

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

STATE INFORMATION TECHNOLOGY



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

#### Welcome and Introductions



#### Welcome to SCEIS SRM 200i, Shopping Cart

- Introductions
- Ø Sign-in sheet
- Restrooms
- Breaks
   Bre
- 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**



#### **Concepts 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
- Control Con

# **Course Learning Objectives**



- Output 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



- Output 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

STATE INFORMATION TECHNOLOGY



### Lesson 1 Learning Objectives



- Open 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



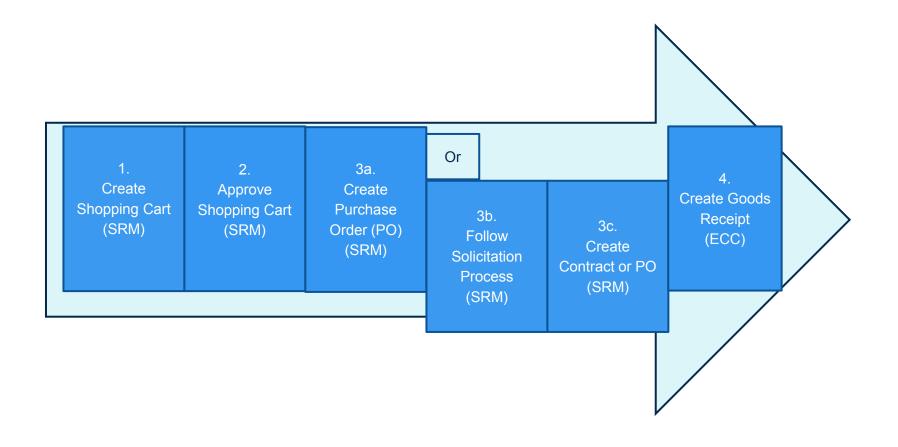
The Goods Receipt (MIGO) transaction code will be accessed through SRM.

Deck Force (1) Topology Families Forceastics View Response (nd Decision)     Example of the Decision     Example of the Decision     Material Discovery (1) Period (1) Topology (1)     Response Decisions (1) Period (1) Topology (1)		8		Goods F	Receipt (	MIGO)	4
December Date Protect Date Protect Date Not Start Text		Hadufet VaCobey	- Bat	Neuror T. A	. Burtipe	344	a Cuturer
	- 1(2	= 10					لى ال

- 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





#### 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



# Lesson 2 Learning Objectives

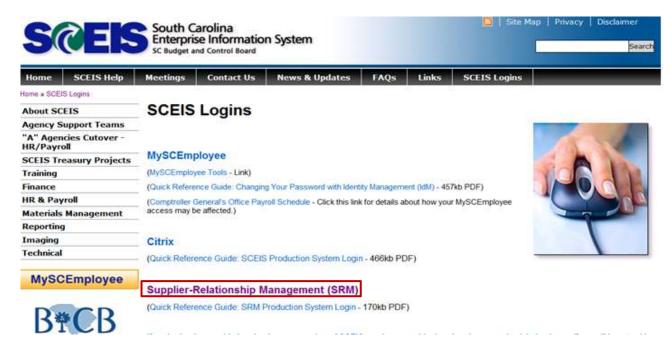


- Construction Co
- Output Understand different options to select goods/services for creation of a shopping cart: Contract Search, NIGP Search, Punch-out Catalog Search, Old Shopping Carts and Templates, or search for Internal Goods/Services (inventory agencies only).
- Oetail processes for:
  - How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





- 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	



SAP		
4 Back Forward	und k History Favorites Per	sonalize View Help
B	E	E
Home	Employee Self-Services	Goods Receipt (MIGO)
Overview	Personalization	
Home >	Overnew	

- 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



SAP			
	ard	sonalize View Help	
171	a	a	
-	0		
Home	Employee Self-Services	Goods Receipt (MIGO)	
Overview	Personalization		
Home >	Overview		

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

# Employee Self-Services Folder Options



Back Forward History Fa	orites Personalize View Help		Search
Home Employee Self-	E		
Overview Employee Self-Services > C	anview > Shopping Area		
Shop	oods and senices from catalogs or templates, or describe your requirement	Advanced Search Search for existing shopping carts and other documents.	

- 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



Back Forward + History Favori	es Personalize View Help			Search
Home Employee Self-Sen Overview Employee Self-Services > Over				
200	ds and services from catalogs or templates, or describe your requirement.	10	Advanced Search Search for existing shopping carts and other documents.	

Shop in 3 steps: Step 1 (Select Goods/Service)		
Je 2 3 4 Select Goods/Service Shapping Cat (empty) Complete and Order		
In this step, you can search for goods/services and add them to your shopping cart. In step 2, you can display your shopping cart and ch throwse: For SCEIS shopping cart creation, click on the NIGP/Contract Search link or one of the Punch-Out Catalog links to shop	eck it, in step 3, yee can order your sho <u>Old filopping Casts and Templates</u> <u>Internal Goods/Senicas</u>	pping cart. Dell Compatens ESI Easternal Easter: Scientific MSC Industrial NGP/Contract.Scientific Office Mass Stell Parceh Out Catalog Spectrum Stagles Travell
Free Text: If you cannot find it above		

# 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).

Shop in 3 steps: Step 1 (Select Goods/Service)		
Previous Next      Order Close		
Select Goods/Service Shopping Cart (empty) Complete and Order		

## 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.

ing in 3 stags: Stag 2 (Shapping et (1 item))			
Paring (har ) (1981 (Dest Lars (her))			-
Use 1. Associat 1001110000 Insulter all exceptions in a COMMUT. de 1. Instrume parter annexitation and instrumentation (dcCondCondCondCondCondCondCondCondCondCond			2
1         Image from the row         Mongaring Col         Comparison on the row of a service of the row of a service on the row of a service of the row row of the row of t	uner The per and Turber Nervic Is par anagong set in and T or over the sheaping set in and T experiments (Section (Section (Section (Section Type (Section Type ) Section (Section (Section (Section (Section Type ) Section (Section Type ) Section (Section (		THE LOOK THE C
Materia Real Technic ( Network Technic Control ( Network ( Ne		SRM 7.2 New Featu Taxes are calculate in the shopping ca	d

#### 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



Hem Data Ac	scount Assignment	rformance Location Bources of Bu	upply / Bervice Agents Approval Process Overview Subcontracting
Identification		Currency, Values and Pricing	
Ham Type:	Material	Order Quantity / Unit	1 EA CP each
Description *	Police Pursuit Tire	Ordered Quantity / Unit:	0.000
Product Category:	86330 Tires and Tubes Miso. (Not Otherwise Listed)	Open Guantity / Unit	1 EA
Order as Direct Material		Price / Currency	2.600.00 USD Price Unit 1
Organization			
	[DHEC - EQC Administration *]	Not Separately Priced:	
and the second sec	8001 C State of South Carolina	Incremental Funding Active:	
Further Properties	actor [] otale of douth Carolina	Goods Receipt	
Supplier Product Number:	86330	Invoice Receipt	
		Goods Receipt Non-Valuated	(1997)
Subcontracting			II A/P Sales Tax + 208.00 USD
		Service Master Record:	Distant
		llervice and Delivery	
		Incoterm Key/ Location:	
		Location / Plant	9967 🗇 BC Dpt of Health & Environmental Control
		Unloading Point	
		Storage Location	0001 (DHEC Admin
		Gooda Recipient.	
		Delivery Profity:	
			09/17/2013 [0]

#### Item Data:

- Oata 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

ACCOUL	$\Pi$ ASSIU						11 <u>1</u>
E betalls for item 1 Poice Pursoit Time			op/ / Service Agents Agents Approval Process	Overview Subcontracting		nt assignme it appears	nt
You can see who bears the costs a second sea	y, you can distribute the cost to several cost o					opened.	
Number Accounting Line Number	Percentage Account Assignment Co		Account Assignment Description	General Ledger Account 5831610008	General Ledger Description INOTORY VEHICLE SUPP	Business Area	
2011 Clubbard	150,08 Cost Center	* (\$4044050)	EGC Community Out	- and a man			
Accounting Line Number 0001 Ipboard	Percentage 100 00	+ 1940442600	Assign Number	Account Assignment Descr Vater Pallution	iption Accou	nt Assignme th Account	nt

**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.

**<u>Step 1</u>**: Cost can be assigned to an Asset, Asset UNK, Cost Center or a WBS Element.

poount Appianmor

Example: Select the Account Assignment Category "Cost Center" from the drop-down menu. (Cost Center is set as the default)

Step 2:

**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.

SCES

#### Example: J0404AD500

<u>Note:</u> 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



Norther Accounting Line Burdler	Add Law   Carry   Peaks   Counters   Centro Restantinge Account Assignment Carry 196.05 Cont Center	ry Aange Surdan	Account Assignment Description BOD Desenverty Del	General Ledger Assourt Recipionation	General Ledge Description BOTOR VEHICLE SUM	Destroad Area
Name Real Actuated Assignment Datagory Cost Denter Deel Darker - (DADA25000 Parat Darker - (DADA25000 Parat Darker - (DADA25000 Orace - (DADA	Percentage * 1990.09	Shopping input fun	g cart create d, functiona mber (if rele	al area and		

#### **Account Assignment Details**

Shopping cart creator will need to input Fund, Functional Area, and Grant Number (If Relevant).

## **Account Assignment Details**



Shop in 3 steps: Step 2 (Shopping Cart (1 item))	AFTER
Line 1: Funded Program J0404AD500 does not exist in FM area SC01 Line 1: Error in account assignment for item 1 Line 1: You are not allowed to enter a tax jurisdiction code for country US Line 1: You are not allowed to enter a tax jurisdiction code for country US	Interview Strap & (Marging Carl (S. Next))       0.1         If or 1 = 10 of 0.0       0.1         If or 1 = 10 of 0.0       0.1         If or 1 = 10 of 0.0       0.1         If or 1 = 0.0       0.0         If or 0.0<
BEFORE	Name         Name <th< td=""></th<>

#### **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



Details for them 5 Police Parault Tire				Notes and At	tachments			
Nem Data Account Assignment	Botes and Attacturents	Data and All and All the	ance Location Sector	we at Separar I Service Agents Agentic	Provess Dominant Subscripting			
T Hannel						-		
Cempry			Description					
NAMES AND A DESCRIPTION OF A DESCRIPTION			dialy-					
PERSONALITATION			deute					
* Alactements								
(All attained   101 Description   Version 101	Control Classics Fraction							
Celegory Description	Thilten	Vereine	Processor	Under Internally and	Chanted Out	Typin	Sign (927)	Charged by
(1) The table then not contain any thats								

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.





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



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

Add Internal N	lote		×
Internal Note:			
	ОК Са	ncel	///

## Step 2: Delivery Address/Performance Location

Barn Data	Account Assignment	liofes and Attachments	Delvery Address Performance Location	Sources of Supply / Service Agents Approval Process	Overview Subcontracting	
Repet Please scharge						
The fam is to be deliver	ed to a different addr	ress, enter the new address here				
fame	SCEIS Rout			Additional Name	The State of South Caroline	
00	DHEC - EDC AP QUE	ity .		Phone Number / Extension:	(1893) 898-4119	
ax NumberExtension	(903) 898-4487			E-Mail	Lave84@dhet.ac.gov	
Building				Flaar / Raom		
reef / House Number	844.58	2808		Pestal Code / City:	29201-1708 Countie	
Dates				Protei Cade / P.O. Brox		
	us diusa				DC Clibouth Carolina	

- 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



1 Details for Nem 1 Police Pursuit Tire			
ten Tata Account Assignment Scree and Attachments Delivery AddressTer	Sources of Supply / Service Agents	Approval Process Overview Subcontracting	
Remove Adapted Suppler			
The fair fill the Distance from the Following Supplier			
Suppley. TODOTAD142 CONTINENTIAL THE NORTH AMERICA			Contract/Sen. (#40300193331
Automating Info Record     Location / Part 3C Dat of Parado & Evenos     Supplem Second Database			Delivery Date (ED13/2013
Automatic rests of the second second suggest the second second			

#### 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: <u>Approval Process Overview</u>



feer Data Account Assignment Rates and Attachments Delivery Address/Performance Location Bources of Supply / Service Agents Agents	Seturnating			
				_
Convert Name Instan				
Servert Process Day				
with Processed By				
Follow Up: CIWork have to Dequester at Process End				
Noder ten				
Sector Se				_
Headler Approval Elatan				
Add Approver Income Approver				
Segunta	Process Slep	Status	Processie	Recei
+ 001	Automit: Appres	Cyan (No Decision Medici	System	

- Allows creator to view the name of the approver(s) assigned to approve shopping cart.
- Additional approvers can be added in this section.
  <u>Example:</u> Approvals for IT products (IT Commodity Approver).
- Approvers can also be replaced in this section.

<u>Example:</u> 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



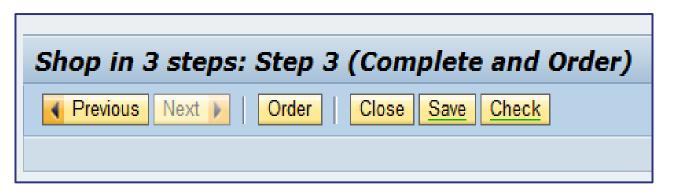
- Enter a name for the shopping cart that will be easy for you to identify in the "Name the shopping cart" field. If you don't enter a name, the current date will become the name of the shopping cart by default.
- You can also add a note to the approver in the "Header Approval Note" field.
- The "Order" button begins the approval workflow and orders the shopping cart.

10 (19) Select Goods/Serve	our shopping cart, or you can save it	Complete and Order and order it at a later date			
Select Goods/Serec	our shopping cart, or you can save it		-H		
Select Goods/Sene	our shopping cart, or you can save it		You can add t		
In this step, you can order y		and order it at a later state.	You can add I		
Number: 30 Approval Process De Header Approval Note	06487924 ustau / Edit Agenta				
Budget D	utay				

# 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!

Shop in 3 steps
Line 1: You are not allowed to enter a tax jurisdiction code for country US
Shopping cart "Automotive Tires for DHEC" with number 2000487924 ordered successfully

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.

	privat								5	(1) 日本日		Repres Safety * To	nik
-									_	Deature	1	16	
manual States Faced	ing Throughout Visio Date											Watching	
1000													
-	6												
Employee Settlace	CAR TOUGH Relays (STOD)												
the part part of the second	one - mapping Area											ful to em	
iter i				10000	ALL STREET								
the second se	ong ang ang ang ang ang ang ang ang ang a			the party of the second s									
Provide and	is and services from talkings or templates, or th	ation block stars	anani.	254 24	boar on manual 1	shoppeds carite and other	documents.						
and the second second second													
Browing Carry UTS													_
They limb Drives Same	tienice ]												
Vew [[iterdate Vew]	· ] the   farm thit tests the	and in case of	Barbara Babash has	afa :									Ē
To Thing my Carl Ramon	thoughing Call Name	teri lamen	Der fige abn bert burger	them Taxant	Tieles	Dasked Do	County   116		Cartering	Total lies Value	Talence	dente Clarkes	
				POSIS Planes and Yvery Supplier Ref.	Approval	m00081314:1437	1.65	10,000.00	100	10,200,00	( Artist	Calculate Operat	
2000401100	1734 Deal Agencia Ichr				and a second second	10/02/0913 14 22:13	1 5A	28,009,00	100	+0.000.00	LAD	PUT AND INCOME TO A DECIMAL OF	5
2000-001-001	104 Disc Agency Infe	Ê.		Sarosa Awatds, Specady Type	: Approved								
		E.		Serves Awards, Speciely Type Patrice Fishers and Fishering Dyppies Ital	-permant	AN-CO CO 1 + 1 + 1 + 1 - 1 - 1	1 14	26,000.00	448	44,300,00		A Conteners Inchis	
2000-452-005	104 Diver Agency who	1									100		ł
2000-601-005 2000-601-064	PD+ Dec Agency Ich PD+E D+EC AGENCY RPD			Peter Flares and Flaring Depice Ital	Approval	10-10-11-11-11-11-11-11-11-11-11-11-11-1	1 14	26,000.00	1.92	44,308.00	AND AND	1. Conteners. Markin	ii ii
2000402405 2000402464 2000402364 2000402364 2000402364	ITS4 Dean Agency Info ITS45 Deen Allendin INFO ITS45 Deen Allendin INFO			Patrice Flares and Flaring Deprins 184 Define Average, Specially Type		48.000013 13 44.48 88.000013 79 80.38	4 74 9 86	24,000.06 26,000.08	1.92) 1.510	46.300.00 46.000.00	600 6020 6027	A Pauleer's Market	1
2000-402-405 2000-402-444 2000-402-444	104 Desc Agents who Inset perc Agent's amp mass being agent's amp Desets despect of the Ammonia			Peter Planes and Flaning Depice Ital Second Available Specially Type Robits Planes and Flaning Depice. Nat	Approved Approved Approved	100000131100000 00000001210000000 000000012100000000	4 54 4 84 4 84	24.000.00 24.000.00 24.000.00	182 158 160	44, 304, 30 44, 505, 55 21, 594, 95	AND AND AND AND AND	A Parabasera Marile A Parabasera Sante A Parabasera Sante	1
2000462165 2000462166 2000462166 2000462166 2000462166	The Disc Agency Info Prive Sector Address V (APO) Intel® Detot Address V (APO) Deserts Strapping Carl for unfortune Dame 145 Test Arguet 18			Particle Flarens and Flarens Digities that Decision Avoid No. Types Mr. Type Potote Florens and Flarens Dupples. Nat Potote Florens and Flarens Supples. Nat	Appreciat Appreciat Appreciat Appreciat	10000000000000000000000000000000000000	4 74 4 84 4 84 4 84	25,000.06 25,000.08 35,000.08 25,000.00	1920 1920 1900 1900	44, 300, 30 44, 500, 30 24, 504, 50 40, 500, 30	000 6420 6420 6400 6400	A Pauloser's Mode G.Pauloser's Mode S.Pauloser's Mode Local Sc.Comm	ii ii
2009-42340 2005-42344 2005-42344 2005-42344 2005-42344 2005-42344 2005-42344 2005-42344 2005-42344	104 Disc Agency Info 1964 DetD AllENCY MPD 1968 DetD AllENCY MPD Devents Statept V 490 Dame Hit Text Agency Hit Devent 248 Text Agency Hit			Petron Flamma and Flamma Supplem Ball Deliver Annu Re. Denisally Type Robus Flamma and Flamma Supplem Ball Dobies Process and Flamma Supplem Ball Device Flamma and Flamma Supplem Ball	Approved Approved Approved Approved	1847232913 13 99 94 48 182223913 14 96 48 182223913 16 81 38 1847942913 16 82 47 1847942913 16 82 47	1 74 1 86 1 64 1 64 1 64	24,000,00 24,000,00 24,000,00 24,000,00 25,000,00	180) 198 1900 1900 1900	44, 304,30 44, 502,55 34, 884,30 44, 809,30 44, 808,30	600 6020 6020 600 6000 6000	11 Auctorea A. Market 11 Auctorea A. Market 11 Auctorea A. Market 12 Auctorea A. Market	1
2005407405 2005407464 2005407464 2005407366 2005407365 2005407365 2005407365	The Date Agency shi Trade bett Address's sure Trade bett Address's sure Trade bette Address's sure Dennis Hill Trad August 10 Dennis Hill Trad August 10 Dennis Hill Trad August 10 Bette Bette Bette			Policy Flares and Flares Digits Tail Decision (visitile, Specially, Type Robel Flares and Flares, Supplex, Tail Doble Flares and Flares, Special Tail Decise Flares and Flares, Type Robert Flares and Flares, Special	Approval Approval Approval Approval Approval	88/20/2015 10 10 10 10 88/20/2015 70 20 10 98/20/2015 30 21 30 98/98/2015 10 25 17 38/98/2015 10 42 30 98/98/2015 10 40 10	1 TA 1 BA 1 EA 1 EA 1 EA 1 BA	21,000,00 21,000,00 21,000,00 21,000,00 21,000,00 21,000,00	100 100 100 100 100 100	44, 500 10 44, 500 15 21, 804, 90 44, 500 10 44, 500, 80 44, 500, 80 44, 500, 80 44, 500, 80	1/00 1/00 1/00 1/00 1/00 1/00	Schuleners Made Schuleners Made Schuleners Made Lengt Schulen Descriptioners	d.

# 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.

7						.544	and the second	14	-
AL TELEVILLE HEAVY PARAMETER TANANAL YANG INC.								- Dates	-
Analysis Galilaninas - Canvasa - Maying Ana								P-45mm	et 15
The Rest of the second	A Statution		****						
( * Hale Space Commerce ) Inspanse (ar thorase - To									
Minapoleg Carl Rainer Ban Darscheller									
Tauhara (saata Data 🗢 🛐 Ya 👘 🖓									
Table C									
Row C									
Will Maximum Savard									
Predett Celeptre Aveating Agencial									
Divid familier Di your faboo.									
LARE (STRC) Carteria Drock									
View District View Up Persons Transme		20100200				I PORTA COMMA		1000000 W	1
P1 Desard Cat House Pair Security Control Control ( ) In Number Control And Security In Se	246.6	Depei de	and the second se	THE YAAN		734a feet Value			
222442152 Palace Palace Traces and Palace Palace		86/22/2013 16 14 37	7,84.	20,088.00		48,000 30		Land, In Lines	- 1
2010/01/201 ITEL Date: Approxy Infty D	100000	88/222913 14:23-33	1.44	20,000.00		49,000-00		hilboohaneth.lineited	
2004001000 TRANS OVER ADDROV MPD. 4 Finite Transmission and Frankry Transmission	tes list Logmont	44/22/04/3 41/06 #8	1.64	- 360840aii	1450	40,004:00	10.00	"A Party age in married	

#### 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.



- Click on the "Shopping Cart Number" link found under the "Shopping Cart Number" column.
- New Feature: "Show my Tasks" (pop-up screen) provides an ata-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 <u>shopping cart.</u>

ing Computing Carls 2000/487384 R. Carlshaw, Carl Area Schreid, Amerika M. Mary Schreid, Mary Schrei	Appletel (	
Consector for Classes Consector for Classes		Law York Control of Law
Annese and Annese (1997) Proceedings (1998)	The American Concern Concern Annual Concern Annual Concern Concern Annual Concern Annual	



- 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.

																	24
cept changes to	shopping	Cart: 200048	2552														
(en) freelinnen	Dates Aug	Aut I Chern I Donte.	k														
salari unitesting	Mane Lates	Angling: Maile			d Dis SECRETIS IN 1938 Created	By LACT		20MB									
Cheveliel Data							1110		_								
may in Benarius (2)	FCI .	- HORMAN A	0 HE	Stater Apps	continues. Interest of a second faith	Contraction -		and in some of									
alan of along ong cart (1) Pream Cole (2) Approval Pricemo (2) Bicanant Changes (2)	ophia (riegizieni lotta urlari i 128 Juanta	51			shapping sample (in the system) of the system of the syste	LTM2011											
Ann Grenme		_															
Details   continue   1	and the lite	anter Lines III	frames of the	- 1 J1													
Los Links   Same	a lammad	Anno Tapat   Printed B	Conservation	Pantani Calegory	Product Category Description	15-14-160	1444	Int Pase 1 Long	Earnerst	Eprint Tares	Par	Dom-Tare	Onterny Date	-		Concernent Danagement Types	Access Designment Karmer
141		take to	ALC: N	attack of the second	Interting Party are Auto East Decision		EA.	200.00	1110		. 1		100112012		4	Con Links	
																	3
A distant for similar t	Laine																
( BARE BARE)	Account Assignment	ment : Australian	d Adapterers	i Bellery i	And any Relationaria Lington	Sauripe of	finely.	f bereta rigette	-119	parts a Picca	96 () ie		Append Sector	-	Buttoont	Vacma /	
			_														
and the distance of the local distance of th	Martin I				Carrence, Values and Proce			10164	-								
									<u></u>								
Description, *					Detected Gamerity / DA			1.040									
Precisci Calegory		Moorning 1	second out	e fartherne	Open Simonty / Vie			0.000									
interest the other sectore and	11.				Weid / Darweity			509.00.1030.11	P102-214								
										13							
-Bourseless	The second se	and the second se			Real Property Printed	# 61 S											
Peopleting Direct	DOI . Provers	Contraction Contraction															
Perchange (hour		e of South Carolina			the enseties have been												
Accessing Direct						• CD (											
	3000111 0449				the sense for Parladeg Parloy Deside Press	8											



- 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 second to a second seco
And and a second s	
A DESCRIPTION OF TAXABLE PROPERTY OF TAXABLE PROPERTY OF TAXABLE PROPERTY.	The second secon
And a state of the second	
and the second	
ADD.	And in the local data and the lo
CONTRACTOR AND A CONTRACT	A STATUTE OF A S
	Karan and a second s
	<ul> <li>The encoderate on A sub-the encoderate of the encoder</li></ul>
( Per Pair )	
PROPERTY AND ADDRESS OF THE OWNER OWNER OF THE OWNER OWNE	
And and a second	
PROPERTY And Annual Property and Annual Property of States	
Annual Statement Statement     Annual Statemen	
A PROVIDE A CONTRACT OF A CONT	

A comment can be added to provide confirmation that the requested change has been made. (ABOVE) Click the "Add" button.

The second second second second second	Connects, Sector ( 19.4.1) - Handrik Science, and	
	GBAXYA HERVERICA	
The Deside on South Lands	In a second s	A supervised of the state
and the second s		



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.

	Allfrance Laura			and in the second	at the description of the latent	wy second as							
States of Lots		territer and	North Annual A		and	ow pressures							
they be Detail at	2008	1 and the later	-	Theories states	and these of the second s	and the second se	A de l'anne de la						
the set ad experting the st the factor of the strategies that are strategies	Laster, Heplices Del Villag Scenes Descent Descent Descent		1		Memory series and the series (12) of a series land of the series and the series land of the series	kongoria							
	and the second												
	A Grow A Parent 1												
Correction of the	and Party and	State Trans   Store	Anna Pi   Development	Broker Calegory	Manual Colleges Statements		And Prove of Cases		 AL COMPANY	Date of the	ferrer ( militaria	Const Challent	Annual Property Statement (199
													Total Value
													Today Mas. 2010-0-0
· Databa line and	and it seems								 				17
Party Table	And and Address	-	and a lateral		Address Technological Address		in the second	1.0	 	Particles' Designed			
Party lists	And the second second		THE R. P. LEWIS CO.	Contract of the local division of the local	ACCOUNT OF A DESIGNATION OF A DESIGNATIO	Description of Description	Concerning succession			Parallel Designed		and the state of t	
Average and the second					Carroway, Volume and Poss	-							
					Order Busides / No.	#-1(	110.4	17. ***					
	e - Talifie				Colored Quantity - UN	4 (	0.000						
the dust leading		1000	ing Davidskie, ind	a besi bernen	there in a start of the		8.886U						
tener au besuit Make	ester []				Print d Materia	P [	The second	max10.0					
Pagesblatters .													
		and the second second			Mail Tempor anno White								
Survivaning (Ja	and DOC PROPERTY	and second second			Internet and Prandering, Worker								

- 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 2000XXXXX ? (True or False)
- Taxes are calculated in the Shopping Cart? (True or False)
- Vendor Text is visible on the Purchase Order? (True or False)



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

STATE INFORMATION TECHNOLOGY



SC BUDGET AND CONTROL BOARD

# uPerforms and Exercises



#### uPerforms

- LINK: <u>http://sceis.sc.gov/page.aspx?id=272</u>
- **©** 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 Unknown Account Assignment
- **@** SRM ESS Create a Shopping Cart Using WBS Element Account Assignment

#### **Exercises 1-4**



# LESSON 4: BEST PRACTICES AND TIPS

STATE INFORMATION TECHNOLOGY



SC BUDGET AND CONTROL BOARD

#### **Best Practices and Tips**



- Begin all shopping carts with the "Contract Search" to ensure that you are linking to existing contracts.
- Overlop 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.
- O NOT use the Internet browser arrows, use the SRM navigation links.



# **LESSON 5: COURSE SUMMARY**

STATE INFORMATION TECHNOLOGY



SC BUDGET AND CONTROL BOARD

# **Course Summary**



#### You should be able to:

- Obscuss 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?



