



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**



Welcome and Introductions



Welcome to SCEIS SRM 200i, Shopping Cart

- 🌀 Introductions
- 🌀 Sign-in sheet
- 🌀 Restrooms
- 🌀 Breaks
- 🌀 Parking lot

Classroom Logistics

- ① Classroom etiquette
 - Cell phones off/silenced
 - No side conversations
- ① Feel free to ask questions
- ① No email or internet usage during class except at breaks

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)

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

- ① **Lesson 3: Exercises**
- ① **Lesson 4: Best Practices and Tips**
- ① **Lesson 5: Course Summary**
- ① **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	<p>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.</p> <p>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).</p>
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	<p>A record of a transaction in SCEIS. Each document is assigned a unique identifying number.</p> <p>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).</p>
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.

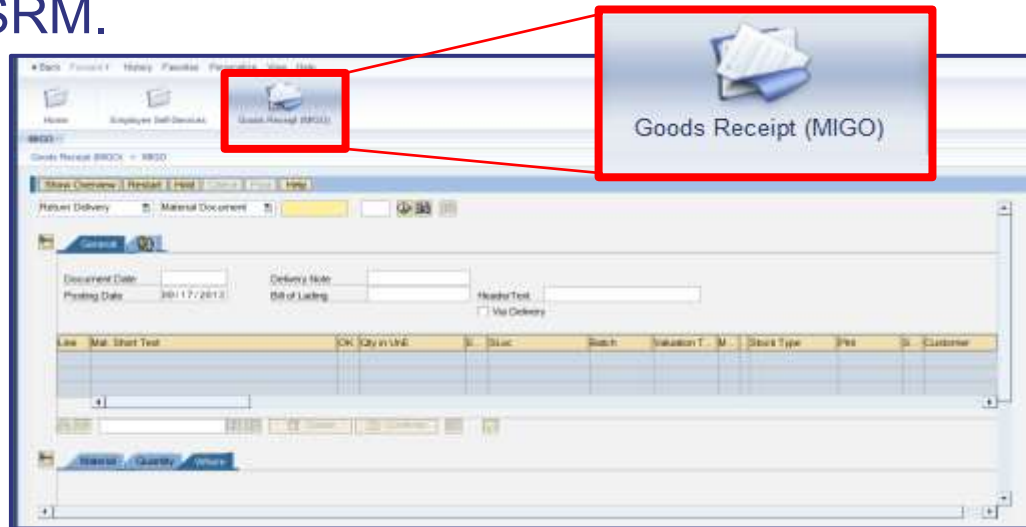
SRM Key Terms and Concepts



Budget Check	<p>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.”</p>
Enterprise Core Component (ECC) (Goods Receipt/MIGO)	<p>ECC is the core of SCEIS where master data is stored.</p> <p>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.</p>

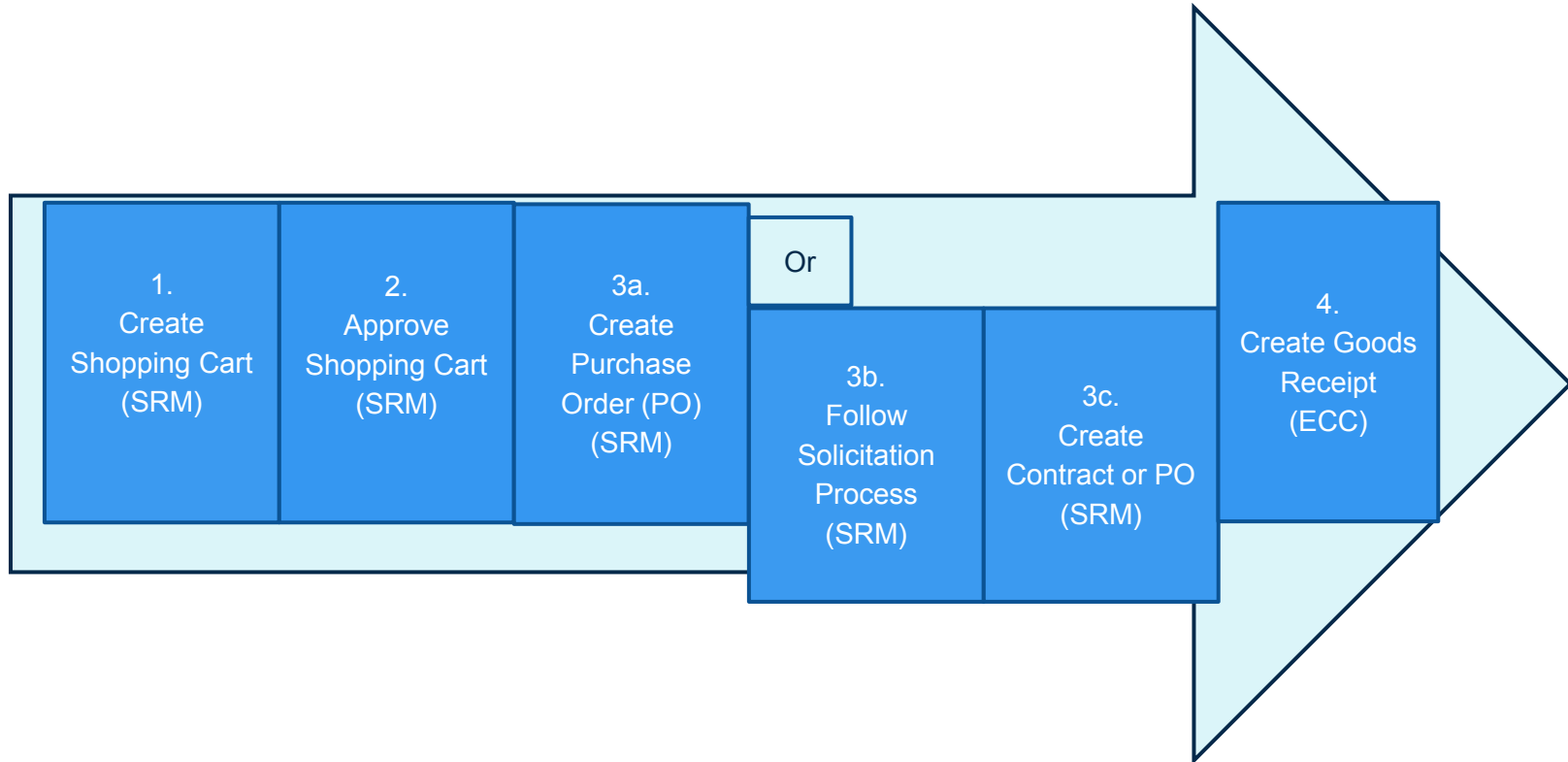
Goods Receipt (MIGO) Additional Information

- 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



Lesson 1 Summary

- ④ 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

Lesson 2 Learning Objectives

- ① Learn the steps to create a shopping cart (shop in 3 steps).
- ① 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).
- ① 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.



SCEIS South Carolina Enterprise Information System
SC Budget and Control Board

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SCEIS Logins

- About SCEIS
- Agency Support Teams
- "A" Agencies Cutover - HR/Payroll
- SCEIS Treasury Projects
- Training
- Finance
- HR & Payroll
- Materials Management Reporting
- Imaging
- Technical

MySCEmployee
(MySCEmployee Tools - Link)

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

Citrix
(Quick Reference Guide: SCEIS Production System Login - 466kb PDF)

Technical
(Quick Reference Guide: Changing Your Password with Identity Management (IdM) - 457kb PDF)
(Comptroller General's Office Payroll Schedule - Click this link for details about how your MySCEmployee access may be affected.)



BICB

Log-on

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



SAP NetWeaver

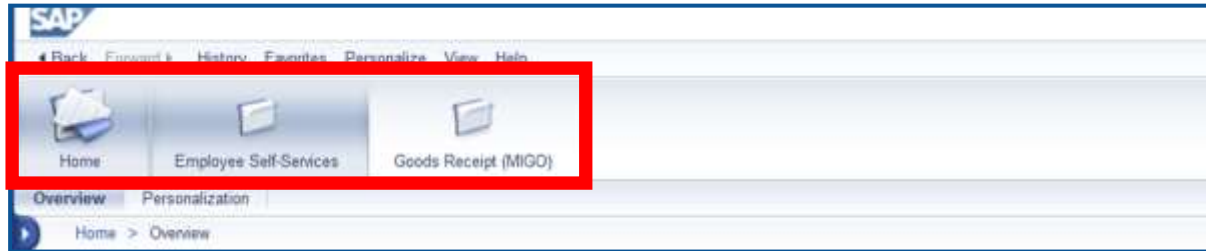
User *
Password *

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



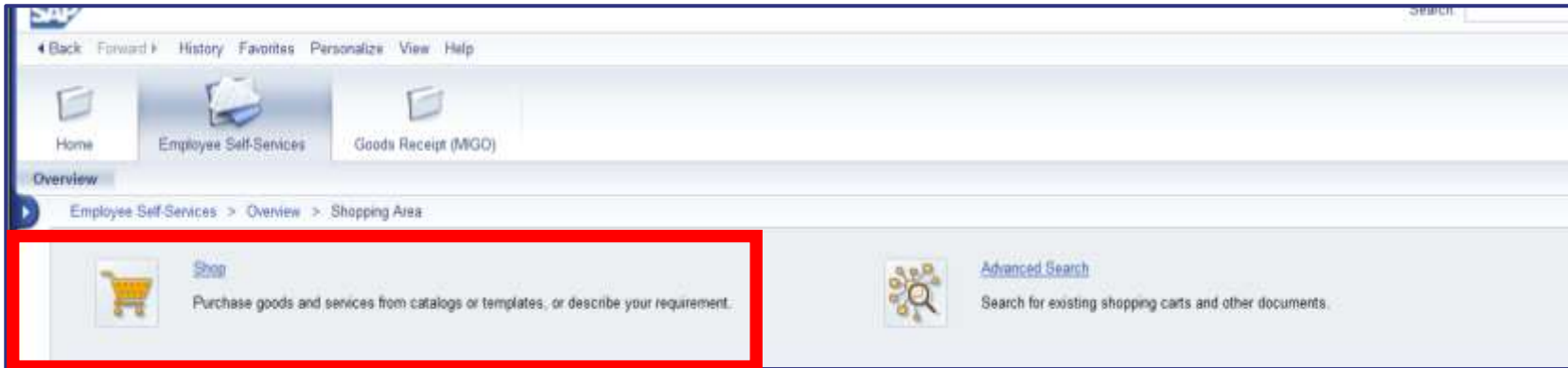
- 🔄 The process to request goods/services in SRM begins by clicking on the Employee Self-Services folder.

Employee Self-Services Folder Options



- ① **Shop**: Create a new shopping cart.
- ① **Advanced Search**: Search for an existing shopping cart by using specific search criteria such as shopping cart number, purchase order number, timeframe, etc.

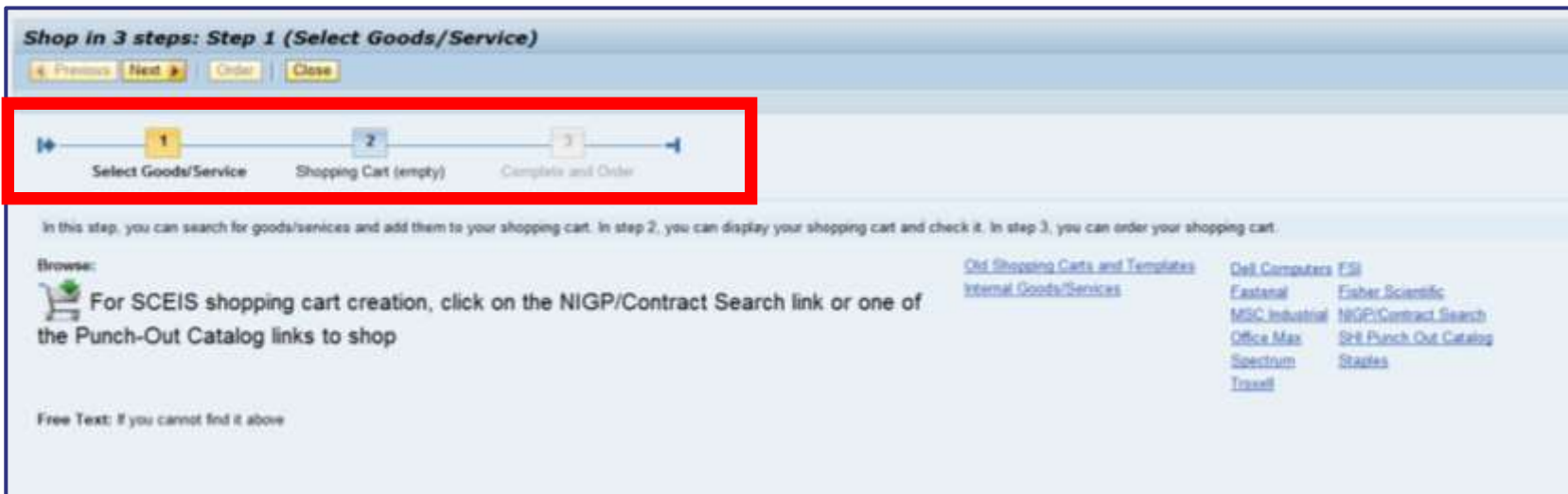
Shop



Employee Self-Service > Overview > Shopping Area

Shop
Purchase goods and services from catalogs or templates, or describe your requirement.

Advanced Search
Search for existing shopping carts and other documents.



Shop in 3 steps: Step 1 (Select Goods/Service)


Previous Next Order Close

1 2 3

Select Goods/Service Shopping Cart (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 check it. In step 3, you can order your shopping cart.

Browse:

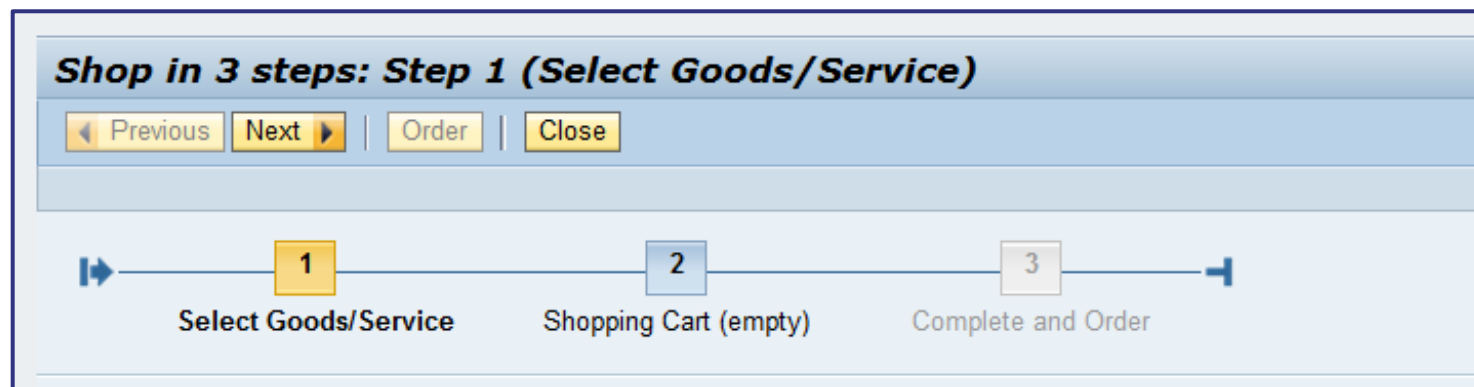
 For SCEIS shopping cart creation, click on the NIGP/Contract Search link or one of the Punch-Out Catalog links to shop

Free Text: If you cannot find it above

- [Old Shopping Carts and Templates](#)
- [Internal Goods/Services](#)
- [Dell Computers ESI](#)
- [Eastman](#)
- [MSC Industrial](#)
- [Office Max](#)
- [Spectrum](#)
- [Traxell](#)
- [Fisher Scientific](#)
- [NIGP/Contract Search](#)
- [SH Punch Out Catalog](#)
- [Staples](#)

Steps to Create a Shopping Cart in SRM 7.2

- ① **Step 1 Select Goods/ Service:** Choose the goods or services that you need to procure with the shopping cart you are creating.
- ② **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.
- ③ **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:

- ① NIGP Search
- ① Contract Search
- ① Punch-out Catalogues (listed by vendor name)
- ① Old Shopping Carts and Templates
- ① Internal Goods/Services (inventory agencies only)

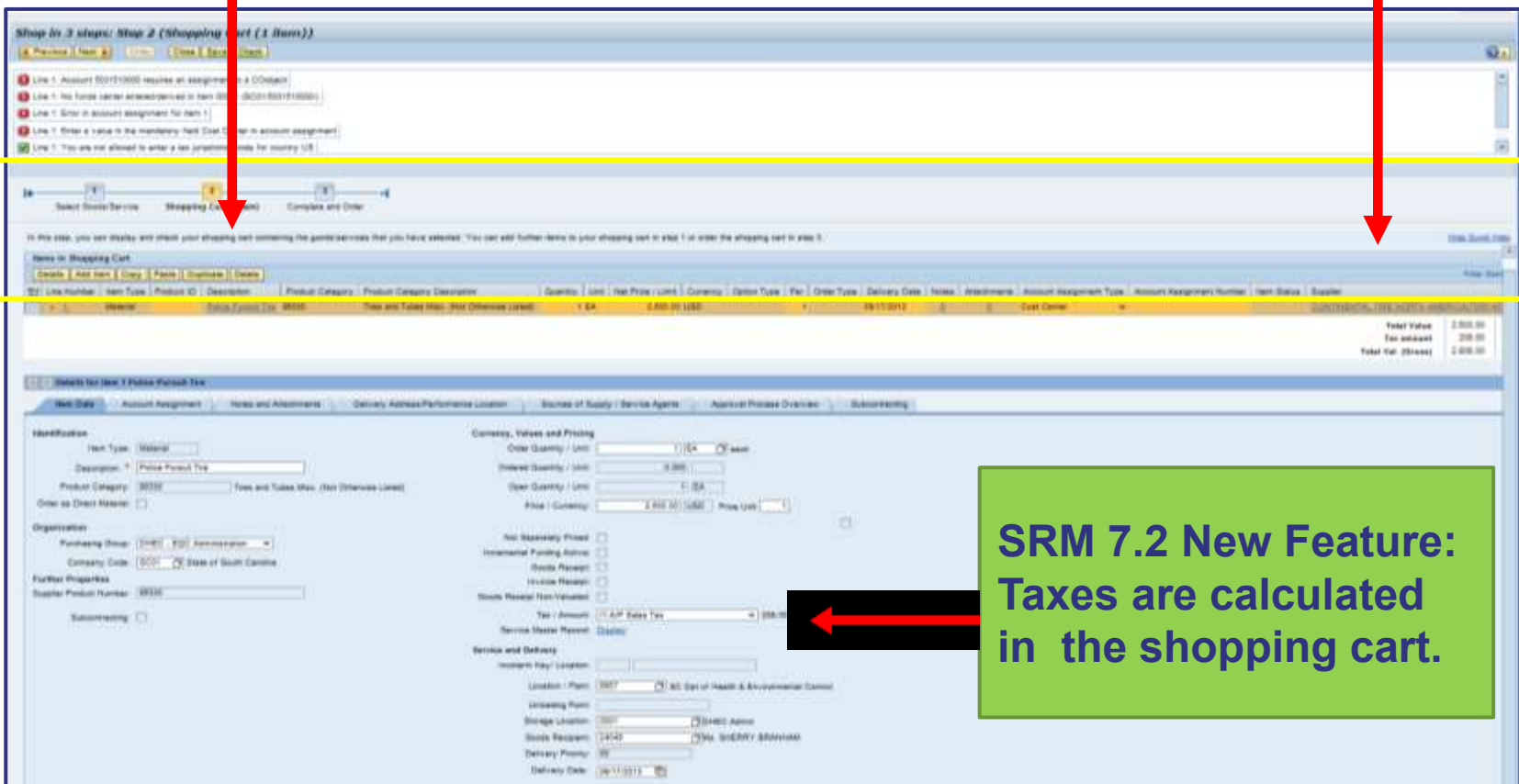
Shopping Cart Option Definitions



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.



The screenshot displays the 'Shopping Cart (1 Item)' interface. A yellow box highlights the 'Items in Shopping Cart' table, which includes columns for Line Number, Item Type, Product ID, Description, Product Category, Product Category Description, Quantity, Unit, Unit Price, Unit Cost, Currency, Order Type, Delivery Date, Items, Attachments, Account Assignment Type, Account Assignment Number, Item Status, and Supplier. The table shows one item with a quantity of 1 and a unit price of 2,800.00. A red arrow points from the text box above to the 'Description' column of this item.

Below the table, the 'Details for New 1 Public Pesticide Use' form is visible. It includes sections for 'Identification', 'Currency, Values and Pricing', 'Tax / Amount', and 'Service and Delivery'. A red arrow points from the text box above to the 'Tax / Amount' section, which shows 'AP Sales Tax' calculated at 288.00. A black arrow points from the text box below to this same 'AP Sales Tax' value.

Line Number	Item Type	Product ID	Description	Product Category	Product Category Description	Quantity	Unit	Unit Price	Unit Cost	Currency	Order Type	Delivery Date	Items	Attachments	Account Assignment Type	Account Assignment Number	Item Status	Supplier	Total Value	Tax amount	Total Tax (Gross)
1	Item	8033	Thio and Thioates Misc. (See Otherwise Listed)	7 EA	2,800.00	1.00	EA	2,800.00	1.00	USD	Y	08/11/2012	2		Cost Center			288710076	2,800.00	288.00	2,512.00

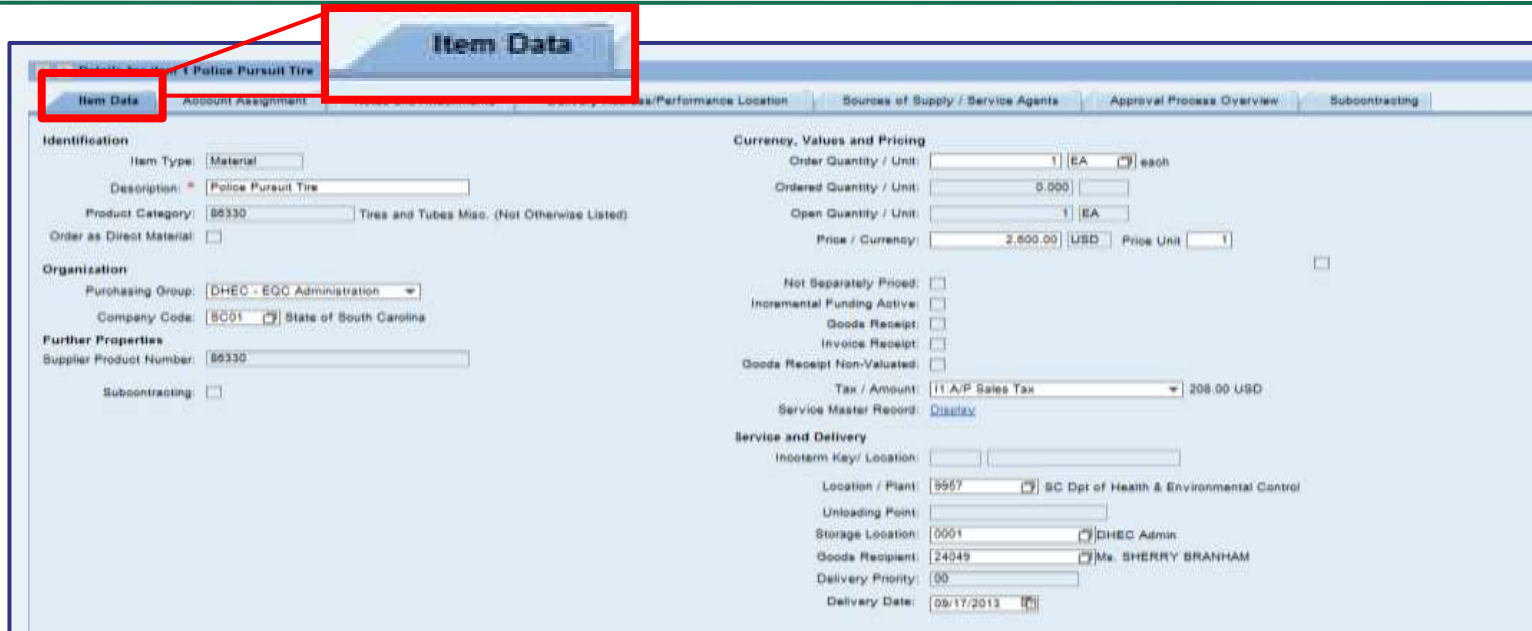
SRM 7.2 New Feature:
Taxes are calculated
in the shopping cart.

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



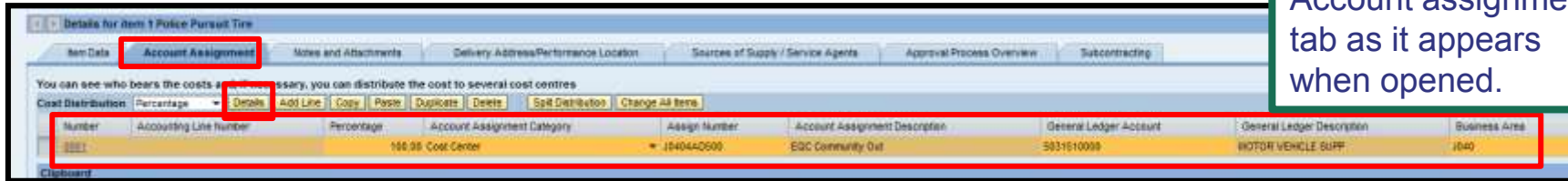
The screenshot shows the 'Item Data' form for 'Police Pursuit Tire'. The form is divided into several sections:

- Identification:** Item Type: Material; Description: Police Pursuit Tire; Product Category: 86330 Tires and Tubes Misc. (Not Otherwise Listed); Order as Direct Material:
- Organization:** Purchasing Group: DHEC - EQC Administration; Company Code: SC01 State of South Carolina
- Further Properties:** Supplier Product Number: 86330; Subcontracting:
- Currency, Values and Pricing:** Order Quantity / Unit: 1 EA each; Ordered Quantity / Unit: 0.000; Open Quantity / Unit: 1 EA; Price / Currency: 2,000.00 USD; Price Unit: 1
- Service and Delivery:** Location / Plant: 9957 SC Dpt of Health & Environmental Control; Unloading Point: ; Storage Location: 0001 DHEC Admin; Goods Recipient: 24049 Ms. SHERRY BRANHAM; Delivery Priority: 00; Delivery Date: 09/17/2013

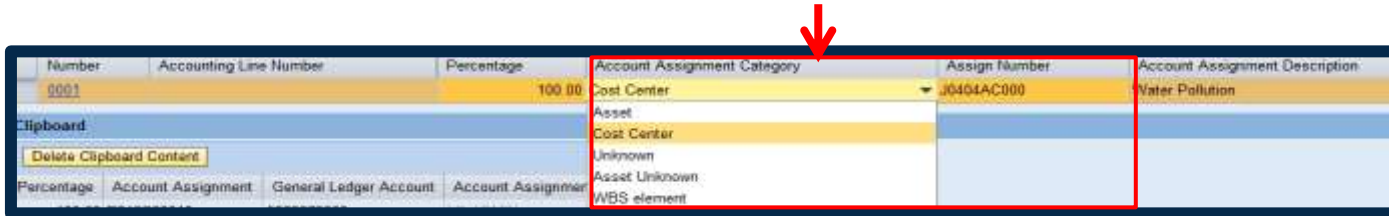
Item Data:

- 🌀 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)

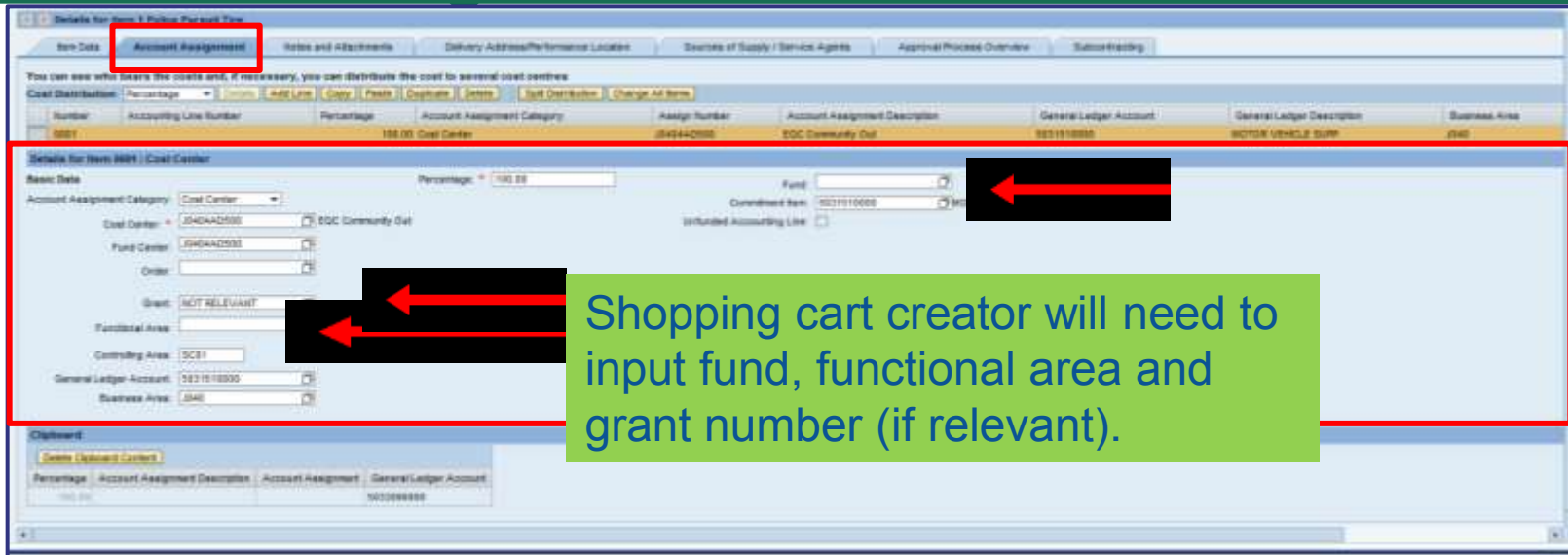
Step 2: The shopping cart creator will need to input the “Assigned Number”. In the example shown above, the cost center is entered in the “Assigned Number” field.

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



Number	Accounting Line Number	Percentage	Account Assignment Category	Assign Number	Account Assignment Description	General Ledger Account	General Ledger Description	Business Area
0001		100.00	Cost Center	00000000	EOC Community Out	003710000	NOTICE VEHICLE SUPP	000

Details for Item 0001 - Cost Center

Basic Data: Percentage: 100.00 Fund: 003710000

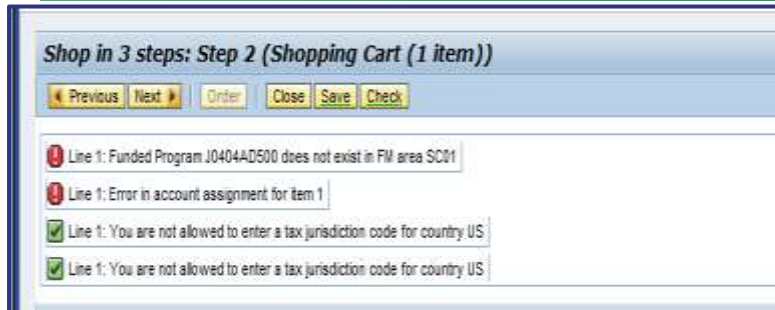
Account Assignment Category: Cost Center
Cost Center: LG04ND030 EOC Community Out
Fund Center: LG04ND030
Order:
Grant: NOT RELEVANT
Functional Area:
Controlling Area: SCS1
General Ledger Account: 003710000
Business Area: 000

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

Account Assignment Details

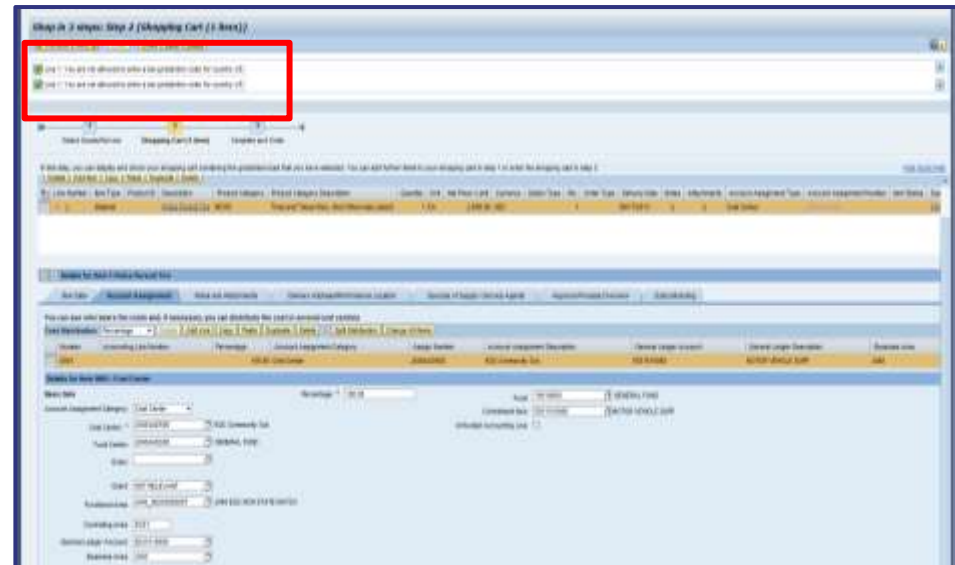
- Shopping cart creator will need to input Fund, Functional Area, and Grant Number (If Relevant).

Step 2: Account Assignment Details



BEFORE

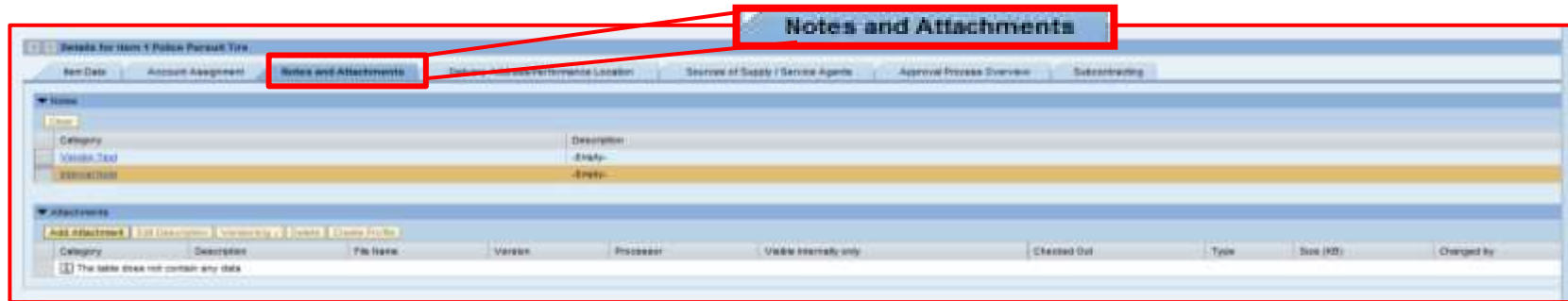
AFTER



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.

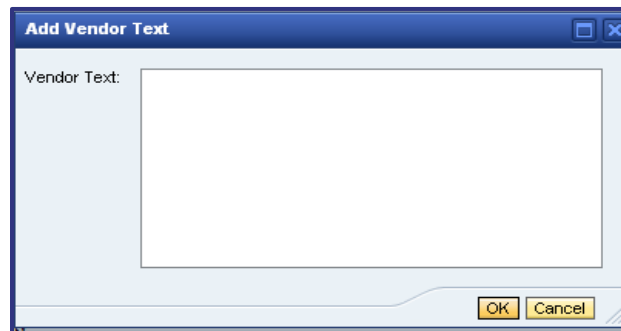
Step 2: Notes and Attachments



- ① The section of shopping cart where documents can be uploaded, such as quotes or data specific to the item being ordered.
- ① 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.

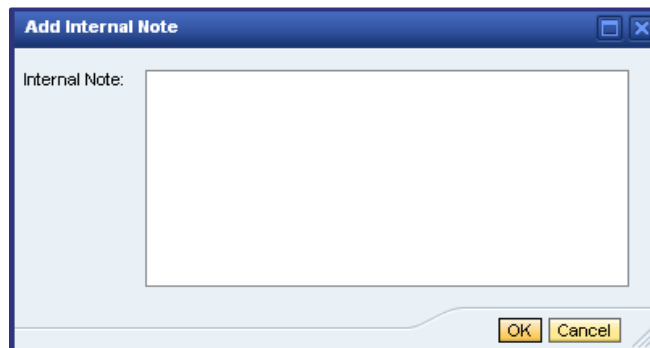
Step 2: Notes and Attachments

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



The screenshot shows a dialog box titled "Add Vendor Text". It has a blue header bar with a close button (X) on the right. The main area contains a label "Vendor Text:" followed by a large, empty white text input field. At the bottom right, there are two buttons: "OK" and "Cancel".

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



The screenshot shows a dialog box titled "Add Internal Note". It has a blue header bar with a close button (X) on the right. The main area contains a label "Internal Note:" followed by a large, empty white text input field. At the bottom right, there are two buttons: "OK" and "Cancel".

Step 2:

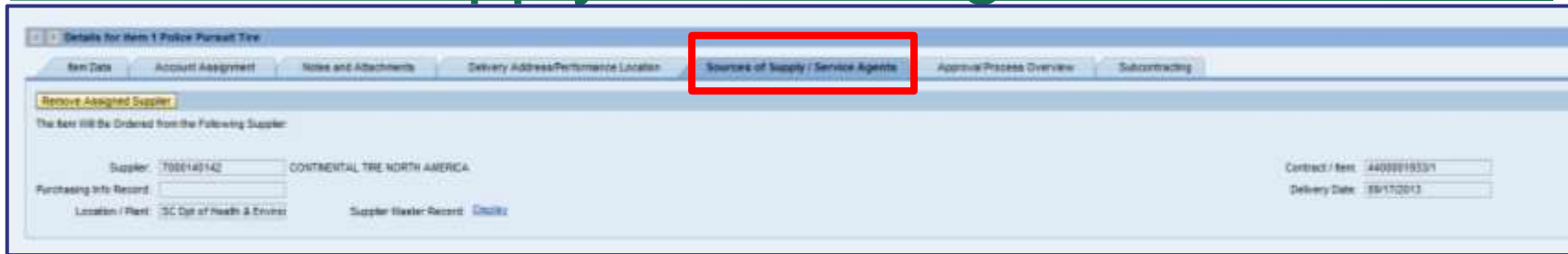
Delivery Address/Performance Location

The screenshot shows a web application interface for 'Details for Item 1 Police Pursuit Tire'. A red box highlights the 'Delivery Address/Performance Location' tab. Below the tab, there is a 'Reset' button and a message: 'Please change all the address details and RESET. If the item is to be delivered to a different address, enter the new address here'. The form contains several input fields for address and contact information:

Name:	<input type="text" value="SCEIS Root"/>	Additional Name:	<input type="text" value="The State of South Carolina"/>
C/O:	<input type="text" value="DHCC - EDC Air Quality"/>	Phone Number / Extension:	<input type="text" value="(803) 895-4119"/>
Fax Number/Extension:	<input type="text" value="(803) 895-4487"/>	E-Mail:	<input type="text" value="LaveBA@dhcc.sc.gov"/>
Building:	<input type="text"/>	Floor / Room:	<input type="text"/>
Street / House Number:	<input type="text" value="Buff St"/> <input type="text" value="2808"/>	Postal Code / City:	<input type="text" value="29201-1700"/> <input type="text" value="Columbia"/>
District:	<input type="text"/>	Postal Code / P.O. Box:	<input type="text"/>
Country:	<input type="text" value="US"/> <input type="checkbox"/> USA	Region:	<input type="text" value="SC"/> <input type="checkbox"/> South 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



Details for Item 1 Police Pursuit Tire

Item Data | Account Assignment | Notes and Attachments | Delivery Address/Performance Location | **Sources of Supply / Service Agents** | Approval Process Overview | Subcontracting

Remove Assigned Supplier

The Item Will Be Ordered from the Following Supplier:

Supplier	Purchasing Info Record	Location / Plant	Supplier Website Record
7086140142		SC Dept of Health & Environ	Conti

Contract / Item: 44000018331
Delivery Date: 09/17/2013

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

Sequence	Process Step	Status	Processor	Received On
+ 001	Automatic Approval	Open (No Decision Made)	System	

- 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

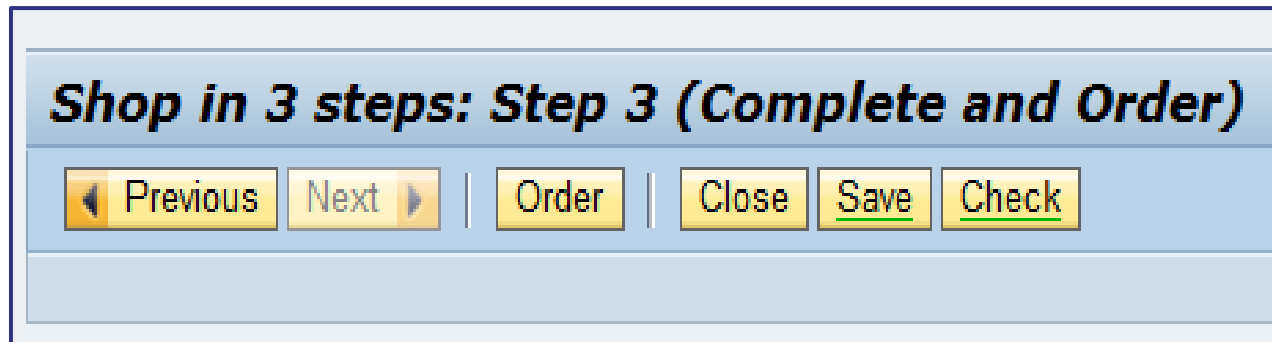
- Enter a name for the shopping cart that will be easy for you to identify in the “Name the shopping cart” field. If you don’t enter a name, the current date will become the name of the shopping cart by default.
- You can also add a note to the approver in the “Header Approval Note” field.
- The “Order”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

The screenshot shows the 'Shop in 3 steps: Step 3 (Complete and Order)' interface. At the top, there are navigation buttons: 'Previous', 'Next', 'Order', 'Close', 'Save', and 'Check'. Below this is a progress bar with three steps: '1 Select Goods/Service', '2 Shopping Cart (1 Item)', and '3 Complete and Order'. The third step is highlighted. Below the progress bar, there is a text box for 'Name of shopping cart' containing the text 'SOE33360 09/16/2013 15:27'. Below that is a 'Number' field with the value '2000487824'. The 'Approval Process' is set to 'Display / E-It Agents'. There is a large text area for 'Header Approval Note'. At the bottom, there is a 'Budget' field with a 'Display' link.

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

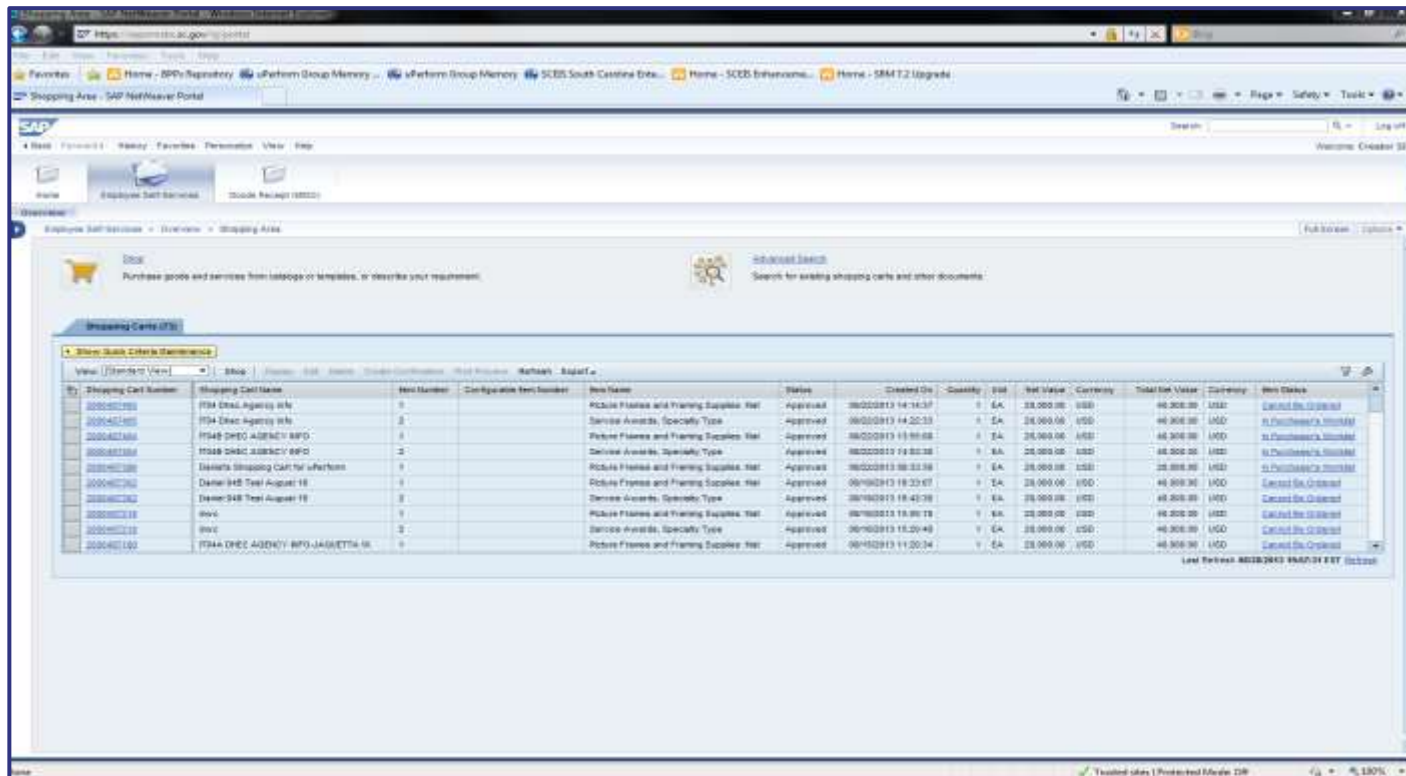
Line 1: You are not allowed to enter a tax jurisdiction code for country US

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.

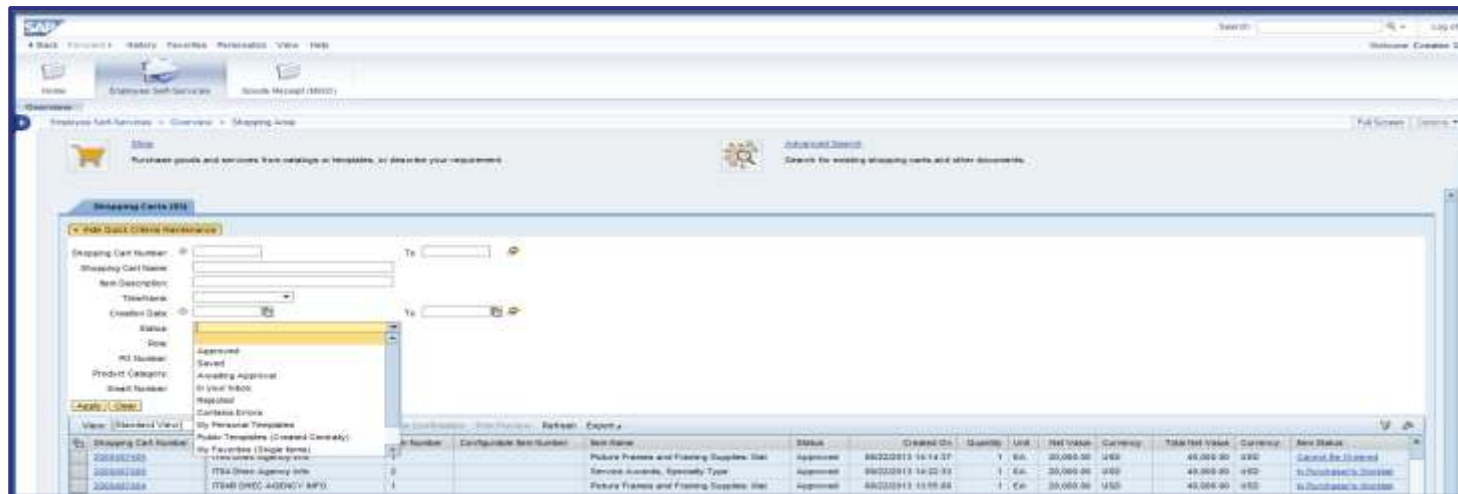


The screenshot displays the SAP SRM 7.2 interface for the 'Shopping Cart List' table. The table contains the following data:

Shopping Cart Number	Shopping Cart Name	Item Number	Configuration Item Number	Item Name	Status	Created On	Quantity	Unit	Net Value	Currency	Total Net Value	Category	Item Date
2000000001	ITM Direct Agency 9th	0		Police Frames and Framing Supplies: Net	Approved	06/20/2013 14:18:57	1	EA	23,000.00	USD	48,300.00	1400	Cancelled On Order
2000000002	ITM Direct Agency 9th	0		Service Awards, Specialty Type	Approved	06/20/2013 14:20:33	1	EA	20,000.00	USD	48,300.00	1400	Cancelled On Order
2000000003	ITM Direct Agency 9th	0		Police Frames and Framing Supplies: Net	Approved	06/20/2013 15:00:02	1	EA	20,000.00	USD	48,300.00	1400	Cancelled On Order
2000000004	ITM Direct Agency 9th	0		Service Awards, Specialty Type	Approved	06/20/2013 15:00:38	1	EA	20,000.00	USD	48,300.00	1400	Cancelled On Order
2000000005	Demo's Shopping Cart for sPerform	0		Police Frames and Framing Supplies: Net	Approved	06/20/2013 16:33:36	1	EA	20,000.00	USD	20,000.00	1400	Cancelled On Order
2000000006	Demo 948 Test August 18	0		Police Frames and Framing Supplies: Net	Approved	06/19/2013 19:25:07	1	EA	20,000.00	USD	48,300.00	1400	Cancelled On Order
2000000007	Demo 948 Test August 18	0		Service Awards, Specialty Type	Approved	06/19/2013 19:45:38	1	EA	20,000.00	USD	48,300.00	1400	Cancelled On Order
2000000008	SWC	0		Police Frames and Framing Supplies: Net	Approved	06/19/2013 19:50:19	1	EA	20,000.00	USD	48,300.00	1400	Cancelled On Order
2000000009	SWC	0		Service Awards, Specialty Type	Approved	06/19/2013 19:50:48	1	EA	20,000.00	USD	48,300.00	1400	Cancelled On Order
2000000010	7294 DNEC AGENT- RFO JAG/ETHA 04	0		Police Frames and Framing Supplies: Net	Approved	06/19/2013 14:20:34	1	EA	20,000.00	USD	48,300.00	1400	Cancelled On Order

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

- ① Status Messages: Approved, Saved, Awaiting Approval, In Your Inbox and Rejected.
- ① Shopping Cart Number: Enter the number in the Shopping Cart Number field.
- ① 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.

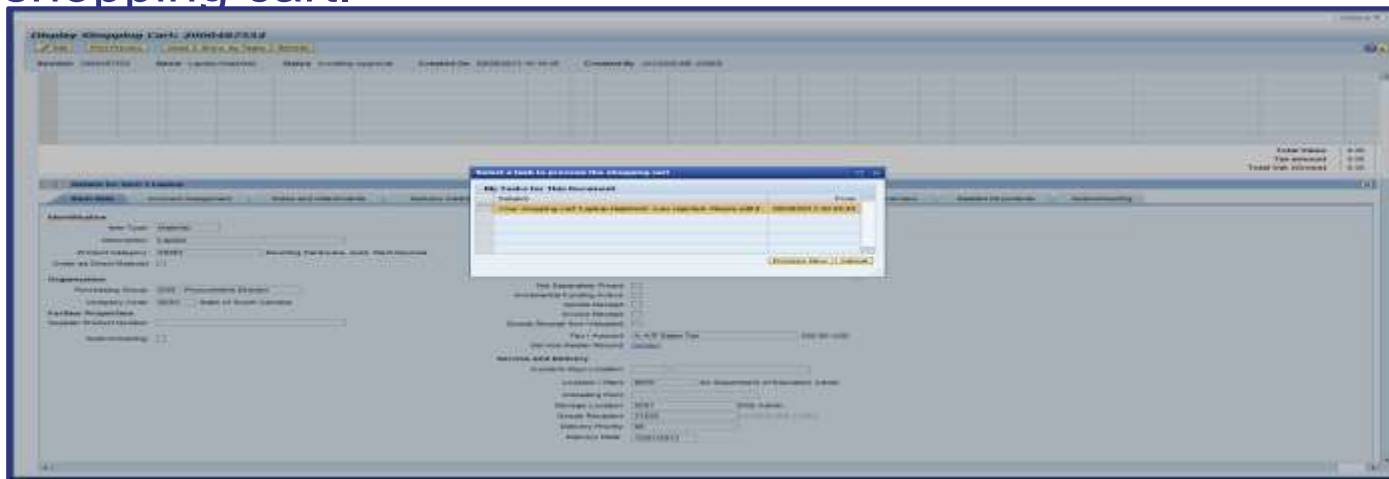
How to Find a Shopping Cart and Check Status, Show/Hide Quick Criteria Maintenance



- ➊ Additional Search Options:
 - ➋ Shopping Cart Number: Enter the number in the Shopping Cart Number field.
 - ➌ 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.

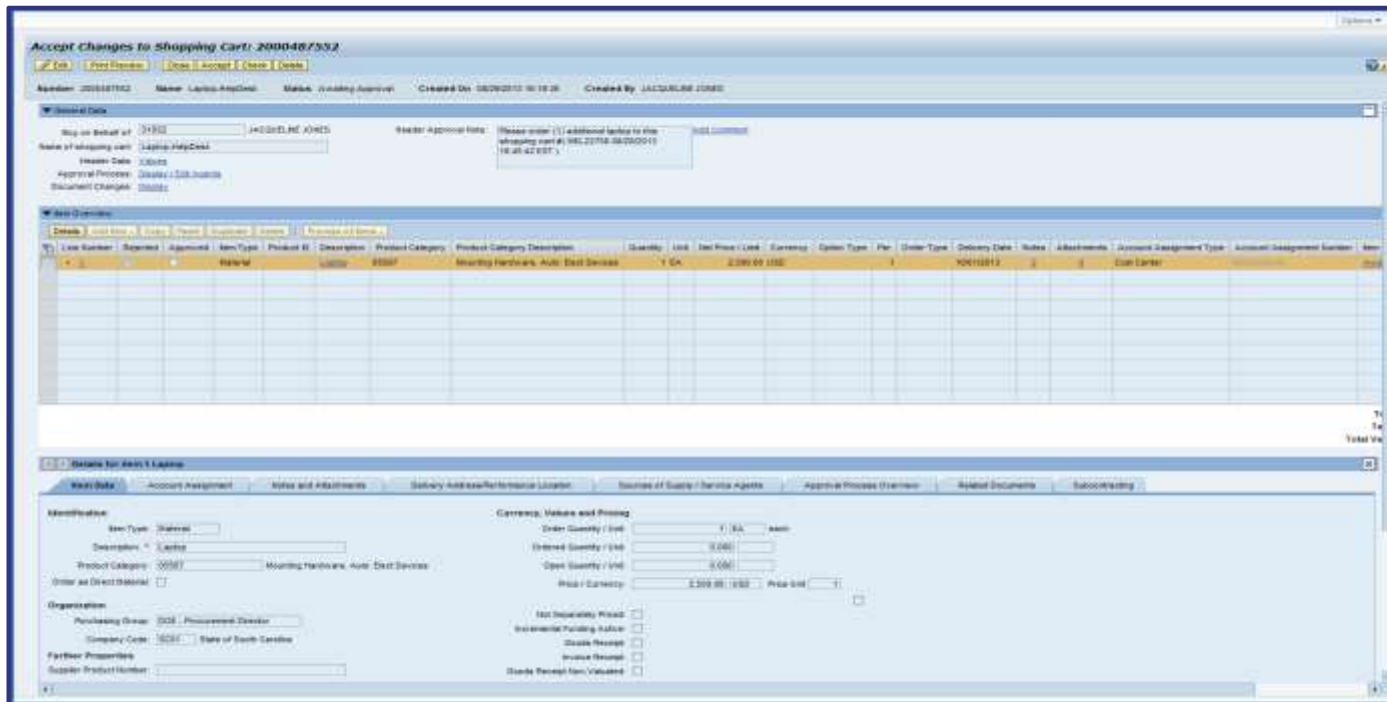
How to Manage a Rejected Shopping Cart

- 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.



Accept Changes to Shopping Cart: 2000487332

Order: 20080702 Name: LARRY ANGLIM M.A. (Pending Approval) Created On: 08/20/12 10:19:28 Created By: JACQUESS JONES

General Data

Buy on Behalf of: JACQUSS JONES (JACQUSS.JONES) Header Approval Note: (Required) (1) Additional links to the shopping cart #1 06120702-08200012 18 45:42:57

Name of shopping cart: LARRY ANGLIM

Invoice Date: 8/20/12

Approval Process: 00001 / 0000000000

Document Changes: Details

Item Details

Line Number	Quantity	Amount	Item Type	Product ID	Description	Product Category	Product Category Description	Quantity	Unit	Unit Price / Unit	Currency	Open Type	Pln	Order Type	Delivery Date	Subs	Subitems	Amount Assigned Type	Amount Assigned Number	Item
1	1		Material	00000	Mounting Hardware, Auto. Dist. Service			1 EA		2,399.99	USD			1	08/20/12					Dist Order

Details for Item 1 Line

Item Data | Account Assignment | Notes and Attachments | Delivery Address/Reference Location | Source of Supply / Service Agents | Approval Process (Workflow) | System Documents | Subcontracting

Identification

Item Type: Material
Description: LARRY ANGLIM
Product Category: 00000 Mounting Hardware, Auto. Dist. Service
Order as Direct Material:

Currency, Values and Pricing

Order Quantity / Unit: 1 / EA
Ordered Quantity / Unit: 0.000
Open Quantity / Unit: 0.000
Unit Currency: 2,399.99 / USD | Unit Cost:

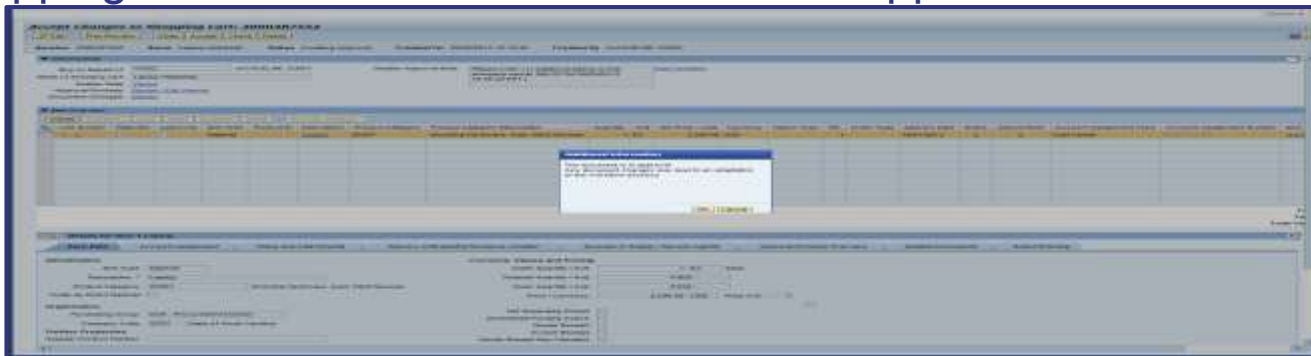
Organization

Purchasing Order: 0000 / Procurement Director
Company Code: 0000 / State of South Carolina
Partner Relationship
Supplier Product Number:

Has Incoterms Field:
Invoicing Posting Advice:
Goods Receipt:
Invoice Receipt:
Goods Receipt Item Valuated:

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.

The screenshot shows the 'Accept Changes to Shopping Cart' interface. At the top, it displays 'Approved By: JACQUES, JAMES' and a 'Proceed' button. Below this is a table with columns: Line Number, Product, Quantity, Unit Price, Line Amount, Order Type, Delivery Date, Status, Subcontract, Account Management Type, and Account Management Number. The table has one row highlighted in yellow. At the bottom, there are sections for 'Identifications' and 'Currency, Volume and Pricing' with various input fields and checkboxes.

- “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

- ④ A “Saved” or “Ordered” shopping cart begins with the number 2000XXXXXX ?
(True or False)
- ④ Taxes are calculated in the Shopping Cart?
(True or False)
- ④ Vendor Text is visible on the Purchase Order?
(True or False)

Lesson 2 Summary

You should now understand how to:

- ① Create a shopping cart in 3 steps using the options to select goods and services available in SCEIS (shop in 3 steps).
- ① Find and check the status of a shopping cart.
- ① Manage a rejected shopping cart.
- ① Add and replace an approver.



LESSON 3: UPERFORMS AND HANDS-ON 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

- ④ 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.
- ④ 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?

