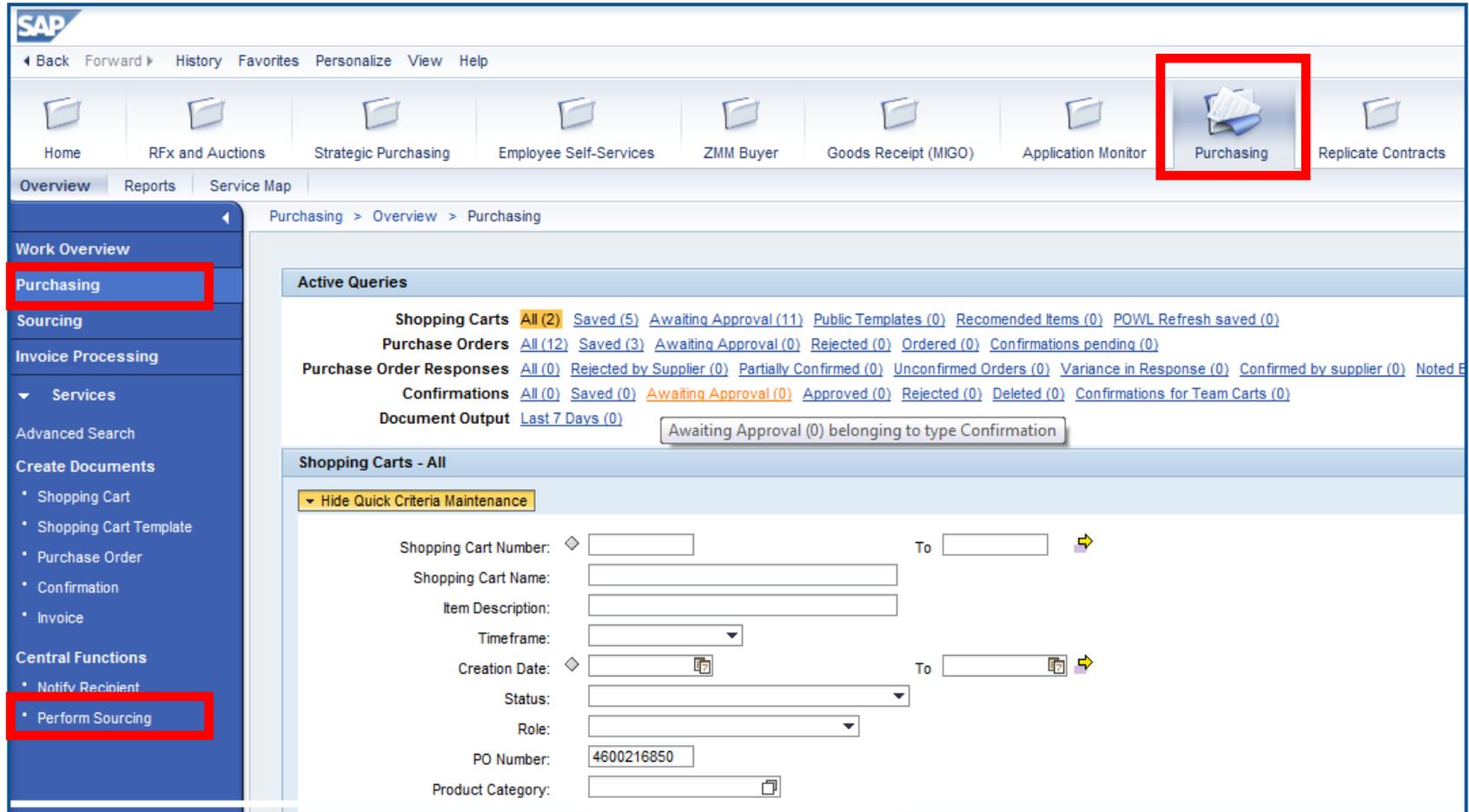
Use the small arrow symbols to expand and collapse navigation details as needed.



PO Navigation

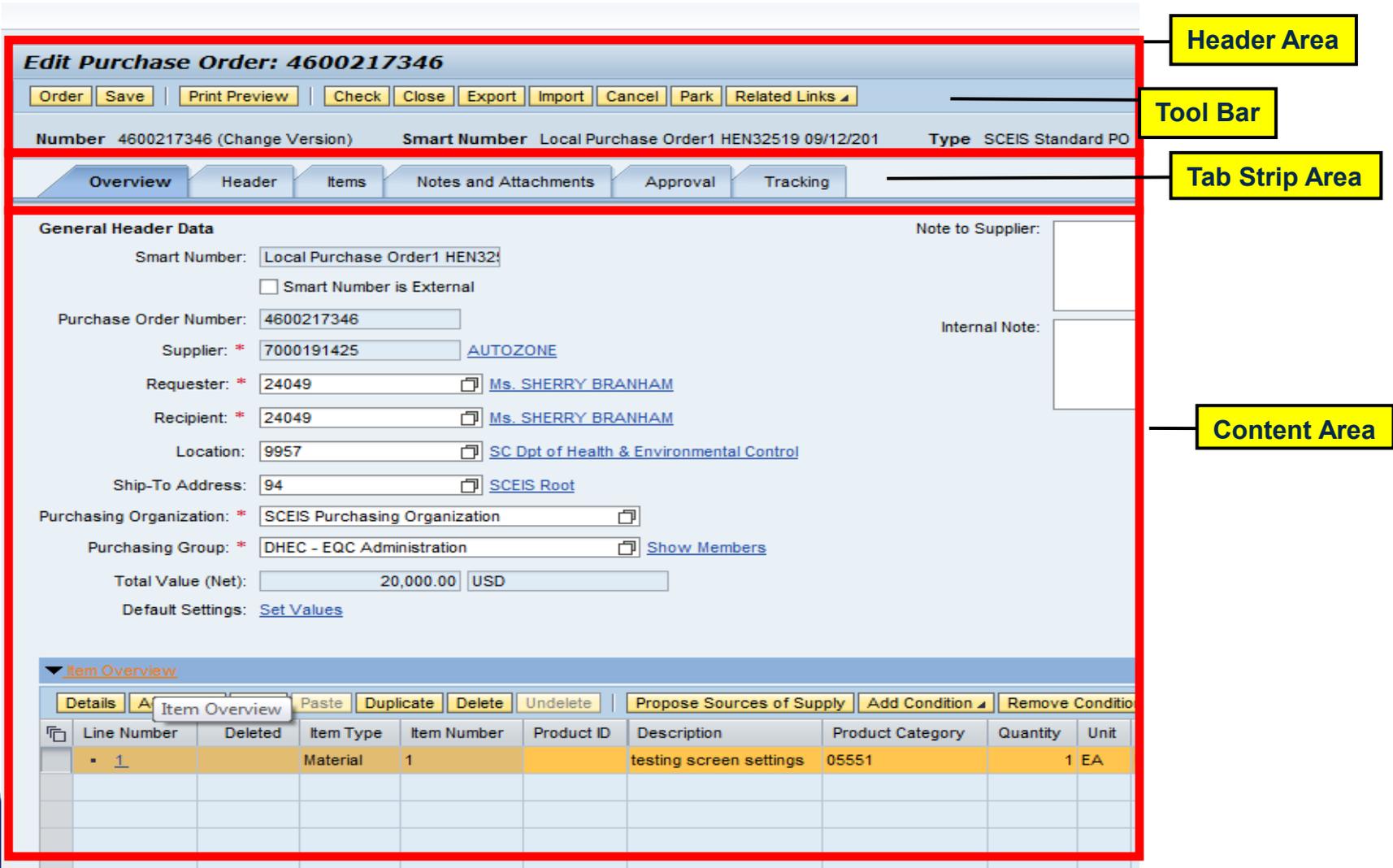
- ① After logging into SRM, folders will appear at the top of the screen.
- ① The number and name of the folders you see will depend on the security roles you have been assigned by your agency.
- ① The transactions that appear on the navigation pane will correspond to the folder.
- ① To create Purchase Orders, the Buyer will use the “Purchasing” folder.

PO - Folder and Transaction Navigation



The screenshot displays the SAP Purchasing Overview page. The top navigation bar includes folders for Home, RFx and Auctions, Strategic Purchasing, Employee Self-Services, ZMM Buyer, Goods Receipt (MIGO), Application Monitor, **Purchasing** (highlighted with a red box), and Replicate Contracts. The left sidebar contains a menu with 'Purchasing' (highlighted with a red box) and 'Perform Sourcing' (also highlighted with a red box). The main content area shows 'Active Queries' with counts for Shopping Carts, Purchase Orders, Purchase Order Responses, Confirmations, and Document Output. Below this is the 'Shopping Carts - All' section, which includes a search form with fields for Shopping Cart Number, Name, Description, Timeframe, Creation Date, Status, Role, PO Number (4600216850), and Product Category.

Navigation in SRM PO



Edit Purchase Order: 4600217346

Order Save Print Preview Check Close Export Import Cancel Park Related Links

Number 4600217346 (Change Version) Smart Number Local Purchase Order1 HEN32519 09/12/201 Type SCEIS Standard PO

Overview Header Items Notes and Attachments Approval Tracking

General Header Data

Smart Number: Local Purchase Order1 HEN32519
 Smart Number is External

Purchase Order Number: 4600217346

Supplier: * 7000191425 [AUTOZONE](#)

Requester: * 24049 [Ms. SHERRY BRANHAM](#)

Recipient: * 24049 [Ms. SHERRY BRANHAM](#)

Location: 9957 [SC Dpt of Health & Environmental Control](#)

Ship-To Address: 94 [SCEIS Root](#)

Purchasing Organization: * SCEIS Purchasing Organization

Purchasing Group: * DHEC - EQC Administration [Show Members](#)

Total Value (Net): 20,000.00 USD

Default Settings: [Set Values](#)

Note to Supplier:

Internal Note:

Item Overview

Details Item Overview Paste Duplicate Delete Undelete Propose Sources of Supply Add Condition Remove Condition

Line Number	Deleted	Item Type	Item Number	Product ID	Description	Product Category	Quantity	Unit
1		Material	1		testing screen settings	05551	1	EA

Annotations: Header Area, Tool Bar, Tab Strip Area, Content Area

Commonly Used Buttons in SRM

Assign Sources of Supply: Step 1 (Select Requisition)

◀ Previous Next ▶ | Close

Assign Sources of Supply: Step 2 (Assign Sources of Supply (No Items))

◀ Previous Next ▶ | Save Close

Assign Sources of Supply: Step 3 (Review Drafts (No Items))

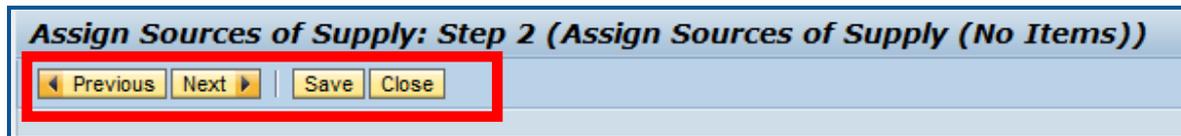
◀ Previous Next ▶ | Process All Drafts Close Process Selected Drafts Edit Selected Drafts

Assign Sources of Supply: Step 4 (Summary Screen (No Documents))

◀ Previous Next ▶ | Refresh Close

Commonly Used Buttons in SRM

There are buttons located in the **Tool Bar Area** for each of the 4 steps to create a Purchase Order. Each step will have its set of buttons.



- **Previous:** Commonly used to navigate back to the screen just before the current one (not available in all steps).
- **Next:** Use this button to navigate to the next screen.
- **Save:** Click the “Save” button to save the document before completion.
- **Close:** Always use this button to close a screen after data entry.

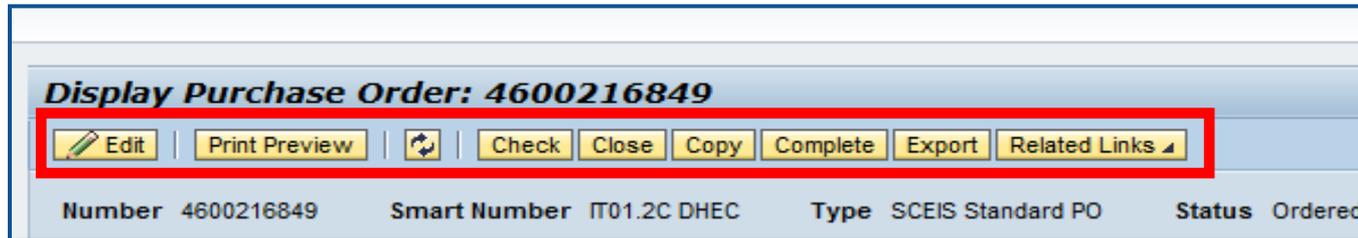
Important Note: If you do not see the word “Close,” then use the red X to close a PO screen in SRM 7.2. Otherwise, do not use the red X to close a PO screen in SRM 7.2.

Commonly Used Buttons in SRM



- **Order:** Use this button to advance when the PO is complete and ready to send to the vendor.
- **Print Preview:** Click this button to view the PO as it will appear when printed out.
- **Check:** Click here to refresh the screen and check for errors.
- **Export:** Clicking this button allows you to export data into an Excel output of PO lines and modify data or add any additional lines.
- **Import:** Use this button to upload data in an Excel file and import it into a PO.
- **Cancel:** This button cancels line item(s) in a PO and sets the PO to deleted.
- **Park:** Use this option to save incomplete documents.
- **Related Links:** This button opens a dropdown menu for “Document Builder”, allowing users to add Terms and Conditions to a PO.

Commonly Used Buttons in SRM



- **Edit:** Click the “Edit” button to modify a PO.
- **Refresh Icon ():** Click this graphical button to refresh a PO and view the most up-to-date details.
- **Complete:** Use the “Complete” button when no further changes will be allowed to the document.

Changing the “Settings” in SRM

Step 1

- This demonstration is provided to assist you in changing the standard SCEIS “Settings” when executing “Assign Sources of Supply: Step 1” (Select Requisition), if you desire. This step is optional.
- The folder path for this step is: Purchasing → Purchasing → Perform Sourcing.

Assign Sources of Supply: Step 1 (Select Requisition)

1 Select Requisition | 2 Assign Sources of Supply (No Items) | 3 Review Drafts (No Items) | 4 Summary Screen (No Documents)

Search for requisitions that you want to source. Then select these requisitions in the search results set and choose "Next"

Search Criteria: Requisitions

Number of Requisition:
Item Description:
Product:
Requisition:
Purchasing Organization:
Purchasing Group:
Priority:
Delivery Date Range: To:
Delivery Date: To:

Name of Requisition:
Product Category:
Supplier:
External Requisition:
Account Assignment Category:
Account Assignment Number:
Intended for Grouping:
Include Locked Items:

DOC - Procurement Director

Settings

Search for Requisitions

Requisition / Item Number	Description	Category	Priority	Quantity	Unit	Requester	Delivery Date	Supplier Number	Supplier Name	Contact	Info Record	Manufacturer Part Number	Manufacturer
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Changing the “Settings” in SRM

Step 1

- Edit/change any of the Default Search Values you desire.
- Ensure you click the “Start Search Upon Opening Application”
- Click “Apply”, then close Step 1. When you get back in Step 1 the revised Default Search Values will be activated.

The screenshot shows the SRM interface for 'Assign Sources of Supply: Step 1 (Select Requisition)'. A 'Settings' dialog box is open, allowing users to define how the initial search screen must start and define default search values. The dialog box is divided into two main sections: 'Start Screen Settings' and 'Default Search Values'.

Start Screen Settings:

- No Preselection
- Own Purchasing Group
- Default Search
- Start Search Upon Opening Application

Default Search Values:

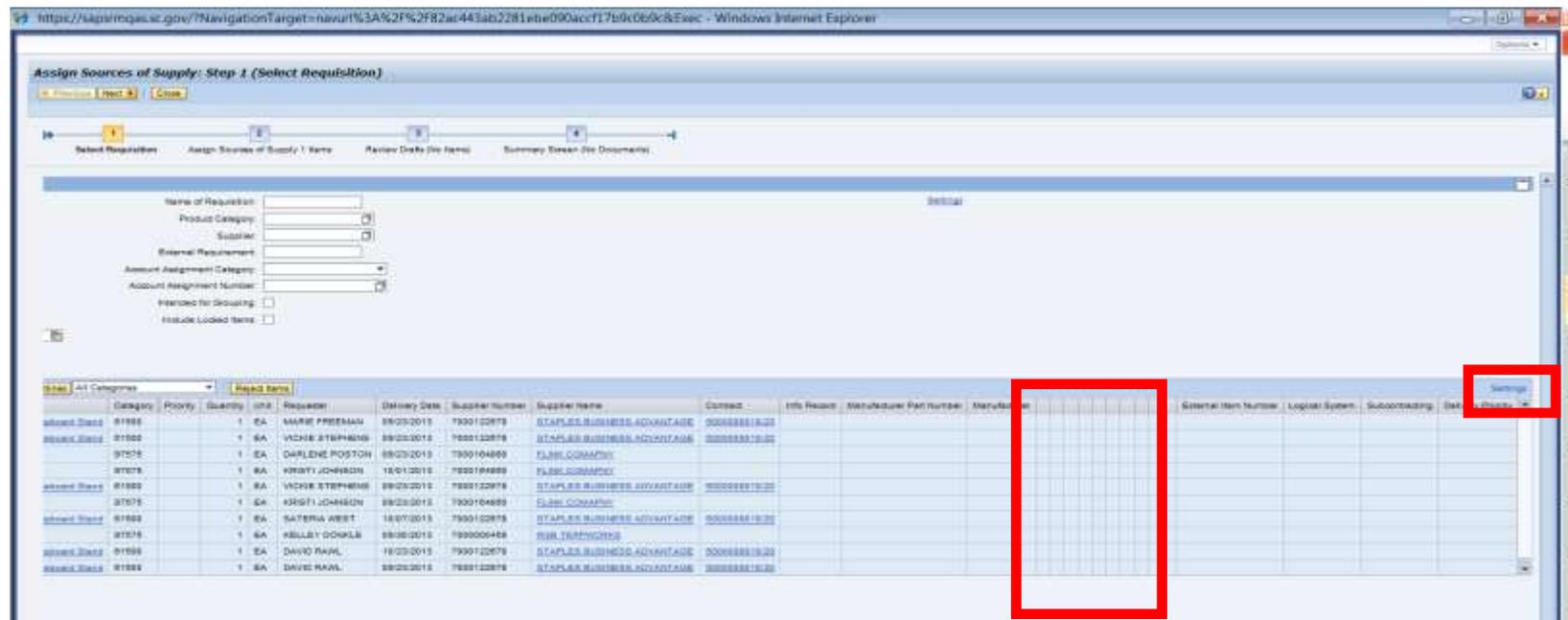
Number of Requisition:	<input type="text"/>	Name of Requisition:	<input type="text"/>
Item Description:	<input type="text"/>	Product Category:	<input type="text"/>
Product:	<input type="text"/>	Supplier:	<input type="text"/>
Requester:	<input type="text"/>	External Requirement:	<input type="text"/>
Purchasing Organization:	<input type="text"/>	Account Assignment Category:	<input type="text"/>
Purchasing Group:	<input type="text"/>	Account Assignment Value:	<input type="text"/>
Priority:	<input type="text"/>	Intended for Grouping:	<input type="checkbox"/>
Delivery Date Range:	<input type="text"/>	Include Locked Items:	<input type="checkbox"/>
Delivery Date:	<input type="text"/>	To:	<input type="text"/>

The background interface shows a list of requisitions with columns for Priority, Quantity, Unit, Requester, and Delivery Date. The 'Settings' dialog box has 'Apply' and 'Cancel' buttons at the bottom right.

Changing the “Settings” in SRM

Step 1

- To make changes to the Area Content section of the screen, scroll to the right to click “Settings.” You may want to delete these blank columns. Follow the detailed instructions in the Quick Reference Card (QRC) “Edit the Dynamic Section/Area Content Settings in Assign Sources of Supply”, located at Blackboard, Classes, Additional Resources and/or SCEIS uPerform Website.

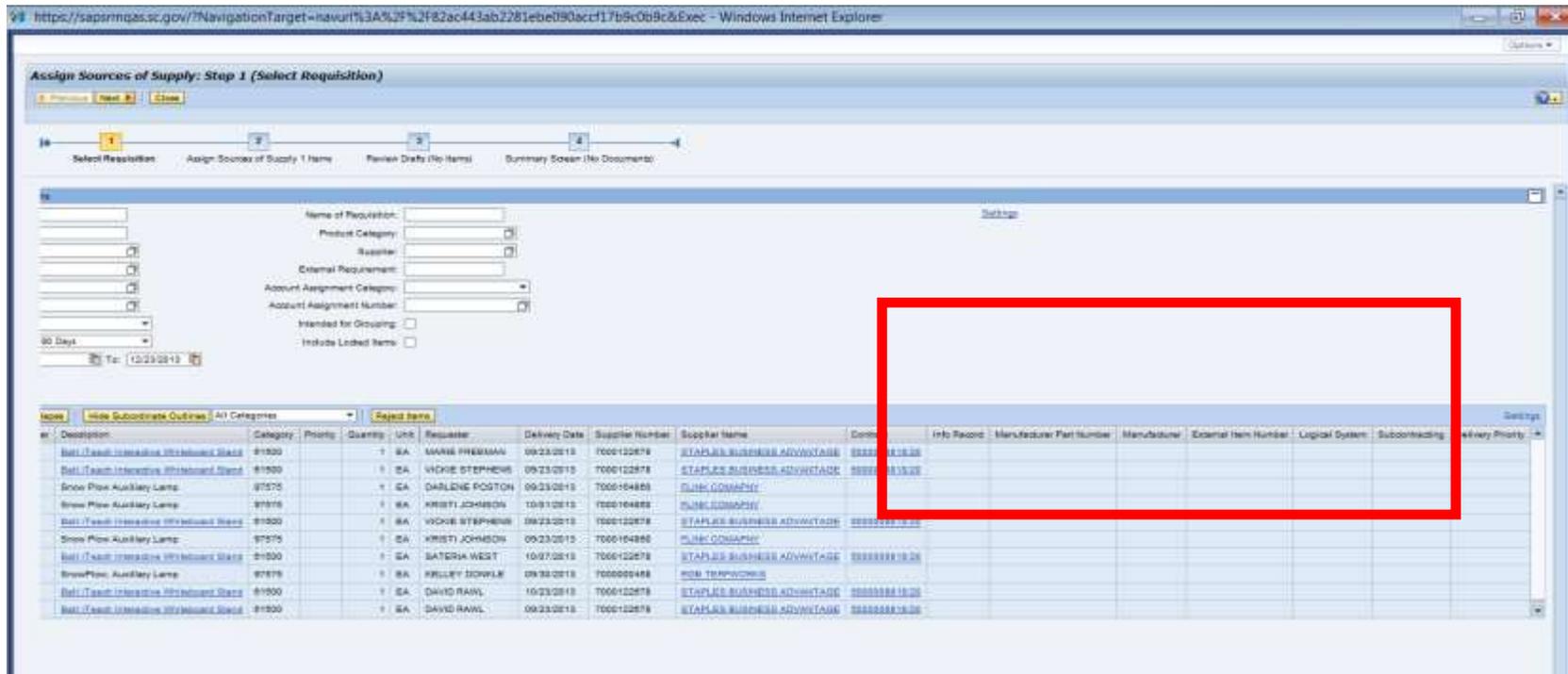


Category	Priority	Quantity	UoM	Requirer	Delivery Date	Supplier Number	Supplier Name	Contact	Info Source	Manufacturer Part Number	Manufacturer	Essential Item Number	Logical System	Subcontracting	Date
Blank Item	01000	1	EA	MARIE FREEMAN	8/23/2015	7900122678	STAPLES BUSINESS ADVANTAGE	000000018.00							
Blank Item	01000	1	EA	VICKE STEPHENS	8/23/2015	7900122678	STAPLES BUSINESS ADVANTAGE	000000018.00							
Blank Item	01000	1	EA	DARLENE POSTON	8/23/2015	7900104800	FLOR COMPANY								
Blank Item	01000	1	EA	KRISTY JOHNSON	10/1/2015	7900194800	FLOR COMPANY								
Blank Item	01000	1	EA	VICKE STEPHENS	8/23/2015	7900122678	STAPLES BUSINESS ADVANTAGE	000000018.00							
Blank Item	01000	1	EA	KRISTY JOHNSON	8/23/2015	7900104800	FLOR COMPANY								
Blank Item	01000	1	EA	SATERIA WEST	10/27/2015	7900122678	STAPLES BUSINESS ADVANTAGE	000000018.00							
Blank Item	01000	1	EA	KELLEY DOOKLE	8/23/2015	9990000408	SHR. THERMOSYS								
Blank Item	01000	1	EA	DAVID RAWL	1/23/2015	7900122678	STAPLES BUSINESS ADVANTAGE	000000018.00							
Blank Item	01000	1	EA	DAVID RAWL	8/23/2015	7900122678	STAPLES BUSINESS ADVANTAGE	000000018.00							

Changing the “Settings” in SRM

Step 1

- After you make the modifications to your Area Content Settings (the lower right Settings) then your screen will look like this. The blank columns are removed and the “External Item Number” column is visible without scrolling to the right.



Description	Category	Priority	Quantity	Unit	Requirer	Delivery Date	Supplier Number	Supplier Name	Cost	Info Record	Manufacturer Part Number	Manufacturer	External Item Number	Logical System	Subcontracting	Priority
Belt / Teesh Interactive Whiteboard Stand	81900	1	EA	MARK FREEMAN	09/23/2013	7000122679	STAPLES BUSINESS ADVANTAGE	0000000000								
Belt / Teesh Interactive Whiteboard Stand	81900	1	EA	VICKIE STEPHENS	09/23/2013	7000122679	STAPLES BUSINESS ADVANTAGE	0000000000								
Snow Plow Auxiliary Lamp	87575	1	EA	DARLENE POSTON	09/23/2013	7000164868	CLARK COMPANY	0000000000								
Snow Plow Auxiliary Lamp	87575	1	EA	KRISTI JOHNSON	10/9/2013	7000164868	CLARK COMPANY	0000000000								
Belt / Teesh Interactive Whiteboard Stand	81900	1	EA	VICKIE STEPHENS	09/23/2013	7000122679	STAPLES BUSINESS ADVANTAGE	0000000000								
Snow Plow Auxiliary Lamp	87575	1	EA	KRISTI JOHNSON	09/23/2013	7000164868	CLARK COMPANY	0000000000								
Belt / Teesh Interactive Whiteboard Stand	81900	1	EA	SATIRA WEST	10/07/2013	7000122679	STAPLES BUSINESS ADVANTAGE	0000000000								
Snow Plow Auxiliary Lamp	87575	1	EA	KELLEY HOWLE	09/30/2013	7000009488	IBM TRAPDOOR	0000000000								
Belt / Teesh Interactive Whiteboard Stand	81900	1	EA	DAVID RAWL	10/23/2013	7000122679	STAPLES BUSINESS ADVANTAGE	0000000000								
Belt / Teesh Interactive Whiteboard Stand	81900	1	EA	DAVID RAWL	09/23/2013	7000122679	STAPLES BUSINESS ADVANTAGE	0000000000								

Lesson 1 Summary

- 🌀 You should now be able to:
 - Describe the procurement process in SCEIS.
 - Define SRM key terms and concepts.
 - Log onto SRM using the portal.
 - Navigate in SRM using the portal.
 - Define the commonly used tool bar buttons.
 - Change the “Settings” in SRM step 1.

Lesson 1 Knowledge Check



- ④ All procurement processes can be accessed through SRM. (True or False)
- ④ The SRM Portal requires one central point of entry. (True or False)
- ④ “Close” is a commonly used button for the Tool Bar Area of SRM. (True or False)
- ④ A user’s document history is available through the Personalized Object Work List. (True or False)
- ④ In Step 1, you can change the “Settings” Default Search Values to make your Work List default to a predefined setting? (True/False)



LESSON 2: TRANSACTION TYPES AND DOCUMENT NUMBERS IN SRM

Lesson 2 Learning Objectives

- Upon completion of this lesson, you should understand:
 - Transaction Types in SRM.
 - The importance of selecting the correct Transaction Type.
 - Document Numbers in SRM.

Transaction Types

- ① Transaction Types in SRM are defined in the “Policy for Use of Purchasing/Payment Document Types,” referred to as “Document Types.”
- ① Once a Transaction Type is selected and the PO number is assigned in SRM, the Transaction Type cannot be changed.
 - The corrective action would be to delete the PO and start a new.

Transaction Types

- Transaction Types are a useful tool to capture purchasing activity for quarterly reports.

Document Numbers

- ① All document numbers are ten digits long. The first two numerals in each document number indicate the Document Type:
 - Shopping Cart numbers begin with the numerals 20.
 - Example: 2000202610
 - Standard PO Doc Types begin with 46.
 - Example: 4600029962
 - Framework, Inventory and Conversion PO Doc Types begin with 45.
 - Example: 4500014822
 - Dept. of Vocational Rehabilitation Client Management System PO Doc Types begin with
 - Example: 4300107079

Lesson 2 Summary

- You should now be able to:
 - Understand Transaction Types in SRM.
 - Understand the importance of selecting the correct Transaction Type.
 - Use Transaction Types for quarterly reporting.
 - Recognize PO Document Numbers.

Lesson 2 Knowledge Check

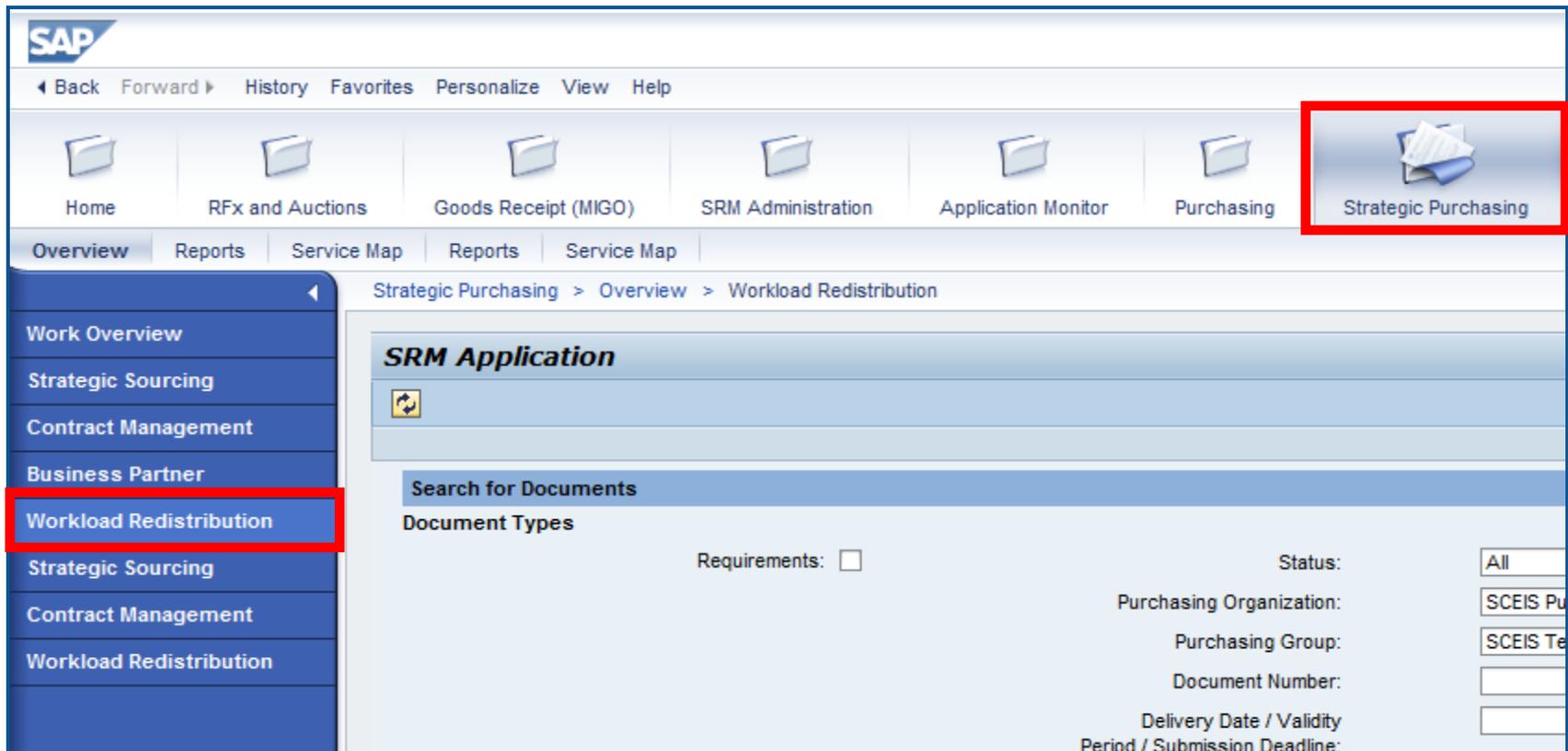
- ④ A standard PO created in SRM begins with 46.
(True or False)
- ④ Once a Transaction Type is selected and the PO number is assigned in SRM, the Transaction Type **cannot** be changed. (True/False)



LESSON 3: REDISTRIBUTE WORKLOAD

Workload Redistribution

- To redistribute a Shopping Cart, the buyer will use the “Strategic Purchasing” folder.



The screenshot displays the SAP SRM Application interface. At the top, the SAP logo is visible. Below it, a navigation bar includes links for Back, Forward, History, Favorites, Personalize, View, and Help. A row of folder icons represents different application areas: Home, RFX and Auctions, Goods Receipt (MIGO), SRM Administration, Application Monitor, Purchasing, and Strategic Purchasing. The Strategic Purchasing folder icon is highlighted with a red rectangle. Below the folder icons, there are tabs for Overview, Reports, and Service Map. A left-hand navigation menu lists various options: Work Overview, Strategic Sourcing, Contract Management, Business Partner, Workload Redistribution (highlighted with a red rectangle), Strategic Sourcing, Contract Management, and Workload Redistribution. The main content area shows the breadcrumb path: Strategic Purchasing > Overview > Workload Redistribution. Below this, the SRM Application header is displayed, followed by a search for documents section with various filters and input fields.

uPerform Information – Redistribute Workload



uPerform Business Process Procedures (BPPs) related to this function are available at

<http://www.sceis.sc.gov/page.aspx?id=272>

SRM SPUR Redistribute Workload



Notice the “S” in the uPerforms naming convention because this process is initiated in Strategic Purchasing versus Purchasing.

Lesson 3 Summary

- You should now be able to:
 - Redistribute a Shopping Cart

Lesson 3 Knowledge Check

- ① The first time you use Strategic Purchasing, Workload Redistribution, you will need to select the SCEIS Purchasing Organization in the Purchasing Organization drop down menu. (True or False)



LESSON 4: CREATE A STANDARD PURCHASE ORDER

Lesson 4 Learning Objectives

- Upon completion of this Lesson, you should be able to:
 - Understand the 4 Steps to create a PO.
 - Find a “Requisition” in SRM’s Perform Sourcing.
 - Navigate through SRM to create a Standard PO.
 - Understand where to find Extended PO History.

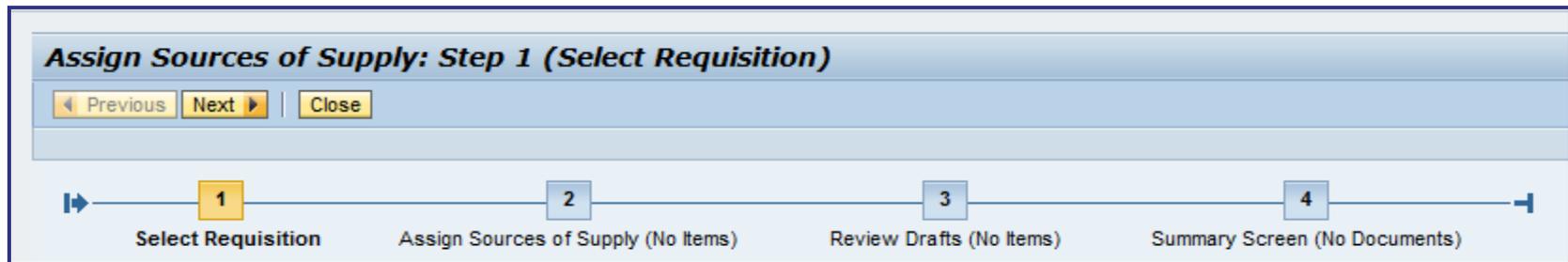
Lesson 4 Learning Objectives cont.



- ① Upon completion of this Lesson, you should be able to:
 - Understand the tax process.
 - Understand that SCEIS encumbers funds upon creation of a PO.
 - Understand the **IMPORTANCE** of the Status of a Purchase Order.

Steps to Create a PO in SRM

1. Select Requisition
2. Assign Source of Supply
3. Review Drafts
4. Summary Screen



Perform Sourcing to Create a Standard PO



uPerform Business Process Procedures (BPPs) related to this function are available at <http://www.sceis.sc.gov/page.aspx?id=272>.

SRM PUR Create Standard Purchase Order

Exercise 1: Create a Standard Purchase Order

Verifying Encumbrance via Extended PO History



In SRM 7.2, the PO Encumbrance can be found in the Header's "Extended PO History" tab, in the "Value" column.

https://sapsrmbx.sc.gov/?NavigationTarget=navurl%3A%2F%2F0fafef6c73b84773ee5478ff07e90cc2&Prev - Windows Internet Explorer

Display Purchase Order: 4600216645

Print Preview Check Close Copy Export System Information Create Memory Snapshot Related Links

Number 4600216645 (Change Version) Smart Number MMUTHUK 07/05/2013 00:00 Type SCEIS Standard PO Status Deleted Created On 07/05/2013 Total Value (Gross) 13,065.73 USD
Supplier CONTINENTAL TIRE NORTH AMERICA

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

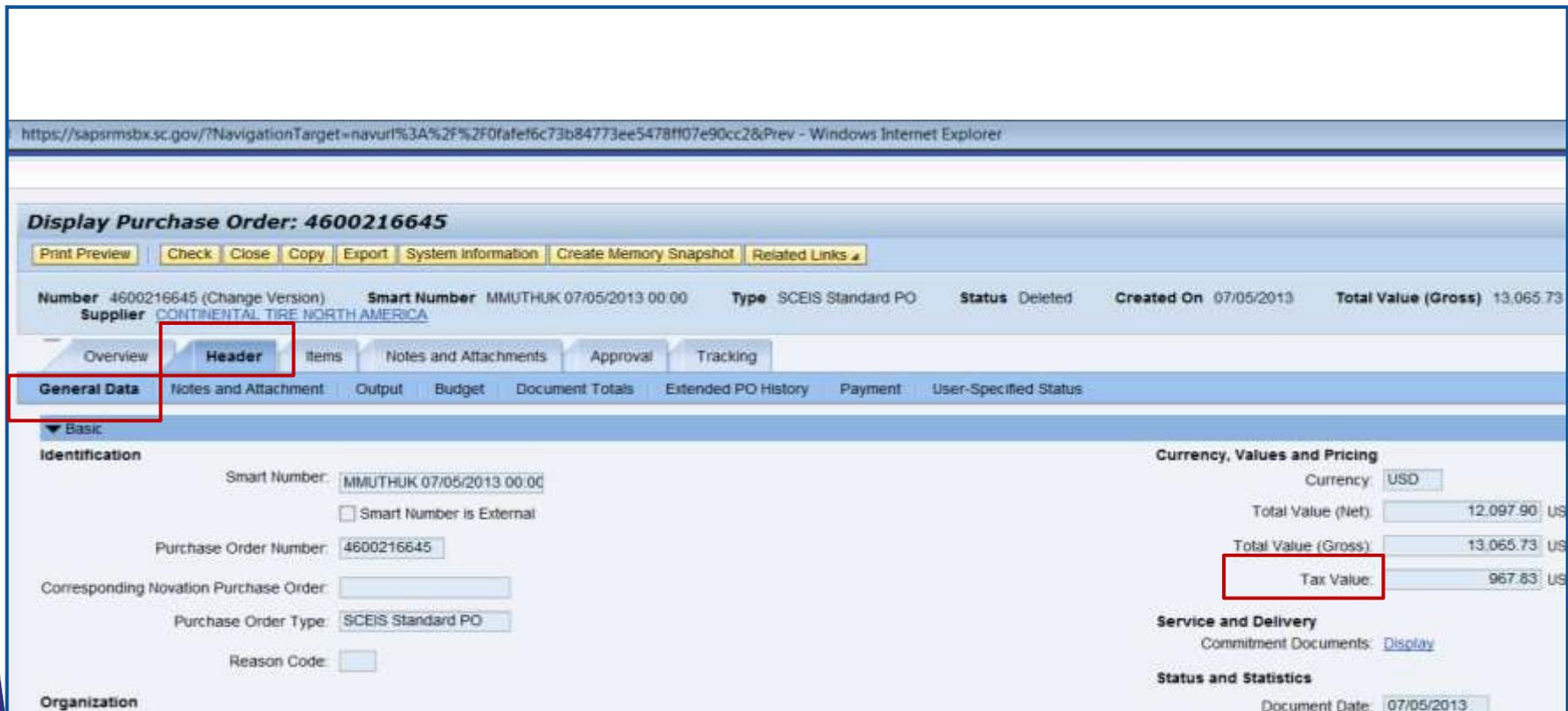
General Data Notes and Attachment Output Budget Document Totals **Extended PO History** Payment User-Specified Status

Send To Records Management

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	Inv
PO Information											
• Total Value in Purchase Order							13065.73	USD			
Item 1 / Police Pursuit Tire											
• Total Value in Purchase Order			1	EA			13065.73	USD			
• Value in Purchase Order		4600216645 / 00001	1	EA			13065.73	USD			

Understand the Tax Value in a Purchase Order

The Tax Value can be found in the Header, then General Data.



The screenshot displays the 'Display Purchase Order: 4600216645' interface. The 'General Data' tab is selected, and the 'Tax Value' field in the 'Currency, Values and Pricing' section is highlighted with a red box. The 'Tax Value' is 967.83 US.

https://sapsrmsbx.sc.gov/?NavigationTarget=navurl%3A%2F%2F0fafef6c73b84773ee5478ff07e90cc2&Prev - Windows Internet Explorer

Display Purchase Order: 4600216645

Print Preview | Check | Close | Copy | Export | System Information | Create Memory Snapshot | Related Links ▾

Number: 4600216645 (Change Version) | Smart Number: MMUTHUK 07/05/2013 00:00 | Type: SCEIS Standard PO | Status: Deleted | Created On: 07/05/2013 | Total Value (Gross): 13,065.73

Supplier: CONTINENTAL TIRE NORTH AMERICA

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

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

Basic

Identification

Smart Number: MMUTHUK 07/05/2013 00:00
 Smart Number is External

Purchase Order Number: 4600216645

Corresponding Novation Purchase Order:

Purchase Order Type: SCEIS Standard PO

Reason Code:

Currency, Values and Pricing

Currency: USD

Total Value (Net): 12,097.90 US

Total Value (Gross): 13,065.73 US

Tax Value: 967.83 US

Service and Delivery

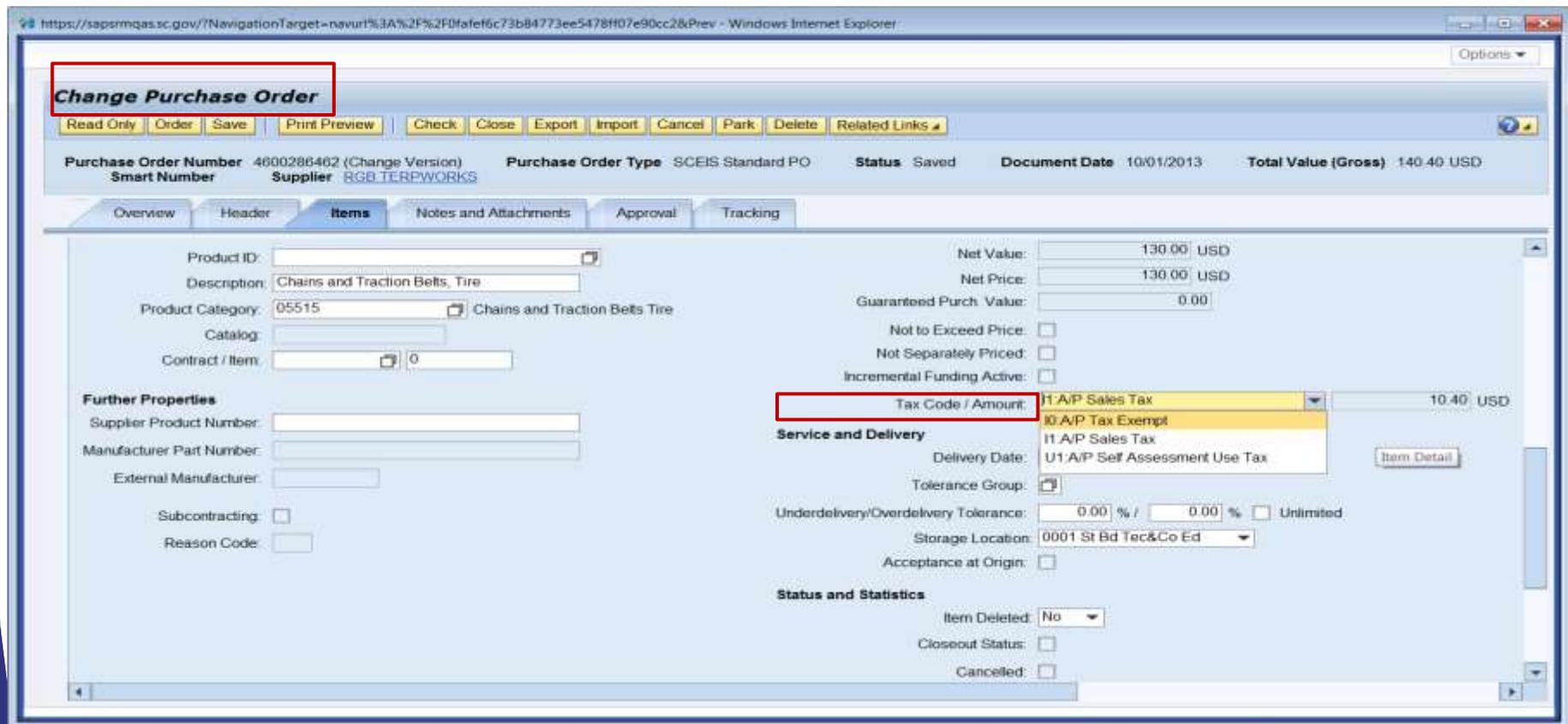
Commitment Documents: [Display](#)

Status and Statistics

Document Date: 07/05/2013

Understand the Tax Value can be Edited in the Items Detail

The Tax Value can be edited in the Items Detail view.



The screenshot shows the SAP S/4HANA Purchase Order Items Detail view. The browser address bar indicates the URL: <https://sapsrmqas.sc.gov/?NavigationTarget=navurl%3A%2F%2F0fafef6c73b84773ee5478f07e90cc2&Prev>. The page title is "Change Purchase Order".

Key information displayed includes:

- Purchase Order Number: 4600286462 (Change Version)
- Smart Number: Supplier: BGB.TERPWORKS
- Purchase Order Type: SCEIS Standard PO
- Status: Saved
- Document Date: 10/01/2013
- Total Value (Gross): 140.40 USD

The "Items" tab is selected, showing details for a specific item:

- Product ID: [Empty]
- Description: Chains and Traction Belts, Tire
- Product Category: 05515 Chains and Traction Belts Tire
- Contract / Item: 0

Further Properties:

- Supplier Product Number: [Empty]
- Manufacturer Part Number: [Empty]
- External Manufacturer: [Empty]
- Subcontracting:
- Reason Code: [Empty]

Financial and Tax Information:

- Net Value: 130.00 USD
- Net Price: 130.00 USD
- Guaranteed Purch. Value: 0.00
- Not to Exceed Price:
- Not Separately Priced:
- Incremental Funding Active:
- Tax Code / Amount: U1:A/P Sales Tax 10.40 USD (highlighted with a red box)

Service and Delivery:

- Delivery Date: [Empty]
- Tolerance Group: [Empty]
- Underdelivery/Overdelivery Tolerance: 0.00 % / 0.00 % Unlimited
- Storage Location: 0001 St Bd Tec&Co Ed
- Acceptance at Origin:

Status and Statistics:

- Item Deleted: No
- Closeout Status:
- Cancelled:

An "Item Detail" button is visible on the right side of the page.

Lesson 4 Knowledge Check

- ④ A valid Purchase Order will have a Status of Ordered. (True or False)
- ④ Once a Transaction Type is selected and the PO number is assigned in SRM, the Transaction Type **cannot** be changed. (True/False)
- ④ Your Personalized Object Work List today can be found in Perform Sourcing in SRM 7.2? (True/False)
- ④ If the Shopping Cart was created with the tax calculated, but if tax is not appropriate you can edit the Tax Code/Amount? (True/False)

Lesson 4 Summary

- ① You should now be able to:
 - Define the 4 steps to create a PO.
 - Find a “Requisition” in SRM.
 - Navigate through SRM to create a Standard PO.
 - Understand where to find Extended PO History.
 - Understand that SCEIS encumbers funds upon creation of a PO.
 - Understand how taxes are added in the Shopping Cart and potentially changed in the PO.



LESSON 5: CREATE A BLANKET AGREEMENT AND A BLANKET PURCHASE ORDER

Lesson 5 Learning Objectives

- Upon completion of this Lesson, you should be able to:
 - Apply the 4 steps to create a PO (Lesson 4).
 - Find a “Requisition” that has been approved and submitted to your Work List (Lesson 4) in SRM’s Perform Sourcing.
 - Understand the difference between a Blanket Agreement and a Blanket PO.
 - Create a Blanket Agreement with the appropriate clauses.
 - Create a Blanket PO with the appropriate clauses.

Lesson 5 Learning Objectives cont.



- ① Upon completion of this Lesson, you should be able to:
 - Apply steps discussed in Lesson 4 on how to:
 - Understand where to find Extended PO History.
 - Understand that SCEIS encumbers funds upon creation of a PO.

Blanket Agreement and Blanket PO



- ① A Blanket Agreement should be used in accordance with Regulation 19-445.2100 of the SC Consolidated Procurement Code and Policy for Use of Purchasing/Payment Document Types.
- ① A Blanket PO should be used in accordance with the Policy for Use of Purchasing/Payment Document Types.
- ① A Goods Receipt transaction (MIGO) is optional on Blanket POs.

Perform Sourcing to Create a Blanket Agreement



uPerform Business Process Procedures (BPPs) related to this function are available at <http://www.sceis.sc.gov/page.aspx?id=272>.

SRM PUR Create a Blanket Agreement

Exercise 2: Create a Blanket Agreement

When in Doc Builder, the answer to the Dialog questions are “Yes,” “Yes” to create the “BLANKET PURCHASE AGREEMENT” clauses.

Perform Sourcing to Create a Blanket PO



uPerform Business Process Procedures (BPPs) related to this function are available at <http://www.sceis.sc.gov/page.aspx?id=272>.

SRM PUR Create a Blanket Purchase Order

Exercise 3: Create a Blanket Purchase Order

When in Doc Builder, the answer to the Dialog questions are “Yes,” “No” to create the “STANDARD PURCHASAE ORDER” clauses.

Lesson 5 Knowledge Check

- ❶ Blanket PO Agreements should be used in accordance with Regulation 19-445.2100 of the SC Consolidated Procurement Code and Policy for Use of Purchasing/Payment Document Types? (True/False)
- ❷ Blanket POs should be used in accordance with the Policy for Use of Purchasing/Payment Document Types? (True/False)
- ❸ Goods Receipt transactions (MIGO) are optional on Blanket POs? (True/False)

Lesson 5 Summary

- ④ You should be able to:
 - Understand the difference between a Blanket Agreement and a Blanket PO.
 - Create a Blanket Agreement with the appropriate clauses.
 - Create a Blanket PO with the appropriate clauses.



LESSON 6: CREATE A FRAMEWORK PURCHASE ORDER

Lesson 6 Learning Objectives

- Upon completion of this lesson, you should be able to:
 - Understand what makes a Framework PO different from Standard POs, Blanket POs, and Inventory POs.
 - Create a Framework PO.

A Framework PO:

- Process begins with the Buyer creating a Shopping Cart and then creating a Framework PO.
 - Purchasing → Purchasing → Create Documents → Shopping Cart
- Does not go through the normal Shopping Cart approval and workflow process.
- Requires a Product Category (5 digit – NIGP code), value limit, a required date, and a supplier number.
- Does not require a Goods Receipt.
- Does not require Account Assignment until time of payment (entered by Accounts Payable).

Create a Framework PO



uPerform Business Process Procedures (BPPs) related to this function are available at <http://www.sceis.sc.gov/page.aspx?id=272>.

SRM PUR Create a Framework Purchase Order

Lesson 6 Knowledge Check

- ① Framework POs are created from a Limit Shopping Cart? (True/False)
- ① Goods Receipt transactions (MIGO) are optional on Framework POs? (True/False)

Lesson 6 Summary

- 🌀 You should now understand:
 - The requirements of a Framework PO.
 - How to Create a Framework PO.



LESSON 7: ADDITIONS TO A PURCHASE ORDER

Lesson 7 Learning Objectives

- ① Upon completion of this lesson, you should be able to:
 - Understand the following additions to a PO.
 - Add Small Purchase Order Terms and Conditions from Document Builder
 - Add Vendor Text: Header and Line Item
 - Add Internal Note: Header and Line Item
 - Add an Attachment(s)
 - Add Conditions
 - Freight
 - Trade-in

Additions to a PO



uPerform Business Process Procedures (BPPs) related to this function are available at <http://www.sceis.sc.gov/page.aspx?id=272>.

- SRM PUR Add Small Purchase Order Terms and Conditions**
- SRM PUR Add Vendor Text – Line Item**
- SRM PUR Add Vendor Text – Header**
- SRM PUR Add Internal Note – Line Item**
- SRM PUR Add Internal Note – Header**
- SRM PUR Add Attachments**
- SRM PUR Add Conditions – Freight & Trade-In**

Lesson 7 Summary

- ④ You should now be able to add the following elements to a PO:
 - Small Purchase Order Terms and Conditions from Document Builder
 - Vendor Text: Header and Line Item
 - Internal Note: Header and Line Item
 - Attachments
 - Conditions
 - Freight
 - Trade-in

Lesson 7 Knowledge Check

- ① The file name of an Attachment can be no greater than 30 characters? (True/False)
- ① After adding Conditions to a PO you must **SAVE** the document, then click **EDIT**, and then **ORDER** the document? (True/False)



LESSON 8: EDIT A PURCHASE ORDER

Lesson 8 Learning Objectives

- Upon completion of this lesson, you should understand how to edit the following fields in a PO:
 - Account Assignment.
 - Add a Contract Number.
 - Add an Asset.
 - Add Split Fund Asset.
 - Change NIGP Code.
 - Change Vendor Prior to Order.
 - Delete a PO: Overview and/or Line Item.

Edit a Purchase Order



uPerform Business Process Procedures (BPPs) related to this function are available at <http://www.sceis.sc.gov/page.aspx?id=272>.

SRM PUR Edit Account Assignment

SRM PUR Add Contract Number

SRM PUR Add Asset

SRM PUR Add Split Fund Asset

SRM PUR Change NIGP Code

SRM PUR Change Supplier Prior to Order

SRM PUR Delete a PO: Overview and Line Item

Lesson 8 Summary

- You should now be able to edit a PO with the following:
 - Account Assignment.
 - Add a Contract Number.
 - Add an Asset.
 - Add Split Fund Asset.
 - Change NIGP Code Prior to Order.
 - Change a Vendor Prior to Order.
 - Delete a PO: Overview and/or Line Item.



LESSON 9: MANAGE NO FURTHER CONFIRMATION & NO FURTHER INVOICE

Lesson 9 Learning Objectives



SCEIS is validating the No Further Confirmation, No Further Invoice process.

Documentation to follow.

No Further Confirmation & No Further Invoice



uPerform Business Process Procedures (BPPs) related to this function are available at <http://www.sceis.sc.gov/page.aspx?id=272>.

SRM PUR Manage No Further Confirmation & No Further Invoice in a Line Item



LESSON 10: PRINT A PURCHASE ORDER

Lesson 10 Learning Objectives

- Upon completion of this lesson, you should be able to:
 - Generate a Print Preview of the PO to ensure all of the data is correct.
 - Print the PO.

Print a PO



uPerform Business Process Procedures (BPPs) related to this function are available at <http://www.sceis.sc.gov/page.aspx?id=272>.

SRM PUR Print Purchase Order

Lesson 10 Summary

- ① You should now be able to:
 - Generate a Print Preview of the PO to ensure all of the data is correct.
 - Print the PO.



LESSON 11: CREATE A STANDARD PURCHASE ORDER WITH RETENTION

Lesson 11 Learning Objectives

- Upon completion of this lesson, you should be able to:
 - Understand and Create Retention at the Header Level.
 - Understand and Create Retention at the Item Level.

uPerform Business Process Procedures (BPPs) related to this function are available at <http://www.sceis.sc.gov/page.aspx?id=272>.

SRM PUR Create Purchase Order with Retention – Header Level

SRM PUR Create Purchase Order with Retention – Item Level

Lesson 11 Summary

- 🌀 You should now be able to:
 - Create a PO with Retention at the Header level.
 - Create a PO with Retention at the Item level.



LESSON 12: CREATE AN INVENTORY PURCHASE ORDER

Lesson 12 Learning Objectives

- Upon completion of this lesson, you should understand:
 - The process flow of a request to replenish inventory.
 - How to display PO tracking.

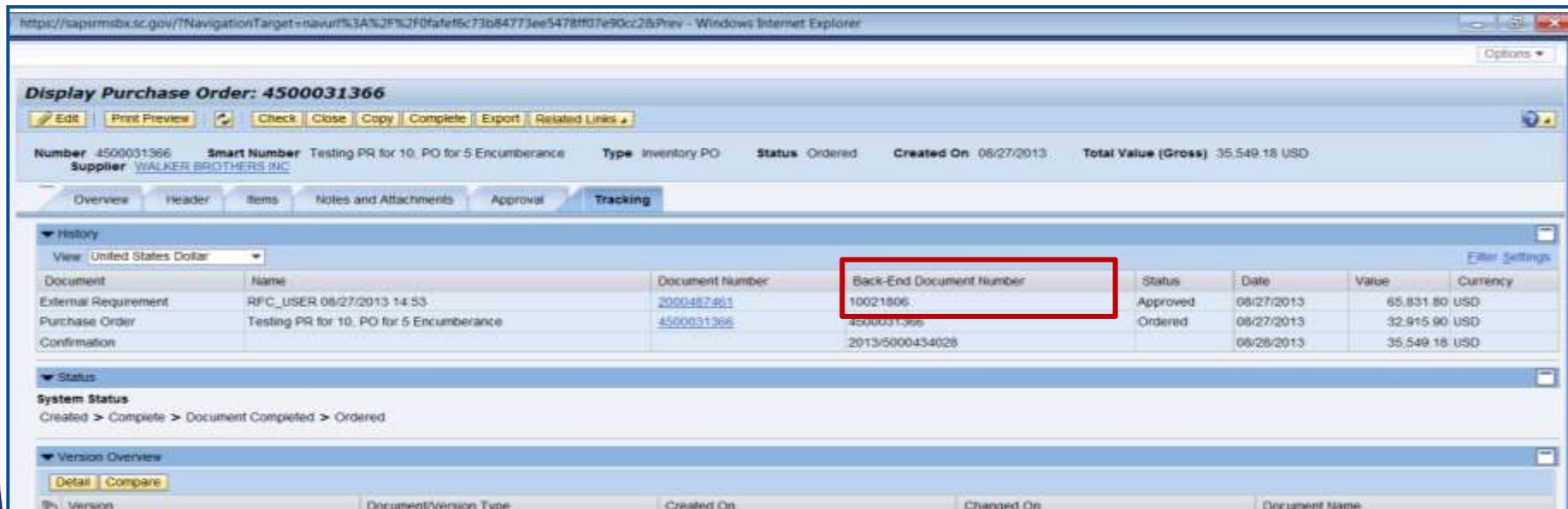
Replenishment of Inventory – Process Flow

- ① No change to the Inventory Staff
 - The Material Requirements Planning Controller (MRP Controller) will initiate the Purchase Requisition (PR) and the system converts the PR into a Shopping Cart.

- ② Procurement Receives Shopping Cart
 - Once a Shopping Cart is in SRM you will follow the process to Find/Display a Shopping Cart and Create a Purchase Order. The Transaction Type will still be Inventory PO, ZINV.

PO Tracking

In the Tracking tab, you can see that the “Back-End Document Number” column reflects the Purchase Requisition number created in ECC (10021806), which is then converted into a Shopping Cart Number, 2000487461.



Display Purchase Order: 4500031366

Number: 4500031366 Smart Number: Testing PR for 10, PO for 5 Encumbrance Type: Inventory PO Status: Ordered Created On: 08/27/2013 Total Value (Gross): 35,549.18 USD

Supplier: WALKER BROTHERS INC

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

▼ History

View: United States Dollar

Document	Name	Document Number	Back-End Document Number	Status	Date	Value	Currency
External Requirement	RFC_USER 08/27/2013 14:53	2000487461	10021806	Approved	08/27/2013	65,831.80 USD	
Purchase Order	Testing PR for 10, PO for 5 Encumbrance	4500031366	4500031366	Ordered	08/27/2013	32,915.90 USD	
Confirmation			2013/5000434028		08/28/2013	35,549.18 USD	

▼ Status

System Status
Created > Complete > Document Completed > Ordered

▼ Version Overview

Detail Compare

Version	Document/Version Type	Created On	Changed On	Document Name
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Lesson 12 Summary

- 🌀 You should now understand:
 - The process flow of a request to replenish inventory
 - How to display PO tracking



South Carolina Enterprise Information System

COURSE SUMMARY

STATE INFORMATION
TECHNOLOGY



SC BUDGET AND CONTROL BOARD

Course Summary

- You should now be able to:
 - Navigate in Supplier Relationship Management (SRM) 7.2.
 - Understand Transaction Types and Document Numbers in SRM.
 - Redistribute Workload.
 - Create a Standard Purchase Order (PO).
 - Create a Blanket Purchase Agreements and Blanket PO.

Course Summary cont.

- You should now be able to:
 - Create a Framework PO.
 - Perform Additions to PO.
 - Edit a PO.
 - Print a PO.
 - Understand Extended PO History.
 - Create a Standard PO with Retention at the Header and Item level.

Course Knowledge Check

- ① Complete the following statement:
 - Additional Text can be added to the Purchase Order?
 - a. At the Item level
 - b. At the Header level
 - c. Both (a) and (b)

Course Knowledge Check cont.

- ① How do you determine whether a Goods Receipt transaction has occurred against a Purchase Order?
 - a. Email your agency's finance department with return receipt requested and wait for a response.
 - b. Call the end user and ask them if they have the packing list.
 - c. Look under the Tracking tab on the Purchase Order.

Course Knowledge Check cont.

- ① Complete the following statement:
 - For vehicle purchases, tax needs to be set up as?
 - a. A separate line item on the PO for \$300.00
 - b. Indicate the item as taxable by selecting Tax Code/Amount “I1 – A/P Sales Tax” under “Items” and “General Data” tabs.

Course Knowledge Check cont.

- ① Where are freight charges added to the Purchase Order?
 - a. Under the “Ship To Address/Performance Location” tab in SRM.
 - b. As a “Condition” in the Purchase Order “Prices and Conditions” tab.

Course Knowledge Check cont.

- ① Complete the following statement:
 - It is a good idea to process the Open Encumbrance Report monthly because:
 - a. This will give you an idea of POs that may need to be expedited, deleted, or marked “No Further Confirmation” and “No Further Invoice.”
 - b. You may have Goods Receipts that have not been invoiced causing late payments to the vendors.
 - c. You can see the POs that need your attention regarding coordination with the ultimate user, the Supplier and PO Process Management (For example: processing Good Receipts, No Further Confirmations, No Further Invoicing or deleting).
 - d. All of the above.

Any Questions?



Next Steps



Additional Support and Reference Materials

- You can access additional support and print step-by-step procedures on the SCEIS uPerform website.

Go to the SCEIS website to view uPerform Business Process Procedures (BPPs) related to this course:
<http://www.sceis.sc.gov/page.aspx?id=272>

***Please complete the online course
evaluation in Blackboard.***

Your input will help to shape future
enhancements to the
SCEIS End User Training Program

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