



South Carolina Enterprise Information System

# SCEIS PURCHASING PROCESS

## PR215

End User Training  
Columbia, SC  
SRM 7.2 Upgrade  
September 22, 2014



# 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

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

# Course Agenda

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

# Course Agenda

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

# Course Agenda

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

# Course Learning Objectives

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- Upon completion of this course, you should be able to:
  - Navigate in Supplier Relationship Management (SRM) 7.2 and understand key terms and concepts.
  - Understand the SCEIS SRM 7.2 purchasing process.
  - Understand Transaction Types and Document Numbers in SRM.
  - Redistribute Workload.
  - Create various Purchase Order Transaction Types with the appropriate clauses.

# Course Learning Objectives cont.

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- Upon completion of this course, you should be able to:
  - Make additions to and edit a Purchase Order.
  - Print a Purchase Order.
  - Understand Extended Purchase Order History.
  - Create a Purchase Order with “Retention” at Header or Line Item Level.
  - Understand the Inventory Purchase Order Replenishment Process.





South Carolina Enterprise Information System

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

STATE INFORMATION  
TECHNOLOGY



SC BUDGET AND CONTROL BOARD

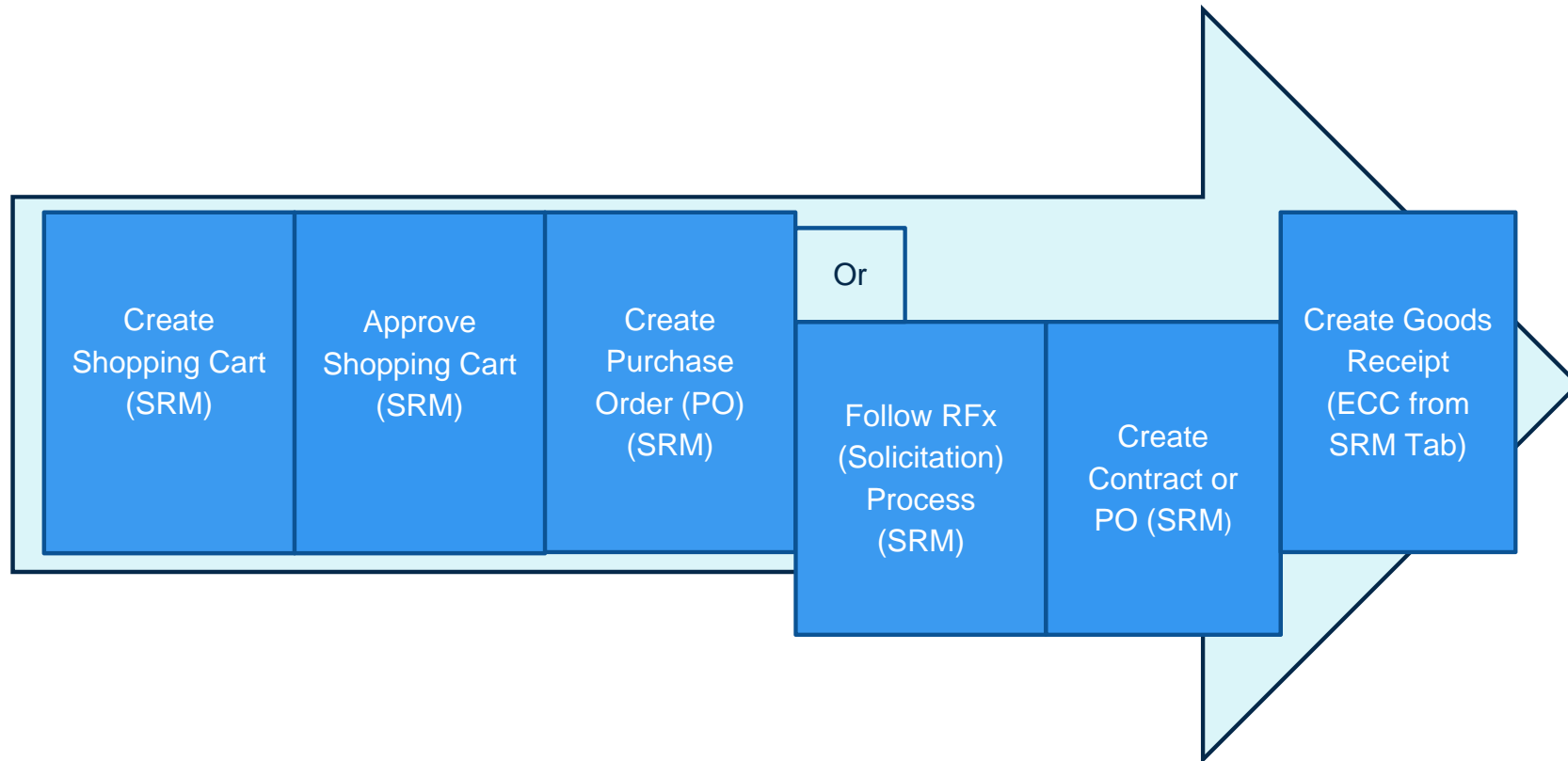
# Lesson 1 Learning Objectives

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- 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 Assign Sources of Supply: Step 1 (Select Requisitions) of Perform Sourcing

# 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 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. This also applies to Purchase Orders

## **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.

## **Matchcode**

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

## **Transaction Type**

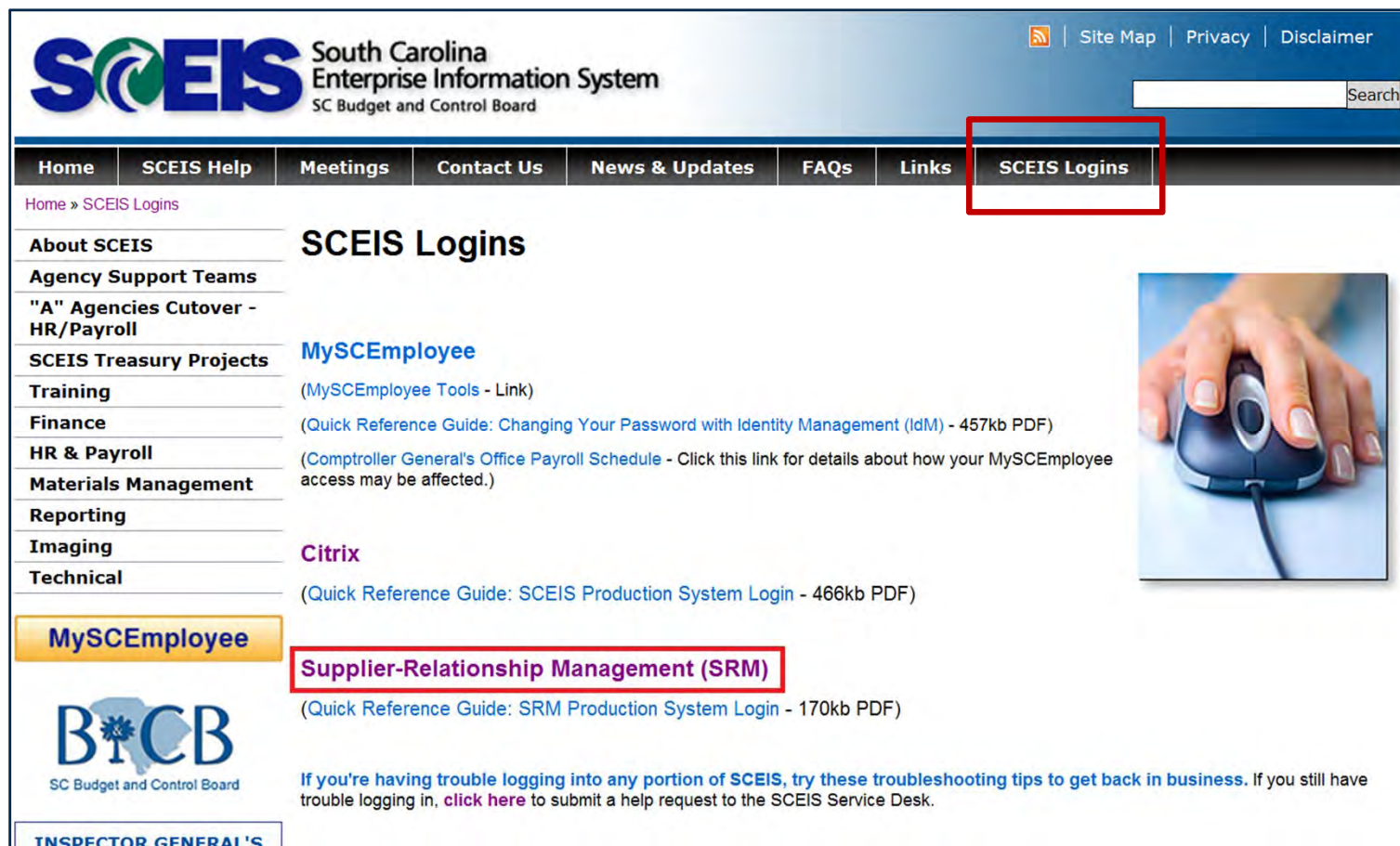
Dropdown of PO types which control the number ranges and lists the State's Document Types for selection when creating a PO.

## **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](http://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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## 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**

(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)**

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

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**

# Log-on

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



**SAP NetWeaver**

User \*

Password \*

**Log On**

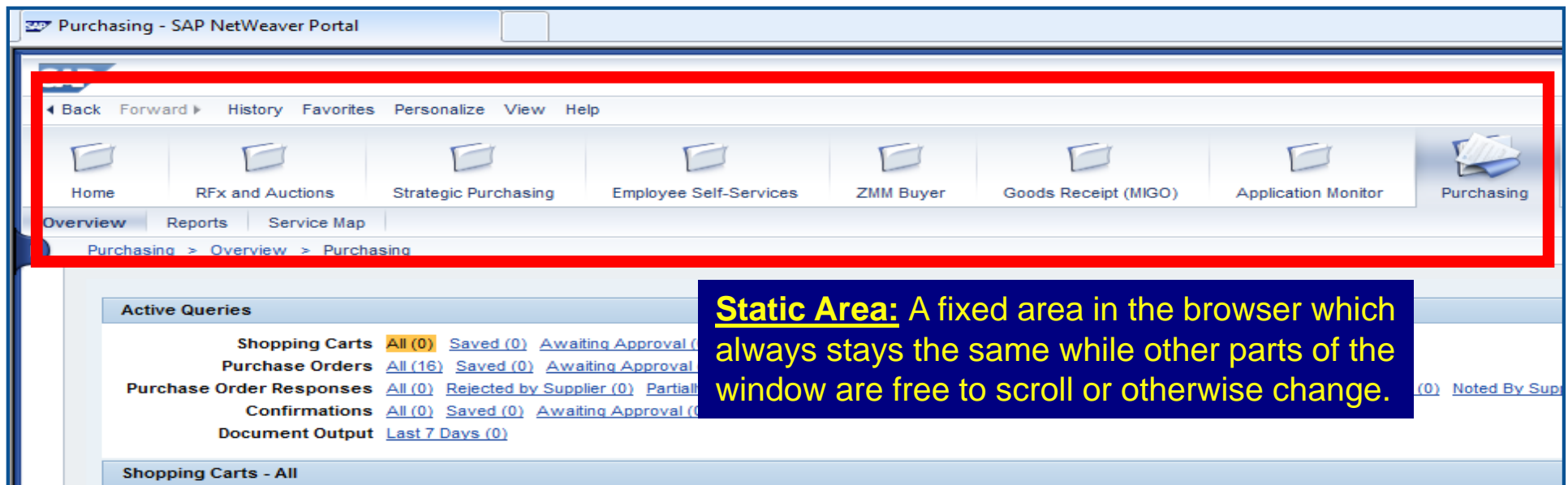
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# SRM Portal – Static Areas

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



The screenshot displays the SRM Portal interface. A red rectangular box highlights the navigation bar, which is a static area. This bar contains a set of navigation buttons: Home, RFx and Auctions, Strategic Purchasing, Employee Self-Services, ZMM Buyer, Goods Receipt (MIGO), Application Monitor, and Purchasing. Below the navigation bar, the main content area is visible, showing a table of active queries. A blue text box with yellow text is overlaid on the right side of the screenshot, defining the static area.

**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.

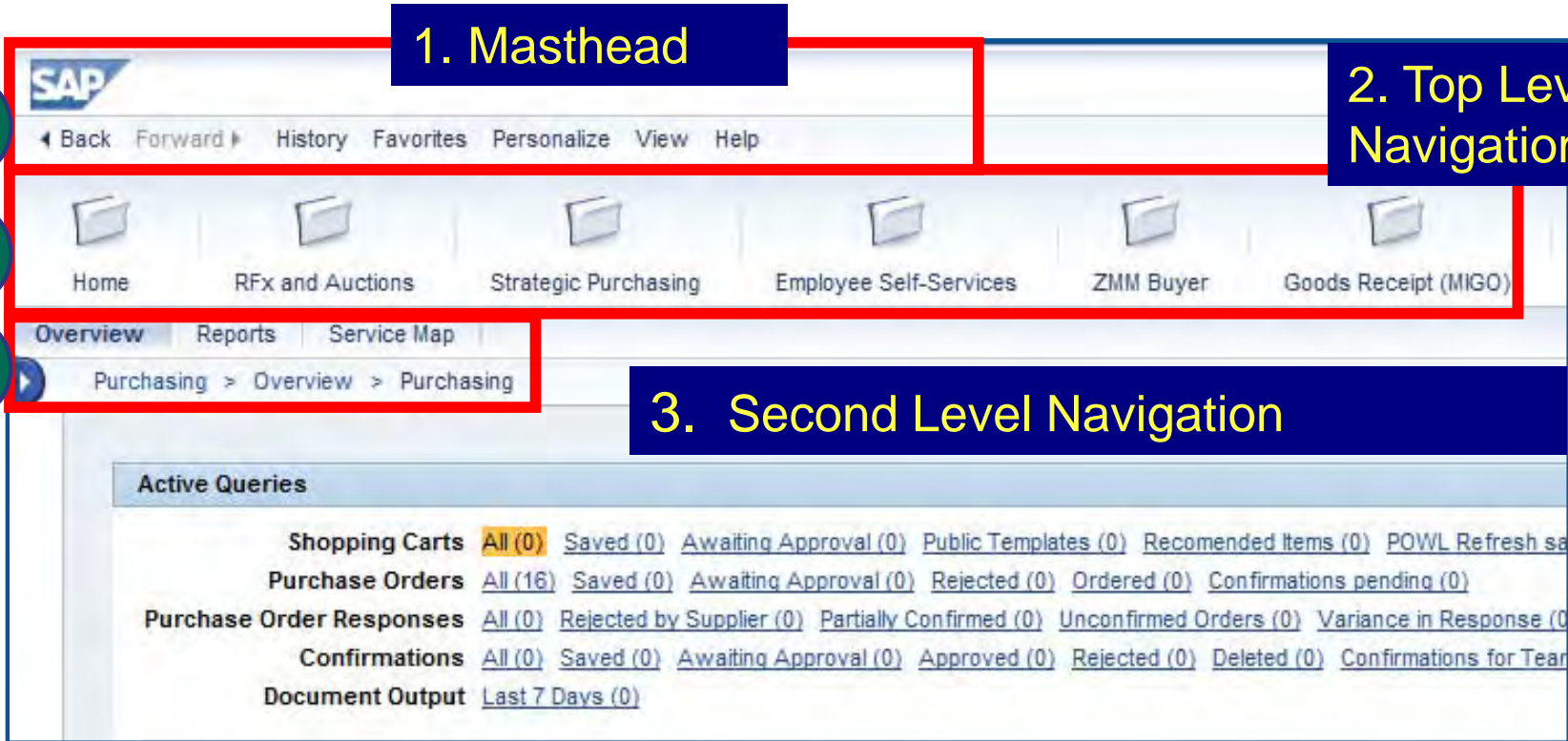
Active Queries	
Shopping Carts	All (0)   Saved (0)   Awaiting Approval (0)
Purchase Orders	All (16)   Saved (0)   Awaiting Approval (0)
Purchase Order Responses	All (0)   Rejected by Supplier (0)   Partially (0)
Confirmations	All (0)   Saved (0)   Awaiting Approval (0)
Document Output	Last 7 Days (0)

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



# SRM Portal – Static Areas

The static areas are:



**1. Masthead**

**2. Top Level Navigation (Folders)**

**3. Second Level Navigation**

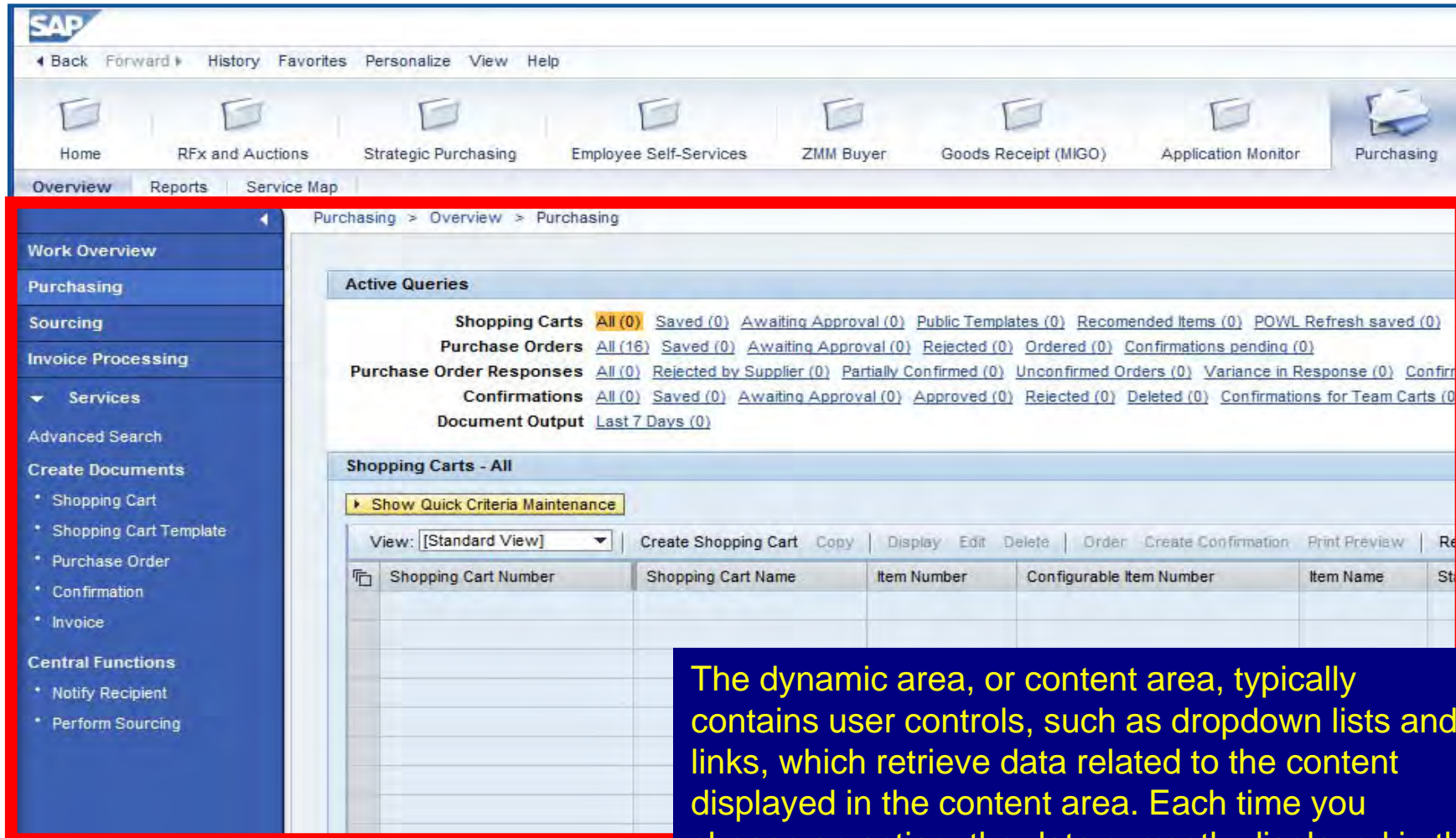
The screenshot shows the SRM Portal interface with the following elements:

- 1. Masthead:** The top section of the page, including the SAP logo and browser navigation buttons (Back, Forward, History, Favorites, Personalize, View, Help).
- 2. Top Level Navigation (Folders):** A row of folder icons representing main navigation areas: Home, RFX and Auctions, Strategic Purchasing, Employee Self-Services, ZMM Buyer, and Goods Receipt (MIGO).
- 3. Second Level Navigation:** A sub-navigation bar with tabs for Overview, Reports, and Service Map. Below this, a breadcrumb trail shows the current path: Purchasing > Overview > Purchasing.

**Active Queries**

<b>Shopping Carts</b>	<a href="#">All (0)</a>	<a href="#">Saved (0)</a>	<a href="#">Awaiting Approval (0)</a>	<a href="#">Public Templates (0)</a>	<a href="#">Recommended Items (0)</a>	<a href="#">POWL Refresh sa</a>	
<b>Purchase Orders</b>	<a href="#">All (16)</a>	<a href="#">Saved (0)</a>	<a href="#">Awaiting Approval (0)</a>	<a href="#">Rejected (0)</a>	<a href="#">Ordered (0)</a>	<a href="#">Confirmations pending (0)</a>	
<b>Purchase Order Responses</b>	<a href="#">All (0)</a>	<a href="#">Rejected by Supplier (0)</a>	<a href="#">Partially Confirmed (0)</a>	<a href="#">Unconfirmed Orders (0)</a>	<a href="#">Variance in Response (0)</a>		
<b>Confirmations</b>	<a href="#">All (0)</a>	<a href="#">Saved (0)</a>	<a href="#">Awaiting Approval (0)</a>	<a href="#">Approved (0)</a>	<a href="#">Rejected (0)</a>	<a href="#">Deleted (0)</a>	<a href="#">Confirmations for Tear</a>
<b>Document Output</b>	<a href="#">Last 7 Days (0)</a>						

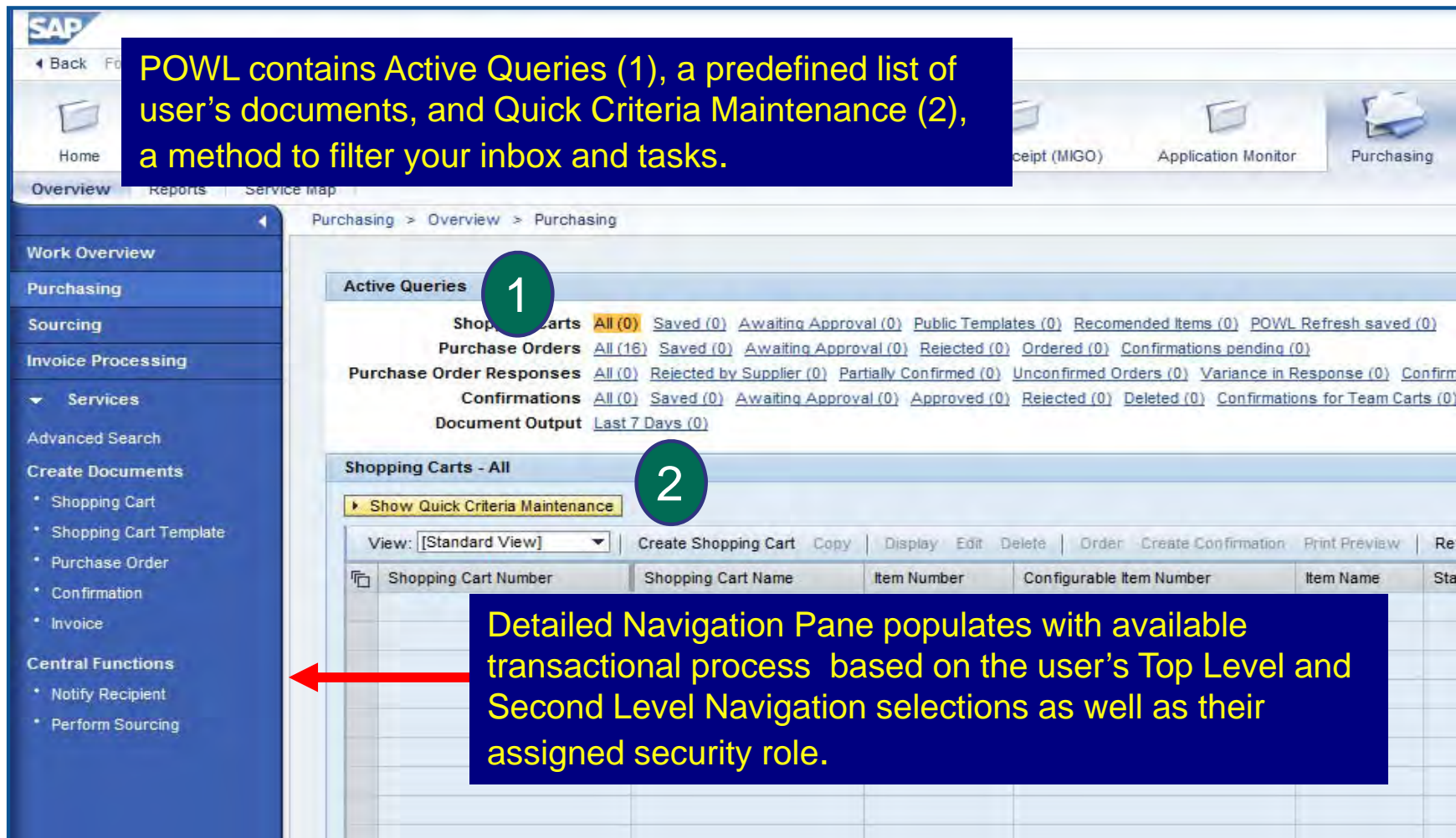
# SRM Portal – Dynamic Area



The screenshot displays the SAP SRM Portal interface. At the top, there is a navigation bar with links for Back, Forward, History, Favorites, Personalize, View, and Help. Below this is a menu of application areas: Home, RFX and Auctions, Strategic Purchasing, Employee Self-Services, ZMM Buyer, Goods Receipt (MIGO), Application Monitor, and Purchasing. The main content area is titled 'Purchasing > Overview > Purchasing' and features a left-hand navigation pane with categories like Work Overview, Purchasing, Sourcing, Invoice Processing, Services, Advanced Search, Create Documents, and Central Functions. The main content area includes an 'Active Queries' section 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.

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**

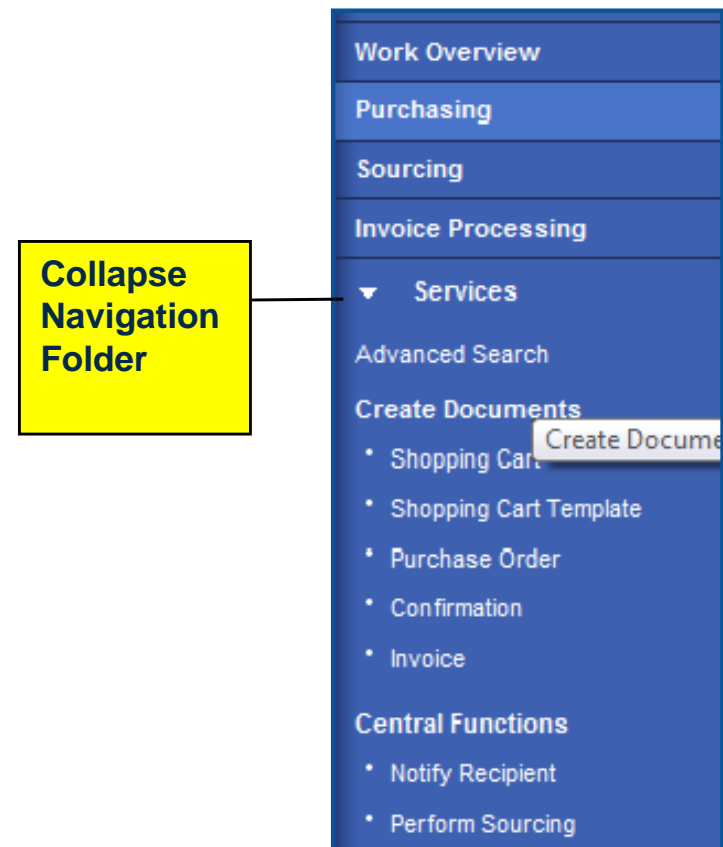
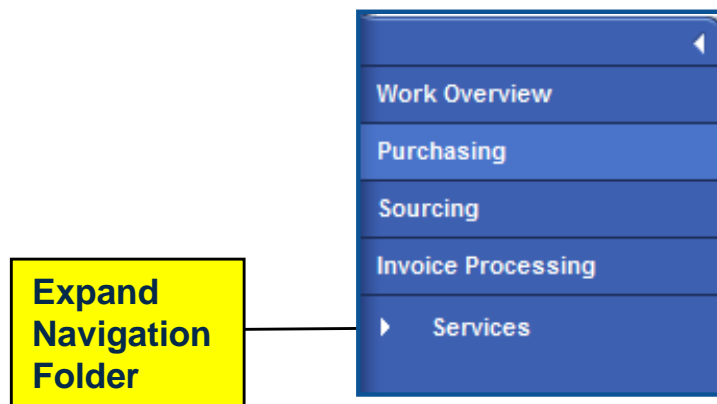
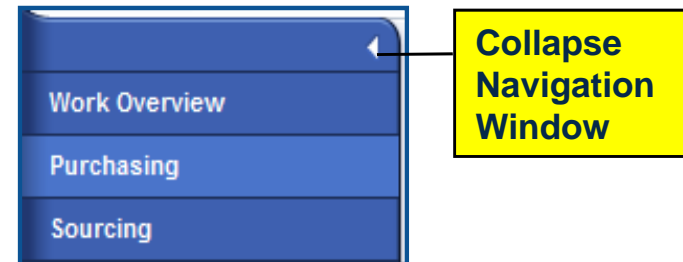
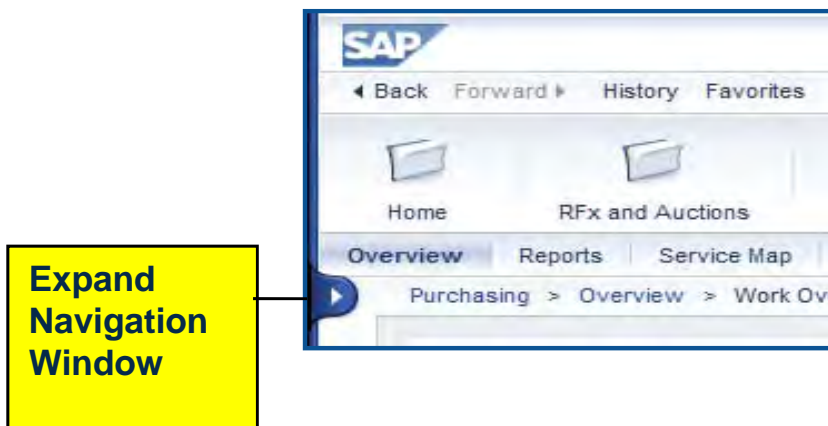
**2**

**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' and 'Shopping Carts - All'. The 'Active Queries' section includes links for 'Shopping Carts', 'Purchase Orders', 'Purchase Order Responses', 'Confirmations', and 'Document Output'. The 'Shopping Carts - All' section features a 'Show Quick Criteria Maintenance' button and a table with columns for 'Shopping Cart Number', 'Shopping Cart Name', 'Item Number', 'Configurable Item Number', and 'Item Name'. 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.



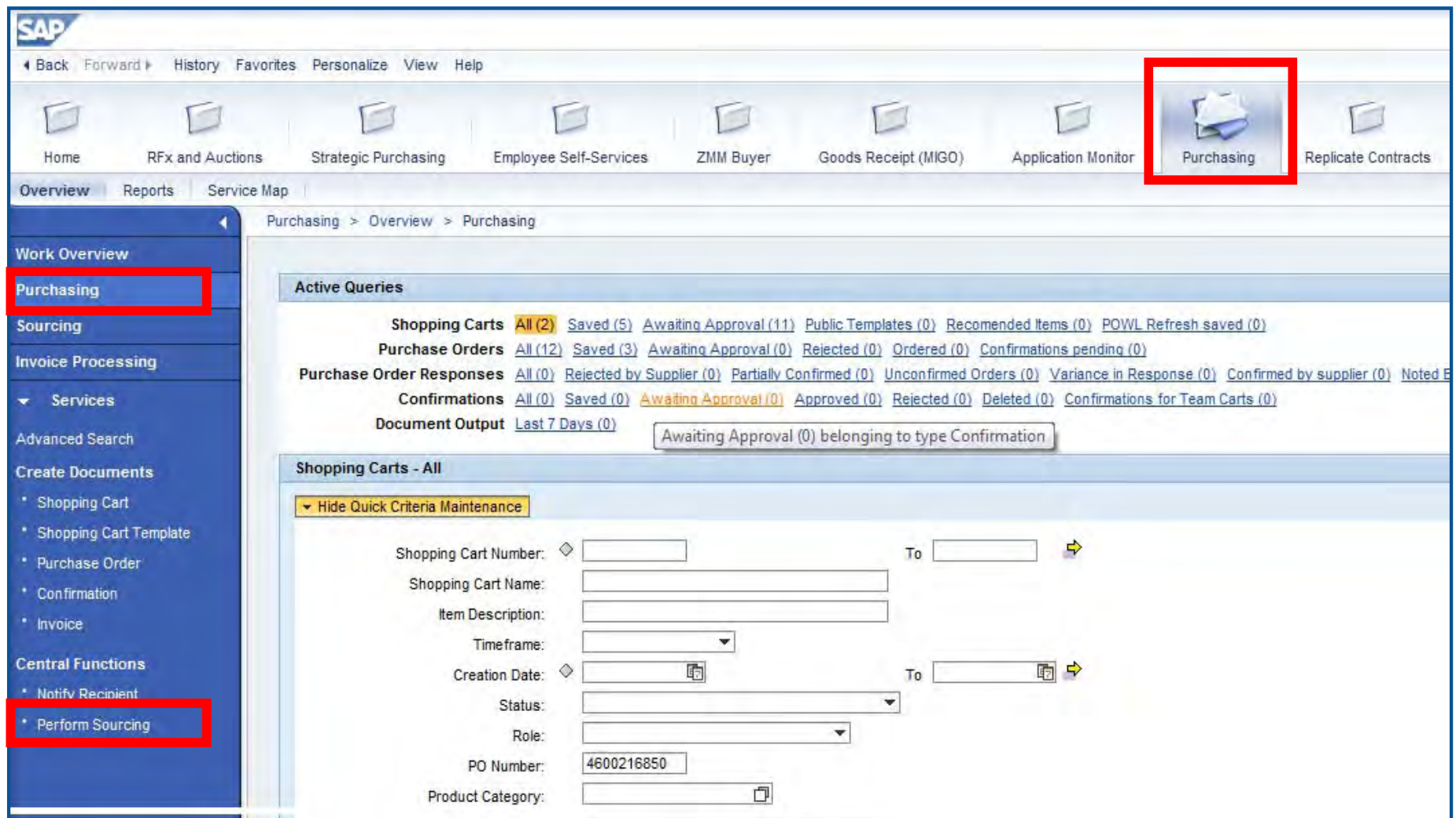


# PO Navigation

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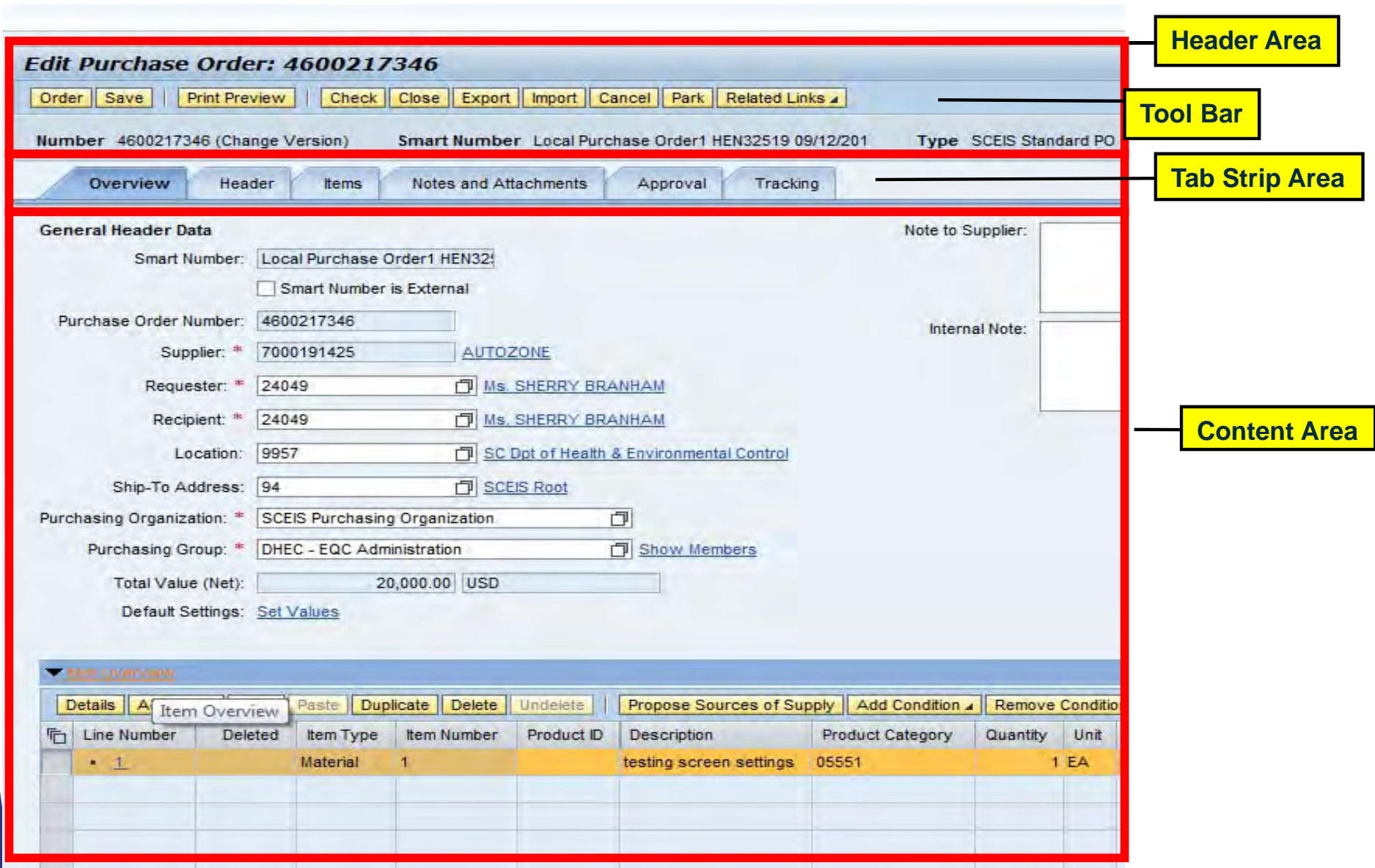
- ➊ After logging into SRM, folders will appear at the top of the screen.
- ➋ The number and name of the folders you see will depend on the security roles you have been assigned by your agency.
- ➌ The processes that appear on the navigation pane will correspond to the folder.
- ➍ To create Purchase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

# PO - Folder and Transaction Navigation



The screenshot displays the SAP Purchasing navigation interface. At the top, a navigation bar includes links for Back, Forward, History, Favorites, Personalize, View, and Help. Below this is a row of folder icons 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 main content area shows the breadcrumb path Purchasing > Overview > Purchasing. On the left, a navigation menu lists Work Overview, Purchasing (highlighted with a red box), Sourcing, Invoice Processing, Services, Advanced Search, Create Documents, and Central Functions. The main content area displays Active Queries 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, Item Description, Timeframe, Creation Date, Status, Role, PO Number, and Product Category.

# Navigation in SRM PO



The screenshot displays the 'Edit Purchase Order: 4600217346' interface. The interface is annotated with four yellow boxes and black lines:

- Header Area:** Points to the top section containing the title 'Edit Purchase Order: 4600217346' and a toolbar with buttons like 'Order', 'Save', 'Print Preview', 'Check', 'Close', 'Export', 'Import', 'Cancel', 'Park', and 'Related Links'.
- Tool Bar:** Points to the same toolbar area.
- Tab Strip Area:** Points to the navigation tabs: 'Overview', 'Header', 'Items', 'Notes and Attachments', 'Approval', and 'Tracking'.
- Content Area:** Points to the main data entry section, including 'General Header Data' and a table of items.

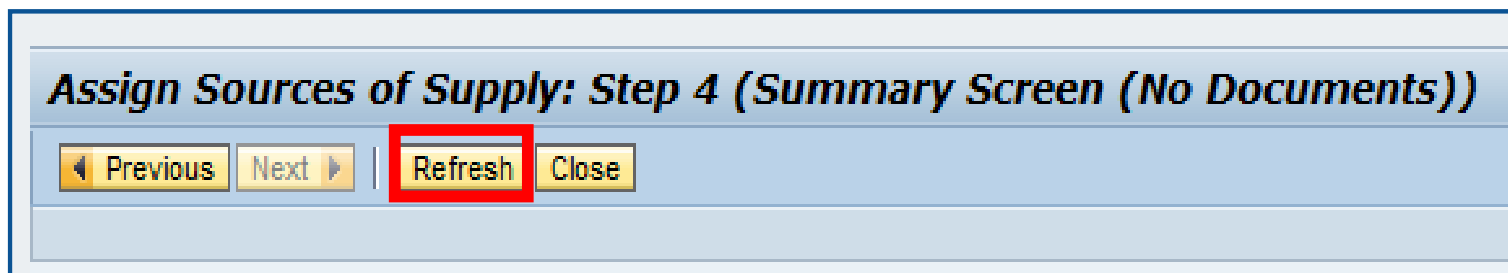
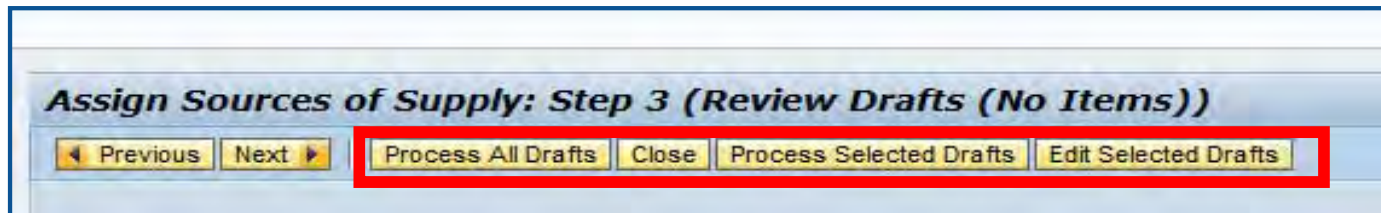
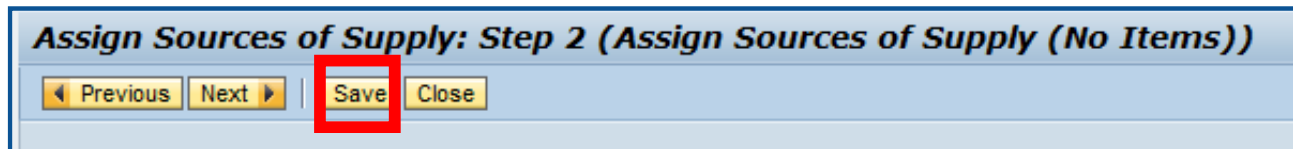
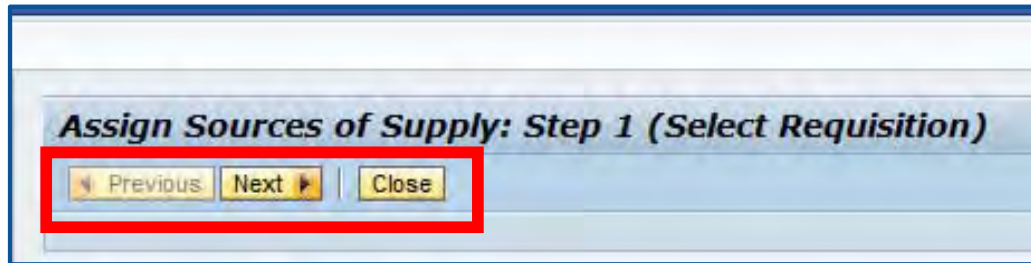
**General Header Data:**

- Smart Number: Local Purchase Order1 HEN32519 09/12/201
- 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

**Item Table:**

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

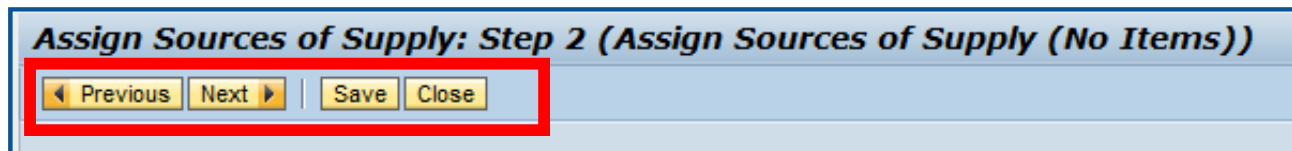
# Commonly Used Buttons in SRM





# Commonly Used Buttons in SRM

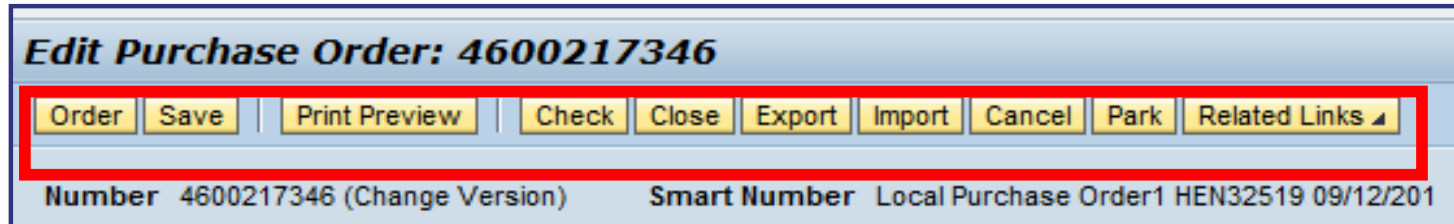
There are buttons located in the **Tool Bar Area** for each of the 4 steps to create a Purchase Order. Each step will have its set of buttons.



- **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.

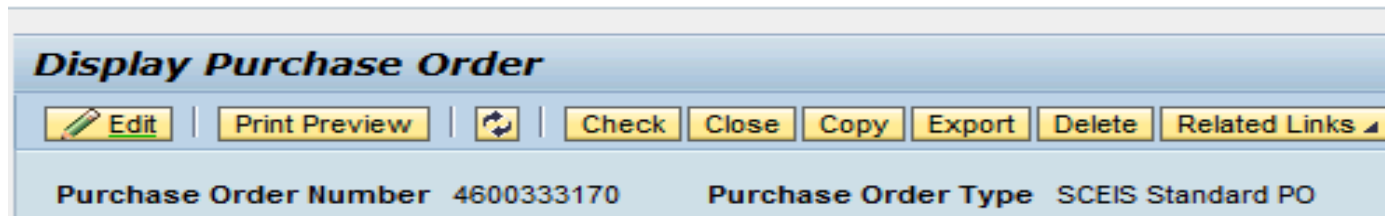
**Important Note:** If you do not see the word "Close," then use the red X to close a PO screen in SRM 7.2. Otherwise, do not use the red X to close a PO screen in SRM 7.2.


# Commonly Used Buttons in SRM



- **Order:** Click 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 check for errors.
- **Export:** Clicking this button allows you to export data into an Excel output of PO line items. **Export is not a SCEIS business process.**
- **Import:** Clicking this button imports data into a PO. Import is not a SCEIS business process.
- **Cancel:** This button cancels line item(s) in a PO at the Header Level and unencumbers the funds.
- **Park:** Use the “save” button. **Park is not a SCEIS business process.**
- **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 this button to modify a PO.
- **Print Preview:** Click this button to view the PO as it will appear when printed out.
- **Refresh Icon (  ):** Click this graphical button to refresh a PO and view the most up-to-date details.
- **Check:** Click here to check for errors.
- **Close:** Click this button to close the current view.

# 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)**

Options ▾

Previous Next Close System Info Create Memory Snapshot

1 2 3 4

Select Requisition Assign Sources of Supply (No Items) Review Drafts (No Items) Summary Screen (No Documents)

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

Hide Quick Help

▼ Search Criteria: Requisitions

Number of Requisition:

Item Description:

Product:

Requester:

Purchasing Organization:

Purchasing Group:  DOC - Procurement Director

Priority:

Delivery Date Range:

Delivery Date:  To:

Name of Requisition:

Product Category:

Supplier:

External Requirement:

Account Assignment Category:

Account Assignment Number:

Intended for Grouping:

Include Locked Items:

Settings

Search

Select All Expand Collapse Hide Subordinate Outlines Search for Requisitions

Requisition / Item Number	Description	Category	Priority	Quantity	Unit	Requester	Delivery Date	Supplier Number	Supplier Name	Contract	Info Record	Manufacturer Part Number	Manufacturer
---------------------------	-------------	----------	----------	----------	------	-----------	---------------	-----------------	---------------	----------	-------------	--------------------------	--------------

# 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 search parameters. The 'Start Screen Settings' section has 'Default Search' selected. The 'Start Search Upon Opening Application' checkbox is checked and highlighted with a red box. The 'Default Search Values' section contains various input fields for search criteria.

**Settings**

Define how initial search screen must start  
Define default search values; you can also define values when search starts upon opening the screen

**Start Screen Settings**

- No Preselection
- Own Purchasing Group
- Default Search

Start Search Upon Opening Application

**Default Search Values**

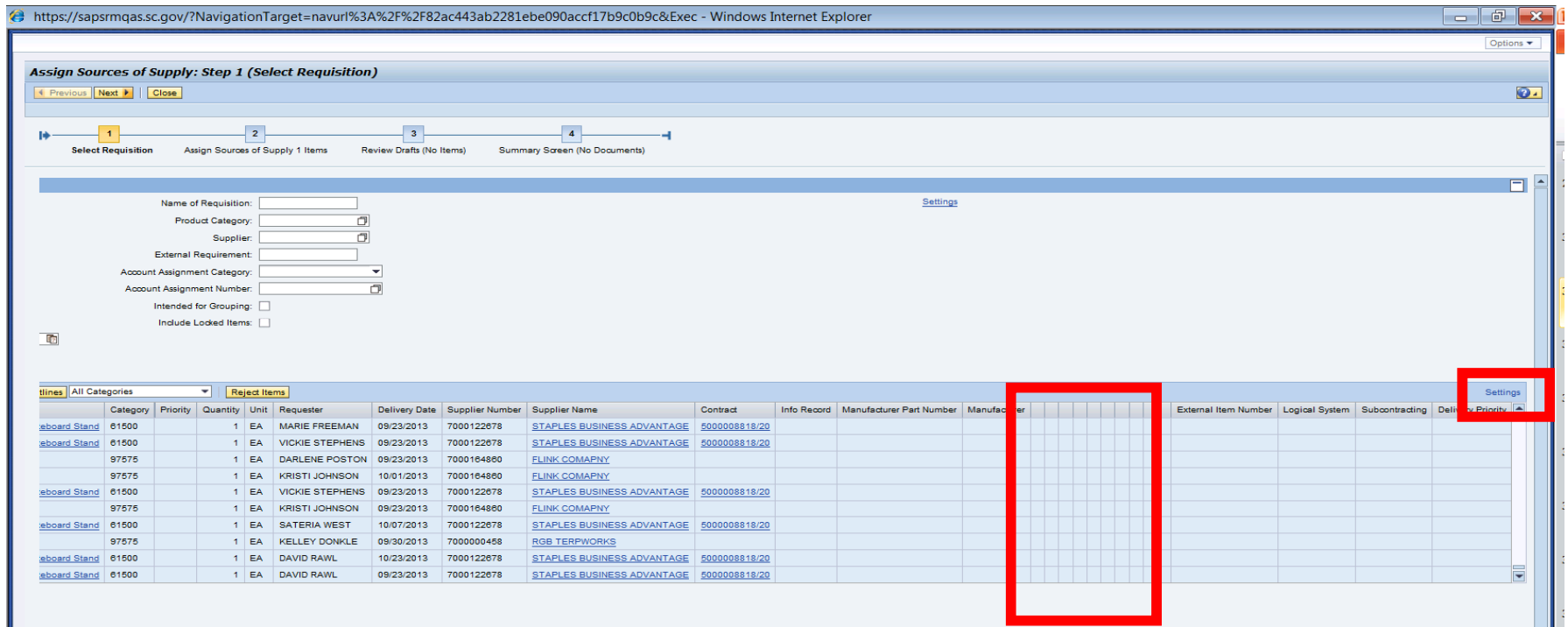
Number of Requisition:	<input type="text"/>	Name of Requisition:	<input type="text"/>
Item Description:	<input type="text"/>	Product Category:	<input type="text"/>
Product:	<input type="text"/>	Supplier:	<input type="text"/>
Requester:	<input type="text"/>	External Requirement:	<input type="text"/>
Purchasing 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"/>

Apply Cancel

# 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,” which is available in SCEIS uPerform.



Assign Sources of Supply: Step 1 (Select Requisition)

Previous Next Close

1 2 3 4

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

Name of Requisition:

Product Category:

Supplier:

External Requirement:

Account Assignment Category:

Account Assignment Number:

Intended for Grouping:

Include Locked Items:

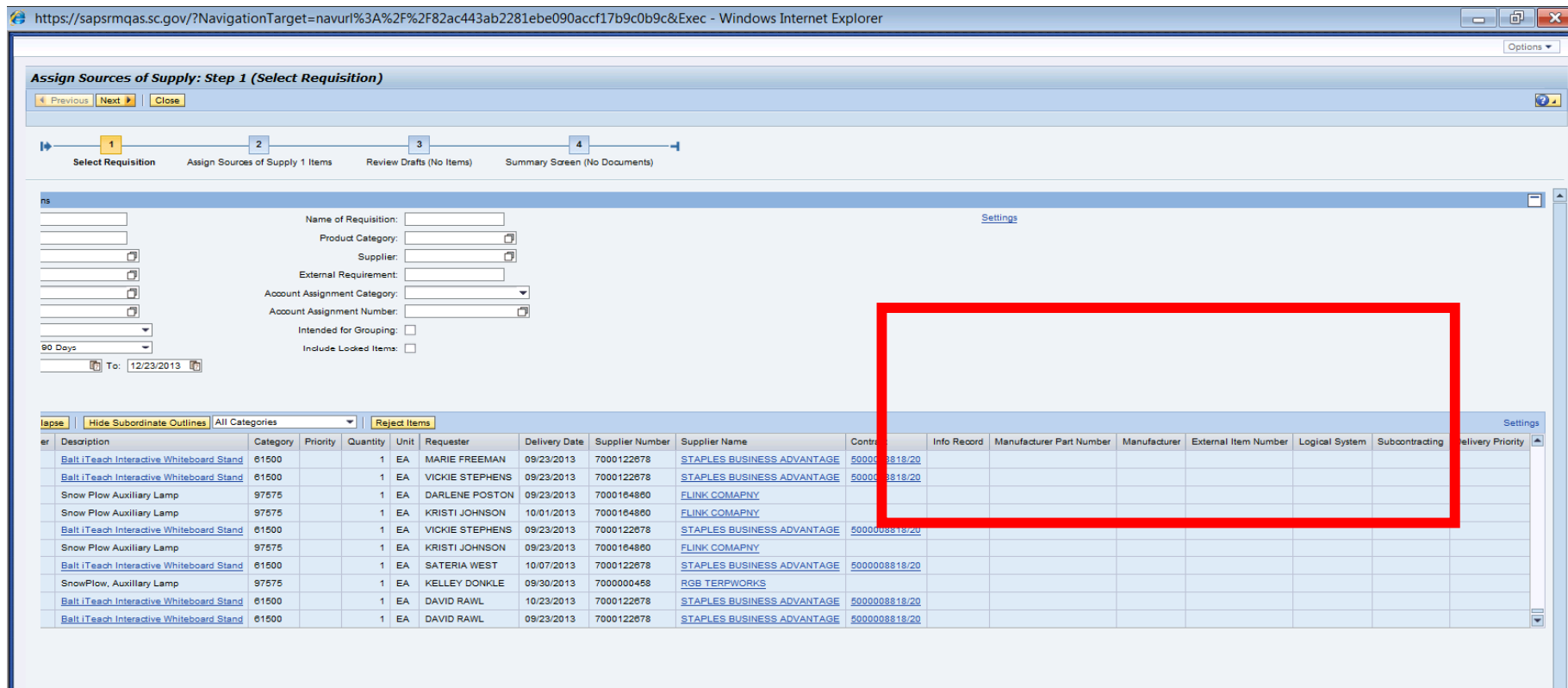
Settings

lines	All Categories	Reject Items	Category	Priority	Quantity	Unit	Requester	Delivery Date	Supplier Number	Supplier Name	Contract	Info Record	Manufacturer Part Number	Manufacturer	External Item Number	Logical System	Subcontracting	Delivery Priority
board Stand			61500		1	EA	MARIE FREEMAN	09/23/2013	7000122678	STAPLES BUSINESS ADVANTAGE	5000008818/20							
board Stand			61500		1	EA	VICKIE STEPHENS	09/23/2013	7000122678	STAPLES BUSINESS ADVANTAGE	5000008818/20							
			97575		1	EA	DARLENE POSTON	09/23/2013	7000164880	FLINK COMPANY								
			97575		1	EA	KRISTI JOHNSON	10/01/2013	7000164880	FLINK COMPANY								
board Stand			61500		1	EA	VICKIE STEPHENS	09/23/2013	7000122678	STAPLES BUSINESS ADVANTAGE	5000008818/20							
			97575		1	EA	KRISTI JOHNSON	09/23/2013	7000164880	FLINK COMPANY								
board Stand			61500		1	EA	SATERIA WEST	10/07/2013	7000122678	STAPLES BUSINESS ADVANTAGE	5000008818/20							
			97575		1	EA	KELLEY DONKLE	09/30/2013	7000000458	RGB TERPWORKS								
board Stand			61500		1	EA	DAVID RAWL	10/23/2013	7000122678	STAPLES BUSINESS ADVANTAGE	5000008818/20							
board Stand			61500		1	EA	DAVID RAWL	09/23/2013	7000122678	STAPLES BUSINESS ADVANTAGE	5000008818/20							

# 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	Requester	Delivery Date	Supplier Number	Supplier Name	Contract	Info Record	Manufacturer Part Number	Manufacturer	External Item Number	Logical System	Subcontracting	Delivery Priority
Balt iTeach Interactive Whiteboard Stand	61500		1	EA	MARIE FREEMAN	09/23/2013	7000122678	STAPLES BUSINESS ADVANTAGE	5000008818/20							
Balt iTeach Interactive Whiteboard Stand	61500		1	EA	VICKIE STEPHENS	09/23/2013	7000122678	STAPLES BUSINESS ADVANTAGE	5000008818/20							
Snow Plow Auxiliary Lamp	97575		1	EA	DARLENE POSTON	09/23/2013	7000164860	FLINK COMAPNY								
Snow Plow Auxiliary Lamp	97575		1	EA	KRISTI JOHNSON	10/01/2013	7000164860	FLINK COMAPNY								
Balt iTeach Interactive Whiteboard Stand	61500		1	EA	VICKIE STEPHENS	09/23/2013	7000122678	STAPLES BUSINESS ADVANTAGE	5000008818/20							
Snow Plow Auxiliary Lamp	97575		1	EA	KRISTI JOHNSON	09/23/2013	7000164860	FLINK COMAPNY								
Balt iTeach Interactive Whiteboard Stand	61500		1	EA	SATERIA WEST	10/07/2013	7000122678	STAPLES BUSINESS ADVANTAGE	5000008818/20							
SnowPlow, Auxiliary Lamp	97575		1	EA	KELLEY DONKLE	09/30/2013	7000000468	RGB TERPWORKS								
Balt iTeach Interactive Whiteboard Stand	61500		1	EA	DAVID RAWL	10/23/2013	7000122678	STAPLES BUSINESS ADVANTAGE	5000008818/20							
Balt iTeach Interactive Whiteboard Stand	61500		1	EA	DAVID RAWL	09/23/2013	7000122678	STAPLES BUSINESS ADVANTAGE	5000008818/20							



# Lesson 1 Summary

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- 🌀 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 Assign Sources of Supply: Step 1 (Select Requisitions) of Perform Sourcing



# Lesson 1 Knowledge Check

---

- ④ All procurement processes can be accessed through SRM. (True/False)
- ④ The SRM Portal requires one central point of entry. (True/False)
- ④ “Close” is a commonly used button for the Tool Bar Area of SRM. (True/False)
- ④ A user’s document history is available through the Personalized Object Work List. (True/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)



South Carolina Enterprise Information System

# LESSON 2: TRANSACTION TYPES AND DOCUMENT NUMBERS IN SRM

STATE INFORMATION  
TECHNOLOGY



SC BUDGET AND CONTROL BOARD

# 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

- Transaction Types in SRM are defined in the “Policy for Use of Purchasing/Payment Document Types,” referred to as “Document Types.”
- Once a Transaction Type is selected and the PO number is assigned in SRM, the Transaction Type cannot be changed.
  - If you created a PO using the wrong Transaction Type the corrective action is 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 Case Management System PO Doc Types begin with 43.
    - 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 reports.
  - Recognize PO Document Numbers.

# Lesson 2 Knowledge Check

---

- ❶ A SCEIS State Standard PO created in SRM begins with 46. (True/False)
- ❷ Once a Transaction Type is selected and the PO number is assigned in SRM, the Transaction Type **cannot** be changed. (True/False)
- ❸ If a PO was created with the wrong Transaction Type, the corrective action is to? Delete the PO and start a new.





South Carolina Enterprise Information System

# LESSON 3: REDISTRIBUTE WORKLOAD

STATE INFORMATION  
TECHNOLOGY



SC BUDGET AND CONTROL BOARD

# Lesson 3 Learning Objectives

---

- Upon completion of this lesson, you should understand:
  - Workload Redistribution.
  - Why we perform Workload Redistribution.
  - How to redistribute a Shopping Cart.

# Workload Redistribution

- What is Workload Redistribution?
  - External Requirements (inventory purchase requisitions) and Shopping Carts are automatically assigned to a Purchasing Group via Org Structure and SCEIS Master Data configuration.
- Why Workload Redistribution?
  - You will use Workload Redistribution to redistribute Shopping Carts among other purchasers in your agency, or
  - If a Shopping Cart exceeds your agency's procurement authorization you will redistribute the Shopping Cart to MMO/ITMO.

# 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, there is a navigation bar with the SAP logo and a menu with options: Back, Forward, History, Favorites, Personalize, View, and Help. Below this is a folder navigation bar with icons for 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 box. Below the folder navigation bar is a sub-navigation bar with tabs for Overview, Reports, and Service Map. The main content area shows the breadcrumb path: Strategic Purchasing > Overview > Workload Redistribution. On the left side, there is a vertical menu with the following items: Work Overview, Strategic Sourcing, Contract Management, Business Partner, Workload Redistribution (highlighted with a red box), Strategic Sourcing, Contract Management, and Workload Redistribution. The main content area is titled 'SRM Application' and contains a search bar for documents. Below the search bar, there are search criteria fields: Document Types, Requirements (checkbox), Status (dropdown menu with 'All' selected), Purchasing Organization (dropdown menu with 'SCEIS Pu' selected), Purchasing Group (dropdown menu with 'SCEIS Te' selected), Document Number (text input field), and Delivery Date / Validity Period / Submission Deadline (text input field).

# uPerform Information – Redistribute Workload

---



**uPerform Business Process Procedure (BPP) related to this function is available at**

**<https://uperform.sc.gov/gm/folder-1.11.3882>**

**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:
  - Know how and why we perform Workload Redistribution
  - Redistribute a Shopping Cart

# Lesson 3 Knowledge Check

---

You will use Workload Redistribution (a) to redistribute Shopping Carts among other purchasers in your agency and (b) to redistribute the Shopping Cart to MMO/ITMO if a Shopping Cart exceeds your agency's procurement authorization. (True/False)





South Carolina Enterprise Information System

# LESSON 4: CREATE A STANDARD PURCHASE ORDER

STATE INFORMATION  
TECHNOLOGY



SC BUDGET AND CONTROL BOARD

# 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 POs.
  - Understand where to find Extended PO History and Tracking.

# Lesson 4 Learning Objectives cont.



- ④ Upon completion of this Lesson, you should be able to:
  - Understand how taxes are selected in the Shopping Cart and potentially changed in the PO.
  - Understand that SCEIS encumbers funds upon creation of a PO with the status of “Ordered”.
  - 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

---



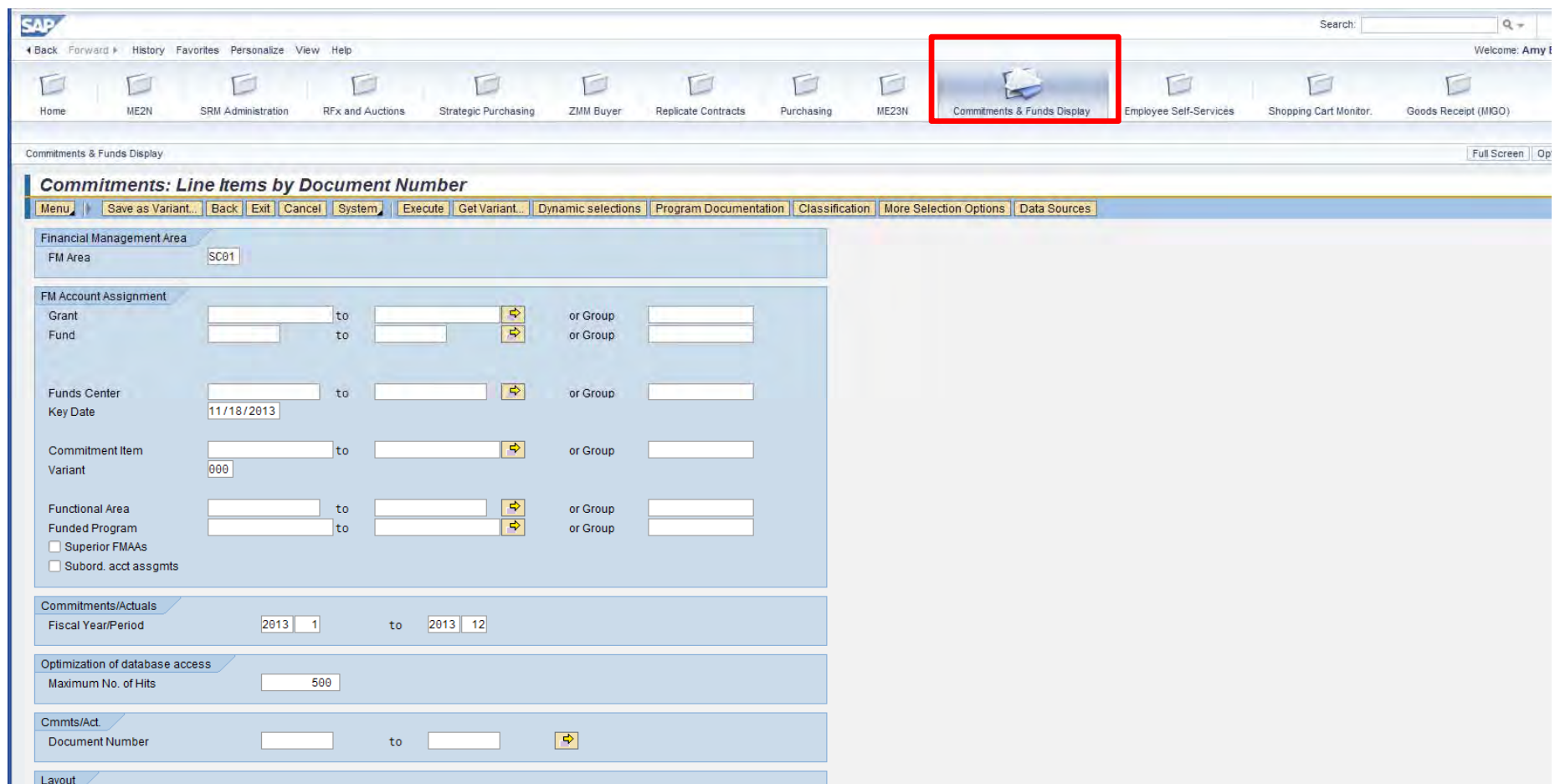
**uPerform Business Process Procedure (BPP) related to this function is available at <http://uperform.sc.gov/gm/folder-1.11.3882>.**

**SRM PUR Create Standard Purchase Order**

**Exercise 1: Create a Standard Purchase Order**

# Verifying Encumbrance via Commitments & Funds Display

In SRM 7.2, the PO Encumbrance can be found in the Commitment and Funds Display folder in the Top Level Navigation Pane.



The screenshot displays the SAP SRM 7.2 user interface. At the top, the navigation pane shows several folders, with 'Commitments & Funds Display' highlighted by a red box. Below the navigation pane, the main content area is titled 'Commitments: Line Items by Document Number'. This area contains several input fields and buttons for configuring the display, including 'Financial Management Area', 'FM Account Assignment', 'Commitments/Actuals', and 'Optimization of database access'.

Financial Management Area  
FM Area: SC01

FM Account Assignment  
Grant: [ ] to [ ] or Group: [ ]  
Fund: [ ] to [ ] or Group: [ ]  
Funds Center: [ ] to [ ] or Group: [ ]  
Key Date: 11/18/2013  
Commitment Item: [ ] to [ ] or Group: [ ]  
Variant: 000  
Functional Area: [ ] to [ ] or Group: [ ]  
Funded Program: [ ] to [ ] or Group: [ ]  
 Superior FMAAs  
 Subord. acct assgmts

Commitments/Actuals  
Fiscal Year/Period: 2013 1 to 2013 12

Optimization of database access  
Maximum No. of Hits: 500

Cmmts/Act.  
Document Number: [ ] to [ ]

Layout

# Verifying Encumbrance via Commitments & Funds Display

To begin the process the user must update the Commitments/Actuals – Fiscal Year/Period to the current Fiscal Year/Period.

Commitments & Funds Display

### Commitments: Line Items by Document Number

Menu | Save as Variant... | Back | Exit | Cancel | System | Execute | Get Variant... | Dynamic selections | Program Documentation | Classification | More Selection Options | Data Sources

**FM Account Assignment**

Grant: [ ] to [ ] or Group: [ ]  
Fund: [ ] to [ ] or Group: [ ]

Funds Center: [ ] to [ ] or Group: [ ]  
Key Date: 09/08/2014

Commitment Item: [ ] to [ ] or Group: [ ]  
Variant: 000

Functional Area: [ ] to [ ] or Group: [ ]  
Funded Program: [ ] to [ ] or Group: [ ]

Superior FMAAs  
 Subord. acct assgnts

**Commitments/Actuals**

Fiscal Year/Period: 2014 1 to 2014 12

**Optimization of database access**


Maximum No. of Hits: 500

**Cmmnts/Act.**

Document Number: 4600333186 to [ ]

**Layout**

Layout: [ ]  Variant fields only

 The list contains no data



# Verifying Encumbrance via Commitments & Funds Display

You do not have to enter an exact date you just need to make sure the document was created within the document range.

**Commitments: Line Items by Document Number**

Menu | Save as Variant... | Back | Exit | Cancel | System | Execute | Get Variant... | Dynamic selections | Program Documentation | Classification | More Selection Options | Data Sources

**Financial Management Area**  
FM Area: SC01

**FM Account Assignment**  
Grant: [ ] to [ ] or Group: [ ]  
Fund: [ ] to [ ] or Group: [ ]  
Funds Center: [ ] to [ ] or Group: [ ]  
Key Date: 11/18/2013  
Commitment Item: [ ] to [ ] or Group: [ ]  
Variant: 000  
Functional Area: [ ] to [ ] or Group: [ ]  
Funded Program: [ ] to [ ] or Group: [ ]  
 Superior FMAAs  
 Subord. acct assgnts

**Commitments/Actuals**  
Fiscal Year/Period: 2013 1 to 2014 12

**Optimization of database access**  
Maximum No. of Hits: 500

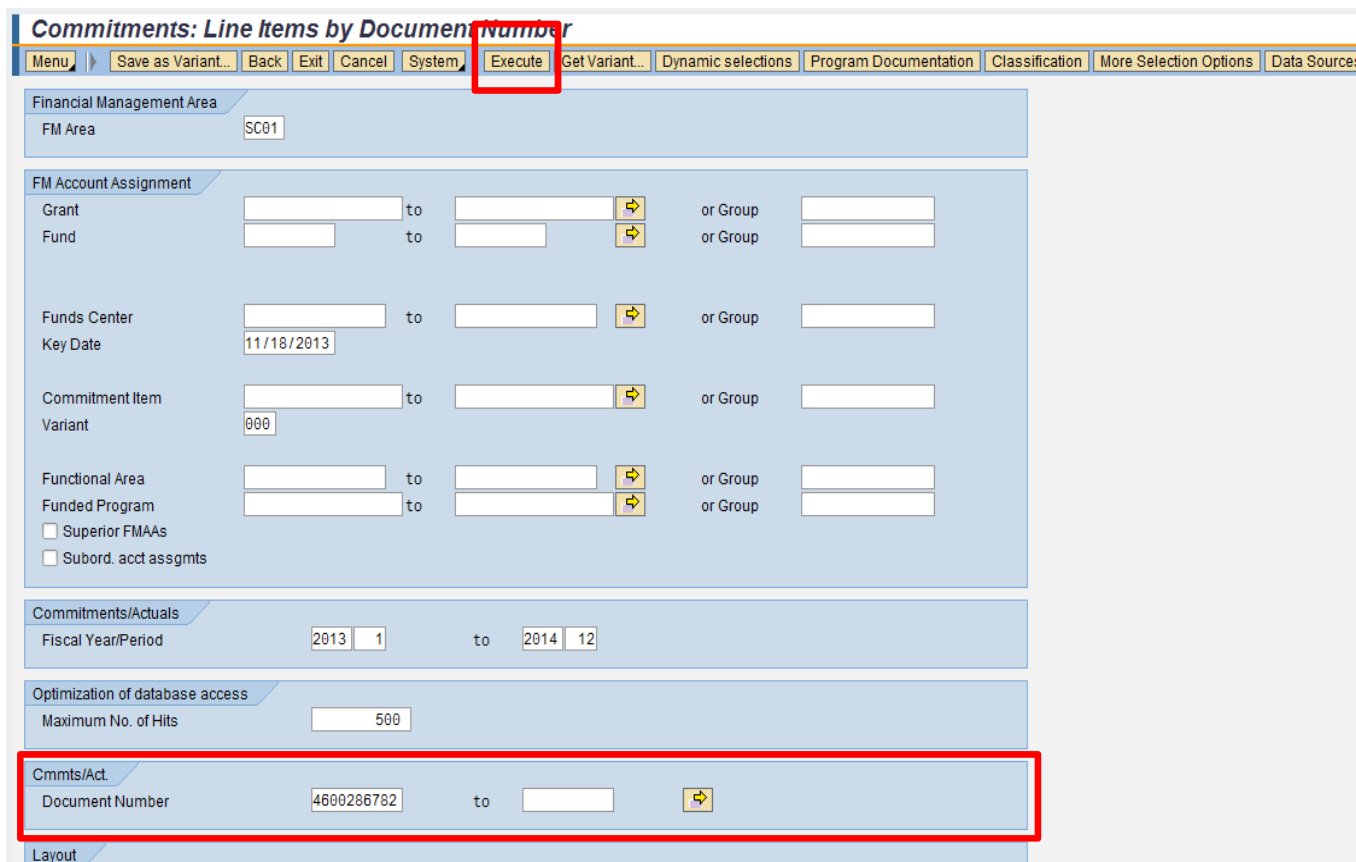
**Cmmts/Act.**  
Document Number: [ ] to [ ]

**Layout**

# Verifying Encumbrance via Commitments & Funds Display

If you know the Purchase Order Number enter it in the Commts/Acts. – Document Number field then click Execute.

Hint: Hitting Enter on your keyboard will not Execute the transaction!



**Commitments: Line Items by Document Number**

Menu | Save as Variant... | Back | Exit | Cancel | System | **Execute** | Get Variant... | Dynamic selections | Program Documentation | Classification | More Selection Options | Data Sources

Financial Management Area  
FM Area: SC01

FM Account Assignment

Grant: [ ] to [ ] or Group: [ ]  
Fund: [ ] to [ ] or Group: [ ]

Funds Center: [ ] to [ ] or Group: [ ]  
Key Date: 11/18/2013

Commitment Item: [ ] to [ ] or Group: [ ]  
Variant: 000

Functional Area: [ ] to [ ] or Group: [ ]  
Funded Program: [ ] to [ ] or Group: [ ]

Superior FMAAs  
 Subord. acct assgmts

Commitments/Actuals  
Fiscal Year/Period: 2013 1 to 2014 12

Optimization of database access  
Maximum No. of Hits: 500

**Cmmts/Act.**  
Document Number: 4600286782 to [ ]

Layout

# Verifying Encumbrance via Commitments & Funds Display



The Commitments Line Items by Document Number for PO 4600286782:

Purchase Orders	51	10/22/2013	4600286782	0150	Change	6.00-	5031510000	J1203JC000	J120_C000	34660000	NOT RELEVANT	Beckman MHC Admin	MOTOR VEHICLE SUPP	7000140142			4	004/2014	10/22/2013	10/2
Purchase Orders	51	10/22/2013	4600286782	0150	Change	0.18	5031510000	J1203JC000	J120_C000	34660000	NOT RELEVANT	Beckman MHC Admin	MOTOR VEHICLE SUPP	7000140142			4	004/2014	10/22/2013	10/2
Purchase Orders	51	10/22/2013	4600286782	0150	Change	0.18-	5031510000	J1203JC000	J120_C000	34660000	NOT RELEVANT	Beckman MHC Admin	MOTOR VEHICLE SUPP	7000140142			4	004/2014	10/22/2013	10/2
Purchase Orders	51	10/22/2013	4600286782	0150	Change	0.18	5031510000	J1203JC000	J120_C000	34660000	NOT RELEVANT	Beckman MHC Admin	MOTOR VEHICLE SUPP	7000140142			4	004/2014	10/22/2013	10/2
Purchase Orders	51	10/22/2013	4600286782	0150	Change	2.00	5031510000	J1203JC000	J120_C000	34660000	NOT RELEVANT	Beckman MHC Admin	MOTOR VEHICLE SUPP	7000140142			4	004/2014	10/22/2013	10/2
Purchase Orders	51	10/22/2013	4600286782	0150	Change	2.00-	5031510000	J1203JC000	J120_C000	34660000	NOT RELEVANT	Beckman MHC Admin	MOTOR VEHICLE SUPP	7000140142			4	004/2014	10/22/2013	10/2
Purchase Orders	51	10/22/2013	4600286782	0150	Change	2.00	5031510000	J1203JC000	J120_C000	34660000	NOT RELEVANT	Beckman MHC Admin	MOTOR VEHICLE SUPP	7000140142			4	004/2014	10/22/2013	10/2
				1		34.05														
						34.05	2014													
						34.05														

# Understand the Tax Value in a Purchase Order



The Tax Value is displayed in the Header tab, then General Data.

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

<b>Identification</b>		<b>Currency, Values and Pricing</b>
Smart Number: MMUTHUK 07/05/2013 00:00		Currency: USD
<input type="checkbox"/> Smart Number is External		Total Value (Net): 12,097.90 US
Purchase Order Number: 4600216645		Total Value (Gross): 13,065.73 US
Corresponding Novation Purchase Order: <input type="text"/>		<b>Tax Value:</b> 967.83 US
Purchase Order Type: SCEIS Standard PO		
Reason Code: <input type="text"/>		

**Service and Delivery**  
Commitment Documents: [Display](#)

**Status and Statistics**  
Document Date: 07/05/2013

**Organization**

# Understand the Tax Value is Edited in the Items tab



The Tax Value is edited in the Items tab.

The screenshot displays the 'Change Purchase Order' interface in a web browser. The browser address bar shows the URL: <https://sapsrmqas.sc.gov/?NavigationTarget=navurl%3A%2F%2F0fafef6c73b84773ee5478ff07e90cc2&Prev>. The page title is 'Change Purchase Order'. The interface includes a menu bar with options: Read Only, Order, Save, Print Preview, Check, Close, Export, Import, Cancel, Park, Delete, and Related Links. The main header displays: Purchase Order Number 4600286462 (Change Version), Purchase Order Type SCEIS Standard PO, Status Saved, Document Date 10/01/2013, and Total Value (Gross) 140.40 USD. The Supplier is listed as RGB TERPWORKS. The 'Items' tab is selected and highlighted. The 'Items' tab contains several sections: Product ID, Description (Chains and Traction Belts, Tire), Product Category (05515 Chains and Traction Belts Tire), Catalog, Contract / Item (0), Further Properties (Supplier Product Number, Manufacturer Part Number, External Manufacturer, Subcontracting, Reason Code), 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 (1:A/P Sales Tax, 10.40 USD), Service and Delivery (Delivery Date, Tolerance Group, Underdelivery/Overdelivery Tolerance, Storage Location, Acceptance at Origin), and Status and Statistics (Item Deleted, Closeout Status, Cancelled). The 'Tax Code / Amount' field is highlighted with a red box, and a dropdown menu is open showing options: 1:A/P Sales Tax, 10:A/P Tax Exempt, 11:A/P Sales Tax, and U1:A/P Self Assessment Use Tax.

# Lesson 4 Knowledge Check

- ④ You want every Purchase Order to end up with a Status of Ordered. (True/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 You will find all of the approved Shopping Carts for you to source in Perform Sourcing. (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

---

- 🌀 You should now be able to:
  - Define the 4 steps to create a PO.
  - Find a “Requisition” in SRM.
  - Navigate through SRM to create POs.
  - Understand where to find Extended PO History and Tracking.
  - Understand that SCEIS encumbers funds upon creation of a PO with the status of “Ordered”.



# Lesson 4 Summary

---

- 🌀 You should now be able to:
  - Understand how taxes are selected in the Shopping Cart and potentially changed in the PO.
  - Understand the importance of the Status of a Purchase Order.



South Carolina Enterprise Information System

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

STATE INFORMATION  
TECHNOLOGY



SC BUDGET AND CONTROL BOARD

# Lesson 5 Learning Objectives

---

- ④ Upon completion of this Lesson, you should be able to:
  - Find a “Requisition” that has been approved in your SRM’s Perform Sourcing. (Lesson 4)
  - Understand the difference between a Blanket Agreement and a Blanket PO.
  - Determine when and how to apply the appropriate clauses.
  - Create a PO regardless of the Transaction Type with the appropriate clauses.

# 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.
- 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 Procedure (BPP) related to this function is available at <http://uperform.sc.gov/gm/folder-1.11.3882>.**

**SRM PUR Create a Blanket Agreement**

## **Exercise 2: Create a Blanket Agreement**

**Helpful Hint: 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 Procedure (BPP) related to this function is available at <http://uperform.sc.gov/gm/folder-1.11.3882>.**

**SRM PUR Create a Blanket Purchase Order**

## **Exercise 3: Create a Blanket Purchase Order**

**Helpful Hint: When in Doc Builder, the answer to the Dialog questions are “Yes,” “No” to create the “STANDARD PURCHASE ORDER” clauses for other PO Transaction Types.**

# Lesson 5 Knowledge Check

---

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



# Lesson 5 Summary

---

- ④ You should be able to:
  - Find a “Requisition” that has been approved in your SRM’s Perform Sourcing. (Lesson 4)
  - Understand the difference between a Blanket Agreement and a Blanket PO.
  - Determine when and how to apply the appropriate clauses.
  - Create a PO, regardless of the Transaction Type, with the appropriate set of clauses.



South Carolina Enterprise Information System

# LESSON 6: CREATE A FRAMEWORK PURCHASE ORDER

STATE INFORMATION  
TECHNOLOGY



SC BUDGET AND CONTROL BOARD

# Lesson 6 Learning Objectives

---

- Upon completion of this lesson, you should be able to:
  - Understand what makes a Framework PO different from Standard PO, Blanket PO, and Inventory PO.
  - Understand the Framework PO process.
  - Understand where to find the Framework uPerform, SRM PUR Create a Framework Purchase Order

# Framework PO

## A Framework PO:

- Process begins with the **Buyer** creating a “Limit Item” Shopping Cart and then creating a Framework PO.
  - Purchasing → Purchasing → Create Documents → Shopping Cart → Add Item → Limit Item
- Is not created through the normal SRM 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 encumber funds.**

## A Framework PO:

- Does not create an actual Line Item in ECC. The Line Item in ECC is a virtual Line Item.
- Does not generate any data on the ECC's "Delivery" tab, as a result the "Delivery Complete" checkbox is not even present in ECC.
- The Line Item you see in ECC is an aggregate, a composite of tables from the SCEIS "back-end" system.
- Cannot process a Goods Receipt because of the lack of a real Line Item. The virtual Line Item prevents any Confirmation/Goods Receipt.

# Framework PO

---

- 🔄 A Framework PO:
  - Cannot be linked to a contract because of the virtual Line Item.

# Create a Framework PO

---



**uPerform Business Process Procedure (BPP)  
related to this function is available at  
<http://uperform.sc.gov/gm/folder-1.11.3882>.**

**SRM PUR Create a Framework Purchase Order**

# Lesson 6 Knowledge Check

---

- ① Framework POs are created from a Limit Item Shopping Cart? (True/False)
- ① A Goods Receipt transaction (MIGO) is mandatory on a Framework PO? (True/False)
- ① A Framework PO can be linked to a contract? (True/False)



# Lesson 6 Summary

---

- ④ You should now understand:
  - What makes a Framework PO different from Standard PO, Blanket PO, and Inventory PO.
  - Understand the Framework PO process.
  - Understand where to find the Framework uPerform, SRM PUR Create a Framework Purchase Order



South Carolina Enterprise Information System

# LESSON 7: ADDITIONS TO A PURCHASE ORDER

STATE INFORMATION  
TECHNOLOGY



SC BUDGET AND CONTROL BOARD

# Lesson 7 Learning Objectives

- 🌀 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://uperform.sc.gov/gm/folder-1.11.3882>.**

**SRM PUR Add Small Purchase Order Terms and Conditions**  
**SRM PUR Add Vendor Text at Line Item**  
**SRM PUR Add Vendor Text at Header**  
**SRM PUR Add Internal Note at Line Item**  
**SRM PUR Add Internal Note at Header**  
**SRM PUR Add Attachment**  
**SRM PUR Add Conditions to Purchase Order**

# Lesson 7 Summary

---

- ④ You should now be able to add the following 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

- ④ The file name of an Attachment can be no greater than 30 characters? (True/False)
- ④ After adding Conditions to a PO you must **SAVE** the document, then click **EDIT**, and then **ORDER** the document? (True/False)
- ④ NIGP Code/Product Category, 96286, Miscellaneous Services: Transportation of Goods and Other Freight Services is a suitable NIGP Code/Product Category to use if Freight is created as a Line Item on a PO? (True/False)



South Carolina Enterprise Information System

# LESSON 8: EDIT A PURCHASE ORDER

STATE INFORMATION  
TECHNOLOGY



SC BUDGET AND CONTROL BOARD

# Lesson 8 Learning Objectives

---

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



# Edit a Purchase Order



**uPerform Business Process Procedures (BPPs) related to this function are available at <http://uperform.sc.gov/gm/folder-1.11.3882>.**

**SRM PUR Add Contract Number to Purchase Order  
Prior to Order**

**SRM PUR Add Asset in Purchase Order**

**SRM PUR Add Split Fund Asset**

**SRM PUR Change NIGP Code in Purchase Order  
Prior to Order**

**SRM PUR Change Supplier in Purchase Order  
Prior to Order**

**SRM PUR Delete Purchase Order at Header**

**SRM PUR Delete Purchase Order at Line Item**

# Lesson 8 Summary

---

- You should now be able to edit a PO with the following:
  - Add a Contract Number.
  - Add an Asset.
  - Add Split Fund Asset.
  - Change NIGP Code Prior to Order.
  - Change a Vendor Prior to Order.
  - Delete Purchase Order at Header.
  - Delete Purchase Order at Line Item.



South Carolina Enterprise Information System

# LESSON 9: MANAGE NO FURTHER CONFIRMATION, NO FURTHER INVOICE & LOCK

STATE INFORMATION  
TECHNOLOGY



SC BUDGET AND CONTROL BOARD

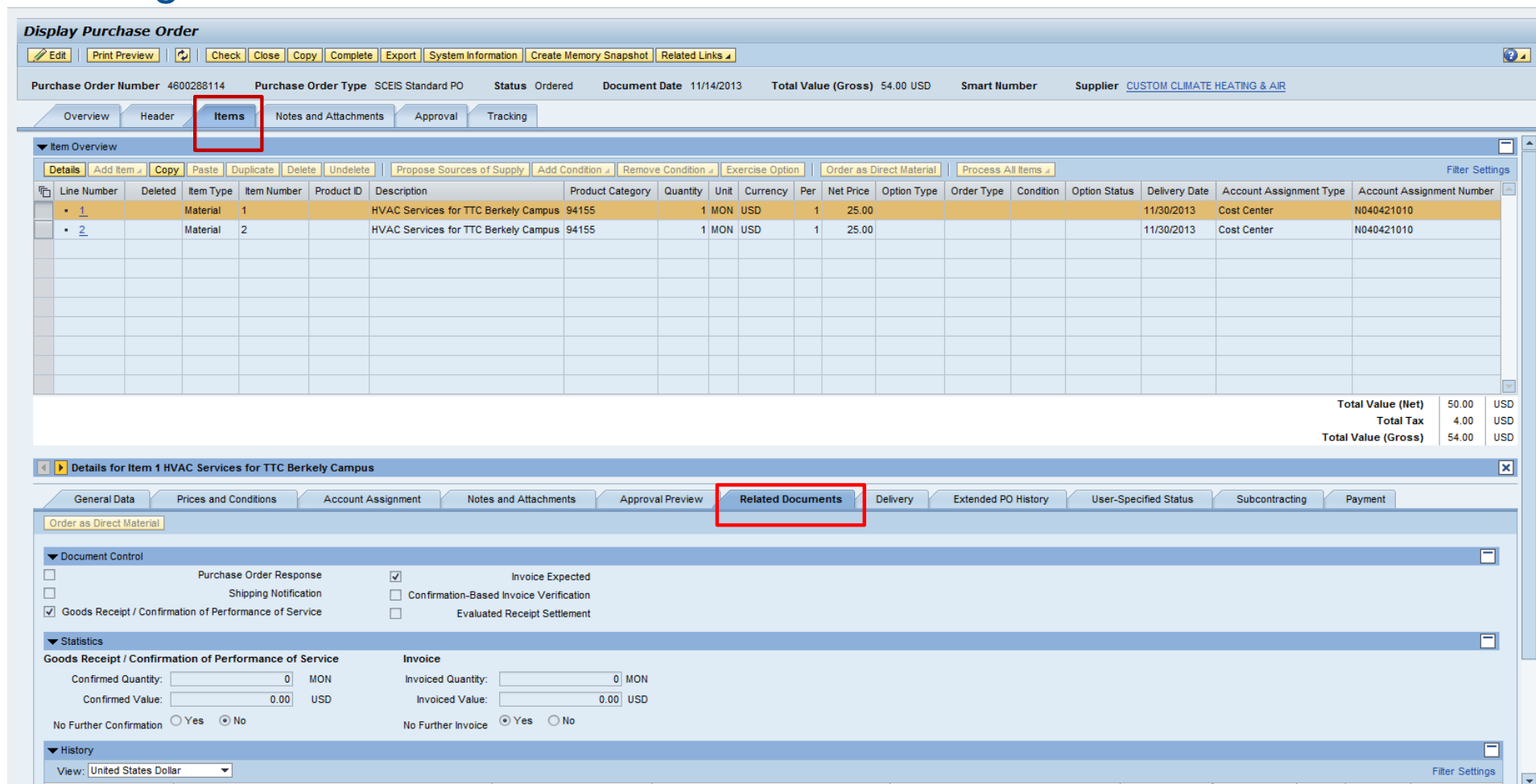
# Lesson 9 Learning Objectives

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- Upon completion of this lesson, you should understand how to manage a line item for No Further Confirmation, No Further Invoice and Lock, and the effect to ECC.
  - Process a line item for No Further Confirmation, No Further Invoice and/or Lock.
  - Use the ME23N folder to verify that the transaction produced the desired results.
  - Use the Commitment & Funds Display folder to review any encumbrance.
  - Determine if a line item has been marked No Further Confirmation, No Further Invoice and/or Locked.

# Manage No Further Confirmation and No Further Invoice

These two procedures can be found by clicking the **Items** tab then clicking the **Related Documents** tab.



The screenshot displays the 'Display Purchase Order' interface. At the top, the 'Items' tab is selected and highlighted with a red box. Below the tab, a table lists two items:

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		HVAC Services for TTC Berkely Campus	94155	1	MON	USD	1	25.00					11/30/2013	Cost Center	N040421010
2		Material	2		HVAC Services for TTC Berkely Campus	94155	1	MON	USD	1	25.00					11/30/2013	Cost Center	N040421010

At the bottom of the screenshot, the 'Related Documents' tab is selected and highlighted with a red box. This tab contains sections for 'Document Control', 'Statistics', and 'History'. The 'Statistics' section includes fields for 'Goods Receipt / Confirmation of Performance of Service' and 'Invoice', with radio buttons for 'No Further Confirmation' and 'No Further Invoice'.

# Manage No Further Confirmation and No Further Invoice

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## No Further Confirmation (NFC):

This means that no additional Goods Receipts are expected for the line item. Although a further delivery is not expected, it is still possible. NFC does not lock the line item.

## No Further Invoice (NFI):

Selecting the NFI button in SRM will only unencumber the funds and set the “Final Invoice” indicator in ECC. NFI does not lock the line item.

# Manage No Further Confirmation and No Further Invoice

The **No** radio button is the default for both No Further Confirmation and No Further Invoice. This means that the transactions are not active.

To activate either No Further Confirmation or No Further Invoice, click the **Yes** radio button.

There will be a yellow message to indicate that the PO has an item or items that have been marked No Further Confirmation or No Further Invoice:

 Item(s) marked No Further Confirmation or Invoice

# Verify No Further Confirmation and No Further Invoice

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## No Further Confirmation

To verify that the line has been marked No Further Confirmation or No Further Invoice, use the ME23N folder.

This procedure will activate the ECC Delivery Complete indicator in the line item indicating in the system that No Further Confirmations are expected.



# Verify No Further Confirmation and No Further Invoice

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## No Further Invoice

To verify the No Further Invoice has reduced the PO Encumbrance use the Commitment & Funds Display folder.

This procedure will activate the ECC Final Invoice Indicator, which will unencumber funds.

# Lock a PO Line Item

- The “Lock Line Item” status is accessible in the PO under the “**General Data**” tab by clicking on the “**Items**” tab, then the “**Details**” button.

Status and Statistics

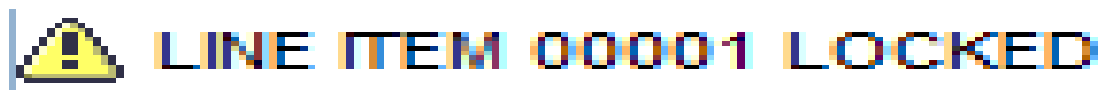
Item Deleted:

Closeout Status:

Cancelled:

Lock Line Item:

- When a PO line item has been locked users will see the following warning message:



# Lock a PO Line Item

**Display Purchase Order**

Purchase Order Number 4600333197 Purchase Order Type SCEIS Standard PO status Ordered Document Date 09/16/2014 Total Value (Gross) 432.00 USD Smart Number Supplier GRAYBAR ELECTRIC INC

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

Details for item 1 Beacons, Visual and Runway Lights

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

Order as Direct Material

**Basic**

**Identification**

Item Number: 1  
Item Type: Material  
Product ID:  
Description: Beacons, Visual and Runway Lights  
Product Category: 03527 Beacons Visual and Runway Lights  
Catalog:  
Contract / Item: 0  
Complete Item on Saving: No

**Further Properties**

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

**Currency, Values and Pricing**

Quantity / Unit: 1 EA ( 0 EA is equivalent to: 0 )  
Gross Price / Per: 100.00 USD 1 EA  
Net Value: 100.00 USD  
Net Price: 100.00 USD  
Guaranteed Purch. Value: 0.00  
Not to Exceed Price:   
Not Separately Priced:   
Incremental Funding Active:   
Tax Code / Amount: H/AP Sales Tax 8.00 USD

**Service and Delivery**

Delivery Date: 09/16/2014  
Tolerance Group:  
Underdelivery/Overdelivery Tolerance: 0.00 % / 0.00 %  Unlimited  
Storage Location: 0001 SCDOT Supply Dep  
Acceptance at Origin:

**Status and Statistics**

Item Deleted: No  
Closeout Status:   
Cancelled:   
**Lock Line Item:**

# Lock a PO Line Item

- ➊ Only when a buyer checks the “Lock Line Item” checkbox will the system prevent no further goods receipts and no further invoice payments in ECC on the line item selected.
- ➋ The lock will allow changes to be made to the PO in SRM, but these changes will not transfer to ECC until the “Lock Line Item” has been unselected.

# Manage No Further Confirmation, No Further Invoice and Lock

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The following Business Process Procedures detailing the changes were made available on August 29, 2014 on the SCEIS uPerform site at <http://upperform.sc.gov/gm/folder-1.11.3882> :

**SRM PUR Line Item Lock on Purchase Order**

**SRM PUR No Further Invoice on Purchase Order**

**SRM PUR Display Locked Purchase Order Line Item**

# Manage No Further Confirmation, No Further Invoice and Lock

- Prior to this modification, if a user selected either “No Further Confirmation” or “No Further Invoice” to a line item of a PO, the system placed a “Lock” icon on the ECC PO line item.
- This action may have been premature if the invoice had not yet been keyed. This premature action could then cause the Accounts Payable staff to contact the buyer to have the PO line item “unlocked.”
- This modification will make the system more efficient and eliminate the need for the buyer to unlock the line item.

# Lesson 9 Summary

- ④ You should now be able to edit a PO with the following:
  - Manage No Further Confirmation, No Further Invoice and Lock
  - Use the ME23N folder to verify that the transaction produced the desired results
  - Use Commitment & Funds Display folder to review encumbrance
  - Determine if a line or lines in a PO have been marked No Further Confirmation, No Further Invoice and/or Locked



South Carolina Enterprise Information System

# LESSON 10: CREATE A STANDARD PURCHASE ORDER WITH RETENTION

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SC BUDGET AND CONTROL BOARD



# Lesson 10 Learning Objectives

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

**uPerform Business Process Procedures (BPPs) related to this function are available at <http://uperform.sc.gov/gm/folder-1.11.3882>.**

**SRM PUR Create Purchase Order with Retention  
at Header Level**

**SRM PUR Create Purchase Order with Retention  
at Item Level**

# Lesson 10 Summary

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



South Carolina Enterprise Information System

# LESSON 11: CREATE AN INVENTORY PURCHASE ORDER

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SC BUDGET AND CONTROL BOARD

# Lesson 11 Learning Objectives

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- Upon completion of this lesson, you should understand:
  - The process flow of an Inventory Purchase Requisition to an Inventory PO.
  - How to display PO tracking.

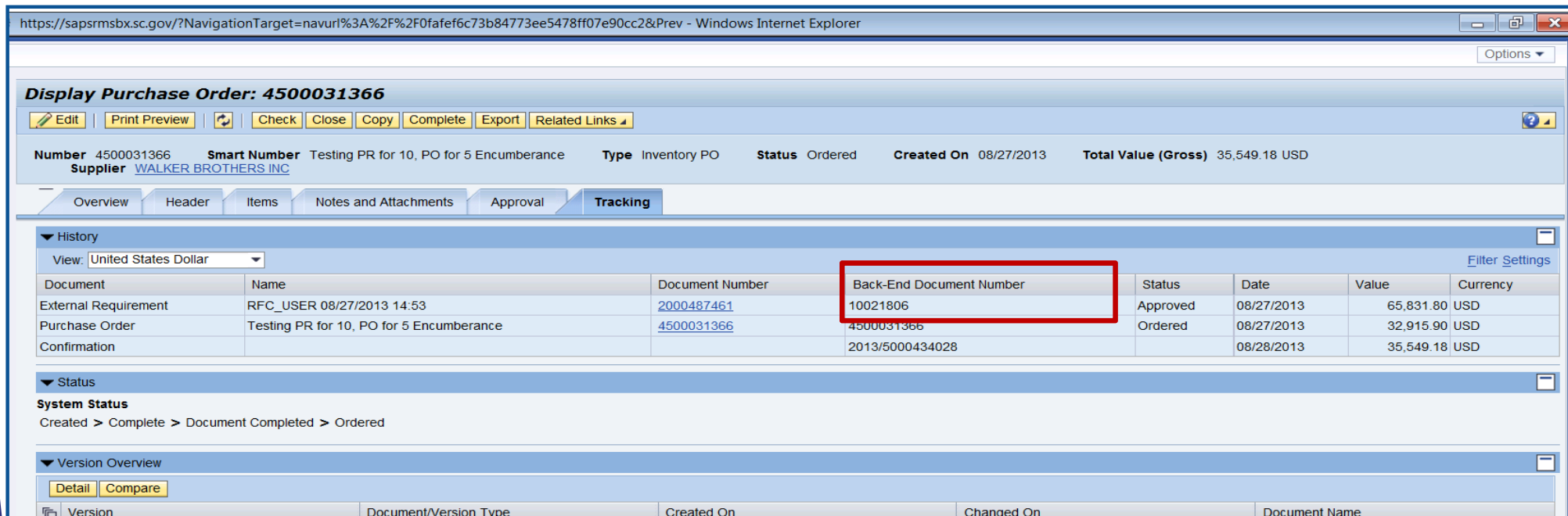
# Replenishment of Inventory – Process Flow

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- ④ No change for 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.
  
- ④ No change for the Buyer
  - 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.



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

**Display Purchase Order: 4500031366**

Edit | Print Preview | Check | Close | Copy | Complete | Export | Related Links

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 Filter Settings

Document	Name	Document Number	Back-End Document Number	Status	Date	Value	Currency
External Requirement	RFC_USER 08/27/2013 14:53	<a href="#">2000487461</a>	10021806	Approved	08/27/2013	65,831.80	USD
Purchase Order	Testing PR for 10, PO for 5 Encumbrance	<a href="#">4500031366</a>	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 11 Summary

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- 🌀 You should now understand:
  - The process flow of an Inventory Purchase Requisition to an Inventory PO.
  - How to display PO tracking.





South Carolina Enterprise Information System

# COURSE SUMMARY

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SC BUDGET AND CONTROL BOARD

# Course Summary

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- You should now be able to:
  - Navigate in Supplier Relationship Management (SRM) 7.2 and understand key terms and concepts.
  - Understand the SCEIS SRM 7.2 purchasing process.
  - Understand Transaction Types and Document Numbers in SRM.
  - Redistribute Workload.
  - Create various Purchase Order Transaction Types with the appropriate clauses.

# Course Summary cont.

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- You should now be able to:
  - Make Additions to and edit a Purchase Order.
  - Print a Purchase Order.
  - Understand Extended Purchase Order History.
  - Create a Standard Purchase Order with Retention at the Header Level and Line Item Level.

# Course Knowledge Check

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- ④ Complete the following statement:
  - Additional Text can be added to the Purchase Order?
    - a. At the Line Item Level
    - b. At the Header Level
    - c. Both (a) and (b)

# Course Knowledge Check cont.

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- ① How do you determine whether a Goods Receipt 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.

- ④ Which of the following is correct for vehicle purchases? (A/B)
  - A. Tax needs to be created as a separate Line Item on the Purchase Order for \$300.00.
  - B. Tax needs to be indicated on the Line Item as taxable by selecting Tax Code/Amount “I1 – A/P Sales Tax” under “Items” and “General Data” tabs.

# Course Knowledge Check cont.

- ① Which of the following is correct when adding freight charges to the Purchase Order? (A/B)
  - A. Add freight as a “Condition” in the Purchase Order “Prices and Conditions” tab.
  - B. Select NIGP Code/Product Category, 96286 (Miscellaneous Services: Transportation of Goods and Other Freight Services) as a suitable NIGP Code/Product Category to use if Freight is created as a Line Item on a Purchase Order.

# Course Knowledge Check cont.

- ④ 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?

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# Next Steps

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- ➊ Go to the SCEIS uPerform website at <http://uperform.sc.gov>.
  - Click **Business Process Procedures (BPPs)** then **Supplier Relationship Management (SRM)** to view step-by-step instructions and examples related to this course.
  - Or, click **Courses** to view the Participant Guide and other handouts related to this course.
- ➋ View the **CG Policy on the Use of Purchase Orders and Direct Expenditures** at <http://www.cg.sc.gov>.
- ➌ View **MMO's Procurement Services** at <http://procurement.sc.gov/PS/PS-index.phtm>.

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