

WELCOME AND INTRODUCTION

Slide Intro 1

Welcome to the SCEIS online training.

Requisitioning, Approval, and Receiving Goods and Services Course or SRM200U is an introduction to three online training courses:

Slide Intro 2

Shopping Cart Creator, Shopping Cart Workflow Approval, and Goods Receipt in ECC.

The SRM 200 training series was developed as a result of an SAP software upgrade from SRM 5.0 to SRM 7.0 Enhancement Pack 2.

The upgrade was necessary as SAP will no longer support SRM 5.0 in the future.

Slide Intro 3

These courses include four lessons: each with a Key Terms and Concepts, Learning Objectives, Best Practices and Tips, and a Summary. Some of the lessons also have a link to additional process simulations.

Lesson 1 - Key Terms and Concepts

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The learning objective of Lesson 1 is to introduce key terms and concepts of SRM.

- Supplier Relationship Management (SRM) is an SAP module that facilitates the full cycle of procurement processes within agencies, and between agencies and suppliers.
- Shopping Cart, a tool in SRM to enter a request for a product or service, can be completed by using one of the search options: NIGP Search, Contract Search, or Punch-out Catalog, Old Shopping Carts and Templates, and Internal Goods/Services.
- 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
 - Approver which is an end-user who has been predefined by each agency to approve or reject a shopping cart.
- 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.
- Check Status (POWL) can be used after a shopping cart is routed to the approver or approvers. This function allows the shopping cart creator to check the status of the shopping cart in their Personalized Object Work List to determine if the shopping cart is awaiting approval, has been approved, or has been routed to an agency buyer for processing.
- When the account assignment is entered in the shopping cart, the system runs a Budget Check to determine if there is budget in the account. If the funds are not available, the end-user will receive system errors to indicate that budget is not available.

- Enterprise Central Component (ECC) is the core system of SCEIS where master data is stored.

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It is especially important for you to understand the Full Procurement Process Flow: 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**

You should now

- Understand the key terms and concepts of the SRM Shopping Cart and
- be able to describe the process flow of procurement and SAP relevant modules

Lesson 2 - How to Create a Shopping Cart

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Lesson 2 will describe and demonstrate:

- Steps to take in order to create a shopping cart
- The different options to select goods/services for creation of a shopping cart
- How to find and check the status of a shopping cart
- How to copy an existing shopping cart
- How to manage a rejected shopping cart and
- How to add and replace an approver

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Options to Create a Shopping Cart

Go to the SCEIS website at sceis.sc.gov to log into SCEIS. Click on the "SCEIS Logins" button and

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

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To log into the SRM portal, enter your user ID and password and click on "Log On."

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After you have logged into SRM, folders will appear at the top of the screen. The number and name of the folders will depend on the security roles you have been assigned by your agency.

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Shopping cart creators who have only the shopping cart creator role will see three folders titled Home, Employee Self-Services, and Goods Receipt (MIGO).

The process to request goods and services in SRM begins by clicking on the Employee Self-Services folder. The folder will open up to the options to “Shop” or “Advanced Search.” If you are creating a new shopping cart, you will select “Shop.” If you are searching for a previous shopping cart you will select “Advanced Search.”

Click on the “Shop” link.

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Step 1, Select Goods/Services, of the 3 steps to shop will display. Five Options to select goods and services are:

- NIGP Search
- Contract Search
- Punch-out Catalogs listed by Vendor Name
- Old Shopping Carts and Templates and
- Internal Goods/Services

Note that within the 3 steps to create a shopping cart, the following processes are included: Item Detail; Account Assignment; Notes and Attachments; Delivery Address/Performance Location; Source of Supply/Service Agents; and Approval Process Overview.

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OPTION 1:

For a demonstration of the first option, we will begin with a Contract Search for a statewide contract. Click on the “NIGP/Contract Search” link.

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Once you click on “NIGP/Contract Search,” the search gives you the option to use either the “Contract Search” or “NIGP Search.” In this example, the “Contract Search” is selected. (Note that the system defaults to “Contract Search.”)

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A “Contract Search,” allows you to search by contract number or by the name of the good or service you wish to purchase. In this example, the contract search is by the name of the item “tires.”

Click on the button “Submit Search.”

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The SCEIS system will find and display all of the contracts available to purchase tires. Select the contract you want by clicking on the contract number.

In this example, Contract #4400001933 is selected. The SCEIS system will return all the contract details and a list of all the contract line items available to select.

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Details about the contract such as the vendor, buyer, and validity dates of the contract will appear. Line items available for purchase under the contract will appear under “Contract Items.”

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Select the line item or items you wish to purchase by clicking on the box next to the line item number. In this example, 00001 is selected.

Click on “Return to Search Screen” at the top of the screen.

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The SCEIS system will return you to the original list of contracts. Click on “Punch-out to SRM.”

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The SCEIS system will take you to Step 2 of the shopping cart creation. In Step 2, data from the contract search is brought over into the line item (1 item) and you need to enter details concerning the items requested.

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On the line item, modify the quantity if needed. In this example, the quantity brought over from the contract is 1 and needs no modification. Add the contract price in the “Net Price/Limit” field. In this example, the price is \$260. Modify “Delivery Date” to the required date. In this example, the delivery date was changed to 09/11/2013.

Click on the “Details” button to view all data of the line item.

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The data entered on the line item can be modified from this screen also.

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Note: In the demonstrations of shopping cart creation that follow, the cost assignment combinations used are examples of basic categories. The SCEIS team offers uPerform documents with details on how to input other account assignments including:

- Assets
- Asset Unknown
- Cost Center Split
- Unknown Account Assignment

WBS (Work Breakdown Structure)

Go to the SCEIS uPerform system to use these guides <http://sceis.sc.gov/page.aspx?id=272>

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Now click on the “Details” tab on the Cost Distribution line. The “General Ledger Account” number and the “General Ledger Description” are mapped to a “Product Category” (NIGP) number and are pulled over from the contract item selection.

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Enter the cost center number in the “Assign Number” field on the line. In this example, the cost center is J040AA000. Hit the “enter” key on your keyboard. The “Business Area” field will automatically populate. In this example, the Business Area that populated is J040. Click on the “Details” button located below the “Account Assignment” tab.

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This will open the “Cost Distribution” section where you can enter account assignment data. Additional account assignment data, to include Fund and Functional Area, must be added. In this example, 34720003 was added in the Fund field and J040_00245905007 was added in the Functional Area field. This purchase is being made using a grant, so J0403S010000 was added to the Grant field. After you click the “Check” button at the top of the screen

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you will notice that the account assignment errors no longer appear since the correct funding has been entered.

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You may now add “Vendor Text,” which will be visible to the vendor on the purchase order and add an “Internal Note” that will be visible to the buyer who is assigned to create the purchase order. Click on the “Notes and Attachments” tab to include these items. Click on the “Vendor Text” link.

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An “Add Vendor Text” box will appear. In this example, a “Test for Vendor text” message was added. When you click the “OK” button,

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...the text written in the text box will appear under the “Description” field. To add an internal note, click on the Internal Note link and follow the same process as adding vendor text. To add attachments, click on the “Add Attachments” button.

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An “Add Attachment” box will appear to upload and attach a file.
Click on the “Browse” button to initiate a search of files on your computer.

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Select the file you want to attach. In this example, a file from the user’s Q directory was selected. Click OK.

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To verify the delivery address of the item that is ordered Click on the “Delivery Address/Performance Location” tab. You may also change a delivery address. In this example, no change is made.
Next, click on the “Source of Supply” tab.

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Verify that the supplier from the contract is populated in the “Supplier” field, that the contract number and line item number of the contract are populated in the “Contract/Item field,” and that the “Delivery Date” is correct.

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You may now view the names of your assigned approver(s) by clicking on the “Approval Process Overview” tab.
Click the “Next” button where...

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...you will complete your order in Step 3.
Enter a name for the shopping cart that will be easy for you to identify in the “Name the shopping cart” field. In this example, the shopping cart is named “Tires for DHEC 08/29/2013.” The current date will default.

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If needed, add a note to the approver in the “Header Approval Note” field. In this example, “tires as requested” is entered.
Finally, click the ‘Order” button.

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You have successfully created a shopping cart.
Click the X at the top right side of the screen to exit SRM.

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Option 2:

Another option used to create a shopping cart is to use the NIGP Search.

To begin this process log into SRM. First go to the SCEIS website at sceis.sc.gov. Now click on the “SCEIS Logins” button and

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

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To log into the SRM portal, enter your user ID and password and click on “Log On.”

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After the shopping cart creator has logged into SRM, folders will appear at the top of the screen. The number and name of the folders will depend on the security roles assigned to you by your agency. Shopping cart creators who have only the shopping cart creator role will see three folders titled Home, Employee Self-Services, and Goods Receipt (MIGO).

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The process to request goods and service in SRM begins by clicking on the Employee Self-Services folder. The folder will open up to the options to “Shop,” if you are creating a new shopping cart, OR “Advanced Search,” if you are searching for a previous shopping cart. Click on the “Shop” link.

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Step 1, Select Goods/Services, of the 3 steps to shop will display. The five options to select goods and services are:

- NIGP Search
- Contract Search
- Punch-out Catalogs listed by Vendor Name
- Old Shopping Carts and Templates and
- Internal Goods/Services

For this demonstration, we will create a shopping cart using the NIGP Search. To begin, click on the “NIGP/Contract Search” link.

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Note that the system defaults to “Contract Search.”

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Click on the “NIGP Search” button.

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The “NIGP Search,” gives you the option to search for the goods or services needed by using either the commodity/services keyword or the NIGP Code.

In this example, the NIGP Search is by the commodity keyword, bulb.

Click on the button “Submit Search.”

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The SCEIS system will find and display a list of products that matches your keyword search description.

In this example, 29 products were found that matched the description for keyword, bulb.

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Select the item or items by clicking on the box next to the NIGP Code and description that best meets your needs. In this example, *NIGP Code 05537, Automotive Accessories for Automobiles, Buses, Trailers, Trucks, etc. is selected.

Click on the “Punch-out to SRM” button...

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...to display the data from the NIGP Search into the line item (1 item) this will take you to Step 2 of the shopping cart creation. In Step 2, you will need to enter details concerning the items requested.

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On the line item, modify the quantity if needed. In this example, the quantity remains at 1. Add the price in the Net Price/Limit field. In this example, the price is \$260. Modify the Delivery Date to the required date. In this example, the delivery date was changed to 10/01/2013.

Click on the “Details” button...

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...Note that the red errors that appear at the top of the screen are related to the cost assignment since you have not yet entered the cost assignment information.

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Click on the “Account Assignment” tab.

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It is important to know that the cost assignment combinations used in these demonstrations are examples of basic categories. The SCEIS team offers uPerform documents with details on how to input other account assignment categories including:

Assets

Asset Unknown

Cost Center Split

Unknown Account Assignment

WBS (Work Breakdown Structure)

Link to uPerform to access these tools <http://sceis.sc.gov/page.aspx?id=272>

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Enter the cost center number in the “Assigned Number” field on the line item. In this example, the cost center is H630JGB040.

Hit the “enter” key on your keyboard. The “Business Area” field will automatically populate.

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Click on the “Details” button located below the “Account Assignment” tab. This will open the “Cost Distribution” section to enter account assignment data.

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Additional account assignment data to include Fund and Functional Area must be added. In this example, H630_0036 was added in the Functional Area field and 10010000 was added in the Fund field. Click the “Check” button at the top of the screen. Note that the account assignment errors no longer appear since funding has been entered.

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Now, click on the “Source of Supply” tab. You may suggest a “Preferred Supplier” by clicking on the white box or by entering the vendor number, if known, to select the vendor that you would like to suggest to the buyer.

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If the Preferred Supplier vendor number is not known, you may find the number by using the Search Criteria depicted.

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In this example, the vendor Napa was entered. Click on “Start Search” to locate the vendor you wish to suggest.

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A list of vendors with the name you entered will display. Select the preferred vendor by clicking on the box located to the left of the Product Category. Click “OK.”

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The “Preferred Supplier” you have selected will populate with the vendor name and vendor number. Click the “Next” button so that you can complete your order in Step 3.

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Enter a name for the shopping cart in the “Name the shopping cart” field. Use a name will be easy for you to identify.

Once you have clicked the “Order” button,

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you have successfully created a shopping cart.

Click on the X at the top right side of the screen to exit SRM.

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The third option for creating a shopping cart is to use a Punch-Out Catalog. The catalogs contain statewide contract items that are maintained by vendors.

To log into SRM, go to the SCEIS website at sceis.sc.gov. Click on the “SCEIS Logins” button

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

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Next, log into the SRM portal; enter your user ID and password and click on “Log On.”

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After the shopping cart creator has logged into SRM, folders will appear at the top of the screen. The number and name of the folders will depend on the security assigned to you by your agency. Shopping cart creators who have only the shopping cart creator role will see three folders titled Home, Employee Self-Services, and Goods Receipt (MIGO).

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The process to request goods and services in SRM begins by clicking on the Employee Self-Services folder. The folder will open up to the options for “Shop” or “Advanced Search.” If you are creating a new shopping cart, you will select “Shop.” If you are searching for a previous shopping cart you will select “Advanced Search.”

Click on the “Shop” link.

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Step 1, Select Goods/Services of the 3 steps to shop will display. The five options to select goods and services are:

NIGP Search
Contract Search
Punch-out Catalogs listed by Vendor Name
Old Shopping Carts and Templates and
Internal Goods/Services

Note that all steps to create a shopping cart include the following processes: Item Detail; Account Assignment; Notes and Attachments; Delivery Address/Performance Location; Source of Supply/Service Agents; and Approval Process Overview.

On the “Shop” screen, note that the links with vendor names are links to punch out to the vendor’s catalog through their website. For this demonstration, we will use the vendor, Staples. Click on the “Staples” link.

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You have punched out to Staples’ website.

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In the “Search” field, for this example, a search for a plastic clipboard is entered and the “Search” button is clicked.

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The catalog returns with items to select and add to your cart.

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For this example, 3 clipboards are selected and added to the cart by clicking “Add to Cart.” Next, click on the “Checkout” button at the top of the page.

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Click “Submit” at the bottom of the page.

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The “Submit” button takes you back to the SRM page and Step 2 of the shopping cart creation. In Step 2, data from the punch-out catalog contract search is brought over into the line item (1 item) and you will need to enter details concerning the items requested.

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Update your shopping cart on the line item, if needed. In this example, the Delivery Date is changed to 09/12/2013.

Click on the “Details” button.

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On this screen you can review item details of the shopping cart.

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To open the “Cost Distribution” section to enter account assignment data click on the “Details” button. This button is located below the “Account Assignment” tab. Then click on the “Details” button on the Cost Distribution line.

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The “General Ledger Account” number and the “General Ledger Description” are mapped to a “Product Category” (NIGP) number and are pulled over from the contract item selection. Add the cost center in the “Assign Number” field. In this example, J0404AA000 is being used.

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Additional account assignment data to include Fund and Functional Area must be added. In this example, 34720003 was added in the Fund field and J040_00245905007 was added in the Functional Area field. This purchase is being made using a grant so J0403S010000 is added to the Grant field. Click “Check”...

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...and the red errors should disappear since you added correct funding information.

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There are no notes or attachments for this shopping cart. Since this is a contract, verify that the contract number is connected to the shopping cart by clicking on the “Source of Supply/Service Agents” tab. In this example, the supplier’s name and the contract number are visible. Click “Next” and...

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...name your shopping cart.
Now, click “Order.”

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The shopping cart for Staples was ordered successfully.

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A fourth option is to create a shopping cart from a shopping cart that already exists. To log into SRM, go to the SCEIS website at sceis.sc.gov. Now click on the “SCEIS Logins” button and

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

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To log into the SRM portal, enter your user ID and password and click on “Log On.”

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After you have logged into SRM, folders will appear at the top of the screen. The number and name of the folders will depend on the security roles you are assigned by your agency. Shopping cart creators who have only the shopping cart creator role will see three folders titled Home, Employee Self-Services, and Goods Receipt (MIGO).

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The process to request goods and services in SRM begins by clicking on the Employee Self-Services folder. The folder will open up to the options to “Shop” or “Advanced Search.” If you are searching for a previous shopping cart will select “Advanced Search.” Click on “Shop.”

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Click on “Old Shopping Carts and Templates.”

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A box will appear to “Add Items from Old Shopping Carts and Templates” with search criteria.

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In this example, the search criteria, “Timeframe” is selected. From the Timeframe dropdown box, “Last 90 days” is selected which will display all shopping carts you have created within the last 90 days. Note: “Include Completed Shopping Carts” criteria can be used to locate additional Shopping Carts.

Click on the “Search” button.

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A list of shopping carts is displayed.

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Highlight the shopping cart you wish to copy and click OK.

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The shopping cart is copied and ready for you to update and add the Account assignment information.

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Option 5 for creating a shopping cart is through Internal Goods and Services. If you belong to an inventory agency, you might want to order goods from your warehouse for consumption. To log into SRM, go to the SCEIS website at sceis.sc.gov. Click on the “SCEIS Logins” button and

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

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To log into the SRM portal, enter your user ID and password and click on the “Log On” button.

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After you have logged into SRM, folders will appear at the top of the screen. The number and name of the folders will depend on the security roles assigned to you by your agency. Shopping cart creators who have only the shopping cart creator role will see three folders titled Home, Employee Self-Services, and Goods Receipt (MIGO).

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The process to request goods and services in SRM begins by clicking on the Employee Self-Services folder. The folder will open up to the options to “Shop” or “Advanced Search.” If you are creating a new shopping cart, you will select “Shop.” If you are searching for a previous shopping cart you will select “Advanced Search.”

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Click on the “Internal Goods/Services” link.

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Follow the link to our uPeform document on how to complete this process. <http://sceis.sc.gov/page.aspx?id=272>

How to Find a Shopping Cart and Check Status

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SCEIS makes it easy to find and check the status of shopping carts that you have created. To begin finding your shopping carts log into SRM. You may log into the system by going to the SCEIS website at sceis.sc.gov. Now click on the “SCEIS Logins” button and

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

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You should now be on the SRM portal page where you will enter your user ID and password and click on “Log On.”

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The Home page for SRM will appear. Click on the Employee Self Services folder.

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A list of shopping carts that you have created will appear in the lower part of the screen under the "Shopping Carts" tab. You can view detailed information about the shopping cart at a glance including the status of the shopping cart under the "Status" column.

To find the status of a shopping cart that is not visible from your screen, click on the "Show Quick Criteria Maintenance" button

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The section will open up and allow you to search for a shopping cart by a variety of criteria.

In this example, the criteria "Status" is used to search. Use the dropdown menu to select a type of status.

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In this example, the creator selected the status of "Approved" to find approved shopping carts. SCEIS displayed the list of approved shopping carts. Details about the carts are also visible at a glance.

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You may also use the shopping cart number to find a shopping cart. In this example, the creator wants to find the shopping cart number 2000486469. Enter the number in the Shopping Cart Number field. Now click the "Apply" button.

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The SCEIS system now displays the shopping cart that was requested in the search.

The creator can view further details about the shopping cart by clicking on the link in the "Shopping Cart Number" column or they can click on the link in the "Item Status" column.

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In this example, when the shopping cart number of Item Number 1 is opened, item details of the shopped cart are displayed.

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In this example, click on "Follow-on Document Created" found under the "Item Status" column to determine what activity there has been on the shopping cart.

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In this example, a purchase order was created from the shopping cart and then it was deleted.

How to Manage a Rejected Shopping Cart

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The next several slides will show you How to Manage a Rejected Shopping Cart

To begin this process, go to 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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To log into the SRM portal, enter your user ID and password and click on “Log On.”

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The process of managing a rejected shopping cart in SRM begins by clicking the Employee Self-Services folder.

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The folder will open up to the option to “Shop” or “Advanced Search.” A list of shopping carts that have been created will appear in the lower part of the screen under the “Shopping Carts” tab. You can view detailed information about the shopping cart at a glance including the status of the shopping cart under the “Status” column.

You will be able to view the status of shopping carts that you have created in the “Status” and “Item Status” columns. In this example, shopping cart 2000487552 has a status of “In your Inbox” and the item status is “Rejected” which means the shopping cart was not approved by the manager and has been return to the creator.

Click on the shopping cart number link found under the “Shopping Cart Number” column.

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Click on the “Show My Tasks” box at the top of the screen.

A pop-up screen will appear.

Click on the “Subject” task that you wish to perform and then click on the “Process Now” button.

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It is important to know that an “approver note” is entered by the approver to provide a reason as to why the shopping cart was rejected and to advise as to what changes need to be made to the shopping cart.

The shopping cart will need to be updated with the requested changes by clicking on the “Edit” button located at the top of the screen.

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You will see a message that reads: “The document is in approval Any document changes may lead to an adaption of the workflow process.” This message lets you know that the shopping cart is being updated and that any changes that are made to the shopping cart will cause the shopping cart to workflow back to the initial approver.

Click “OK.”

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To apply the requested changes click on the “Details” box and select the correct tab.

In this example (1), an additional laptop has been added to the shopping cart. The order quantity has been updated to (2) and the total value has been updated to \$5,000.00

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A comment can be added to provide confirmation that the requested change has been made. Click the “Add” button.

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A comment has been added to provide an update to the approver. Click the “Proceed” button to continue the shopping cart order process.

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The “Proceed” button indicates that you have made all of the requested changes and that you are now ready for the shopping cart to workflow to the assigned approvers. Click the “Close” button

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which will return you to the “Shop” screen.

Your shopping cart status will reflect “Awaiting Approval.” This status indicates that the approval workflow is in process and the shopping cart is ready for a response from the assigned approver.

How to Add and Replace an Approver

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To begin adding or replacing an Approver log into SRM.

You may access the SRM login screen by going to the SCEIS website at sceis.sc.gov. Now click on the “SCEIS Logins” button and

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

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To log into the SRM portal, enter your user ID and password and click on “Log On.”

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Click on the Employee Self Services folder

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And click on “Shop.”

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While in the process of creating your shopping cart in Step 2, click on the “Approval Process Overview” tab. To add an approver, click on the “Add Approver” button.

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A dropdown will display with 2 options: Add Approver Above Selected Line and Add Approver Below Selected Line which will define the sequence of the approver.

In this example, “Add Approver Below Selected Line” is selected.

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An “Add Approver” box will appear. Highlight and select “ok.”

Click on the “Approver ID” field.

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A box to enter search criteria will display.

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Enter the name of the approver you wish to add.

For this example, the last name, Clark, was entered in the “Name1/Last name” field. The added approver must have the SCEIS security role to approve shopping carts submitted by the shopping cart creator. Click “OK.”

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SCEIS will return names of those with “Clark” who have the approver role. Select the name you want as an approver.

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In this example, Henry Clark was selected. Click “OK.”

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The added approver will appear in the sequence that you have selected.
To replace an approver, click on “Replace Approver.”

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Then click on “Approver ID.”

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A box will appear where you will enter the search criteria.

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Enter the name of the person you want to name as the replaced approver. In this example, there were two approvers, Valerie Hunter and Debra Lybrand. In this example, Lybrand was entered in the Name1/last name” field. Select the “Start Search” button.

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SCEIS will display all possibilities with the name “Lybrand.”

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Debra Lybrand was selected as the replace approver by highlighting the grey box to the left of her name.

Click “OK.”

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A box will appear with the name of the approver. Click “OK.”

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Valerie was replaced and now only Debra is listed as the approver.

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Summary

You should now understand how to:

- Create shopping carts in 3 steps using the options to select goods and services available in SCEIS
 - Find and check the status of a shopping cart
 - Copy an Existing Shopping Cart
 - Manage a rejected shopping cart
 - Add and Replace an Approver
-

Lesson 3 Best Practices and Tips

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When creating a shopping cart remember these best practices:

- Begin all shopping carts with the “Contract Search” to ensure that you are linking to existing contracts.
- Check first with your accounting department if you receive account assignment or budget errors in the shopping cart.
- Develop a naming convention for your shopping carts to make them easy to find.
- Before adding or replacing an approver, check with the person you are adding or replacing to verify their availability.

Lesson 4 Course Summary

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Now that you have completed the SCEIS Shopping Cart Creation course you should be able to:

- Discuss the shopping cart process and roles, and describe how the shopping cart process is related to the procurement process
- Create a shopping cart using the appropriate option to select goods and services
- Check the status of a shopping cart
- Manage a shopping cart when it is rejected or when you need to add or replace an approver

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.