South Carolina Enterprise Information System

SCEIS REQUISITIONING, PURCHASING, AND RECEIVING GOODS AND SERVICES SUPPLEMENTAL COURSE SRM200i

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

STATE INFORMATION TECHNOLOGY

B&CB

SC BUDGET AND CONTROL BOARD

Welcome and Introductions

Welcome to SCEIS SRM 200i, Shopping Cart

- Introductions

- Sign-in sheet

- Restrooms

- Breaks

- Parking lot

Classroom Logistics

- **Classroom etiquette**
  - Cell phones off/silenced
  - No side conversations

- **Feel free to ask questions**

- **No email or internet usage during class except at breaks**

Course Agenda

Lesson 1: Key Terms and Concepts

- Supplier Relationship Management (SRM) 7.2

- Shopping Cart

- Shopping Cart Creator

- Shopping Cart Approver

- Documents in SRM

- Workflow

- Personalized Object Work List "Check Status"

- Budget check

- Enterprise Core Component (ECC) (Goods Receipt/MIGO)

Course Agenda

Lesson 2: How to Create a Shopping Cart

– Access Shopping Cart Options

– Shopping Cart Options

  ▪ NIGP Search

  ▪ Contract Search

  ▪ Punch-out Catalog

  ▪ Old Shopping Carts and Templates

  ▪ Internal Goods/Services (inventory agencies only)

Course Agenda

- **Lesson 3:** Exercises

- **Lesson 4:** Best Practices and Tips

- **Lesson 5:** Course Summary

- **Lesson 6:** Link to and List of uPerforms Business Process Procedures Related to this Presentation

Course Learning Objectives

- Upon completion of this course, you should be able to:
  - Describe the goods and services requisitioning processes in the Supplier Relationship Management (SRM) system.
  - Define key terms and concepts.
  - Create a shopping cart for different types of goods/services in SRM.
  - Understand how to "look-up" the status of a Shopping Cart.

Course Learning Objectives con't

Upon completion of this course, you should be able to:

- Manage a Rejected Shopping Cart

- Add and Replace an Approver

- Access resources for ongoing learning and practicing of Shopping Cart functionality (uPerforms)

LESSON 1: KEY TERMS AND CONCEPTS

Lesson 1 Learning Objectives

- Upon completion of this lesson, you should be able to:
    - Describe key terms and concepts related to the procurement process.
    - Understand the procurement process in SCEIS SRM.

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.
Shopping Cart	A tool in SRM used to enter a request for a product or service. When an end-user has a need for a good or service, a Shopping Cart is created in SRM to begin the procurement process. Shopping cart creators can use any one of a number of the search options to select goods or services for a shopping cart: Contract Search, NIGP Search, Punch-out Catalog Search, copy previously created shopping carts or templates, or search for Internal Goods/Services (inventory agencies only).
Shopping Cart Creator	An end-user who has been allowed access by his or her agency to create a shopping cart.

SRM Key Terms and Concepts

Shopping Cart Approver	An end-user authorized by your agency to approve shopping carts.
Documents in SRM	A record of a transaction in SCEIS. Each document is assigned a unique identifying number. The document number for a "Saved" or "Ordered" shopping cart begins with the number 2000, followed by six unique digits, as in 2000XXXXXX (a ten-digit number).
Workflow	The automated approval process in the shopping cart, can include hierarchical approval, shopping limits (output limits) and dollar limits (approval limits) predefined by the agency.
Personalized Object Work List (POWL) "Check Status"	A new feature in SRM 7.2, the POWL serves as home base for SRM users. It contains Active Queries, Quick Criteria Maintenance and document history allowing users to view detailed information about a shopping cart at a glance and "check status" of a shopping cart.

SRM Key Terms and Concepts

Budget Check	The shopping cart checks the budget at each step of the process. Once the account assignment is entered in the shopping cart, the system runs a check to determine if there are funds available. If funds are not available, or if the account assignment information is entered incorrectly, the end-user will receive system-generated error messages commonly known as "red hard-stop messages."
Enterprise Core Component (ECC) (Goods Receipt/MIGO)	ECC is the core of SCEIS where master data is stored. The Goods Receipt Transaction (MIGO) is performed in ECC by end-users who have been authorized by their agencies to perform the task of receiving goods in SCEIS.

Goods Receipt (MIGO) Additional Information

- The Goods Receipt (MIGO) transaction code will be accessed through SRM.
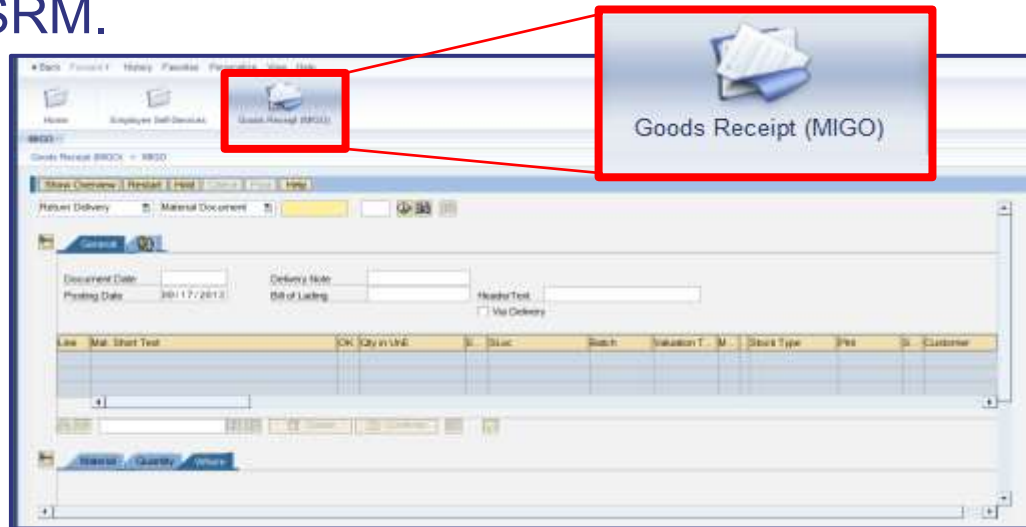
- This transaction will be used by the goods receiver to receive goods in ECC. A goods receipt will let the finance department know that the item has been delivered. Once a goods receipt has been completed and an invoice has been received, payment can be made.

- A uPerform Business Process Procedure (BPP) is available to provide step-by-step instructions on how to complete the transaction.

Full Procurement Process Flow in SCEIS

1.
Create
Shopping Cart
(SRM)

2.
Approve
Shopping Cart
(SRM)

3a.
Create
Purchase
Order (PO)
(SRM)

Or

3b.
Follow
Solicitation
Process
(SRM)

3c.
Create
Contract or PO
(SRM)

4.
Create Goods
Receipt
(ECC)
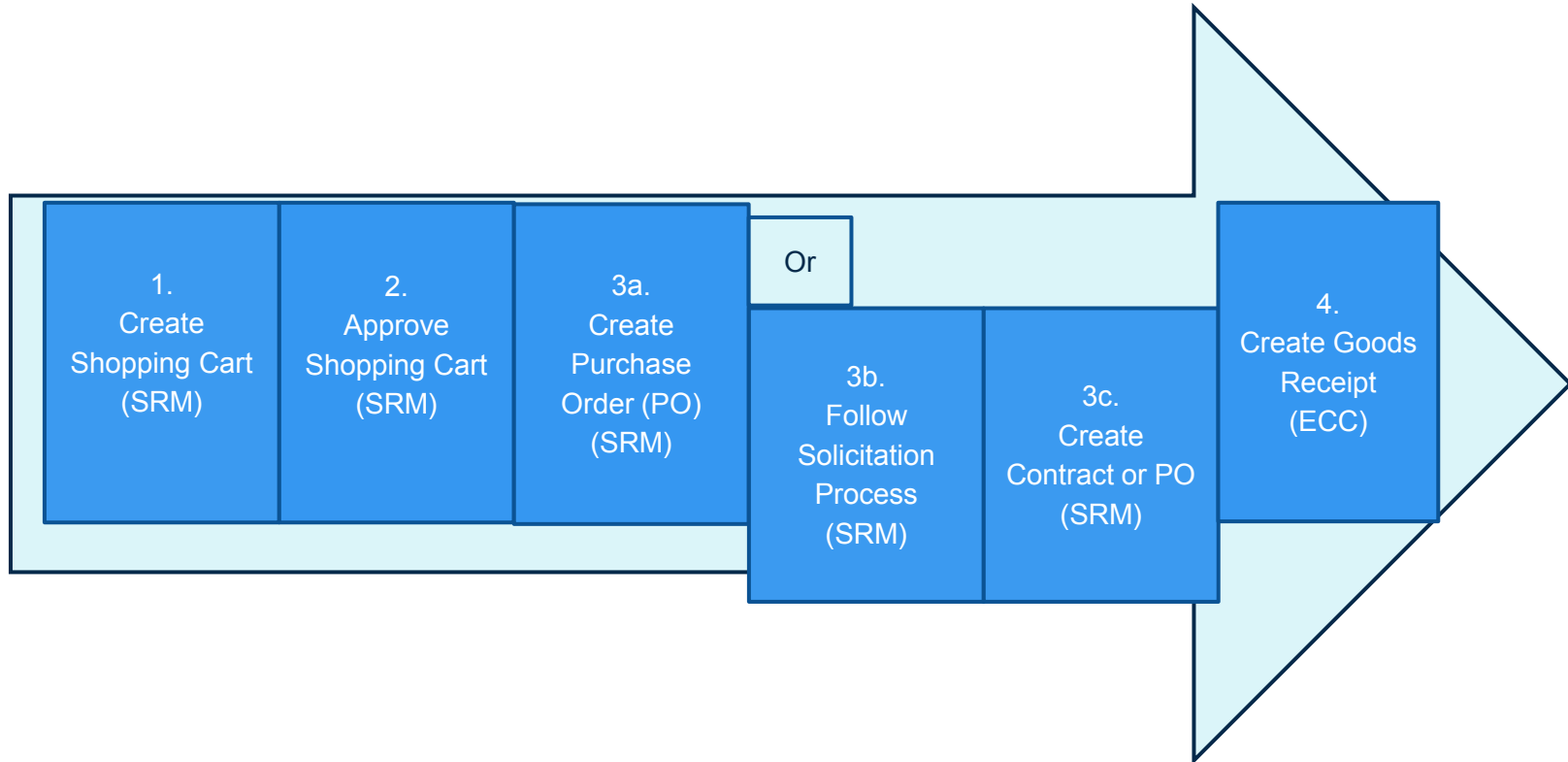
Lesson 1 Summary

- You should now be able to:
  - Understand the key terms and concepts of the SRM Shopping Cart.
  - Describe the process flow of procurement and relevant SAP modules.

LESSON 2: HOW TO CREATE A SHOPPING CART

STATE INFORMATION TECHNOLOGY

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SC BUDGET AND CONTROL BOARD

Lesson 2 Learning Objectives

- Learn the steps to create a shopping cart (shop in 3 steps).

- Understand different options to select goods/services for creation of a shopping cart: Contract Search, NIGP Search, Punch-out Catalog Search, Old Shopping Carts and Templates, or search for Internal Goods/Services (inventory agencies only).

- Detail processes for:

  - 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.
  - How to add and replace an approver.

Log-on

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

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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Shopping Cart Creator SRM Folders
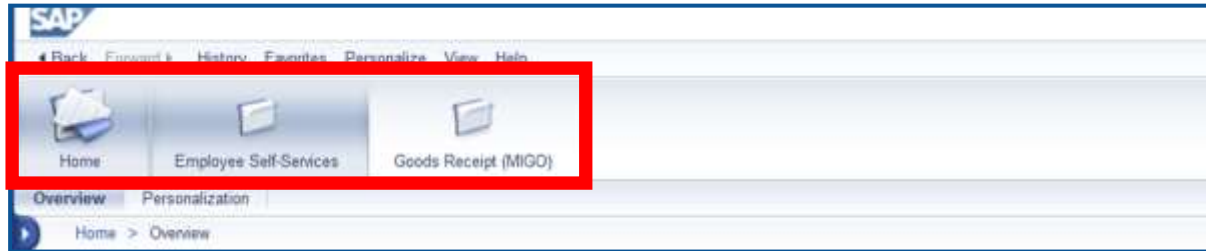
- After logging into SRM, folders will appear at the top of the screen.

- The number and name of the folders will depend on the security roles you have been assigned by your agency.

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

SRM Employee Self-Services Folder
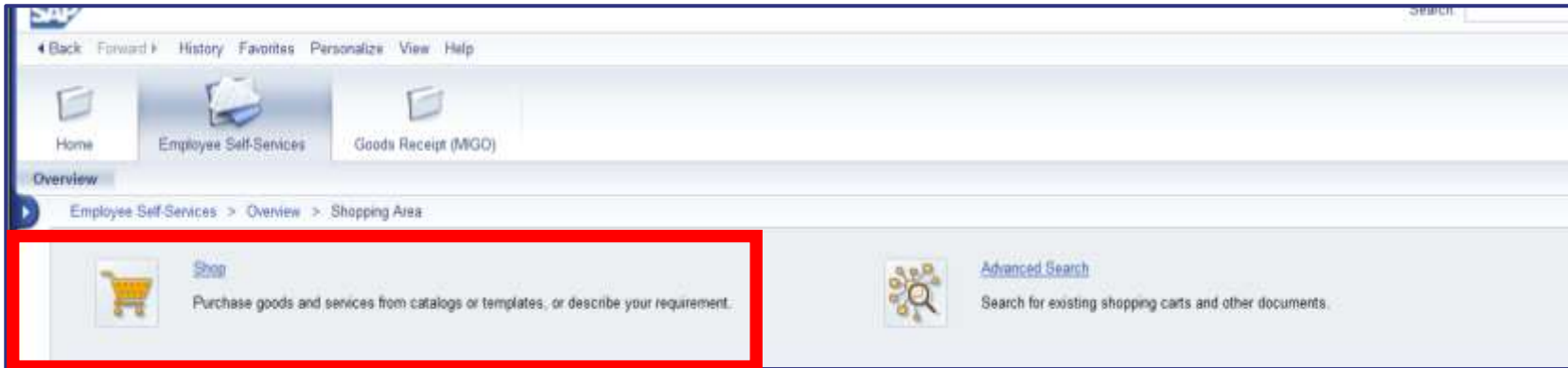
- The process to request goods/services in SRM begins by clicking on the Employee Self-Services folder.

Employee Self-Services Folder Options

 Shop: Create a new shopping cart.

 Advanced Search: Search for an existing shopping cart by using specific search criteria such as shopping cart number, purchase order number, timeframe, etc.

Shop

Steps to Create a Shopping Cart in SRM 7.2

- **Step 1 Select Goods/ Service:** Choose the goods or services that you need to procure with the shopping cart you are creating.

- **Step 2 Shopping Cart:** Fill in required information: basic line-item data, account assignment (financial information), documents that need to be attached, ship-to/delivery address (review and edit if needed) and the source of supply "Preferred Supplier", if relevant.

- **Step 3 Complete and Order:** Enter the name of the shopping cart, then order. The shopping cart is then sent through workflow to the assigned approver(s).
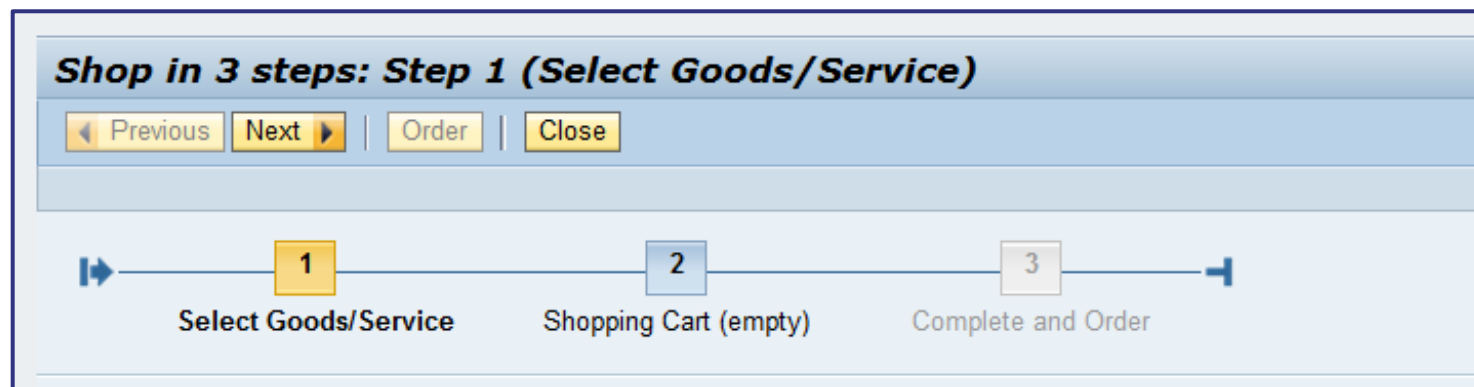
Step 1: Select Goods/Services

There are 5 options you can use to select goods and services in SRM:

- NIGP Search
- Contract Search
- Punch-out Catalogues (listed by vendor name)
- Old Shopping Carts and Templates
- Internal Goods/Services (inventory agencies only)
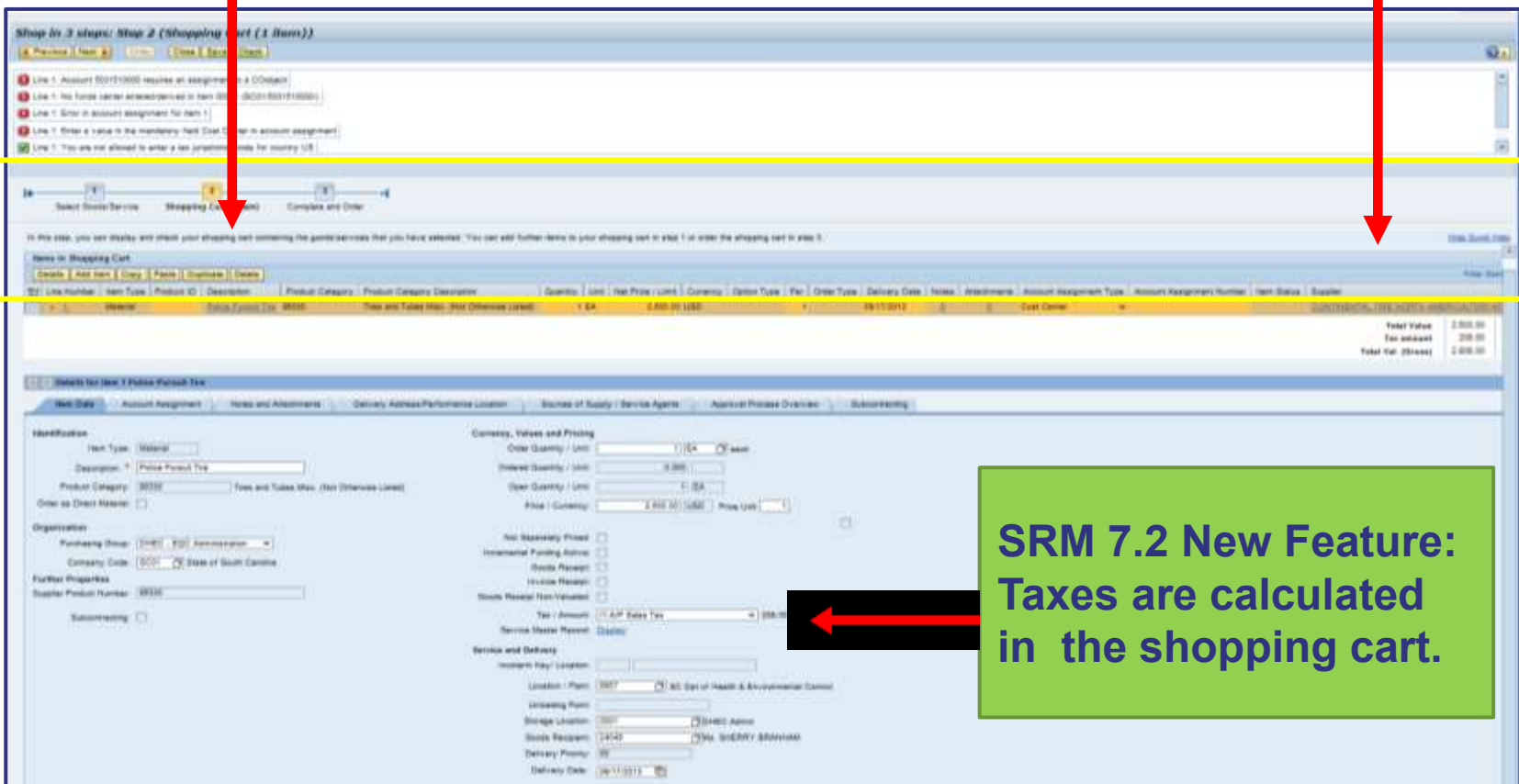
Shopping Cart Option Definitions

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.
Contract Search	Allows you to search by contract number or by the name of the good or service you wish to purchase. This option is the system default .
Punch-out Catalogs (listed by vendor name)	The catalogues contain statewide contract items that are maintained by vendors. Punch-out Catalogs are located on the "Shop" screen in SRM 7.2.
Old Shopping Carts and Template	This feature is used to copy an existing shopping cart.
Internal Goods/Services (inventory agencies only)	Inventory agencies use this option to order goods from their warehouse for consumption.

Step 2:
Shopping Cart Detail Information

SCEIS takes the data collected in Step 1 (Select Goods/Services) and brings over the Description and the Supplier (Contract Search) into the line item of the shopping cart.

SRM 7.2 New Feature: Taxes are calculated in the shopping cart.

Step 2: Shopping Cart Detail Information

🌀 The following details are included in the tab strip area of the shopping cart:

– Item Data

– Account Assignment

– Notes and Attachments

– Delivery Address/Performance Location

– Sources of Supply/Service Agents

– Approval Process Overview

Step 2: Item Data

Item Data:

- Data specific to the item being ordered
- The description, quantity, required on date and price can be adjusted
- Product Category/NIGP Code can not be changed in Shopping Cart once "Punch-out to SRM" has been selected

Step 2:
Account Assignment
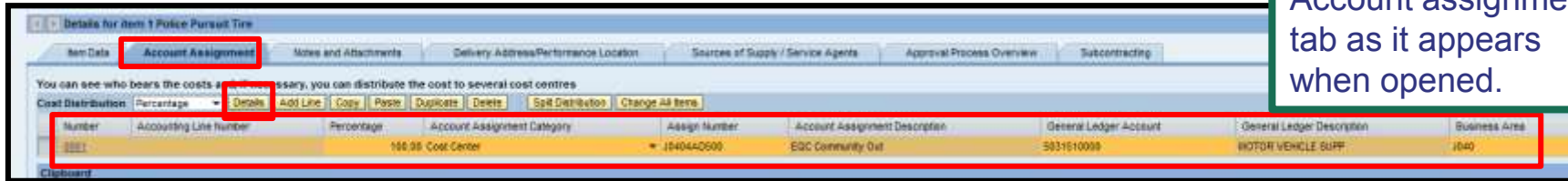
Account assignment tab as it appears when opened.
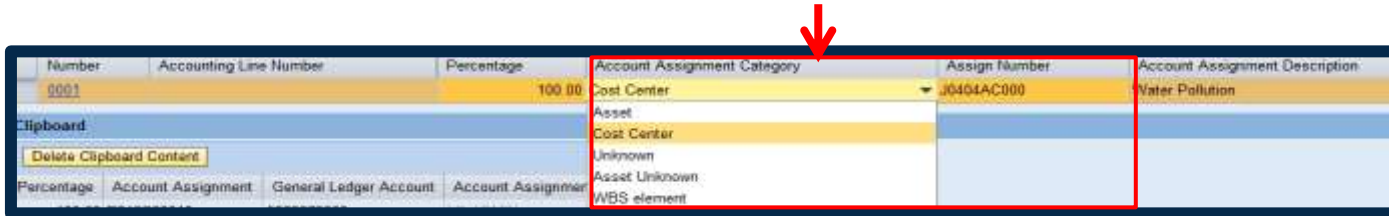
Account Assignment tab with Account Assignment drop-down list expanded.

Note: Selecting the "Unknown" Account Assignment Category shown in the screen shot above causes the shopping cart to route to the FI Approver (Finance Department) to enter the account assignment details.

Step 1: Cost can be assigned to an Asset, Asset UNK, Cost Center or a WBS Element.

Example: Select the Account Assignment Category "Cost Center" from the drop-down menu. (Cost Center is set as the default)
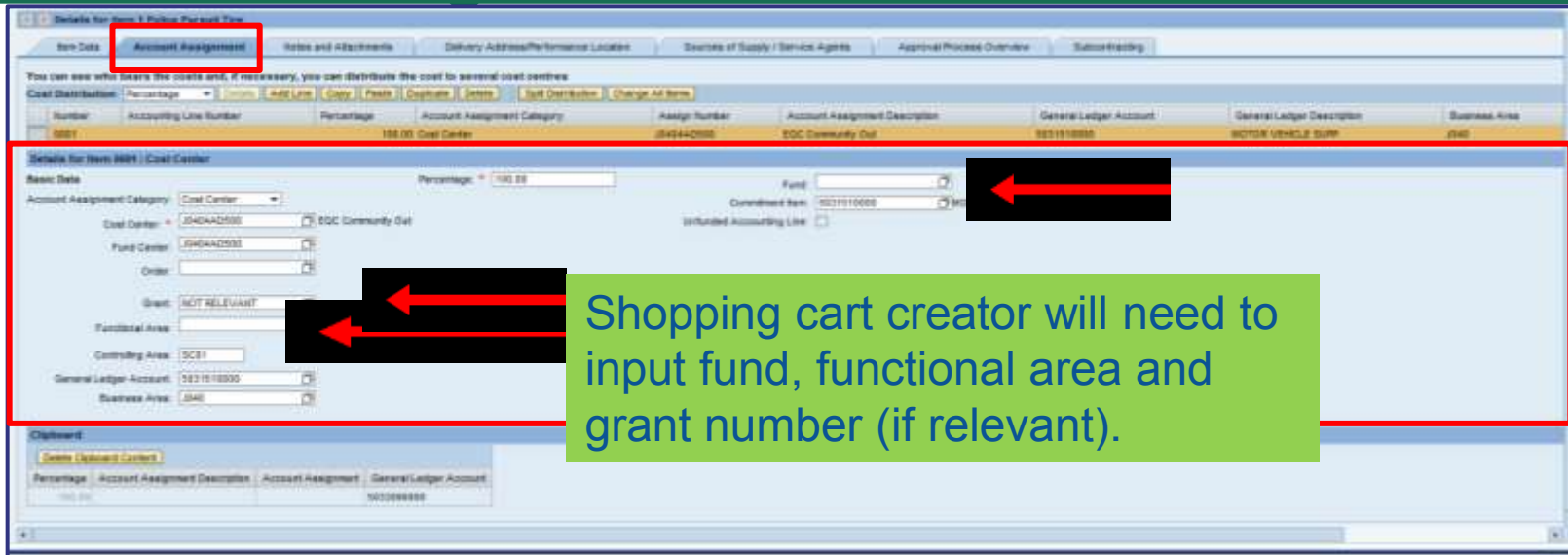
Step 2: The shopping cart creator will need to input the "Assigned Number". In the example shown above, the cost center is entered in the "Assigned Number" field.

Example: J0404AD500

Note: Account Assignment Description and Business Area populate based on the Assigned Number selected

Step 3: Select the "Details" button to enter the Account Assignment details.

Step 2:
Account Assignment Details

Shopping cart creator will need to input fund, functional area and grant number (if relevant).
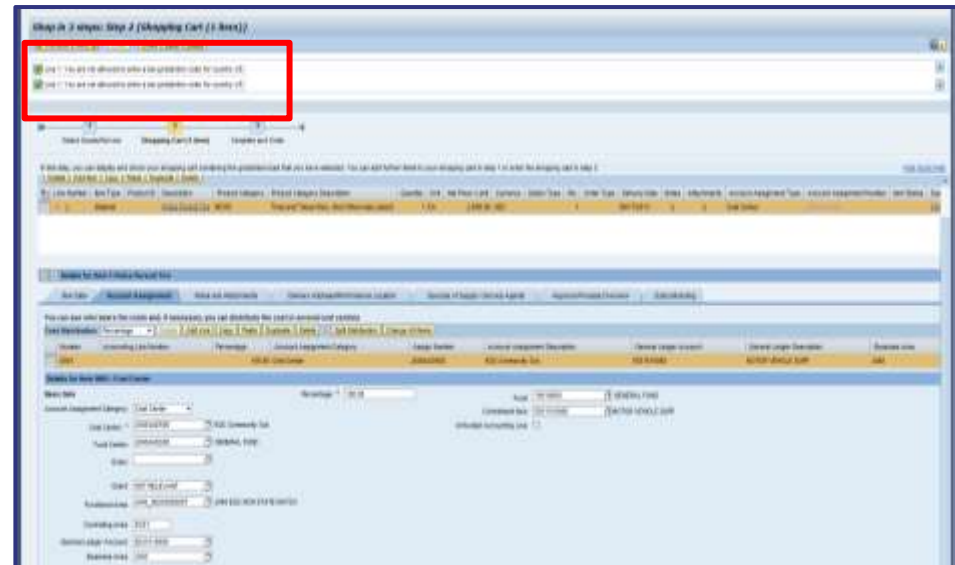
Account Assignment Details

- Shopping cart creator will need to input Fund, Functional Area, and Grant Number (If Relevant).
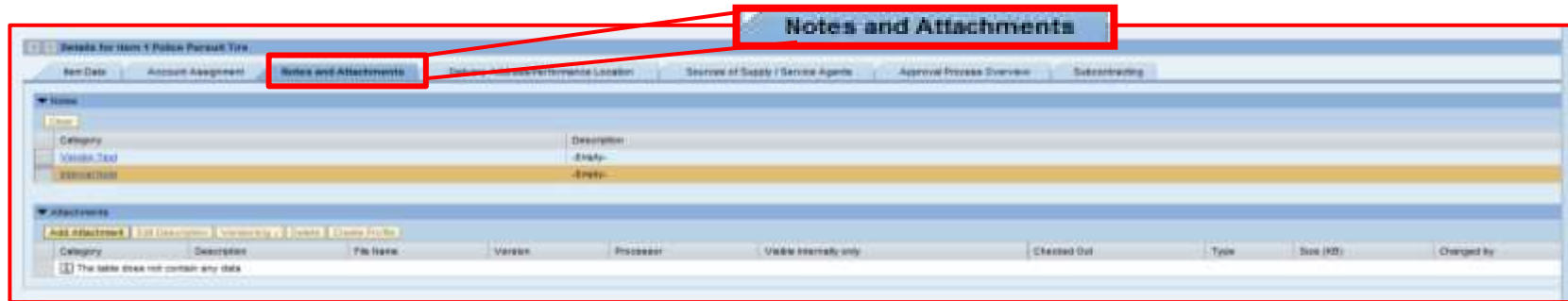
Step 2:
Account Assignment Details
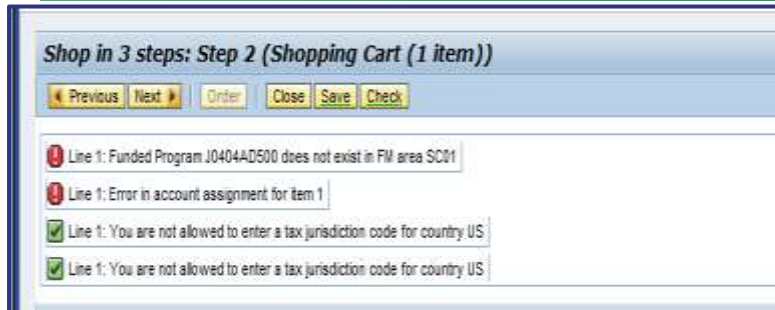
AFTER

BEFORE

Account Assignment Details

- Account Assignment errors will disappear when the correct funding information is entered.
- uPerform BPPs with details on how to input Account Assignment categories are available for further practice.
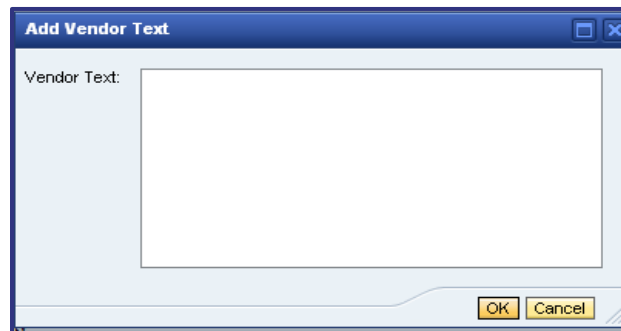
Step 2: Notes and Attachments

- The section of shopping cart where documents can be uploaded, such as quotes or data specific to the item being ordered.

- Add attachments
  - Ensure you use acceptable attachment file types (Word, PDF, Excel, etc.).
  - File names for attachments cannot exceed 30 characters in length.
  - Files larger than 10 megabytes in size cannot be attached.
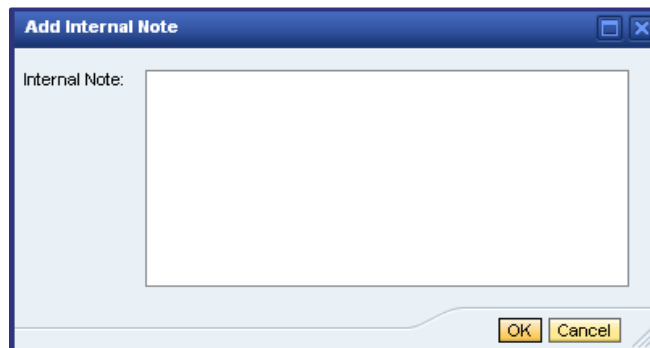
Step 2:
Notes and Attachments

⚛ Vendor Text is visible to the vendor on the purchase order:

Add Vendor Text

Vendor Text:

[OK] [Cancel]

⚛ Internal Notes are visible to the buyer who is assigned to create the purchase order:

Add Internal Note

Internal Note:

[OK] [Cancel]

Step 2:
Delivery Address/Performance Location

- This is the section of Shopping Cart that identifies where the items are to be delivered or services to be received.

- The default is based on organizational structure assignment of requestor.

- It can be changed per line item for delivery to different addresses.

Step 2:
Source of Supply/Service Agents

Sources of Supply/Service Agents

- This is the section of the Shopping Cart that identifies which vendor, "Preferred Supplier," if any, the requestor specifies to order from.

- If shopping cart item data originated from a contract, supplier is already populated in the Supplier field.

- Search criteria can be used to find a preferred supplier. Shopping carts can be processed without a vendor assigned.

- Buyers do not have to use a vendor that is specified by the requestor.

Step 2:
Approval Process Overview

- Allows creator to view the name of the approver(s) assigned to approve shopping cart.
- Additional approvers can be added in this section.

  Example: Approvals for IT products (IT Commodity Approver).

- Approvers can also be replaced in this section.

  Example: Replace Approver with a Substitute Approver because regular approver is out of the office and the shopping cart must be approved today.
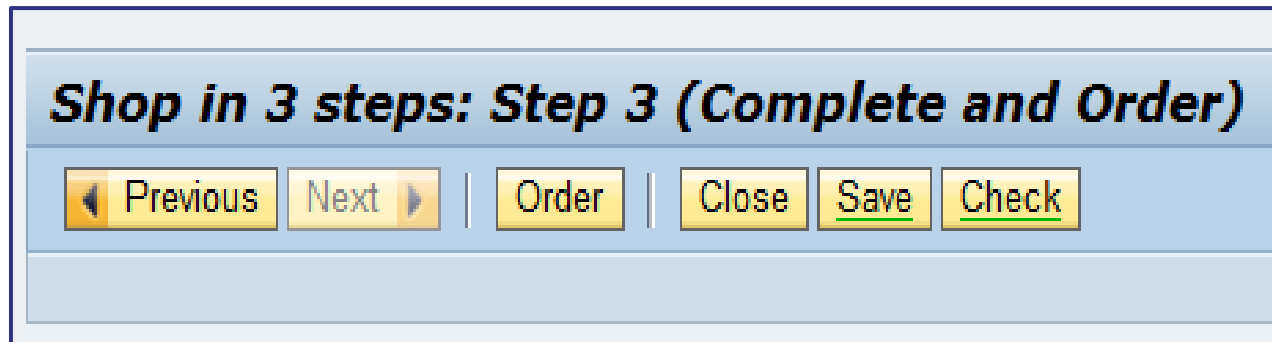
Step 3: Complete and Order

@ Enter a name for the shopping cart that will be easy for you to identify in the "Name the shopping cart" field. If you don't enter a name, the current date will become the name of the shopping cart by default.

@ You can also add a note to the approver in the "Header Approval Note" field.

@ The "Order" button begins the approval workflow and orders the shopping cart.

Step 3:
Complete and Order

- At this point, if the shopping cart is free of errors (all green check mark messages), the shopping cart can be ordered by selecting "Order."

- If you are not ready to order or the Shopping Cart has errors, the shopping cart creator can place the shopping cart on hold by selecting "Save."

Step 3:
Complete and Order

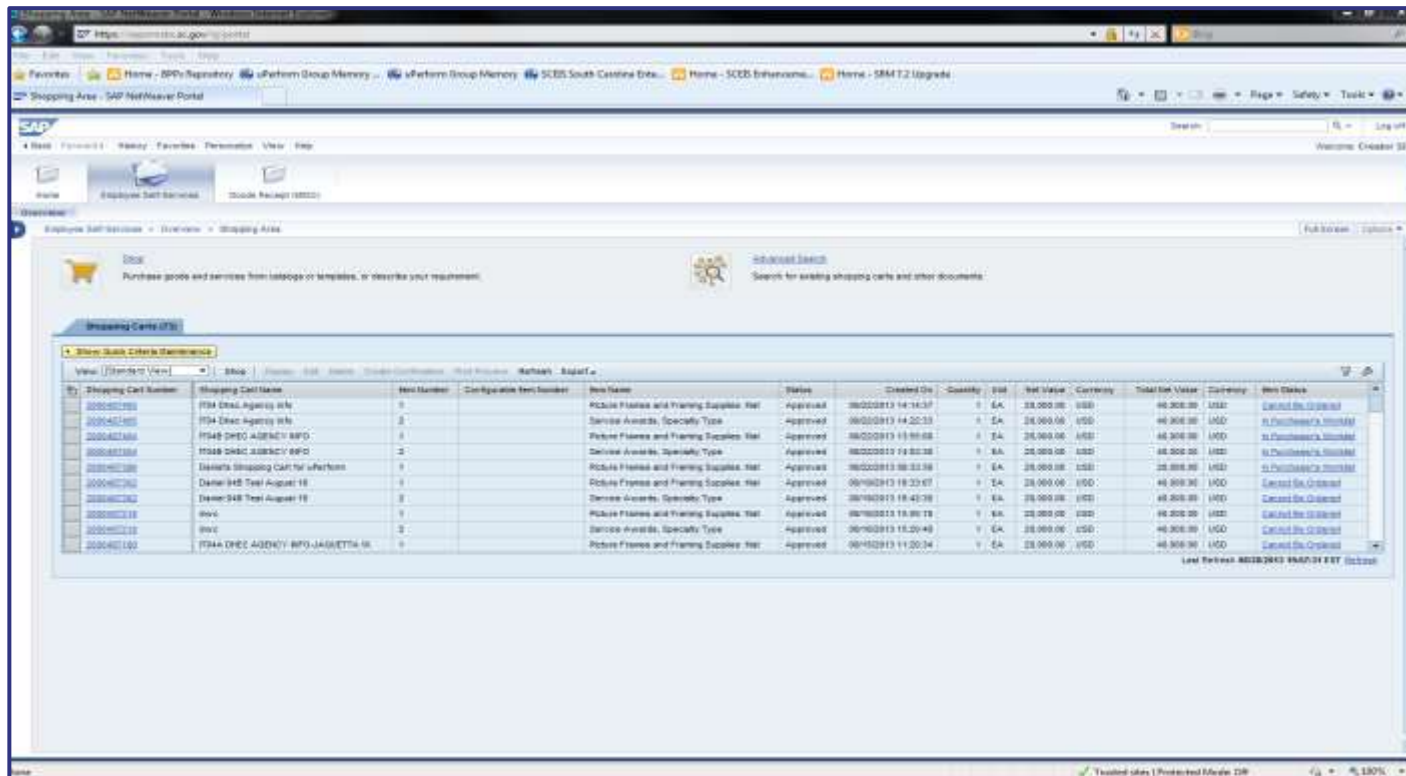You have successfully created a Shopping Cart!

Click the red "Close" icon () in the top right side of screen to exit the shopping cart screen and return to the SRM home page.

How to Find a Shopping Cart and Check Status, Show/Hide Quick Criteria Maintenance

❧ New feature in SRM 7.2.

❧ Find an additional shopping cart that is not visible in the Personalized Object Work List (POWL) using a variety of search criteria.
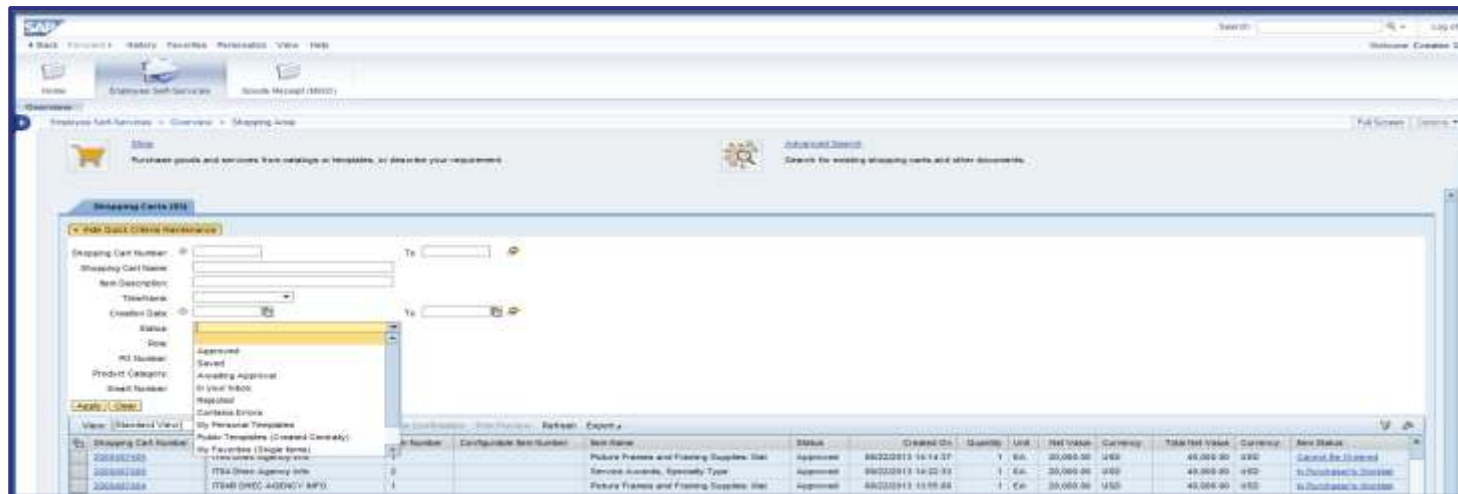
How to Find a Shopping Cart and Check Status, Show/Hide Quick Criteria Maintenance

- Status Messages: Approved, Saved, Awaiting Approval, In Your Inbox and Rejected.

- Shopping Cart Number: Enter the number in the Shopping Cart Number field.

- Creator can view further details about the shopping cart by clicking on the link in the "Shopping Cart Number" column or by clicking on the "Item Status" column.

How to Find a Shopping Cart and Check Status, Show/Hide Quick Criteria Maintenance

Status Messages	Definition
Approved	Shopping cart has been approved by the Approver.
Saved	Shopping cart has been placed on hold by the shopping cart creator and has not moved forward for approval or purchase.
Awaiting Approval	Shopping cart has been ordered by the shopping cart creator and is located in the approver's inbox awaiting approval.
In Your Inbox	Approver has made changes or the shopping cart has been rejected and your attention is required.
Rejected	Shopping cart was rejected by the approver.

## How to Find a Shopping Cart and Check Status, Show/Hide Quick Criteria Maintenance

- Additional Search Options:

  - Shopping Cart Number: Enter the number in the Shopping Cart Number field.

  - Shopping Cart Creator can view further details about the shopping cart by clicking on the link in the "Shopping Cart Number" column or by clicking on the "Item Status" column.
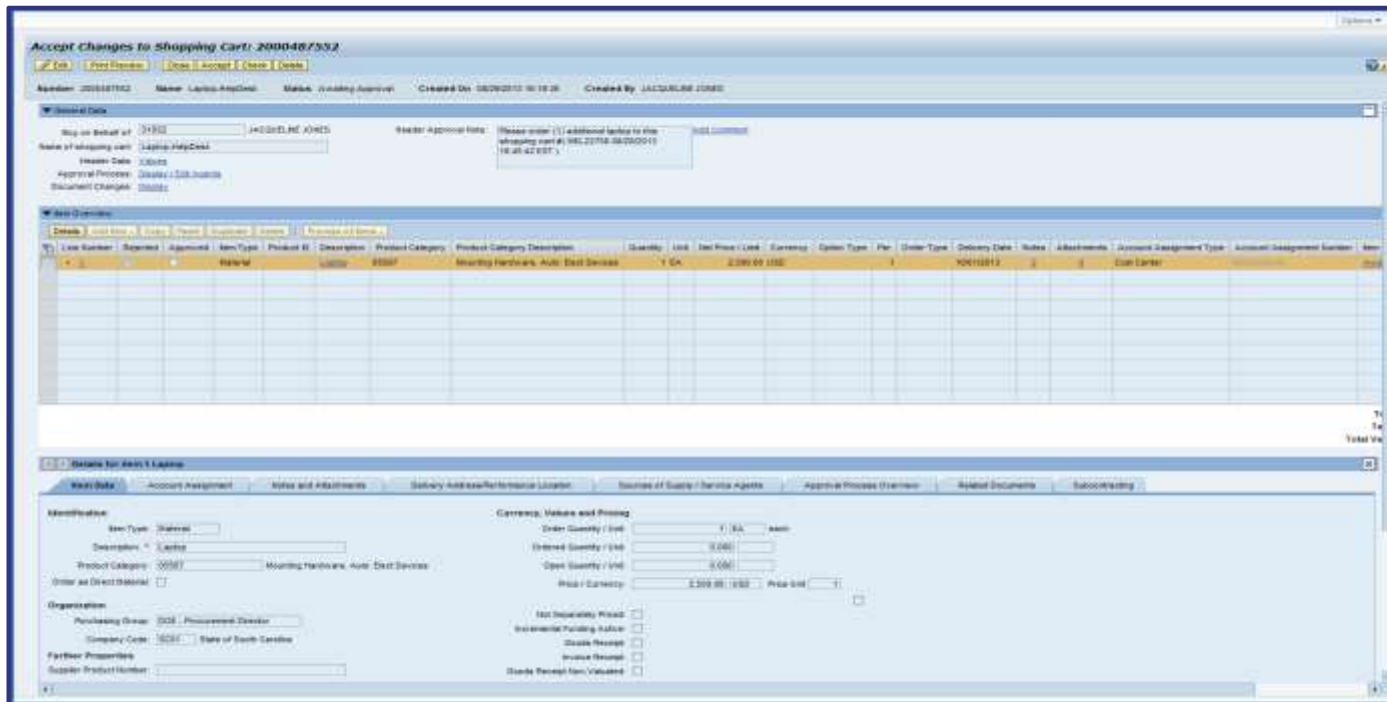
How to Manage a Rejected Shopping Cart

- Click on the "Shopping Cart Number" link found under the "Shopping Cart Number" column.

- New Feature: "Show my Tasks" (pop-up screen) provides an at-a-glance view of the tasks that need to be performed on the shopping cart.

- Process Now: Allows you to update the shopping cart with the requested changes and workflow the shopping cart back to the initial approver with the requested changes made to the shopping cart.
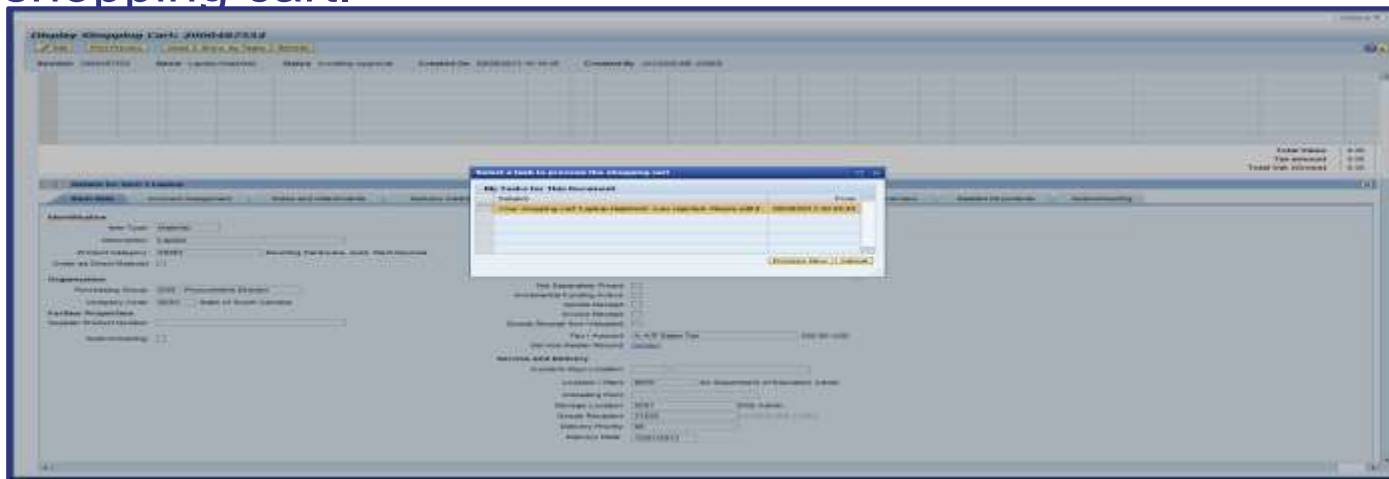
How to Manage a Rejected Shopping Cart

- It is important to know that an "approver note" is entered by the approver to provide a reason why the shopping cart was rejected and to advise the creator on 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.

How to Manage a Rejected Shopping Cart

- Message: "Document is in approval. Any document changes may lead to an adaptation 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.
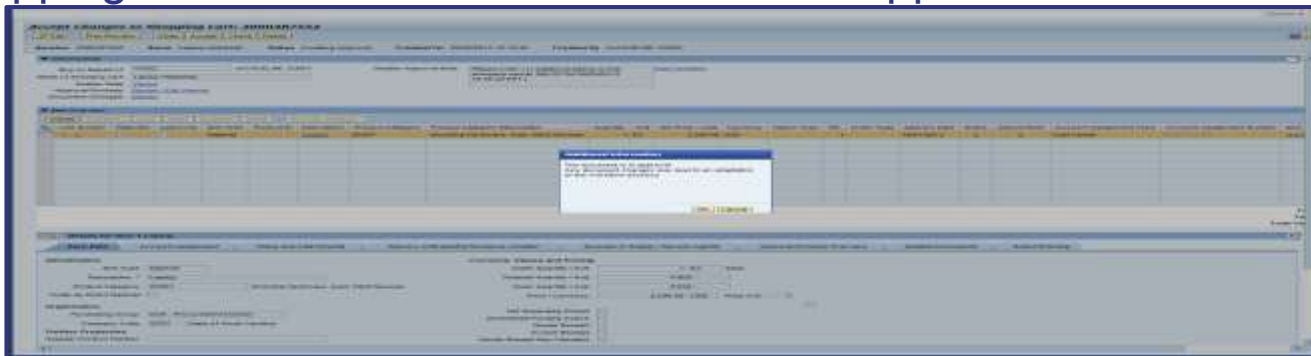
- A comment can be added to provide confirmation that the requested change has been made. (ABOVE) Click the "Add" button.

How to Manage a Rejected Shopping Cart

- In the screen shot below, a comment has been added to provide an update to the approver. Click the "Proceed" button to continue the shopping cart order process.

- "Proceed" button: Once you have made all the requested changes and you are ready for the shopping cart to workflow back to the assigned approver(s), click the "Proceed" button.

- Shopping cart status will show "Awaiting Approval."

How to Add and Replace an Approver

- To replace an approver, begin in the Approval Process Overview tab.

- If an approver has not set up a substitute, the shopping cart creator can add an approver (before approving the SC) or replace an approver in the workflow.

- The approver replacement must have the Approver role within the agency.

Lesson 2: Knowledge Check

- A "Saved" or "Ordered" shopping cart begins with the number 2000XXXXXX ?

  (True or False)

- Taxes are calculated in the Shopping Cart?

  (True or False)

- Vendor Text is visible on the Purchase Order?

  (True or False)

Lesson 2 Summary

You should now understand how to:

- Create a shopping cart in 3 steps using the options to select goods and services available in SCEIS (shop in 3 steps).

- Find and check the status of a shopping cart.

- Manage a rejected shopping cart.

- Add and replace an approver.

LESSON 3: UPERFORMS AND HANDS-ON EXERCISES

uPerforms and Exercises

uPerforms

- **LINK: http://sceis.sc.gov/page.aspx?id=272**
- **SRM ESS Create Shopping Cart Using Contract Search**
- **SRM ESS Create Shopping Cart Using NIGP Search**
- **SRM ESS Create Shopping Cart from Punch-out Catalog**
- **SRM ESS Creating Shopping Cart from Old Shopping Carts and Templates**
- **SRM ESS Add, Replace Approver**
- **SRM ESS Managing Rejected Shopping Carts**
- **SRM ESS Check Status of Shopping Cart**
- **SRM ESS Create a Shopping Cart for Inventory Items**
- **SRM ESS Create a Shopping Cart Using Cost Center Split Distribution**
- **SRM ESS Create a Shopping Cart Using Asset or Asset Unknown Using Account Assignment**
- **SRM ESS Create a Shopping Cart Using Unknown Account Assignment**
- **SRM ESS Create a Shopping Cart Using WBS Element Account Assignment**

Exercises 1-4

LESSON 4: BEST PRACTICES AND TIPS

Best Practices and Tips

- Begin all shopping carts with the "Contract Search" to ensure that you are linking to existing contracts.

- Develop a naming convention for your shopping carts to make them easy to find. One good rule of thumb is to give shopping carts a name related to what is being ordered.

- Before adding or replacing an approver, check with the person you are adding or replacing to verify their availability to approve the shopping cart.

Best Practices and Tips

- The shopping cart checks the budget at each step of the process. If budget errors are received when creating, ordering or approving a shopping cart, check with the finance/budget department in your agency to ensure funds are available.

- Do NOT use the Internet browser arrows, use the SRM navigation links.

LESSON 5: COURSE SUMMARY

Course Summary

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.

Any Questions?