Lesson 1 - Key Terms and Concepts

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There are three key SRM terms and concepts associated with the Shopping Cart Workflow Approval in SCEIS.

- Supplier Relationship Management (SRM) is an SAP module that facilitates the full cycle of procurement processes within agencies and between agencies and suppliers.
- An automated approval process in the Shopping Cart, known as Workflow, can include hierarchical approval, shopping limits (Output Limits), and dollar limits (Approval Limits). This approval process eliminates the need for manual signatures.
- Two Shopping Cart Roles available in SRM include:
    - Shopping Cart Creator which is an end-user who has been predefined by each agency to create a shopping cart and
    - Shopping Cart Approver which is an end-user who has been predefined by each agency to approve or reject a shopping cart.

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The procurement process flow in SCEIS begins in SRM with the shopping cart creation.
The agency has discretion on the routing of the shopping cart for approval. After the shopping cart has been approved, the shopping cart will route to a buyer for processing.
The buyer will create a purchase order or create a solicitation,
follow the appropriate solicitation process including evaluation of vendor bids and make awards
through the creation of a contract or purchase order. Once the vendor delivers the good or service,
the goods receiver will create a goods receipt in ECC.

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- **Lesson Summary**
    We hope that you now have a better understanding of:
    - the key terms and concepts of the SRM Shopping Cart and Approval processes
    - as well as the process flow of procurement and SAP relevant modules

Lesson 2 - Shopping Cart Approver Processes

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In this lesson you will see demonstrations of:

- The different options to manage a shopping cart in SRM and
- How to Create and Manage Substitution Rules

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Options to Manage a Shopping Cart

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Approve, Reject, and Edit a Shopping Cart are the options that you have when managing a shopping cart

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To access SRM go the SCEIS website at sceis.sc.gov. and click on the "SCEIS Logins" button

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Then click on the Supplier-Relationship Management (SRM) link.

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On this screen enter your user ID and password and click on "Log On."

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Click on the "Home" folder at the top of the screen.
The SCEIS system will default to "Work Overview" on the left-hand, blue menu bar. The Home folder will also display the "Tasks" tab which will allow the shopping cart approver to view the shopping carts that need to be approved. Note that on this screen the "Show" line has a dropdown with "New and In Progress Tasks" set as a default.

Click on the shopping cart link located in the "Subject" line that you wish to approve. In this example, the shopping cart that needs to be approved reads "Approve shopping cart of SHERRY BRANHAM with a value of $260.00 USD." This screen also displays the sent date and the status.

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From this screen, you can determine the identity of the requestor, the purchase request items, notes from the requestor located in the "Header Approval Note," the quantity, the price, delivery date and the cost center information. You have the option to approve or reject the shopping cart from this screen or open the shopping cart to view the details.

If you elect to approve the shopping cart with no edits from this screen you may simply click on the "Submit" button at the top left side of the screen because the "Approve" radio button is the default setting.
>   Note that there may be times when there are multiple line items. You have the option to select the yellow "Process All Items" drop down button and "Approval All" or "Reject All" to approve or reject all line items.

If you elect to reject the shopping cart, change the radio button from "Approve" to "Reject."
>   It is important to know that the approver may reject individual line items of a shopping cart by changing the appropriate radio button to reject.

If you elect to view the details of the shopping cart, you will click on the yellow "Details" button in the "Item Overview" section to view a line item or multiple line items. You may approve, edit, reject, and add comments to the shopping cart.

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In this example, the approver elects to open the shopping cart to review the shopping cart with one line item.

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From this screen, you can view the general data located in the "Item Data" tab. If no changes are needed in the item data and you do not wish to view the account assignment data, you can approve the shopping cart by clicking on the "Submit" button.

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In this example, the approver wants to change the quantity from 1 tire to 2 tires. Click on the "Edit" button.

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An "Additional Information" box will appear on the screen. Click "OK."

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The shopping cart is now in edit mode and ready for changes.

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The approver edited the shopping cart to increase the quantity of tires from 1 tire to 2 tires.

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If you wish to view the account assignment details, click on the "Account Assignment" tab. Then click on the "Details" tab. Changes to the account assignment can be made by the approver, but in this example, no changes are made.

You can view data under the other tabs labeled "Notes and Attachments," "Delivery Address/Performance Location," "Sources of Supply/Service Agents," and "Approval Process Overview

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Comments may be added at the "Header Approval Note" located on the right of the screen under "General Data."   The note will appear along with the defaulted name of the approver, date and time. To add a note, click on the "Add Comment" link.   An "Approval Note" box will appear.

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Now enter your comment. In this example, "Added an additional tire to the request" was added. Click the "Add" box.

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On this screen you can see the approver note in the "Header Approval Notes

Now, click the yellow "Submit" box in the upper left-hand corner to approve the shopping cart.

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In the upper left-hand corner of "Display Documents," a management notice will appear that states: "Action was successfully performed." The management notice (in green which will not stop you) may also read "You are not allowed to enter a tax jurisdiction code for country US."
Click on the 'Close' box at the top of the screen.

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If the shopping cart is approved, the Shopping Cart Creator will see a status in their work overview of "In Purchasers Work list" (Approved)

If a shopping cart is rejected, the Shopping Cart Creator will see a status of "In your box" to edit and resubmit to the approver or to delete.

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There are other options for managing the approval process for a shopping cart including Application Monitor (Monitor Shopping Carts) and Approve and Update with Asset Shell Information (Asset Custodian).

Step-by-step guides for these processes are available through SCEIS uPerform (http://sceis.sc.gov/page.aspx?id=272)

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How to Manage Substitution Rules

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If a Shopping Cart Approver will be out of the office they may create a substitute approver for their shopping cart.

To access the SRM login page, go to the SCEIS website at sceis.sc.gov. Click on the "SCEIS Logins" button

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and then click on the Supplier-Relationship Management (SRM) link.

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Click on the "Home" folder at the top of the screen.

To continue, click on "Work Overview" on the left-hand blue menu bar and then click on the "Task" tab which is set as the default.

Now, click on the last icon that looks like a sheet of paper. This icon is located on the right-hand side of the screen in the 'Content area' below the tabs.

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From the drop down menu that appears, click on "Manage Substitute Rules."

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Now click on "Create Rule…"

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A screen will appear that is titled Create Substitute Rule. This is Step 1 or Define Rule.

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To assign tasks using the Substitution Rule, enter the nominee, the person you want to receive your tasks, and click on the "Select" button. In this example, test34 is entered.
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A box titled "Find People" will appear with options related to the selected person's name.   Highlight the name of the person you want to nominate and click on the "Apply" button.
 Note: The person assigned to the tasks must have been assigned by your agency to have the SCEIS Approver role and must be in your SRM Organizational Structure.

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From the dropdown section labeled "Assign These Tasks," "All" is defaulted. All shopping carts will be assigned to the substitute to approve.
From "I Want the Nominee to:" choose from the options "Receive My Tasks" and "Fill in for Me."
- Receive my tasks means that you hand over tasks to the assignee for the duration of your planned absence. In the next step you can set a start date for this rule.
- Fill in for me indicates that you are unexpectedly absent and the assignee can take over your tasks completely.

In this example, Receive My Tasks is the selected option.

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   A screen will appear that provides the option to turn the substitution rule on or off.
                   You can choose to turn the rule
- On At once, or
- You can enter a specific date to turn on the rule
                     There is also an option to
   Disable the rule by clicking on the radio button labeled "Off – The rule will not be enabled."

In this example, the "On, At Once" is selected.

After you have made your selection, click on the "Save" button.

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This screen shows that the Nominee or Substitute Approver, 34 Buyer (SRUTEST34) was "Successfully" added as shown in the Rule Activation column.

Note that in the last column labeled "Turn On/Off" you will have the button "Turn Off" when a substitution is activated. "Turn On" will be displayed when a substitution is not activated.
The nominee/substitute you assigned should now see your name under the Other Users' Substitution Rules content area under Manage Substitutes Rules screen.

Lesson 3 Best Practices and Tips

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Before you create a substitution rule be sure that the nominee is informed so they know to be available to manage your work.

Lesson 4 Summary:

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Now that you have taken the SCEIS Shopping Cart Workflow Approval course you should be able to:

- Manage a shopping cart in SRM with different approval options and

- Create and Manage Substitution Rules

Thank you for participating in our training program. Please fill in the SCEIS training completion survey (https://www.surveymonkey.com/s/ZL866XW) to indicate that you have taken this course. This will help us respond to agencies when they ask the SCEIS Team for lists of agency employees who have completed SRM training.