



pennsylvania

DEPARTMENT OF GENERAL SERVICES

SAP

Supplier
Relationship
Management

SRM 7.0

Requisitioning



pennsylvania

DEPARTMENT OF GENERAL SERVICES

Welcome!

Introductions



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Course Objectives

Course Objectives

- After successfully completing this course, you will be able to:
 - Set User Attributes
 - Understand the *Team Shopping Cart* functionality
 - Utilize SRM search functions to shop for items
 - Locate and View Statewide Contracts
 - Create a Shopping Cart, by one of the following:
 - Describe Requirement
 - MSCC Catalog
 - Punch-Out Catalog
 - Make necessary Edits to a Shopping Cart
 - Access a Shopping Cart to Delete a line item or the entire Shopping Cart
 - Check the status of Shopping Carts

Agenda

- Set User Attributes
- Team Shopping Cart
- Locate & View Statewide Contracts
- Create a Shopping Cart
- Edit a Shopping Cart
- Delete a Shopping Cart
- Check Shopping Cart Status

Requisitioning

Set User Attributes

Where do you go to “Set User Attributes?”

- Select **My Settings**
- Left navigation pane under – Services
- Select **Change Attributes**



Setting User Attributes

- Select the EDIT button

Display Document:

 Edit

Employee ID 720859 Name Virgen Colon

▼ Personal Data

Form of Address: Academic Title:

First Name: Last Name:

Position User Account

Organizational Assignment

Department: 00157140; GS Strtgc Spt Aud Div

Position: 50274457; Admv Ofr 1

Functional Assignment

Department Head Of:

Purchasing Group: 50008932 ; DGS Central Purchase Purchasing Group

Department Address

Street/ House Number:

Postal Code/ City:

Country:

Department Address Details

Building:

Floor/ Room Number:

Inhouse Mail:

Communication Type:

Phone Number/ Extension:

Fax Number / Extension:

E-Mail:

Attributes for Position Admv Ofr 1

Attribute:

- Select the Attributes dropdown

Set User Attributes

Attribute:

- Account assignment category*
- Attachment
- Cost Center
- Default printer*
- Delivery address*
- Flag: Forward Work Item*
- Fund*
- Grant
- Local Currency*
- Plant*

- There are two (2) mandatory Attributes:
 - Delivery Address
 - Plant

Set User Attributes: Delivery Address

Attribute:

	Standard	Deactivate
	<input type="radio"/>	<input type="checkbox"/>

- Select Delivery Address from the dropdown
- Select the ADD LINE button

The default Delivery Address attribute is set by typing in the assigned delivery address number.

- Select the STANDARD radio button.
- Select the CHECK button, then the SAVE button at the top of the SRM screen

Attribute:

	Standard	Deactivate	Value Description	Value	Changeable
	<input checked="" type="radio"/>	<input type="checkbox"/>		175500	<input checked="" type="checkbox"/>

Addresses and corresponding numbers are available online at: www.dgs.pa.gov/procurement-resources/ship-to-address.

Set User Attributes: Plant

Attribute: Logical system:

	Standard	Excluded		Plant

- Select Plant from the dropdown
 - A second option will display; from this option select R/3 Backend*
 - Upon this selection you will receive options to choose your plant
 - Select the appropriate option and select the SAVE button at the top of your SRM screen

Attribute: Logical system:

	Standard	Excluded	Changeable	Plant	Logical system	Company Code	Description	BusinessPartner
	<input type="radio"/>	<input type="checkbox"/>	<input type="checkbox"/>	1500	PC1CLNT110	COPA	DGS	300430
	<input type="radio"/>	<input type="checkbox"/>	<input type="checkbox"/>	1502	PC1CLNT110	COPA	DGS Administration	300440
	<input checked="" type="radio"/>	<input type="checkbox"/>	<input type="checkbox"/>	1504	PC1CLNT110	COPA	DGS Bureau of Procurement	301375
	<input type="radio"/>	<input type="checkbox"/>	<input type="checkbox"/>	1501	PC1CLNT110	COPA	DGS Property Management	300439
	<input type="radio"/>	<input type="checkbox"/>	<input type="checkbox"/>	1503	PC1CLNT110	COPA	DGS Public Works	300441

Team Shopping Cart

What is Team Shopping Cart?

- The functionality, "Team Shopping Cart," was added within SRM 7.0
- Team Shopping Cart, allows the Requisitioner (within an agency/plant) to establish substitutes, and these substitutes can process Shopping Carts on the Requisitioner's behalf

How do you use Team Shopping Cart functionality?

- The Requisitioner must establish substitutes in My Settings → Change Attributes → User Account tab
- Steps are provided on the following slides

Where would you go to set-up Team Shopping Cart?

- Select **My Settings**
- Left navigation pane under – Services
- Select **Change Attributes**



Team Shopping Cart Set-up

CHANGE ATTRIBUTES SCREEN

- Select the User Account tab

Display Document:

 Edit

Employee ID 317922 Name Ms. Angela Eshleman

▼ Personal Data

Form of Address: Academic Title:

First Name: Last Name:

Position **User Account**

Organizational Assignment

Department: 00152530; GS Bus Procs Cnsltng Div

Position: 50266527; Admv Ofr 2

Functional Assignment

Department Head Of:

Purchasing Group: 50000080 ; DGS Central Purchasing Group

Department Address

Street/ House Number:

Postal Code/ City:

Country:

Department Address Details

Building:

Floor/ Room Number:

Inhouse Mail:

Communication Type:

Phone Number/ Extension:

Fax Number / Extension:

E-Mail:

Attributes for Position Admv Ofr 2

Attribute:

Team Shopping Cart Set-up

- Select the EDIT button to proceed with the assignment

Your "Procurement Substitutes" will be the individual(s) processing Shopping Carts on your behalf

- Use the search function to locate your "Procurement Substitute's" name

NOTE: Procurement Substitutes can only be individuals that **do not** have an Approval Role as this is a role conflict.

Display Document:

 Edit

Employee ID 720859 Name Virgen Colon

▼ Personal Data

Form of Address: Academic Title:

First Name: Last Name:

Position **User Account**

Standard Settings

User ID:

E-Mail:

Time Zone: Eastern Time (New York)

Language:

Date Format:

Decimal Notation:

My Procurement Substitutes for Team Purchasing

[Settings](#)

Name of Substitute	Start Substitution On	End Substitution On
<input type="text"/>	<input type="text"/>	<input type="text"/>



Persons I Represent As Substitute

[Settings](#)

Substitute For	Start Substitution On	End Substitution On
P00446880	05/31/2016	12/31/9999
P00472487	05/31/2016	12/31/9999

Team Shopping Cart Set-up

Search: Name of Substitute

Search Criteria Hide Search Criteria ?

User + -

Last name + -

First name + -

Results List: 1 results found for Name of Substitute

User	First name	Last name	E-Mail Address	User group	Valid from	Valid through
<input type="checkbox"/> P00068292	Angela	Eshleman	AESHLEMAN@PA.GOV	15DGS	02/01/2003	12/31/9999

- Enter the substitute(s) name in the appropriate fields, or enter the P00 (employee number) in the User field and select the SEARCH button
- Results will display, select the gray box or the User to transfer the information back to the "My Procurement Substitutes for Team Purchasing" section

Team Shopping Cart Set-up

▼ Personal Data

Form of Address: Academic Title:

First Name: Last Name:

Position **User Account**

Standard Settings

User ID:

E-Mail:

Time Zone:

Language:

Date Format:

Decimal Notation:

My Procurement Substitutes for Team Purchasing [Settings](#)

Name of Substitute	Start Substitution On	End Substitution On
P00446880		<input type="text"/>

Persons I Represent As Substitute [Settings](#)

Substitute For	Start Substitution On	End Substitution On
The table does not contain any data		

- The employee number populates the Name of Substitute field

- Complete the Start Substitute On and End Substitute On date fields

Team Shopping Cart Set-up

- Select the SAVE button to save the updates

- If additional "Procurement Substitutes" are required, select the ADD LINE button and repeat the previous steps

Edit Document:

Save **Read Only** **Check**

Employee ID 317922 Name Ms. Angela Eshleman

▼ Personal Data

Form of Address: Academic Title:

First Name: Last Name:

Position **User Account**

Standard Settings

User ID:

E-Mail:

Time Zone:

Language:

Date Format:

Decimal Notation:

My Procurement Substitutes for Team Purchasing [Settings](#)

Add Line **Remove**

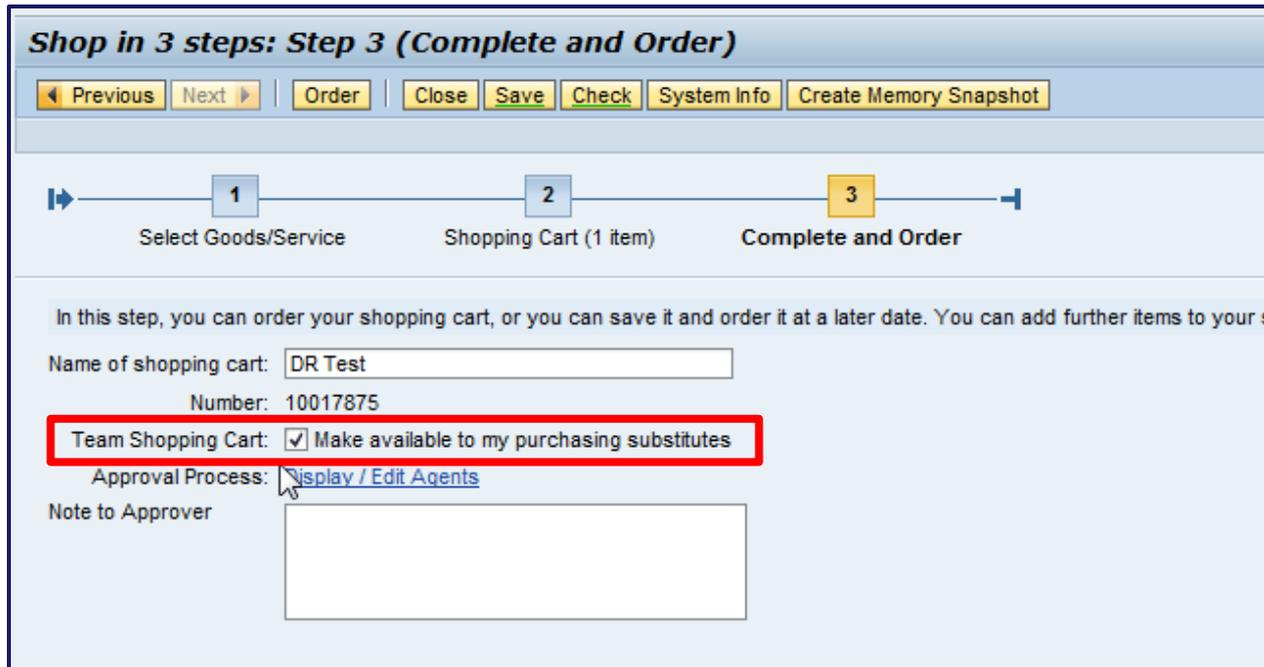
Name of Substitute	Start Substitution On	End Substitution On
P00446880	07/01/2013	07/15/2013

Persons I Represent As Substitute [Settings](#)

Substitute For	Start Substitution On	End Substitution On
The table does not contain any data		

Using Team Shopping Cart Functionality

- Within the Shopping Cart, the Team Shopping Cart box must be checked on Step 3 of the wizard, prior to saving and/or ordering the Shopping Cart (the box will not be available if Step 1 has not been completed)



Shop in 3 steps: Step 3 (Complete and Order)

◀ Previous | Next ▶ | Order | Close | Save | Check | System Info | Create Memory Snapshot

1 Select Goods/Service 2 Shopping Cart (1 item) 3 Complete and Order

In this step, you can order your shopping cart, or you can save it and order it at a later date. You can add further items to your s

Name of shopping cart: DR Test

Number: 10017875

Team Shopping Cart: Make available to my purchasing substitutes

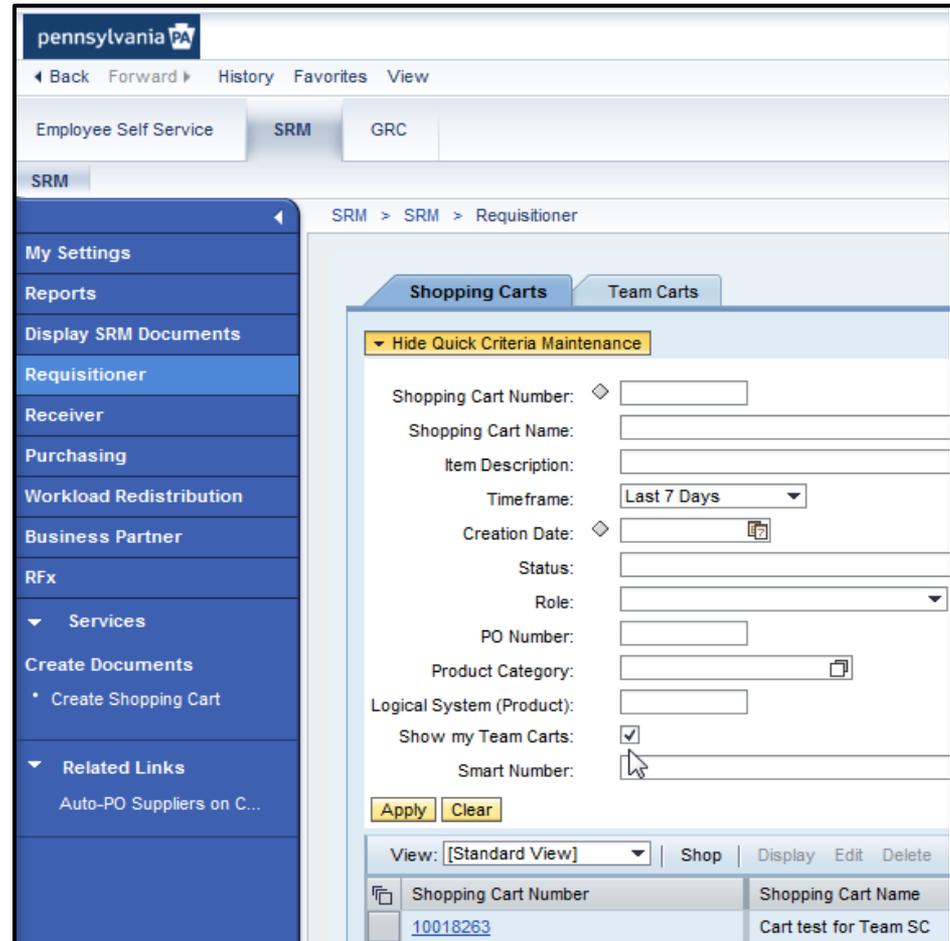
Approval Process: [Display / Edit Agents](#)

Note to Approver

NOTE: Shopping Carts must be in a *SAVED* status to use the Team Shopping Cart functionality

Accessing Team Shopping Cart: User

- A requisitioner's Team Shopping Cart will not display in the owner's Shopping Cart POWL until selecting the box for Show My Team Carts in the Quick Criteria Search



The screenshot shows the SRM (Supplier Relationship Management) interface for a Requisitioner. The left sidebar contains navigation options such as My Settings, Reports, Display SRM Documents, Requisitioner, Receiver, Purchasing, Workload Redistribution, Business Partner, RFX, Services, Create Documents (with a sub-option for Create Shopping Cart), and Related Links (with a sub-option for Auto-PO Suppliers on C...). The main content area is titled 'SRM > SRM > Requisitioner' and features two tabs: 'Shopping Carts' and 'Team Carts'. Under the 'Shopping Carts' tab, there is a section for 'Hide Quick Criteria Maintenance' with various search criteria including Shopping Cart Number, Name, Description, Timeframe (set to 'Last 7 Days'), Creation Date, Status, Role, PO Number, Product Category, and Logical System (Product). The 'Show my Team Carts' checkbox is checked, and a mouse cursor is hovering over the 'Smart Number' field. Below the search criteria are 'Apply' and 'Clear' buttons. At the bottom, there is a table with columns for 'Shopping Cart Number' and 'Shopping Cart Name'. The table contains one entry with the number '10018263' and the name 'Cart test for Team SC'.

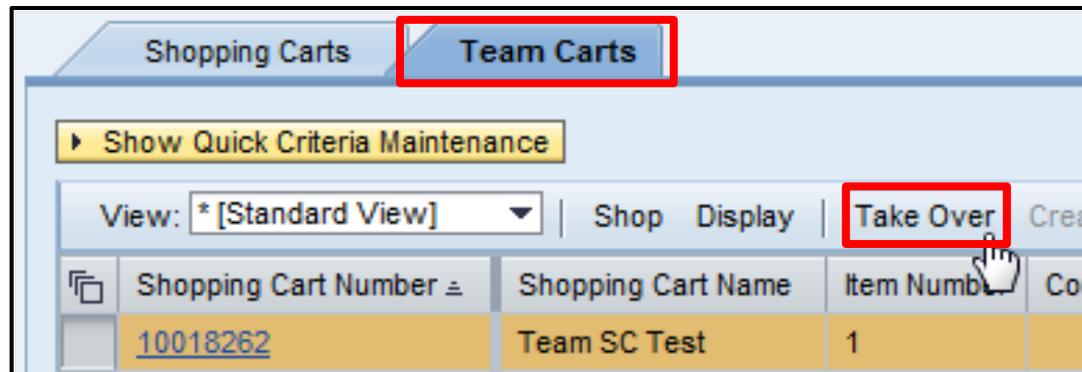
Shopping Cart Number	Shopping Cart Name
10018263	Cart test for Team SC

Accessing Team Shopping Cart: Substitute

For a substitute to display a Team Shopping Cart, select the Team Shopping Cart tab in the POWL.

Team Shopping Cart functionality includes "Take Over."

- Take Over allows a substitute to order a SAVED Cart created by a different user
- To use Take Over, highlight the cart in the Team Cart POWL, then select the TAKE OVER button



Accessing Team Shopping Cart: Substitute (cont'd)

- Take Over functionality can also be performed by selecting the TAKE OVER button after opening a cart from Display SRM Documents → Search All Shopping Carts → select the shopping cart number to open and view the details

SRM

- My Settings
- Reports
- Display SRM Documents
- Requisitioner
- Pcard Requisitioner
- Purchasing
- Receiver
- Workload Redistribution
- Business Partner
- RFx
- Services
- Search All Shopping Carts

Shopping Cart Monitor

▼ Search for Shopping Carts

Name of Shopping Cart:

Status:

Purchasing Group:

Product: To

Created On: To

Requester: To

Cating: To

Delivery Date: To

Assigned To:

Type of Follow-On Document:

Maximum Number of Items (Total):

Number of Shopping Cart: 11901417 To

Item Description:

Purchasing Organization:

Product Category: To

Created By:

Supplier: To

Preferred Supplier: To

Goods Recipient: To

Logical System: To

Number of Follow-On Document: To

Search Result

Details - Delete | Create Follow-On Document | Update Shopping Cart Back-End Data | Update Messages | Team Cart | Filter Settings

Object Number	Name of Shopping Cart	Created By	Created On	Status	Total Value	Currency	Messages	Message Counter	Team Cart
▼ 11901417	4511 Projectors & Supplies	P00026009	08/02/2016	Saved	4,930.95	USD			0 <input checked="" type="checkbox"/>
Item Description					Category ID	Quantity	Unit	Status	
UM35T1W-MK PROJ 3500LUM WXGA LCD					45111600		3.000	EA	

Accessing Team Shopping Cart: Substitute (cont'd)

- You can now select the TAKE OVER button from within the display shopping cart details screen

Display Shopping Cart

Print Preview | Close **Take Over** Refresh

Number	11981417	Document Name	4511 Projectors & Supplies	Status	Saved
---------------	----------	----------------------	----------------------------	---------------	-------

▼ General Data

Buy on Behalf of: Virgen Colon Approval N

Name of shopping cart:

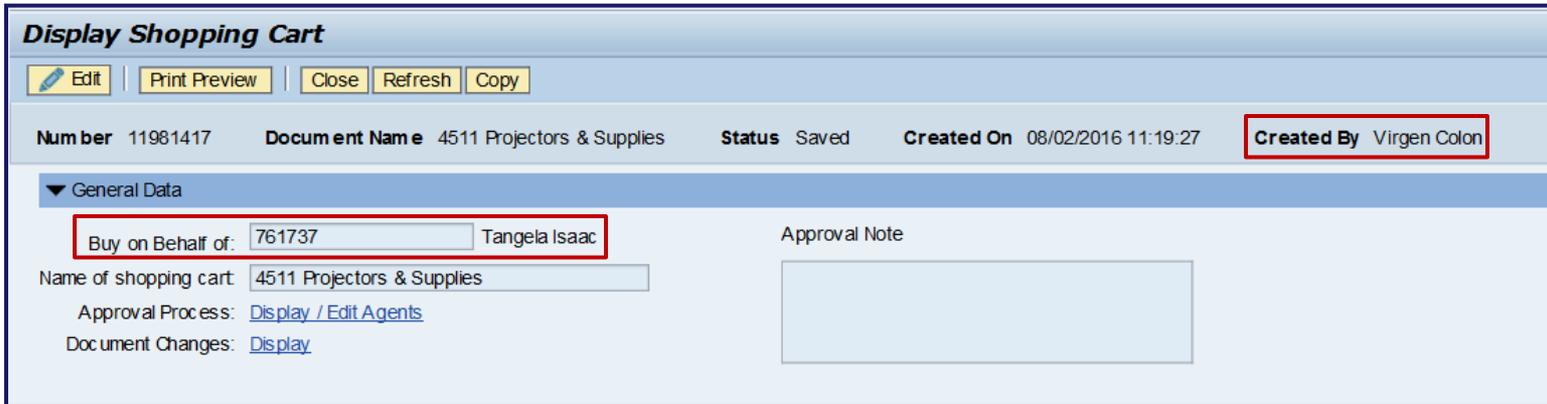
Team Shopping Cart: Make available to my purchasing substitutes

Approval Process: [Display / Edit Agents](#)

Document Changes: [Display](#)

Team Shopping Cart

- Upon ordering, the Team Shopping Cart will show the initial requisitioner as the creator, but will follow the workflow for the user who ordered the cart.
 - Only the user or substitute that orders the SAVED Cart can access the cart for additions
- While a take-over cart maintains the original requisitioner as the cart creator, the requisitioner ordering the cart is listed in the Buyer on Behalf of field



Display Shopping Cart

[Edit](#) | [Print Preview](#) | [Close](#) | [Refresh](#) | [Copy](#)

Number 11981417 **Document Name** 4511 Projectors & Supplies **Status** Saved **Created On** 08/02/2016 11:19:27 **Created By** Virgen Colon

▼ General Data

Buy on Behalf of: 761737 Tangela Isaac Approval Note

Name of shopping cart: 4511 Projectors & Supplies

Approval Process: [Display / Edit Agents](#)

Document Changes: [Display](#)

- Once a substitute takes over and orders a cart, the cart will display in the substitute's Team Cart POWL

Team Shopping Cart: Additional Information

- On a copied shopping cart, the Team Shopping Cart indicator will only be available for those carts created AFTER the Team Purchasing substitute(s) have been set.
- Team Shopping Cart functionality does not apply to Plan Driven Procurement (PDP) Shopping Carts
- To edit a Shopping Cart, the cart must be in a SAVED status and the users must be set as a substitute for each other to switch back and forth between users
- Team Shopping Carts Offer:
 - Find and edit/save carts – from the Team Shopping Cart POWL

Team Shopping Cart: Additional Information (cont'd)

- In Display SRM Documents → Search All Shopping Carts, Team Shopping Carts have an indicator in the far right column
 - This functionality is for display purposes only

Search Result									
Details Delete Create Follow-On Document Update Shopping Cart Back-End Data Update Messages Team Cart									Filter
Object Number	Name of Shopping Cart	Created By	Created On	Status	Total Value	Currency	Messages	Message Counter	Team Cart
▶ 10018262	Team SC Test	P00504742	03/31/2014	Saved	1,000.00	USD		0	<input checked="" type="checkbox"/>

Locate and View Statewide Contracts

Department of General Services' (DGS') Statewide Contracts

- Addresses goods and services that are commonly used by most agencies, or are used by one or more agencies at locations throughout the Commonwealth
- Provides agencies with a practical and convenient ordering methodology
- Allows agencies to purchase small quantities at bulk rates
- DGS is responsible for: creating, negotiating, and managing the contract
- Agencies are required to: order their goods or services directly from the supplier(s) who holds the contract

Department of General Services' (DGS') Statewide Contracts

- Some examples of statewide contracts are:
 - UniqueSource Products & Services
 - Janitorial Supplies
 - Catering Services
 - Office Supplies
 - Commercial Furniture
 - Peripherals & Networking Gear (CDW-G, ePlus, Pomeroy)

Contracts on eMarketPlace

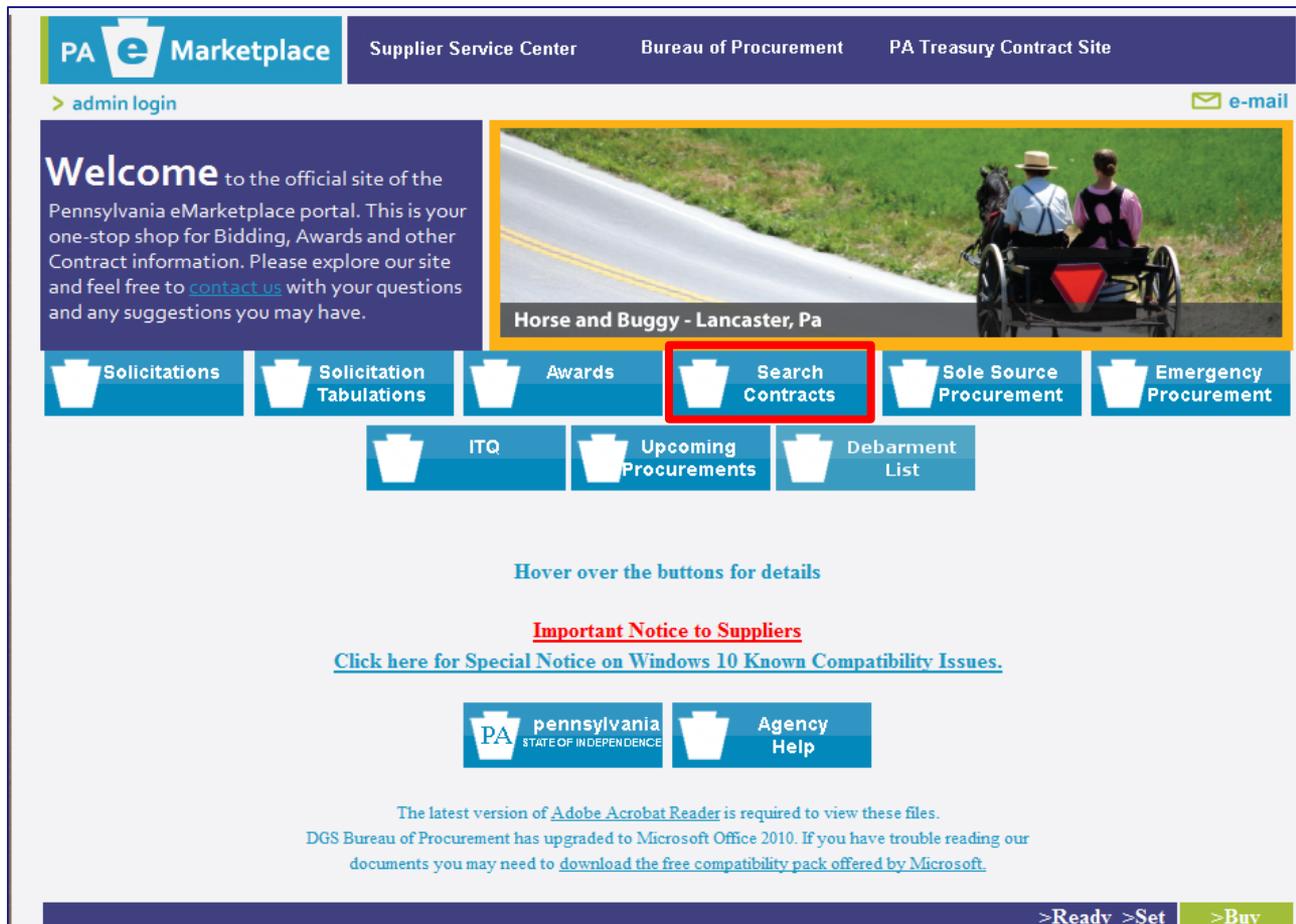
- Open Internet Explorer
- In the Address line, enter the following address: www.emarketplace.state.pa.us



The screenshot shows the Pennsylvania eMarketPlace website in an Internet Explorer browser window. The address bar displays <http://www.emarketplace.state.pa.us/>. The website features a blue header with the PA.GOV logo and navigation links for BUSINESSES, LOCAL GOVERNMENT & SCHOOLS, and STATE GOVERNMENT. Below the header is a large image of the Pennsylvania State Capitol dome. A search bar is positioned on the right side of the dome image. The Pennsylvania Department of General Services logo is overlaid on the dome image, along with the names of the Governor (Tom Wolf) and Secretary (Curt Topper). At the bottom of the page, there are three blue boxes with white text: BUSINESS LINKS (Materials & Services Bidding Opportunities), PUBLIC LINKS (Commonwealth Telephone Directory), and EMPLOYEE LINKS (Contact Capitol Police).

Contracts on eMarketPlace

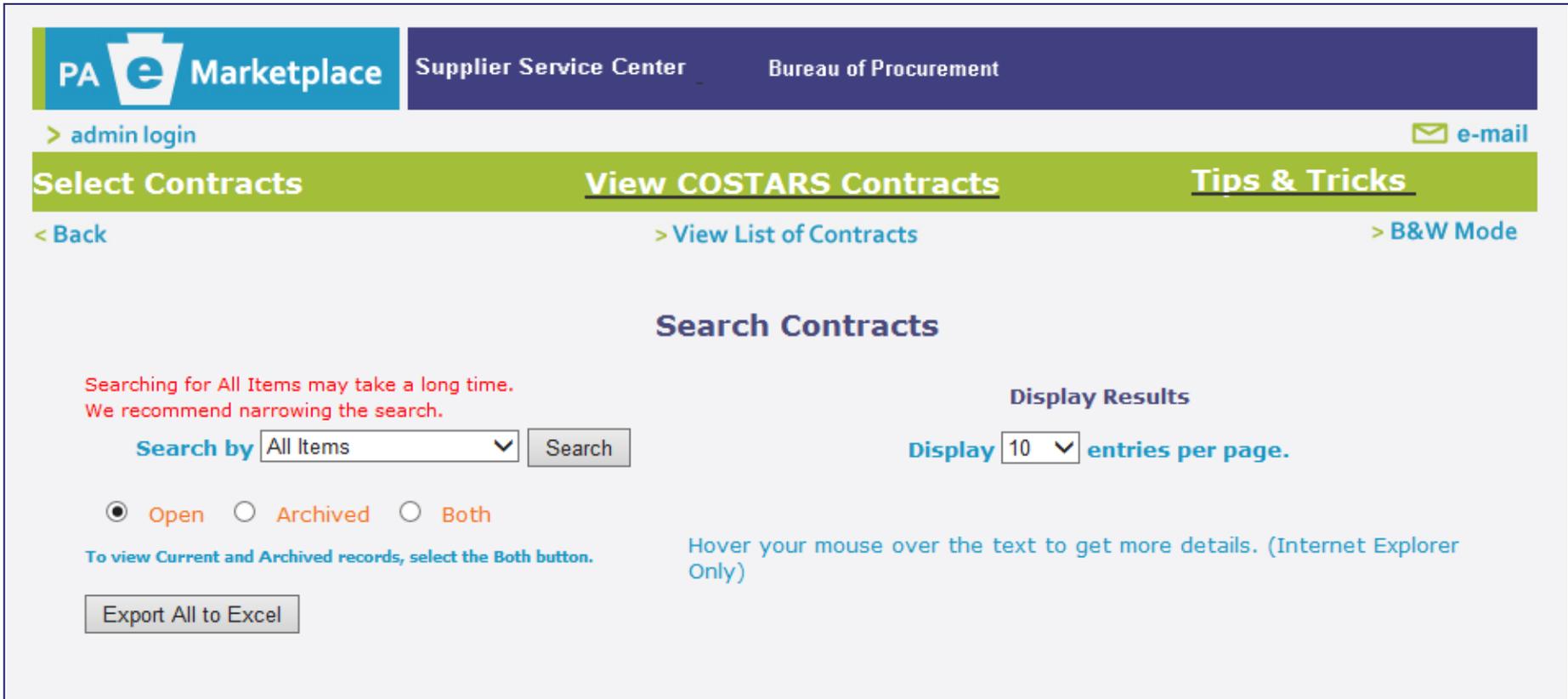
The eMarketplace website enables you to search for contracts by selecting the Search Contracts section as shown below.



The screenshot shows the Pennsylvania eMarketplace website interface. At the top, there is a navigation bar with the following links: "Supplier Service Center", "Bureau of Procurement", and "PA Treasury Contract Site". The "PA eMarketplace" logo is on the left, and "admin login" and "e-mail" are on the right. Below the navigation bar is a "Welcome" message and a featured image of a horse and buggy in Lancaster, Pa. A horizontal menu of buttons is displayed below the image, with "Search Contracts" highlighted by a red box. Other buttons include "Solicitations", "Solicitation Tabulations", "Awards", "Sole Source Procurement", "Emergency Procurement", "ITQ", "Upcoming Procurements", and "Debarment List". Below the menu, there is a note to "Hover over the buttons for details" and an "Important Notice to Suppliers" link. At the bottom, there are logos for "pennsylvania STATE OF INDEPENDENCE" and "Agency Help", along with a footer note about Adobe Acrobat Reader and Microsoft Office 2010 compatibility. The bottom right corner of the page has a navigation bar with ">Ready >Set >Buy".

Contracts on eMarketPlace

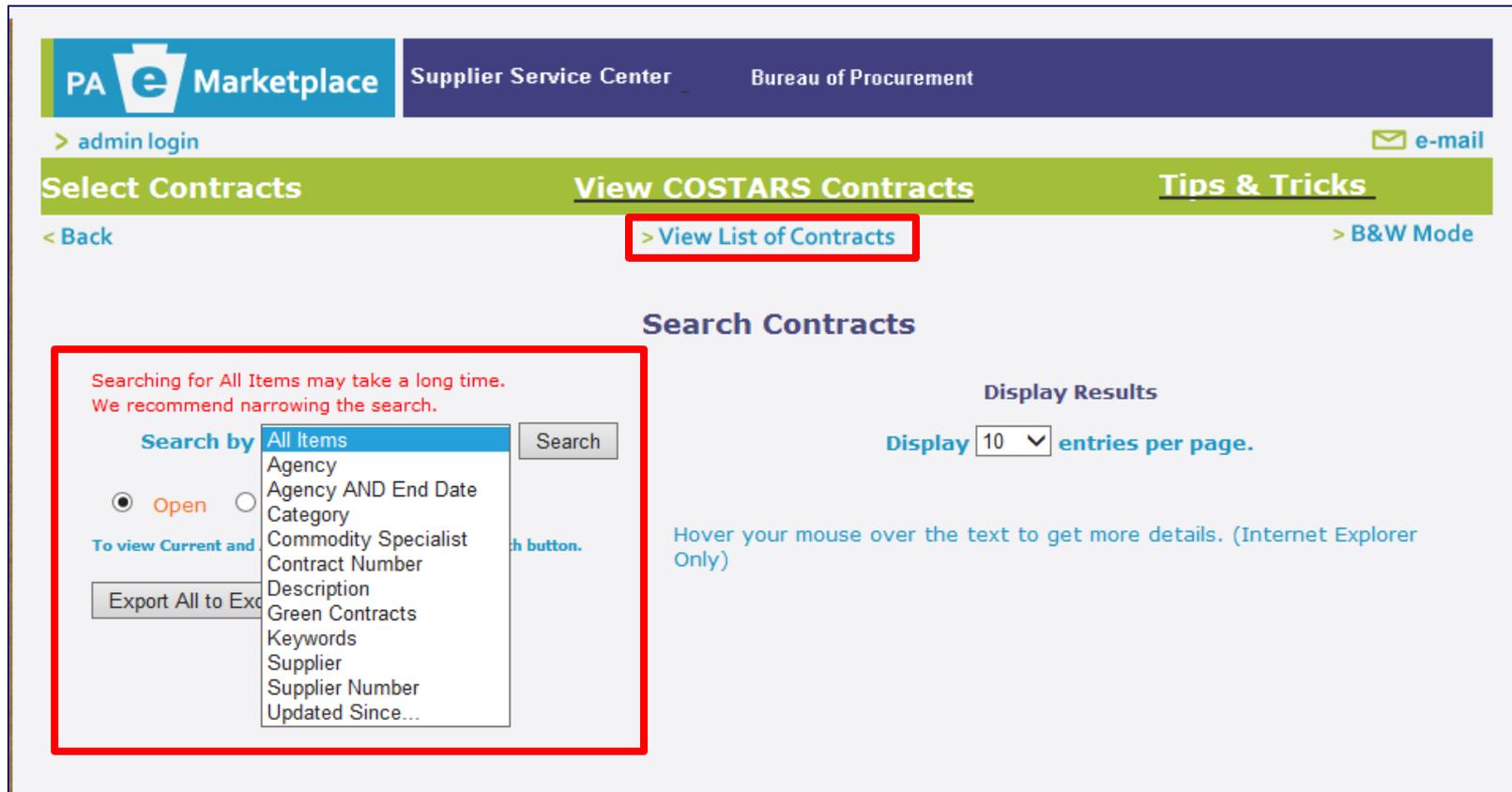
- This will open the Search Contracts screen as shown below



The screenshot shows the PA eMarketplace interface. At the top left is the logo for PA eMarketplace. To its right, in a dark blue header, are the text labels "Supplier Service Center" and "Bureau of Procurement". Below the logo is a link for "> admin login" and an "e-mail" icon. A green navigation bar contains three links: "Select Contracts", "View COSTARS Contracts", and "Tips & Tricks". Below this bar are three links: "< Back", "> View List of Contracts", and "> B&W Mode". The main heading is "Search Contracts". A red warning message states: "Searching for All Items may take a long time. We recommend narrowing the search." Below this is a search form with a "Search by" dropdown menu set to "All Items" and a "Search" button. To the right, under "Display Results", it says "Display 10 entries per page." Below the search form are three radio buttons: "Open" (selected), "Archived", and "Both". A note below the radio buttons says: "To view Current and Archived records, select the Both button." At the bottom left is an "Export All to Excel" button. At the bottom right, a note says: "Hover your mouse over the text to get more details. (Internet Explorer Only)".

Contracts on eMarketPlace

Select the "Search by" dropdown to determine how you want to search for a contract. You can search open or archived contracts, or both. You can also view a list of contracts by selecting the link at the top of the page.



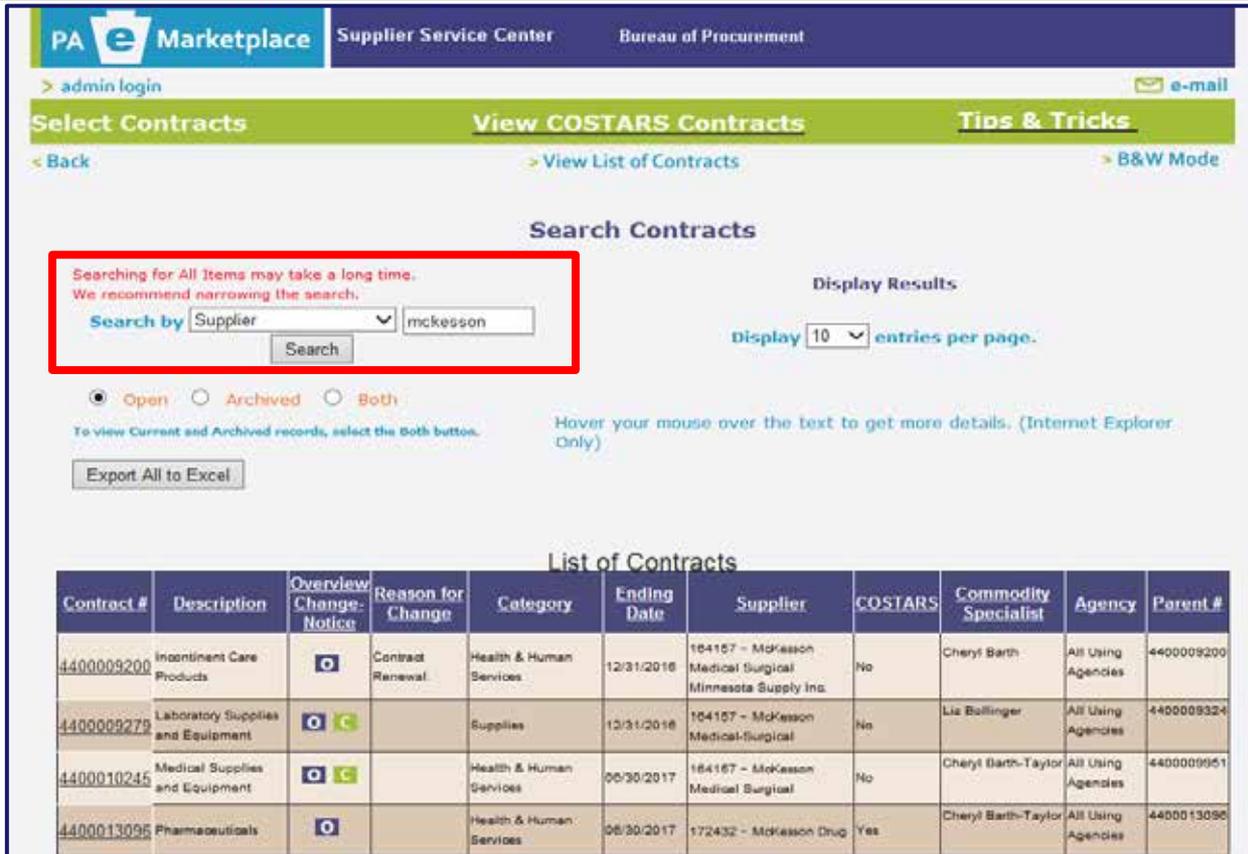
The screenshot displays the PA eMarketplace interface. At the top, there is a navigation bar with the logo and text "PA eMarketplace", "Supplier Service Center", and "Bureau of Procurement". Below this, there are links for "admin login" and "e-mail". A green navigation bar contains "Select Contracts", "View COSTARS Contracts", and "Tips & Tricks". Below this, there are links for "< Back", "> View List of Contracts" (highlighted with a red box), and "> B&W Mode".

The main section is titled "Search Contracts". It features a search form with a "Search by" dropdown menu (highlighted with a red box) and a "Search" button. The dropdown menu is open, showing options: "All Items", "Agency", "Agency AND End Date", "Category", "Commodity Specialist", "Contract Number", "Description", "Green Contracts", "Keywords", "Supplier", "Supplier Number", and "Updated Since...". Below the dropdown, there are radio buttons for "Open" (selected) and "Archived", and a link "To view Current and Archived Contracts, click here". There is also an "Export All to Excel" button.

To the right of the search form, there is a "Display Results" section with a "Display" dropdown set to "10" and the text "entries per page.". Below this, there is a note: "Hover your mouse over the text to get more details. (Internet Explorer Only)".

Contracts on eMarketPlace

You may select Supplier from the dropdown to search by supplier. Another field opens for you to enter search criteria. In the example below, we entered "mckesson" and selected the SEARCH button. This displays all the contracts related to the supplier Mckesson.



PA Marketplace Supplier Service Center Bureau of Procurement

> admin login e-mail

Select Contracts View COSTARS Contracts Tips & Tricks

< Back > View List of Contracts > B&W Mode

Search Contracts

Searching for All Items may take a long time. We recommend narrowing the search.

Search by **Supplier**

Display Results Display entries per page.

Open Archived Both

To view Current and Archived records, select the Both button.

Export All to Excel

Hover your mouse over the text to get more details. (Internet Explorer Only)

List of Contracts

Contract #	Description	Overview/Change/Notice	Reason for Change	Category	Ending Date	Supplier	COSTARS	Commodity Specialist	Agency	Parent #
4400009200	Incontinent Care Products	<input type="checkbox"/>	Contract Renewal	Health & Human Services	12/31/2016	164167 - McKesson Medical Surgical Minnesota Supply Inc.	No	Cheryl Barth	All Using Agencies	4400009200
4400009279	Laboratory Supplies and Equipment	<input type="checkbox"/> <input type="checkbox"/>		Supplies	12/31/2016	164167 - McKesson Medical-Surgical	No	Liz Bollinger	All Using Agencies	4400009324
4400010245	Medical Supplies and Equipment	<input type="checkbox"/> <input type="checkbox"/>		Health & Human Services	06/30/2017	164167 - McKesson Medical Surgical	No	Cheryl Barth-Taylor	All Using Agencies	4400009951
4400013095	Pharmaceuticals	<input type="checkbox"/>		Health & Human Services	06/30/2017	172432 - McKesson Drug	Yes	Cheryl Barth-Taylor	All Using Agencies	4400013095

Contracts on eMarketPlace

To view the contract detail, select the Contract Number link. A new screen will display as shown on the next slide.

PA  Marketplace
Supplier Service Center
Bureau of Procurement

[> admin login](#)
 [e-mail](#)

Select Contracts
[View COSTARS Contracts](#)
[Tips & Tricks](#)

[< Back](#)
[> View List of Contracts](#)
[> B&W Mode](#)

Search Contracts

Searching for All Items may take a long time.
We recommend narrowing the search.

Search by Supplier

Open Archived Both

To view Current and Archived records, select the Both button.

Display Results

Display entries per page.

Hover your mouse over the text to get more details. (Internet Explorer Only)

List of Contracts

Contract #	Description	Overview Change-Notice	Reason for Change	Category	Ending Date	Supplier	COSTARS	Commodity Specialist	Agency	Parent #
4400009200	Incontinent Care Products		Contract Renewal.	Health & Human Services	12/31/2018	164157 - McKesson Medical Surgical Minnesota Supply Inc.	No	Cheryl Barth	All Using Agencies	4400009200
4400009279	Laboratory Supplies and Equipment	 		Supplies	12/31/2018	164157 - McKesson Medical-Surgical	No	Liz Bollinger	All Using Agencies	4400009324
4400010245	Medical Supplies and Equipment	 		Health & Human Services	06/30/2017	164157 - McKesson Medical Surgical	No	Cheryl Barth-Taylor	All Using Agencies	4400009951
4400013096	Pharmaceuticals			Health & Human Services	06/30/2017	172432 - McKesson Drug	Yes	Cheryl Barth-Taylor	All Using Agencies	4400013098

Contracts on eMarketPlace: Contract Details

The Contract Details screen displays. Much of the information is similar to the main eMarketplace Contracts screen. To view the **Overview**, select the blue "O" in the View Overview area. To view the **Change Notice**, select the green "C" in the View Change Notice area. To view the **Contract**, select the orange "C" in the View Contract File area.

Contract Details		
Contract #: 4400010245	Parent #:	4400009951
Description: Medical Supplies and Equipment		
View Overview: O	View Contract File: C	
View Change Notice: C	Reason For Change:	
Category: Health & Human Services		
Begin Date:		
End Date: 06/30/2017		
Execution Date:		
Contract Amount:		
Supplier Name: McKesson Medical Surgical Supplier Number: 164157		
Commodity Specialist: Cheryl Barth-Taylor		
Agency: All Using Agencies		
Last Updated: 10/03/2016		
COSTARS: No	MSCC: <input type="checkbox"/>	PCard: P-Card Accepted
Solicitations: V	Tabs: N/A	Awards: V

Contracts on eMarketPlace: Contract Details (cont'd)

The Contract Details screen also provides additional information such as the Green Seal of Approval, Recycled Content and other Green Product Logos. The Green products or services are recognized as having a lesser or reduced effect on human health and the environment when compared with competing products or services that serve the same purpose. For additional information, view *Part I Chapter 22 Green Procurement* within the Procurement Handbook.



Green Seal Of Approval



Recycled Content

Contracts on eMarketPlace: Overview

- To view the Contract Overview, select the blue "O" link

CONTRACT DESCRIPTION/HIGHLIGHTS	CONTRACT INFORMATION	
<p>This contract supplies all using agencies with Medical Supplies, Equipment and Nutritional Supplements.</p> <p>This is a 5 year contract with no renewals.</p> <p>McKesson Medical Supply is the only supplier for medical supplies and nutritional supplements. All other suppliers are for medical equipment.</p>	Contract Change Revision Date:	
	Contract Title	Medical Supplies, Equipment and Nutritional Supplements
	Contract Number	4400009951
	Solicitation Number	6100022663
	Original Validity Period	7/1/2012 - 6/30/2017
	Current Validity End Date & Renewals Remaining	6/30/2017 - No Renewals
	Total Number of Contracts	23
	Point of Contact	Cheryl A Barth-Taylor
	Contact Phone Number	717-703-2934
	Contact Email Address	cbarhtayl@pa.gov
Pcard Accepted	<input checked="" type="checkbox"/> YES <input type="checkbox"/> NO	
PROCESS TO ORDER		
Contract Type:	Material	
Contract Description:	Catalog/Price List	
End User Procedures:	End-User Procedures	
Recommended EUP:		
ITQ Procedures:	ITQ Home	

Contracts on eMarketPlace: Change Order

- To view the Change Notice, select the green "C" link

CN Number:
SRM Parent Number: 4400009951
SAP/SRM Contract Number: 4400010246
Change Number: 1
Change Effective Date: 11/29/2012

**COMMONWEALTH OF PENNSYLVANIA
DEPARTMENT OF GENERAL SERVICES
HARRISBURG**

For: All Using Agencies
Subject: Skil Care Pricelist
Contract Period: Beginning 1/1/2010 and Ending 6/30/2017
Commodity Specialist: Cheryl A. Barth

CHANGE SUMMARY:

The attached pricelist is effective 11/1/2012. Note that prices may be lower than prices originally posted to contract.

ALL OTHER TERMS AND CONDITIONS OF THIS AGREEMENT NOT CHANGED BY THIS CHANGE NOTICE REMAIN AS ORIGINALLY WRITTEN.

Contracts on eMarketPlace

- To view the Contract, select the orange "C" link

Contract Details		
Contract #: 4400010245	Parent #:	4400009951
Description: Medical Supplies and Equipment		
View Overview: O	View Contract File:	C
View Change Notice: C	Reason For Change:	
Category: Health & Human Services		
Begin Date:		
End Date: 06/30/2017		
Execution Date:		
Contract Amount:		
Supplier Name: McKesson Medical Surgical	Supplier Number:	164157
Commodity Specialist: Cheryl Barth-Taylor		
Agency: All Using Agencies		
Last Updated: 10/03/2016		
COSTARS: No	MSCC: <input type="checkbox"/>	PCard: P-Card Accepted
Solicitations: V	Tabs: N/A	Awards: V

Contracts on eMarketPlace

Copy of Fully Executed Contract

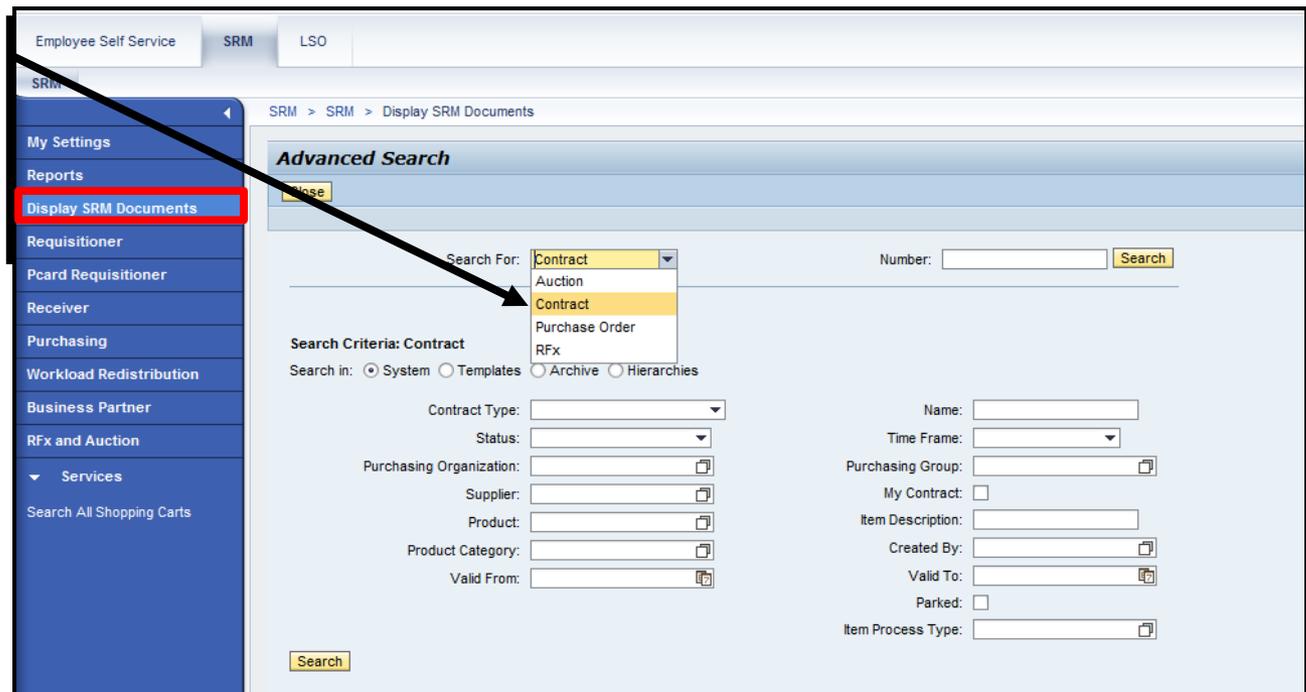
		Page 1 of 2				
<p>FULLY EXECUTED Contract Number: 4400010245 Contract Effective Date: 09/25/2012 Valid From: 08/14/2012 To: 06/30/2017</p>						
<p>Purchasing Agent Name: Barth Cheryl Phone: 717-703-2934 Fax: 717-783-6241</p>						
<p>Your SAP Vendor Number with us: 164157</p>						
<p>Supplier Name/Address: MCKESSON MEDICAL SURGICAL MINNESOTA SUPPLY INC 8121 10TH AVE N GOLDEN VALLEY MN 55427-0000 US</p>		<p>Please Deliver To: To be determined at the time of the Purchase Order unless specified below.</p>				
<p>Supplier Phone Number: 800-800-8111 Supplier Fax Number: 800-237-9766</p>						
<p>Contract Name: Medical Supplies and Equipment</p>		<p>Payment Terms NET 30</p>				
<p>Solicitation No.: 6100022663</p>		<p>Issuance Date: 08/03/2012</p>				
<p>Supplier Bid or Proposal No. (if applicable): 6500053306</p>		<p>Solicitation Submission Date: 08/14/2012</p>				
<p>This contract is comprised of: The above referenced Solicitation, the Supplier's Bid or Proposal, and any documents attached to this Contract or incorporated by reference.</p>						
Item	Material/Service Desc	Qty	UOM	Price	Per Unit	Total
1	Medical Supplies <small>Item Text: Please use MSCC for this line.</small>	0.000		0.00	1	0.00
2	Medical Equipment	0.000		0.00	1	0.00
3	Nutritional Supplements	0.000		0.00	1	0.00

		Page 2 of 2	
<p>FULLY EXECUTED - REPRINT Contract Number: 4400010245 Contract Effective Date: 09/25/2012 Valid From: 08/14/2012 To: 06/30/2017</p>			
<p>Supplier Name: MCKESSON MEDICAL SURGICAL MINNESOTA SUPPLY INC</p>			
<p>Header Text This contract is for the purchase of Medical Supplies, Equipment and Nutritional Supplements.</p>			
<p>Supplier contact information: MCKESSON MEDICAL SURGICAL MINNESOTA SUPPLY INC 8121 10TH AVE N GOLDEN VALLEY MN 55427-0000 US</p>			
<p>Contact: Ross Brownstein Telephone # 800-800-8111 Fax # 800-237-9766 Email: ross.brownstein@MCKESSON.COM</p>			
<p>All contract questions should be directed to: Cheryl Barth at cbarth@pa.gov No further information for this Contract</p>			

Locating Contracts in SRM

- In order to “shop” effectively against a contract, you should understand the layout and contents of the contract you are ordering against

- Select Display SRM Documents
- Select Contract



Employee Self Service SRM LSO

SRM > SRM > Display SRM Documents

Advanced Search

Search For: **Contract**
Auction
Contract
Purchase Order
RFx

Search Criteria: **Contract**
Search in: System Templates Archive Hierarchies

Contract Type:
Status:
Purchasing Organization:
Supplier:
Product:
Product Category:
Valid From:

Number: **Search**

Name:
Time Frame:
Purchasing Group:
My Contract:
Item Description:
Created By:
Valid To:
Parked:
Item Process Type:

Search

Contracts in SRM – Advanced Search

Advanced Search

Search For:

Search Criteria: Contract

Search in: System Templates Archive Hierarchies

My Contract

 Parked

- Search for the desired Contract using common search criteria such as: Contract Number, Contract Name, Status and Purchasing Organization. Select the SEARCH Button.

Contracts in SRM – Search Results

Search Criteria: Contract

Search in: System Templates Archive Hierarchies

Contract Type:

Status:

Purchasing Organization:

Supplier:

Product:

Product Category:

Valid From:

Name:

Time Frame:

Purchasing Group:

My Contract:

Item Description:

Created By:

Valid To:

Parked:

Item Process Type:

Search Results: 25 Contracts

Number	Name	Purchasing Organization	Valid From	Valid To	Supplier	Status
4400010725	Un-Armed & Armed Security Guards	COPA Purchasing Organization	10/01/2012	07/31/2017	AM-GARD INC	Released
4400010424	Un-Armed & Armed Security Guards	COPA Purchasing Organization	10/01/2012	07/31/2017	MARLOWE E FREEMAN SR	Released
4400010376	Un-Armed & Armed Security Guards	COPA Purchasing Organization	09/18/2012	07/31/2017	SECURITY GUARD INC	Released
4400010375	Un-Armed & Armed Security Guards	COPA Purchasing Organization	09/18/2012	07/31/2017	GITTINGS PROTECTIVE SECURITY	Released
4400010366	Un-Armed & Armed Security Guards	COPA Purchasing Organization	09/11/2012	07/31/2017	Prestige Security Specialists Inc	Released
4400010365	Un-Armed & Armed Security Guards	COPA Purchasing Organization	09/11/2012	07/31/2017	Colonial Security Service	Released
4400010364	Un-Armed & Armed Security Guards	COPA Purchasing Organization	09/11/2012	07/31/2017	CAULEY DETECTIVE AGENCY INC	Released
4400010361	Un-Armed & Armed Security Guards	COPA Purchasing Organization	09/10/2012	07/31/2017	GRAHAM & GRAHAM SECURITY &	Released
4400010360	Un-Armed & Armed Security Guards	COPA Purchasing Organization	09/10/2012	07/31/2017	POND SECURITY SERVICE LLC	Released
4400010359	Un-Armed & Armed Security Guards	COPA Purchasing Organization	09/10/2012	07/31/2017	SECURITY GUARDS INC	Released

- Display the document from the Search Result

Contracts in SRM – Display Contract (Overview)

Display SW Regular Contract 4400010725

Close Refresh Edit Copy Check Renew Print Preview Related Links

Contract Number: 4400010725 Smart Number: Un-Armed & Armed Security Guards Contract Type: SW Regular Contract Status: Released Supplier: 178841 AM-GARD, INC Contract Owner: 820462 Jeffrey Henry

Overview Header Items Notes and Attachments Conditions Approval Tracking

General Header Data

Contract Number: 4400010725 Contract Owner: 820462 Jeffrey Henry
 Smart Number: Un-Armed & Armed Security G Target Value/ Currency: 12,000,000.00 USD
 Smart Number is External Release Value: 421,083.20 USD
 Contract Description: Basic Contract:
 Supplier: * 178841 AM-GARD, INC Valid From / To: * 10/01/2012 - 07/31/2017
 Purchasing Organization: * COPA Purchasing Organization
 Purchasing Group: * VM4-1504-DOS BOP MAT [Show Members](#)

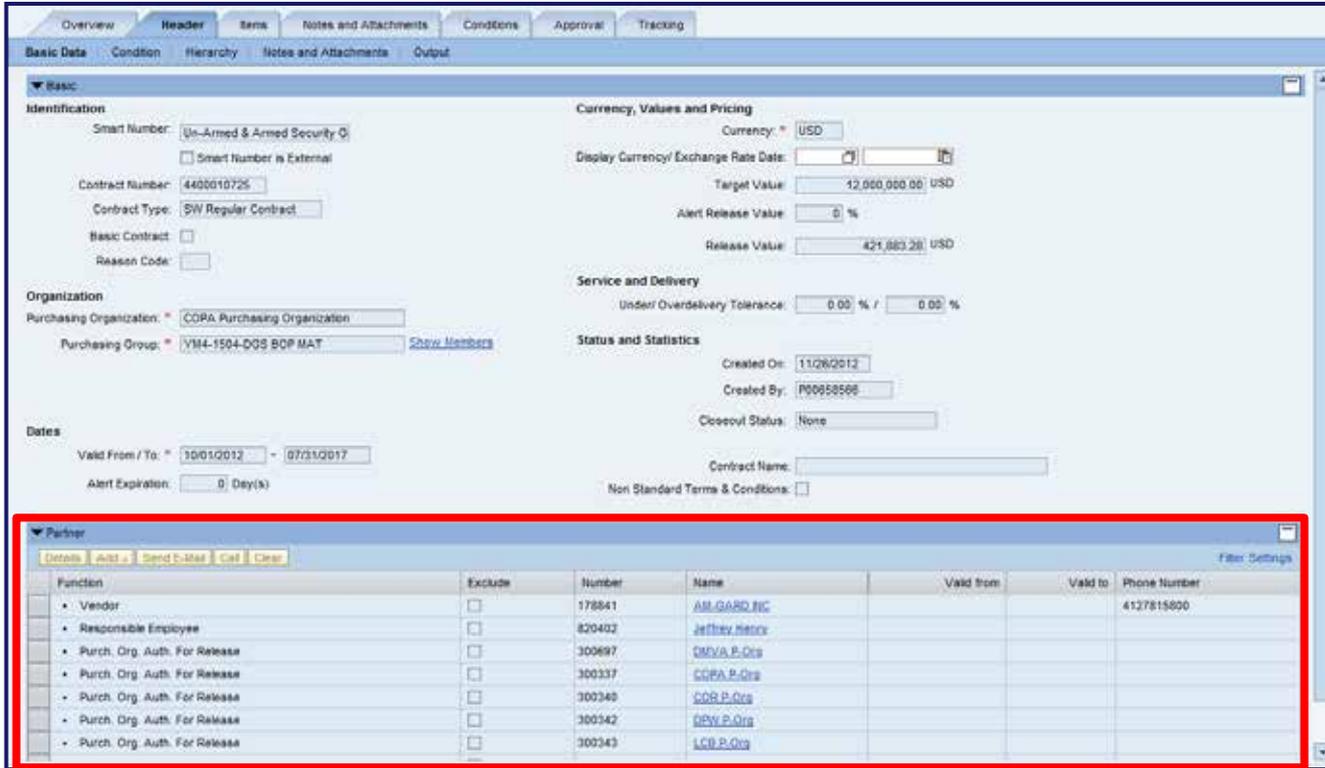
Items

Line Number	Item Category	Item Number	Product ID	Description	Product Category	Target Quantity	Option Status	Unit	Target Value	Price	Currency	Total Value	Price Per	Price Unit	Reference Item Number	Distribution	Block Local Sourcing
1	Product Category 1			Unarmed Security Guard Services	82121504	0.000			12,000,000.00	0.00	USD		1	0			<input type="checkbox"/>
2	Product Category 2			Armed Security Guard Services		0.000			12,000,000.00	0.00	USD		1	0			<input type="checkbox"/>

List of Items

- The Overview tab displays showing the contract validity period and line item overview which will contain the Product Category, Unit (of Measure), and price (if available)

Contracts in SRM –Contract Header



The screenshot displays the SRM Contract Header page. The 'Header' tab is selected, and the 'Basic' sub-tab is active. The page is divided into several sections: Identification, Currency, Values and Pricing, Organization, Service and Delivery, Dates, and Status and Statistics. The 'Partner' section is highlighted with a red border and contains a table of partner information.

Function	Exclude	Number	Name	Valid from	Valid to	Phone Number
• Vendor	<input type="checkbox"/>	178841	AM-GARD INC			4127815000
• Responsible Employee	<input type="checkbox"/>	820402	Jeffrey Henry			
• Purch. Org. Auth. For Release	<input type="checkbox"/>	300697	DMVA P.Org			
• Purch. Org. Auth. For Release	<input type="checkbox"/>	300337	CORA P.Org			
• Purch. Org. Auth. For Release	<input type="checkbox"/>	300340	COB P.Org			
• Purch. Org. Auth. For Release	<input type="checkbox"/>	300342	DPV P.Org			
• Purch. Org. Auth. For Release	<input type="checkbox"/>	300343	LCB P.Org			

- Select the Header tab, Basic sub-tab to find the *Partner* information
 - The *Partner* section shows the following: Vendor information, the DGS Commodity Specialist responsible for the contract, and which Purchasing Organizations are permitted to issue POs against the Contract

Contracts in SRM – Contract Notes and Attachments

Overview Header Items **Notes and Attachments** Conditions Approval Tracking

▼ Notes Filter Settings

Add Clear

Assigned To	Category	Text Preview
Document Header	Header Text	The Department of General Services is issuing this contr...

▼ Attachments Filter Settings

Add Attachment Edit Description Versioning Delete

Assigned To	Category	Description	File Name	Version	Processor	Visible Internally only	Checked Out	Type	Size (KB)	Changed by	Changed on
Document Header	Standard Attachment	Act 235	Armed Guards.docx	1		<input type="checkbox"/>	<input type="checkbox"/>	docx	4	DDUNCAN	08/14/2012
Document Header	Standard Attachment	Price List.xls	Price List.xls	1		<input type="checkbox"/>	<input type="checkbox"/>	xls	26	DDUNCAN	08/14/2012
Document Header	Standard Attachment	Geographic Coverage.xls	Geographic Coverage.xls	1		<input type="checkbox"/>	<input type="checkbox"/>	xls	31	P00658566	11/26/2012
Document Header	Standard Attachment	CRP Clearance.pdf	CRP Clearance.pdf	1		<input type="checkbox"/>	<input type="checkbox"/>	pdf	39	P00658566	11/26/2012
Document Header	Standard Attachment	Neq CRP.doc	Neg CRP.doc	1		<input type="checkbox"/>	<input type="checkbox"/>	doc	73	P00658566	11/26/2012

- Select the Notes and Attachments tab to view text and attachments
 - The *Notes* area contains all relevant information in the text fields
 - Additional information may be contained in the Attachments

Create a Shopping Cart

Where do we go to Create a Shopping Cart?

- Select **Requisitioner**

Left navigation pane under – Services

- Select **Create Shopping Cart**



Ways of Selecting Products in SRM Shopping Carts

In SRM, you can select products to requisition two ways:

- Catalogs
 - Punch-out sites (supplier sites)
 - Warehouse (items available from agency warehouses)
 - Material/Service Contract Catalog (items from DGS statewide contracts which have been loaded into the catalog)
 - Internal Goods/Services (items with Product Numbers from DGS statewide contracts)
- Free Text “Describe Requirement”
 - Used when an item cannot be found in a catalog

Shopping Cart Wizard: Shop in 3 Steps

- The Shopping Cart Wizard is a 3 Step process that assists you in the creation of Shopping Carts

- Browse various Supplier Punch-out Catalogs or Agency or DGS Warehouse
- Use MSCC to access items from DGS Contracts
- Use Free Text (Describe Requirement) if the item is not available in the catalog

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

Find: Go

Browse: [Old Shopping Carts and Templates](#) [CI WEBSITE - VIEW ONLY](#) [COPA INTERNAL ECATALOG DGS - 1500](#)
[Internal Goods/Services](#) [Material/Service Contract Catalog\(MSCC\)](#) [PA Compute Services – Unisys](#)
[Peripherals & Networking Gear - CDW-G](#) [Peripherals & Networking Gear - POMEROY](#)
[Peripherals & Networking Gear - ePlus](#) [UniqueSource Products & Services](#)
[VWR LAB SUPPLIES](#)

Free Text: [Describe what you need](#) If you cannot find it above

Selection Process: Step 1 (Select Goods/Service)

- Select a Catalog or Free Text to start the order process

- In this example, we are selecting "Free Text."

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

Previous | **Next** | Order | Close

1 → Select Goods/Service → 2 Shopping Cart (empty) → 3 Complete and Order →

Find: **Go**

Browse: [Old Shopping Carts and Templates](#) [CI WEBSITE - VIEW ONLY](#) [COPA INTERNAL ECATALOG DGS - 1500](#)
[Internal Goods/Services](#) [Material/Service Contract Catalog\(MSCC\)](#) [PA Compute Services – Unisys](#)
[Peripherals & Networking Gear - CDW-G](#) [Peripherals & Networking Gear - POMEROY](#)
[Peripherals & Networking Gear - ePlus](#) [UniqueSource Products & Services](#)
[VWR LAB SUPPLIES](#)

Free Text: [Describe what you need](#) If you cannot find it above

Free Text: Describe Requirement

- When the input screen displays, fill in the required Description field
- Also complete the Internal Note field (typically this field contains the justification)



Describe Requirement

Product Type: Material

Description: * Managerial Chair

Internal Note: Justification: Chair is needed to replace worn & broken chair.

Product Category: 78121603 FREIGHT FEE

Quantity / Unit: 1.000

Net Price / Currency: 0.00 USD

Delivery Date: 02/24/2014

OK Cancel

- Enter the applicable Product Category number if it is known, or select the match code to perform a search

Product Category Search

Search Product Category

Display As: Flat List

Note: Placeholder search with * is possible. Search ignores upper/lowercase spelling.

Product Category ID:

Description: *Furniture*

Logical System:

Restrict Number of Value List Entries

Start Search

Item Detail 0 Unsaved data will be lost

Description	Category ID	Logical System
VET CLIN FURNITURE	42121700	PC1CLNT110
AUTOPSY FURNITURE	42261700	PC1CLNT110
FURNITURE POLISH/WAX	47131806	PC1CLNT110
FURNITURE CLEANERS	47131830	PC1CLNT110
RESTAURANT FURNITURE	48102000	PC1CLNT110
CAMPING FURNITURE	49121600	PC1CLNT110
FURNITURE & FURNISHI	56000000	PC1CLNT110
FURNITURE	56101500	PC1CLNT110
FURNITURE SET	56101532	PC1CLNT110
OUTDOOR FURNITURE	56101600	PC1CLNT110
OFFICE FURNITURE	56101700	PC1CLNT110
MODULAR FURNITURE CO	56101711	PC1CLNT110
GENERAL FURNITURE PA	56101900	PC1CLNT110
FURNITURE TOPS/WORK	56101901	PC1CLNT110
FURNITURE MOVING DIS	56101902	PC1CLNT110

OK Cancel

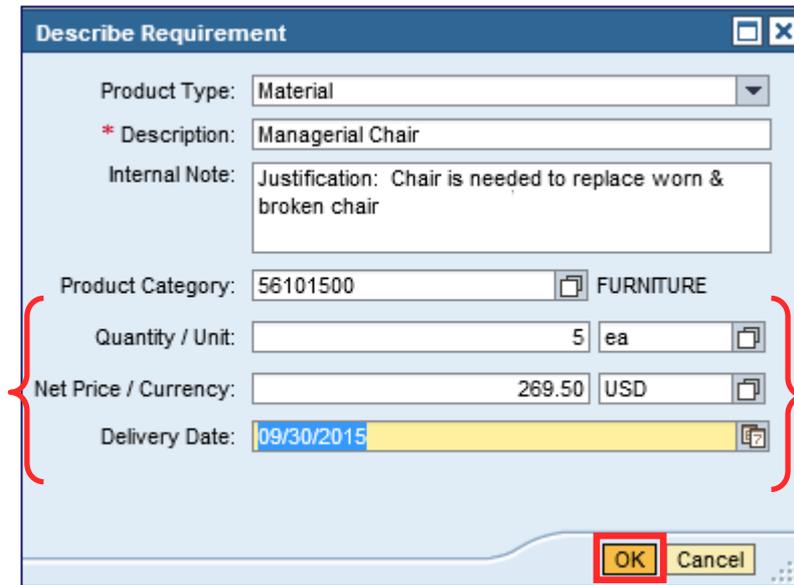
- Make an entry in the Description field

- Select the START SEARCH button

- When the search results display, select the *gray* box to highlight the row of the desired item

- Select the OK button

Free Text: Describe Requirement



Describe Requirement

Product Type: Material

* Description: Managerial Chair

Internal Note: Justification: Chair is needed to replace worn & broken chair

Product Category: 56101500 FURNITURE

Quantity / Unit: 5 ea

Net Price / Currency: 269.50 USD

Delivery Date: 09/30/2015

OK Cancel

- The Product Category field is populated
- Complete the remaining fields:
 - Quantity
 - Unit of Measure (see next slide for further information on searching for the UOM)
 - Price
 - Delivery Date
- Select the OK button

Unit of Measure Search

- Selecting the match code next to the Unit of Measure field on the previous slide, will open up search criteria to locate your unit of measure as shown below
- Enter the unit of measure within the Unit text field with an * before and after
- Select the SEARCH button
- Select the gray box or the result itself and it will transfer back to the UOM field

Search: Unit of Measurement
☐ ✕

Search Criteria Personal Value List Hide Search Criteria ⚙️ ?

Commercial	▼	is	▼		+	-
Unit text	▼	is	▼	*each*	+	-

Maximum Number of Results:

Search
Clear Entries
Reset to Default

Results List: 1 results found for Unit of Measurement

Commercial	△	Unit text
EA		Each

Free Text: Step 2 (Shopping Cart)

Displayed is a view of the SRM Shopping Cart in document landscape

Shop in 3 steps: Step 2 (Shopping Cart (1 item))

◀ Previous Next ▶ Order Close Save Check

! Fund must be entered for non-asset account assignment categories
! Line 1: No G/L account was entered; enter a G/L account
! Line 1: Error in account assignment for item 1
! Line 1: Enter a value in the mandatory field Cost Center in account assignment

1 Select Goods/Service 2 Shopping Cart (1 item) 3 Complete and Order

Items in Shopping Cart

Details Add Item Copy Paste Duplicate Delete Filter Settings

Line Number	Item Type	Product ID	Description	Product Category	Product Category Description	Quantity	Unit	Net Price / Limit	Currency	Option Type	Per	Order Type	Delivery Date	Notes	Attachments	Item Status	Supplier
1	Material		Managerial Chair	56101500	FURNITURE	5.000	EA	269.50	USD		1		12/19/2013	1	0		None
*	Undefined Item Type			80121800	FAMILY LAW SVCS	1.000		0.00	USD		1		12/03/2013	0	0		
*	Undefined Item Type			80121800	FAMILY LAW SVCS	1.000		0.00	USD		1		12/03/2013	0	0		
*	Undefined Item Type			80121800	FAMILY LAW SVCS	1.000		0.00	USD		1		12/03/2013	0	0		
*	Undefined Item Type			80121800	FAMILY LAW SVCS	1.000		0.00	USD		1		12/03/2013	0	0		
*	Undefined Item Type			80121800	FAMILY LAW SVCS	1.000		0.00	USD		1		12/03/2013	0	0		
*	Undefined Item Type			80121800	FAMILY LAW SVCS	1.000		0.00	USD		1		12/03/2013	0	0		
*	Undefined Item Type			80121800	FAMILY LAW SVCS	1.000		0.00	USD		1		12/03/2013	0	0		
*	Undefined Item Type			80121800	FAMILY LAW SVCS	1.000		0.00	USD		1		12/03/2013	0	0		
Total Value 1,347.50 USD Tax amount 0.00 USD Total Val. (Gross) 1,347.50 USD																	

• Select the DETAILS button or the Line Item Number to view the details of the line item

Free Text: Step 2 (Shopping Cart)

Displayed is a view of the SRM Shopping Cart in document landscape

Shop in 3 steps: Step 2 (Shopping Cart (1 item))

◀ Previous Next ▶ Order Close Save Check

❗ Fund must be entered for non-asset account assignment categories
❗ Line 1: No G/L account was entered; enter a G/L account
❗ Line 1: Error in account assignment for item 1
❗ Line 1: Enter a value in the mandatory field Cost Center in account assignment

1 Select Goods/Service 2 Shopping Cart (1 item) 3 Complete and Order

Items in Shopping Cart

Details Add Item Copy Paste Duplicate Delete Filter Settings

Line Number	Item Type	Product ID	Description	Product Category	Product Category Description	Quantity	Unit	Net Price / Limit	Currency	Option Type	Per	Order Type	Delivery Date	Notes	Attachments	Item Status	Supplier
1	Material		Manoerial Chair	56101500	FURNITURE	5.000	EA	269.50	USD		1		12/19/2013	1	0		None
*	Undefined Item Type			80121800	FAMILY LAW SVCS	1.000		0.00	USD		1		12/03/2013	0	0		
*	Undefined Item Type			80121800	FAMILY LAW SVCS	1.000		0.00	USD		1		12/03/2013	0	0		
*	Undefined Item Type			80121800	FAMILY LAW SVCS	1.000		0.00	USD		1		12/03/2013	0	0		
*	Undefined Item Type			80121800	FAMILY LAW SVCS	1.000		0.00	USD		1		12/03/2013	0	0		
*	Undefined Item Type			80121800	FAMILY LAW SVCS	1.000		0.00	USD		1		12/03/2013	0	0		
*	Undefined Item Type			80121800	FAMILY LAW SVCS	1.000		0.00	USD		1		12/03/2013	0	0		
*	Undefined Item Type			80121800	FAMILY LAW SVCS	1.000		0.00	USD		1		12/03/2013	0	0		
*	Undefined Item Type			80121800	FAMILY LAW SVCS	1.000		0.00	USD		1		12/03/2013	0	0		
Total Value 1,347.50 USD Tax amount 0.00 USD Total Val. (Gross) 1,347.50 USD																	

• Select the DETAILS button or the Line Item Number to view the details of the line item

Free Text: Shopping Cart – Item Detail

- Line item detail is in a tabular format just below the Item Overview

Shop in 3 steps: Step 2 (Shopping Cart (1 item))

1 Select Goods/Service 2 Shopping Cart (1 item) 3 Complete and Order

Items in Shopping Cart

Line Number	Item Type	Product ID	Description	Product Category	Product Category Description	Quantity	Unit	Net Price / Limit	Currency	Option Type	Per	Order Type	Delivery Date	Notes	Attachments	Item Status	Supplier
1	Material	Managerial Chair	56101500	FURNITURE		5.000	EA	269.50	USD		1		12/19/2013				None
*	Undefined Item Type		80121800	FAMILY LAW SVCS		1.000		0.00	USD		1		12/03/2013				

Total Value 1,347.50 USD
Tax amount 0.00 USD
Total Val. (Gross) 1,347.50 USD

Details for item 1 Managerial Chair

Identification

Item Type:
 Product ID:
 Description:
 Product Category: FURNITURE

Currency, Values and Pricing

Order Quantity / Unit: Each
 Ordered Quantity / Unit:
 Open Quantity / Unit: EA
 Price / Currency: Price Unit

Organization

Purchasing Group:
 Company Code: COMMONWEALTH OF PA

Service and Delivery

Location / Plant: DGS Bureau of Procurement
 Storage Location:
 Goods Recipient: Cynthia Anderson
 Delivery Date:

Supplier Product Number:

Proceed Using P-CARD?:

Item Data

- The Item Data contains the basic information required on an order such as the Description, Product Category, Order Quantity, Unit (of measure), Price, Plant, Storage Location, Delivery Date, and P-Card information.

Details for item 1 Managerial Chair

Item Data | Account Assignment | Notes and Attachments | Delivery Address | Sources of Supply | Approval Process Overview

Identification

Item Type: Material

Product ID:

Description: * Managerial Chair

Product Category: 56101500 FURNITURE

Organization

Purchasing Group: DGS Central Purchase Purchasing Group [Show Members](#)

Company Code: COPA COMMONWEALTH OF PA

Further Properties

Supplier Product Number:

Currency, Values and Pricing

Order Quantity / Unit: 5.000 EA Each

Ordered Quantity / Unit: 0.000

Open Quantity / Unit: 5.000 EA

Price / Currency: 269.50 USD Price Unit 1

Service and Delivery

Location / Plant: 301375 DGS Bureau of Procurement

Storage Location:

Goods Recipient: 703389 Cynthia Anderson

Delivery Date: 12/19/2013

Proceed Using P-CARD?:

- Populate open fields as applicable

Account Assignment

- Select the Account Assignment tab to enter the cost assignment which typically includes the fund and general ledger

Details for item 1 Test

Item Data **Account Assignment** Notes and Attachments Delivery Address Sources of Supply Approval Process O

You can see who bears the costs and, if necessary, you can distribute the cost to several cost centres

Cost Distribution Percentage Details Add Line Copy Paste Duplicate Delete Split Distribution Change All Items

Number	Accounting Line Number	Percentage	Account Assignment Category	Assign Number	Account Assignment De
0001		100.00	Cost Center		

Details for Item 0001 : Cost Center

Basic Data

* Percentage: 100.00 Fund: 1007400700

Account Assignment Category: Cost Center Budget Period: 2014

* Cost Center: 1577140000 Commitment Item:

Fund Center:

Functional Area:

Controlling Area: COPA

General Ledger Account: 6362130

Business Area:

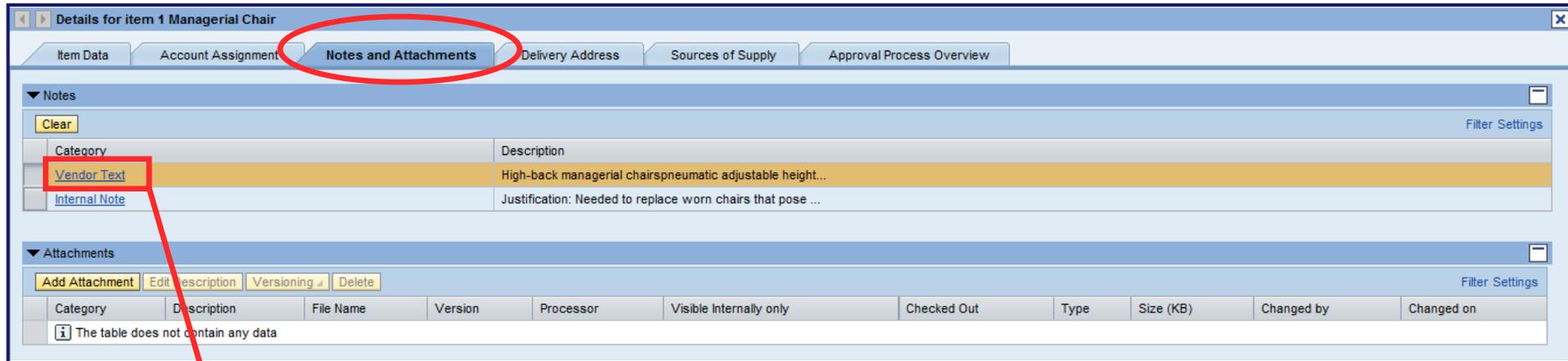
Cost Distribution Percentage

Number	Acc
0001	

Percentage
By Quantity
By Value

- The account assignment can be split by Percentage, Quantity, or Value
- Action buttons allow you to add a line, copy, paste, duplicate, and delete

Notes and Attachments



Details for item 1 Managerial Chair

Item Data | Account Assignment | **Notes and Attachments** | Delivery Address | Sources of Supply | Approval Process Overview

Notes

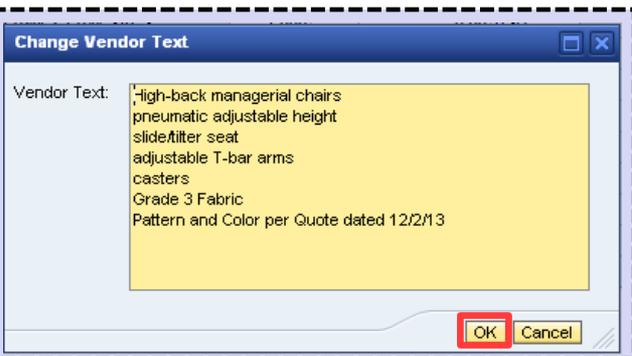
Clear Filter Settings

Category	Description
Vendor Text	High-back managerial chairspneumatic adjustable height...
Internal Note	Justification: Needed to replace worn chairs that pose ...

Attachments

Add Attachment Edit Description Versioning Delete Filter Settings

Category	Description	File Name	Version	Processor	Visible Internally only	Checked Out	Type	Size (KB)	Changed by	Changed on
The table does not contain any data										



Change Vendor Text

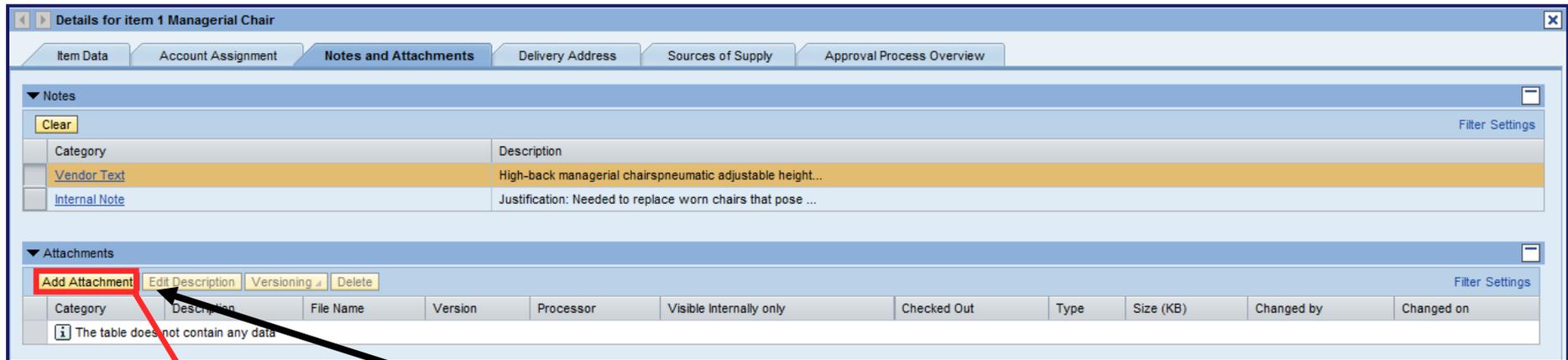
Vendor Text:

High-back managerial chairs
pneumatic adjustable height
slide/filter seat
adjustable T-bar arms
casters
Grade 3 Fabric
Pattern and Color per Quote dated 12/2/13

OK Cancel

- Select the Vendor Text link to add a note to be viewed by the supplier
 - Type or paste the text into the box and select the OK button
- Select the Internal Note to add a Justification or information you want to remain internal to COPA employees
- If needed, use the CLEAR button to remove an existing note

Notes and Attachments



Details for item 1 Managerial Chair

Item Data Account Assignment **Notes and Attachments** Delivery Address Sources of Supply Approval Process Overview

▼ Notes

Clear Filter Settings

Category	Description
Vendor Text	High-back managerial chairs pneumatic adjustable height...
Internal Note	Justification: Needed to replace worn chairs that pose ...

▼ Attachments

Add Attachment Edit Description Versioning Delete Filter Settings

Category	Description	File Name	Version	Processor	Visible Internally only	Checked Out	Type	Size (KB)	Changed by	Changed on
The table does not contain any data										



Add Attachment

Here, you can upload a file and attach it to the selected item

File: H:\Sales quote for Chair P... Browse...

Description:

Visible Internally only:

OK Cancel

- Select the ADD ATTACHMENT button to browse for a document
 - Attach the document by selecting the OK button

Notes and Attachments

Details for item 1 Managerial Chair

Item Data | Account Assignment | **Notes and Attachments** | Delivery Address | Sources of Supply | Approval Process Overview

▼ Notes

Clear Filter Settings

Category	Description
Vendor Text	High-back managerial chairs pneumatic adjustable height...
Internal Note	Justification: Needed to replace worn chairs that pose ...

▼ Attachments

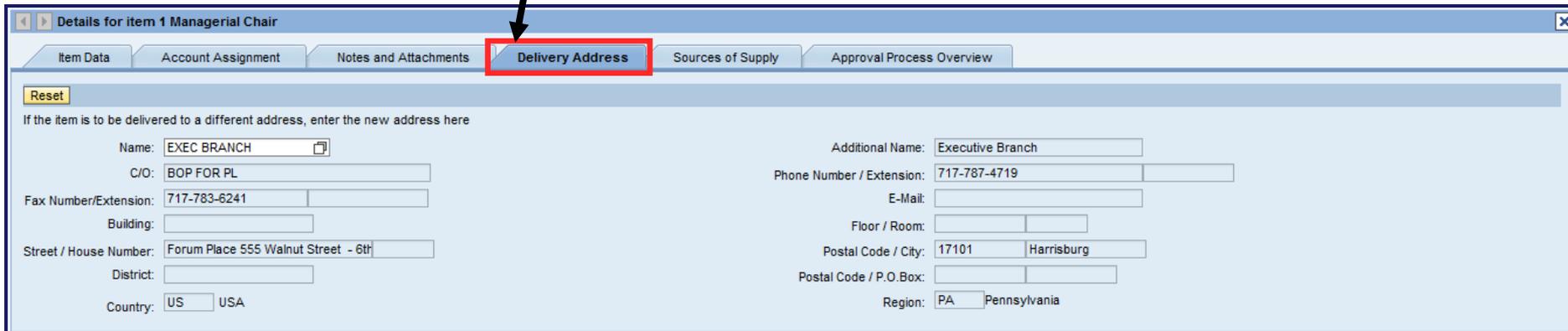
Add Attachment | **Edit Description** | Versioning ▾ | Delete Filter Settings

Category	Description	File Name	Version	Processor	Visible Internally only	Checked Out	Type	Size (KB)	Changed by	Changed on
Standard Attachment	Sales quote for Chair PO	Sales quote for Chair PO.docx	1		<input checked="" type="checkbox"/>	<input type="checkbox"/>	docx	33	P00446880	12/03/2013

- If applicable, use the EDIT DESCRIPTION or DELETE buttons
- Do not use the VERSIONING button as we are not utilizing this functionality
 - If edits to an attachment are required, delete the current version and replace it with the revised version

Delivery Address

- Review the Delivery Address, and if applicable, the delivery address can be changed by selecting the match code in the Name field and searching for a different address using various criteria.



Details for item 1 Managerial Chair

Item Data | Account Assignment | Notes and Attachments | **Delivery Address** | Sources of Supply | Approval Process Overview

Reset

If the item is to be delivered to a different address, enter the new address here

Name:	<input type="text" value="EXEC BRANCH"/>	<input type="button" value="🔍"/>	Additional Name:	<input type="text" value="Executive Branch"/>
C/O:	<input type="text" value="BOP FOR PL"/>		Phone Number / Extension:	<input type="text" value="717-787-4719"/>
Fax Number/Extension:	<input type="text" value="717-783-6241"/>		E-Mail:	<input type="text"/>
Building:	<input type="text"/>		Floor / Room:	<input type="text"/>
Street / House Number:	<input type="text" value="Forum Place 555 Walnut Street - 6th"/>		Postal Code / City:	<input type="text" value="17101"/> <input type="text" value="Harrisburg"/>
District:	<input type="text"/>		Postal Code / P.O. Box:	<input type="text"/>
Country:	<input type="text" value="US"/> <input type="text" value="USA"/>		Region:	<input type="text" value="PA"/> <input type="text" value="Pennsylvania"/>

Source of Supply

- The Sources of Supply refers to the supplier who has been identified to provide the material or service. Available sources of supply are generated based on the Shopping Cart line item's Product Category. In the example below we purchased furniture (56101500).

Details for item 1 Managerial Seating

Item Data | Account Assignment | Notes and Attachments | Delivery Address | **Sources of Supply** | Approval Process Overview

No supplier has been assigned; select and assign one of the following sources of supply

Sources of Supply

Assign Supplier | Compare Suppliers | Filter

Supplier Number	Supplier Name	Contract	Item	Contract Item Description	Supplier Product Number	Net Price	Currency	Per	Unit	In Supplier List	Priority Rank	Priority Description	Interlinkage
100245	DCI INC	4400009388	1	Seating		855.95	USD	1	EA	No	0		No
100245	DCI INC	4400009388	2	Tables		855.95	USD	1	EA	No	0		No
100245	DCI INC	4400009388	3	Library, Classroom, Music & Dormatory		855.95	USD	1	EA	No	0		No
100245	DCI INC	4400009388	4	Free Standing Office		855.95	USD	1	EA	No	0		No
100245	DCI INC	4400009388	5	Healthcare Furniture		855.95	USD	1	EA	No	0		No

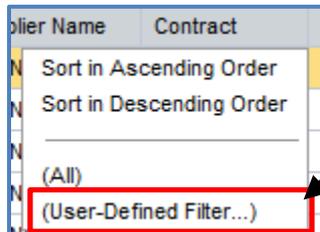
Source of Supply



Supplier Product Number	Net Price	Currency	Per	Unit	In Supplier List	Priority Rank	Priority Description	Interlinkage
	855.95	USD	1	EA	No	0		No
	855.95	USD	1	EA	No	0		No
	855.95	USD	1	EA	No	0		No
	855.95	USD	1	EA	No	0		No
	855.95	USD	1	EA	No	0		No

- Select the Filter option to narrow your search options

- Select the column you want to filter by, e.g. the Contract column.



Supplier Name	Contract
N	Sort in Ascending Order
N	Sort in Descending Order
N	(All)
N	(User-Defined Filter...)

- Select (User-Defined Filter...)

Source of Supply

Custom Filter ✕

Use * to Represent Character Strings

Filter By

Contract:

- Enter your criteria in the space provided (e.g. the contract number)
 - Select the FILTER button

- Results for the searched contract displays.

Sources of Supply

<input type="checkbox"/>	Supplier Number	Supplier Name	Contract	Item	Contract Item Description	Supplier Product Number	Net Price
<input type="checkbox"/>	162319	ALLSTEEL INC	4400009337	1	Seating		855.95
<input type="checkbox"/>	162319	ALLSTEEL INC	4400009337	2	Tables		855.95
<input type="checkbox"/>	162319	ALLSTEEL INC	4400009337	3	Library, Classroom, Music		855.95
<input type="checkbox"/>	162319	ALLSTEEL INC	4400009337	4	Free Standing Office		855.95
<input type="checkbox"/>	162319	ALLSTEEL INC	4400009337	6	Lounge & Meeting Room		855.95

- Select the grey box next to the line item of the contract, then select the ASSIGN SUPPLIER button

72 **NOTE:** You must add a Source of Supply for each line item in a Shopping Cart.

Approval Process Overview

Details for Item 1 BEDSHEET,FITTED,PERCALE,WHT,35X90X6

Item Data | Account Assignment | Notes and Attachments | Delivery Address | Sources of Supply | **Approval Process Overview**

Current Status:
 Current Process Step:
 Currently Processed By:
 Approval Process Data: [Download as XML](#)

Header | Item

Header Approval Status

[Add Approver](#) | [Remove Approver](#) | [Settings](#)

Sequence	Process Step	Status	Processor	Received On	Processed On	Forwarded By
001	SRM Shopping Cart Completion	Open (No Decision Made)	Terri Heimbach Yicky Chichi Judy Kiser-Smith Susan Reinhold Elizabeth Lehard			
002	SRM Shopping Cart Completion	Open (No Decision Made)	Terri Heimbach Susan Reinhold Elizabeth Lehard			

- Review of the Workflow is available through the Approval Process Overview tab

What is an Ad Hoc Approver?

- An Ad Hoc Approver is an additional approver that can be added within a cart by a Requisitioner or Approver anytime the defined strategy does not meet the approval needs of the cart
 - Users added as an Ad Hoc approver must have an approver role
- Ad Hoc Approvers cannot be added to a Special Category cart after the cart reaches the final approver

Adding an Ad Hoc Approver

Shop in 3 steps: Step 3 (Complete and Order)

◀ Previous Next ▶ Order Close Save Check

1 2 3

Select Goods/Service Shopping Cart (3 items) Complete and Order

Name of shopping cart: P00068292 08/07/2013 08:25

Number: 10011734

Approval Process: [Display / Edit Agents](#)

Note to Approver

- Select the Display/Edits Agents link in Step 3 to Ad Hoc an Approver to the Shopping Cart

- Select the ADD APPROVER button

Details for item 1 BED SHEET, FITTED, PERCALE, WHT, 35X66X9

Item Data Account Assignment Notes and Attachments Delivery Address Sources of Supply Approval Process Overview

Current Status: Initial

Current Process Step:

Currently Processed By:

Approval Process Data: [Download as XML](#)

Header Item

Header Approval Status

Add Approver Remove Approver

Sequence	Process Step	Status	Processor	Received On	Processed On	Forwarded By
• 001	SRM Shopping Cart Completion	Open (No Decision Made)	Tami Hombach, Ycky Chichi, Jada Kinn-Smith, Susan Reinhold, Elizabeth Lenhart			
• 002	SRM Shopping Cart Completion	Open (No Decision Made)	Tami Hombach, Susan Reinhold, Elizabeth Lenhart			

Adding an Ad Hoc Approver

Details for item 1 Wood Chipper

Item Data | Account Assignment | Notes and Attachments | Delivery Address | Sources of Supply | **Approval Process Overview**

Current Status:

Current Process Step:

Currently Processed By:

Approval Process Data: [Download as XML](#)

Header | Item

Header Approval Status

Add Approver | Remove Approver

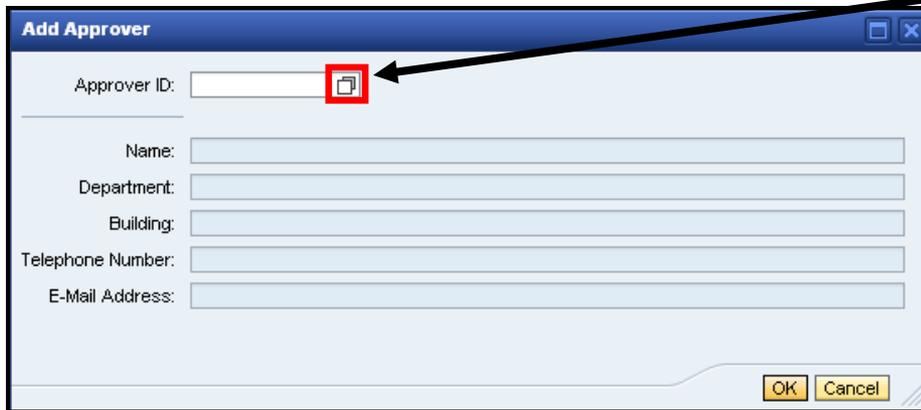
Add Approver Above Selected Line

Add Approver Below Selected Line

	Status	Processor	Received
001 CRM Shopping Cart Completion	Open (No Decision Made)	Terri Heimbach;Vicky Chichi;Judy Kiner-Smith;Susan Reinhold;Elizabeth Lenhart	
002 CRM Shopping Cart Completion	Open (No Decision Made)	Terri Heimbach;Susan Reinhold;Elizabeth Lenhart	

- If additional approvals are required, select the point of entry
- Select the ADD APPROVER button and choose one of the dropdown options

Adding an Ad Hoc Approver



Add Approver

Approver ID: 

Name:

Department:

Building:

Telephone Number:

E-Mail Address:

OK Cancel

- When the input screen displays, type in the applicable employee number
- If the employee number is not known, select the match code to perform a search



Add Approver

Approver ID: 00093747 

Name: Edward Myslewicz

Department:

Building:

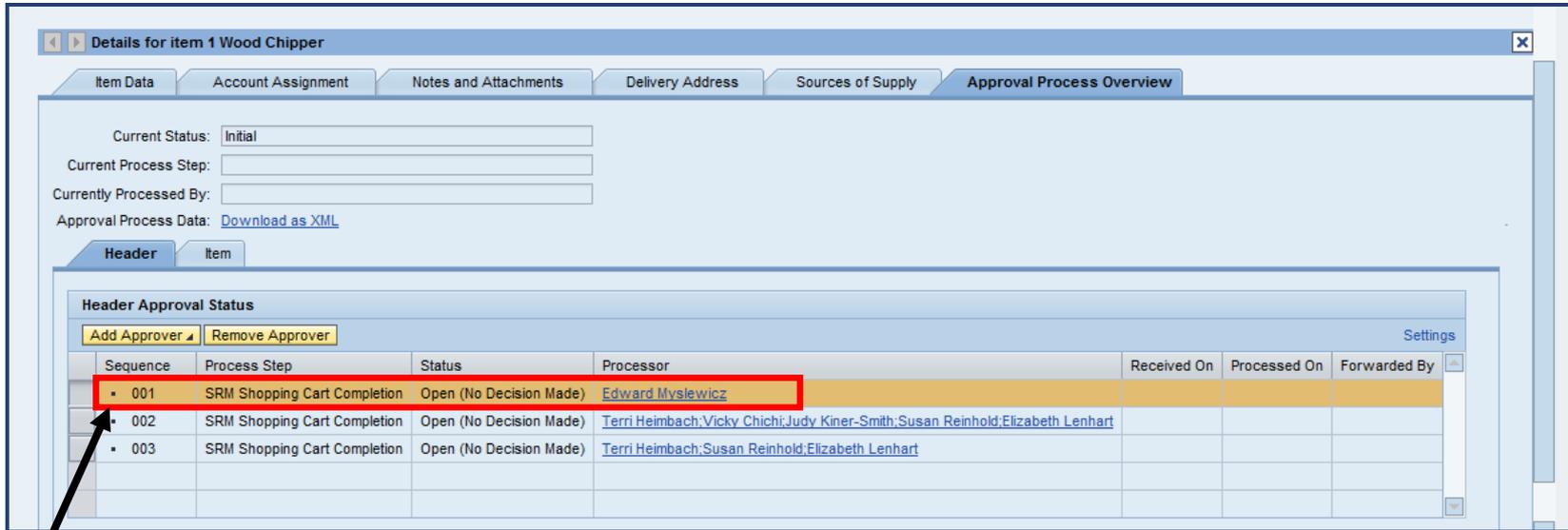
Telephone Number:

E-Mail Address: EMYSLEWICZ@PA.GOV

OK Cancel

- Select the OK button to proceed

Adding an Ad Hoc Approver



Details for item 1 Wood Chipper

Item Data Account Assignment Notes and Attachments Delivery Address Sources of Supply **Approval Process Overview**

Current Status:
 Current Process Step:
 Currently Processed By:
 Approval Process Data: [Download as XML](#)

Header Item

Header Approval Status

[Add Approver](#) [Remove Approver](#) [Settings](#)

Sequence	Process Step	Status	Processor	Received On	Processed On	Forwarded By
001	SRM Shopping Cart Completion	Open (No Decision Made)	Edward Myslewicz			
002	SRM Shopping Cart Completion	Open (No Decision Made)	Terri Heimbach;Vicky Chichi;Judy Kiner-Smith;Susan Reinhold;Elizabeth Lenhart			
003	SRM Shopping Cart Completion	Open (No Decision Made)	Terri Heimbach;Susan Reinhold;Elizabeth Lenhart			

- The Ad Hoc Approver's name displays in the assigned sequence

Ordering the Shopping Cart

- To continue adding items to the Shopping Cart, select Step 1
- To complete the order, select Step 3

Shop in 3 steps Step 2 (Shopping Cart (1 item))

Previous Next Order Close Save Check

1 2 3

Select Goods/Service Shopping Cart (1 item) Complete and Order

Total Value	1,800.00	USD
Tax amount	0.00	USD
Total Val. (Gross)	1,800.00	USD

Details for item 1 Wood Chipper

Item Data Account Assignment Notes and Attachments Delivery Address Sources of Supply Approval Process Overview

Current Status:

Current Process Step:

Currently Processed By:

Approval Process Data: [Download as XML](#)

Header Item

Header Approval Status

Add Approver Remove Approver Settings

Sequence	Process Step	Status	Processor	Received On	Processed On	Forwarded By
001	SRM Shopping Cart Completion	Open (No Decision Made)	Edward Myslewicz			
002	SRM Shopping Cart Completion	Open (No Decision Made)	Terri Heimbach;Vicky Chichi;Judy Kiner-Smith;Susan Reinhold;Elizabeth Lenhart			
003	SRM Shopping Cart Completion	Open (No Decision Made)	Terri Heimbach;Susan Reinhold;Elizabeth Lenhart			

Step 3 (Complete and Order)

Shop in 3 steps: Step 3 (Complete and Order)

1 Select Goods/Service 2 Shopping Cart (1 item) 3 Complete and Order

Name of shopping cart: ←

Number: 10011881

Approval Process: [Display / Edit Agents](#)

Note to Approver:

- Enter the name of the Shopping Cart (see next slide for DGS naming convention)
- Select the ORDER button; OR
- Select the SAVE button and retrieve the Shopping Cart later via your POWL

Shop in 3 steps

Shopping Cart "2100 Wood Chipper 08-21-2013" with number 10011881 ordered successfully ←

Items in Shopping Cart																	
Line Number	Item Type	Product ID	Description	Product Category	Product Category Description	Quantity	Unit	Net Price / Limit	Currency	Option Type	Per	Order Type	Delivery Date	Notes	Attachments	Item Status	Supplier
1	Material		Wood Chipper	21100000	AGRICULTURAL & FORES	1.000	EA	1,800.00	USD		1		10/01/2013	2	2	Awaiting Approval	None
															Total Value	1,800.00	USD
															Tax amount	0.00	USD
															Total Val. (Gross)	1,800.00	USD

- Message displays showing Shopping Cart number

DGS Document Naming Convention

Naming Your Document

- There is a 40-character limit on the document's name
 - Characters include letters, punctuation, and spaces
- The name must include:
 - 4-digit UNSPSC code (ref: www.unspsc.org)
 - Space or Dash
 - Noun that describes the item or Contract Title (no abbreviations)

Note: Sole Source Shopping Carts should begin with SS.

- Example:
 - 2517 Radial Tires

Exercise 1- Create Describe Requirement (Free Text) Shopping Cart

Exercise 1 – Create Describe Requirement (Free Text) Shopping Cart

<http://eniesrwd01.state.pa.us/gm/folder-1.11.98136?originalContext=1.11.93448>

- From the dropdown menu options, select Simulation

When the Simulation dialog box opens,

- Select “Click here for Interactive Tutorial”

This will start the interactive exercise.

Create Shopping Cart from the MSCC Catalog

MSCC: Step 1 (Select Goods/Services)

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

Find: Go

Browse: [Old Shopping Carts and Templates](#) [CI WEBSITE - VIEW ONLY](#) [COPA INTERNAL ECATALOG DGS - 1500](#)
[Internal Goods/Services](#) [Material/Service Contract Catalog\(MSCC\)](#) [PA Compute Services - Unisys](#)
[Peripherals & Networking Gear - CDW-G](#) [Peripherals & Networking Gear - POMEROY](#)
[Peripherals & Networking Gear - ePlus](#) [UniqueSource Products & Services](#)
[VWR LAB SUPPLIES](#)

Free Text: [Describe what you need](#) If you cannot find it above

- In this example, we are selecting the Material/Service Contract Catalog (MSCC)

MSCC: SRM-MDM Product Catalog Search

- The SRM-MDM Product Catalog screen opens into a search window
- Enter search criteria in any of the applicable fields and select the SEARCH button
- If your first search attempt does not deliver the desired results, you must select the RESET SEARCH button before attempting another search

Back to application

SRM-MDM Product Catalog

Items: 0
Price: 0.00

Search Search Criteria

Keyword: [Search](#) [Reset Search](#) [Advanced Search](#)

Supplier Part Number: Contains Product ID: Contains

Contract: Contains Long Description: Contains

Category: [All] [None]

Supplier: [Select: Supplier] [All] [BF GOODRICH] [CORRECTIONAL INDUSTRIES] [Goodyear Tire and Rubber Co.] [Hot Diggly] [Raspberny Company]

Found 250 item(s) of 390 and showing 1 to 10

Products

List View

[Add to Cart](#) [View Cart](#) [Compare](#) Results Per Page: 10 [Image On](#)

Select	Quantity	Action	Product ID	Short Description	Supplier	Supplier Part Number	Order Unit	Price Information	Price Base	Quantity	Minimum Quantity	Minimum Quantity Unit	Special Search Terms
<input type="checkbox"/>	1		326855	27 TIRE TRUCK COMM... LN ALL POS-11R255-W	BF GOODRICH	001-626-2145	Each	26.00 USD	1 Each	1	Each	210202 1:4400006339	
<input type="checkbox"/>	1		326856	27 TIRE TRUCK COMM... LN ALL POS-11R255-W	BF GOODRICH	001-626-2051	Each	28.98 USD	1 Each	1	Each	210202 1:4400006339	
<input type="checkbox"/>	1		326864	28 TIRE TRUCK COMM... LN ALL POS-11R275-W	BF GOODRICH	002-563-5696	Each	85.00 USD	1 Each	1	Each	210202 1:4400006339	
<input type="checkbox"/>	1			Alloy Rim	Goodyear Tire and Rubber Co.	006-897-4100	Each	80.00 USD	1 Each	1	Each	210219 1:4400006193	
<input type="checkbox"/>	1		305883	4 PRON BB	CORRECTIONAL INDUSTRIES	001-0019-0001	Each	9.75 USD	1 Each	1	Each	170796 1:4400002052	

MSCC: SRM-MDM Product Catalog Search

- The results will display on the MSCC Catalog screen
- Adjust the number of rows per page, if desired, using the dropdown arrow

Found 111 Item(s) of 33537 and showing 1 to 100

Products

List View

Add to Cart
 View Cart
 Compare
 Results Per Page: 100
 Image Off

Select	Quantity	Action	Product ID	Short Description	Supplier	Supplier Part Number	Order Unit	Price information	Price Base Quantity	Minimum Quantity	Minimum Quantity UoM	Special Search Terms	Image
<input checked="" type="checkbox"/>	100			ALC GEL MEDPAK 40Z	McKesson Medical	80322700	Each	1.07 USD	1 Each		Each	164157 1:4400010245;	
<input checked="" type="checkbox"/>	10			ALC SANI HAND WIPES CAN	McKesson Medical	47201100	Canister	4.79 USD	135 Canister		Canister	164157 1:4400010245;	
<input type="checkbox"/>	1			ALLEVYN DRSG 2X3C	McKesson Medical	86432101	Each	2.79 USD	1 Each		Each	164157 1:4400010245;	
<input checked="" type="checkbox"/>	300			COLD PACK 5X9	McKesson Medical	56043600	Each	0.41 USD	1 Each		Each	164157 1:4400010245;	
<input checked="" type="checkbox"/>	300			COLD PACK 81ST 5x7 LF	McKesson Medical	97022700	Each	0.30 USD	1 Each		Each	164157 1:4400010245;	
<input type="checkbox"/>	1			COND SHEI AFTA SHAVE 30X	McKesson Medical	85761700	Each	1.92 USD	1 Each		Each	164157 1:4400010245;	

- Select the items by placing a checkmark within the checkboxes and enter the desired quantity to be ordered
- Select the ADD TO CART button

NOTE: The above steps alone will not bring the item into your Shopping Cart

MSCC: SRM-MDM Product Catalog Search

SRM-MDM Product Catalog

Items: 9 Price: 461.66 USD [View Cart](#) [Check Out](#)

Search Search Criteria

Keyword: [Search](#) [Reset Search](#) [Advanced Search](#)

Supplier Part Number: Contains Product ID: Contains

Contract: 4400010245 Contains Long Description: Contains

- To exit the catalog and continue processing the Shopping Cart, select the **Check Out** link
 - This will transfer your items into a Shopping Cart as shown below

Shop in 3 steps: Step 2 (Shopping Cart (9 Items))

1 Previous Next 2 **Shopping Cart (9 Items)** 3 Complete and Order

Fund must be entered for non-asset account assignment categories
 Fund must be entered for non-asset account assignment categories
 Line 1: No GL account was entered, enter a GL account
 Line 1: Error in account assignment for item 1
 Line 1: Enter a value in the mandatory field Cost Center in account assignment

Items in Shopping Cart

Item	Line Number	Item Type	Product ID	Description	Product Category	Product Category Description	Quantity	Unit	Net Price / List	Currency	Option Type	Qty	Order Type	Delivery Date	Status	Allocations	Account Assignment	Item Status	Supplier
1	1	Material	ALC 061 MEDPHAC 402	ALC 061 MEDPHAC 402	42000000	MEDICAL EQUIP &	100.000	EA	1.37 USD			1	1	10/27/2016	1	0	Cost Center (1)	OK	WICKESON MEDICAL SURGICAL W9960074164102
2	2	Material	ALC 061 MEDPHAC 402	ALC 061 MEDPHAC 402	42000000	MEDICAL EQUIP &	10	CAN	4.70 USD			126	1	10/27/2016	2	0	Cost Center (1)	OK	WICKESON MEDICAL SURGICAL W9960074164102
3	3	Material	COLL BACK 510	COLL BACK 510	43000000	MEDICAL EQUIP &	300.000	EA	0.81 USD			1	1	10/27/2016	2	0	Cost Center (1)	OK	WICKESON MEDICAL SURGICAL W9960074164102
4	4	Material	COLL PACH INT SKT LP	COLL PACH INT SKT LP	42000000	MEDICAL EQUIP &	200.000	EA	0.50 USD			1	1	10/27/2016	2	0	Cost Center (1)	OK	WICKESON MEDICAL SURGICAL W9960074164102
5	5	Material	GAUZE 4.5X6A 1100 BLANK BT	GAUZE 4.5X6A 1100 BLANK BT	42000000	MEDICAL EQUIP &	200.000	EA	0.70 USD			1	1	10/27/2016	2	0	Cost Center (1)	OK	WICKESON MEDICAL SURGICAL W9960074164102
6	6	Material	GAUZE 4.5X6A 1100 BLANK BT	GAUZE 4.5X6A 1100 BLANK BT	42000000	MEDICAL EQUIP &	25.000	PAC	2.58 USD			260	1	10/27/2016	2	0	Cost Center (1)	OK	WICKESON MEDICAL SURGICAL W9960074164102
7	7	Material	GAUZE 4.5X6A 1100 BLANK BT	GAUZE 4.5X6A 1100 BLANK BT	42000000	MEDICAL EQUIP &	1.000	BOX	1.81 USD			25	1	10/27/2016	2	0	Cost Center (1)	OK	WICKESON MEDICAL SURGICAL W9960074164102
8	8	Material	GAUZE 4.5X6A 1100 BLANK BT	GAUZE 4.5X6A 1100 BLANK BT	42000000	MEDICAL EQUIP &	1.000	EA	0.07 USD			1	1	10/27/2016	2	0	Cost Center (1)	OK	WICKESON MEDICAL SURGICAL W9960074164102
9	9	Material	GAUZE 4.5X6A 1100 BLANK BT	GAUZE 4.5X6A 1100 BLANK BT	42000000	MEDICAL EQUIP &	25.000	PAC	2.74 USD			340	1	10/27/2016	2	0	Cost Center (1)	OK	WICKESON MEDICAL SURGICAL W9960074164102
-	-	Undefined Item Type			7512 1003	FREIGHT FEE	1.000		0.00 USD			1	1	10/27/2016	0	0			

Total Value: 461.66 USD
 Tax amount: 0.00 USD
 Total Val. (Gross): 461.66 USD

MSCC: Compare Two or More Items in COPA Ecatalog or MSCC

Found 111 item(s) of 33637 and showing 1 to 100

Products

List View

Add to Cart View Cart Compare Results Per Page 100 Image Off

Select	Quantity	Action	Product ID	Short Description	Supplier	Supplier Part Number	Order Unit	Price Information	Price Base Quantity	Minimum Quantity	Minimum Quantity UoM	Special Search Terms	Image
<input checked="" type="checkbox"/>	1			GAUZE 4X4 PERF• 4PLY NS	McKesson Medical	9442000	Pack	2.58 USD	200 Pack		Pack	164157 1:4400010245	
<input checked="" type="checkbox"/>	1			GAUZE 4X4 VRSLN 4PLY ST	McKesson Medical	36262000	Box	1.91 USD	25 Box		Box	164157 1:4400010245	
<input checked="" type="checkbox"/>	1			GAUZE 4X4 YDS 4PLY ST	McKesson Medical	44032001	Each	0.57 USD	1 Each		Each	164157 1:4400010245	
<input checked="" type="checkbox"/>	1			GAUZE PAD 4X4	McKesson Medical	44082000	Pack	2.74 USD	200 Pack		Pack	164157 1:4400010245	

- Select items to compare by placing checks in the boxes to the left of the items
- Select the COMPARE button

MSCC: Compare Two or More Items in COPA Ecatalog or MSCC

SRM-MDM Catalog

 Items: 0
Price: 0.00

Item Comparison

[Back to Search](#)

Fields	Item 1	Item 2	Item 3	Item 4
	Remove Item	Remove Item	Remove Item	Remove Item
Quantity	1	1	1	1
Action				
Supplier	McKesson Medical	McKesson Medical	McKesson Medical	McKesson Medical
Category				
Short Description	GAUZE 4X4 PERF+ 4PLY NS	GAUZE 4X4 VRSLN 4PLY ST	GAUZE 4X4 YDS DERM ST	GAUZE, PAD 4"x4"
Long Description	PERFORMANCE PLUS GAUZE SPONGE NON WOVEN NON STERILE 4"x4" 4PLY	VERSALON NONWOVEN ALL PURPOSE SPONGES 4"x4" 4 PLY STERILE LINT FREE	DERMACEA GAUZE FLUFF ROLL 4"x4" YARDS STERILE	PERFORMANCE 4X4 GAUZE SPONGE 8PLY NON STERILE
Product ID				
Product Group	MEDICAL EQUIP &	MEDICAL EQUIP &	MEDICAL EQUIP &	MEDICAL EQUIP &
Manufacturer Part Number	94442000	8044	441103	44082000
External Manufacturer	MCKESSON	KENDALL COMPANY	KENDALL COMPANY	MCKESSON
Delivery Time in Days				
Price Information	2.58 USD	1.91 USD	0.57 USD	2.74 USD
Price Base Quantity	200 Pack	25 Box	1 Each	200 Pack
Supplier Part Number	94442000	35262000	44032001	44082000
Minimum Quantity	0	0	0	0
Total Price	0.01 USD	0.08 USD	0.57 USD	0.01 USD

[Back to Search](#)

- The selected items are displayed side-by-side for simple comparison

MSCC: Compare Two or More Items in COPA Ecatalog or MSCC

- An item may be added to a Shopping Cart from this screen
- Enter the quantity of the desired item
- Select the SHOPPING CART icon
- Follow the procedures to complete a Shopping Cart as demonstrated earlier in the course; OR
- Return to the search without adding an item to the Shopping Cart by selecting the BACK TO SEARCH button

SRM-MDM Catalog

Item Comparison

[Back to Search](#)

Fields	Item 1	Item 2	Item 3	Item 4
	Remove Item	Remove Item	Remove Item	Remove Item
Quantity	50	1	300	1
Action				
Supplier	McKesson Medical	McKesson Medical	McKesson Medical	McKesson Medical
Category				
Short Description	GAUZE 4X4 PERF+ 4PLY NS	GAUZE 4X4 VRSLN 4PLY ST	GAUZE 4X4 YDS DERM ST	GAUZE, PAD 4"x4"
Long Description	PERFORMANCE PLUS GAUZE SPONGE NON WOVEN NON STERILE 4"x4" 4PLY	VERSALON NONWOVEN ALL PURPOSE SPONGES 4"x4" 4 PLY STERILE LINT FREE	DERMACEA GAUZE FLUFF ROLL 4"x4" YARDS STERILE	PERFORMANCE 4X4 GAUZE SPONGE 8PLY NON STERILE
Product ID				
Product Group	MEDICAL EQUIP &	MEDICAL EQUIP &	MEDICAL EQUIP &	MEDICAL EQUIP &
Manufacturer Part Number	94442000	8044	441103	44082000
External Manufacturer	MCKESSON	KENDALL COMPANY	KENDALL COMPANY	MCKESSON
Delivery Time in Days				
Price Information	2.58 USD	1.91 USD	0.57 USD	2.74 USD
Price Base Quantity	200 Pack	25 Box	1 Each	200 Pack
Supplier Part Number	94442000	35262000	44032001	44082000
Minimum Quantity	0	0	0	0
Total Price	0.01 USD	0.08 USD	0.57 USD	0.01 USD

[Back to Search](#)

MSCC: Compare Two or More Items in COPA Ecatalog or MSCC

SRM-MDM Product Catalog

Items: 2 [View Cart](#)
Price: 171.65 USD [Check Out](#)

Search Search Criteria

Keyword: [Search](#) [Reset Search](#) [Advanced Search](#)

Supplier Part Number: [Contains](#) Product ID: [Contains](#)
Contract: [Contains](#) Long Description: [Contains](#)

Category **Supplier**

• [All]
• [None]

Select	Supplier
<input checked="" type="checkbox"/>	[All]
<input type="checkbox"/>	McKesson Medical

• Select the Check Out link

MSCC: Shopping with a Purchasing Card (P-Card)

Details for item 1 GAUZE 4X4 PERF+ 4PLY NS

Item Data | Account Assignment | Notes and Attachments | Delivery Address | Sources of Supply | Approval Process Overview

Identification

Item Type: Material

Product ID:

Description: GAUZE 4X4 PERF+ 4PLY NS [Show Item in Catalog](#)

Product Category: 42000000 MEDICAL EQUIP &

Organization

Purchasing Group: DGS Central Purchase Purchasing Group [Show Members](#)

Company Code: COPA COMMONWEALTH OF PA

Further Properties

Supplier Product Number: 94442000

Currency, Values and Pricing

Order Quantity / Unit: 50.000 PAC Pack

Ordered Quantity / Unit: 0.000

Open Quantity / Unit: 50.000 PAC

Price / Currency: 2.58 USD Price Unit 200

Service and Delivery

Location / Plant: 301375 DGS Bureau of Procurement

Storage Location:

Goods Recipient: 720859 Virgen Colon

Delivery Date: 10/27/2016

Proceed Using P-CARD?:

- *Note: If you have been assigned a Purchasing Card (P-Card), the contract you are ordering from is P-Card Enabled, and your order is less than \$10,000, select the Proceed Using P-CARD checkbox located on the Item Data sub-tab*

– Refer to the next slide for the definition of the term P-Card Enabled

Shopping Cart from a Catalog: Using a Purchasing Card (P-Card)

- As a reminder, when a P-Card is used as the method of payment for a catalog item, the contract may be designated *P-Card Accepted*, *P-Card Enabled*, or both
 - P-Card Accepted means that the supplier has agreed to accept the P-Card as a method of payment for contract items
 - § The items might be ordered via the supplier's external website, the telephone, or by walking into their store/office
 - P-Card Enabled means that the contract has been set up (e.g. enabled) in SRM to allow the Shopping Cart to be ordered and paid for directly with the P-Card

Exercise 2- Create a Shopping Cart from the MSCC Catalog

Exercise 1 – Create a Shopping Cart from the MSCC Catalog

<http://eniesrwd01.state.pa.us/gm/folder-1.11.98165?originalContext=1.11.93448>

- From the dropdown menu options, select Simulation

When the Simulation dialog box opens,

- Select “Click here for Interactive Tutorial”

This will start the interactive exercise.

Create Shopping Cart from a Punch-Out Catalog

Punch-Out Catalog: Step 1 (Select Goods from Supplier Site)

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

Find: Go

Browse: [Old Shopping Carts and Templates](#) [Internal Goods/Services](#) [CI WEBSITE - VIEW ONLY](#) [COPA INTERNAL ECATALOG DGS - 1500](#)

[Material/Service Contract Catalog\(MSCC\)](#) [PA Compute Services – Unisys](#)

[Peripherals & Networking Gear - CDW-G](#) [Peripherals & Networking Gear - POMEROY](#)

[Peripherals & Networking Gear - ePlus](#) [UniqueSource Products & Services](#)

[VWR LAB SUPPLIES](#)

Free Text: [Describe what you need](#) If you cannot find it above

To select items to purchase, you have the option to choose from the various Punch-Out (Supplier) Catalogs.

For example:

- PA Compute Services
- Peripherals & Networking Gear
- VWR Lab Supplies

- Note: *UniqueSource Products & Services is **no longer** a Punch-Out Catalog. It is a stand alone website utilized for P-Card Orders 10K and under. The link will remain for users to access UniqueSource website. For additional information, refer to UniqueSource contract via Emarketplace at www.dgs.pa.gov or contact your procurement office.*

Punch-Out Catalog: Select Goods/Services

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

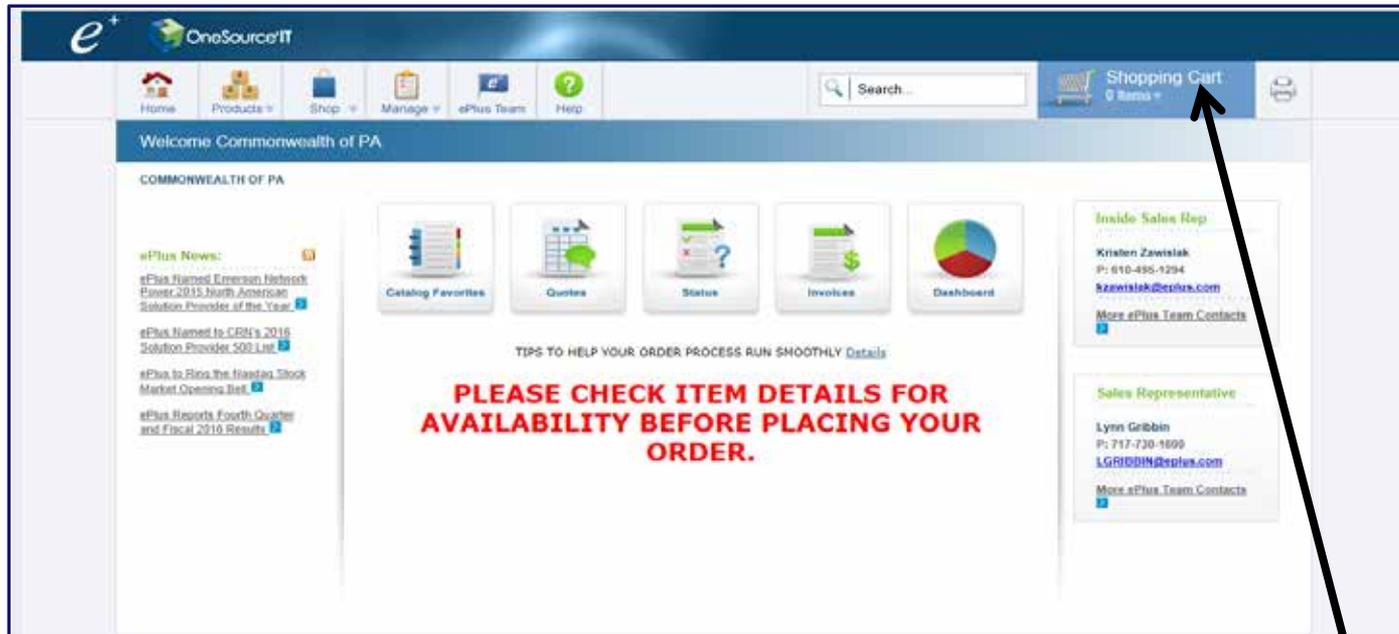
Find: Go

Browse: [Old Shopping Carts and Templates](#) [Internal Goods/Services](#) [CI WEBSITE - VIEW ONLY](#) [COPA INTERNAL ECATALOGS DGS - 1500](#)
[Material/Service Contract Catalog\(MSCC\)](#) [PA Compute Services - Unisys](#)
[Peripherals & Networking Gear - CDW-G](#) [Peripherals & Networking Gear - POMEROY](#)
[Peripherals & Networking Gear - ePlus](#) [UniqueSource Products & Services](#)
[VWR LAB SUPPLIES](#)

Free Text: [Describe what you need](#) If you cannot find it above

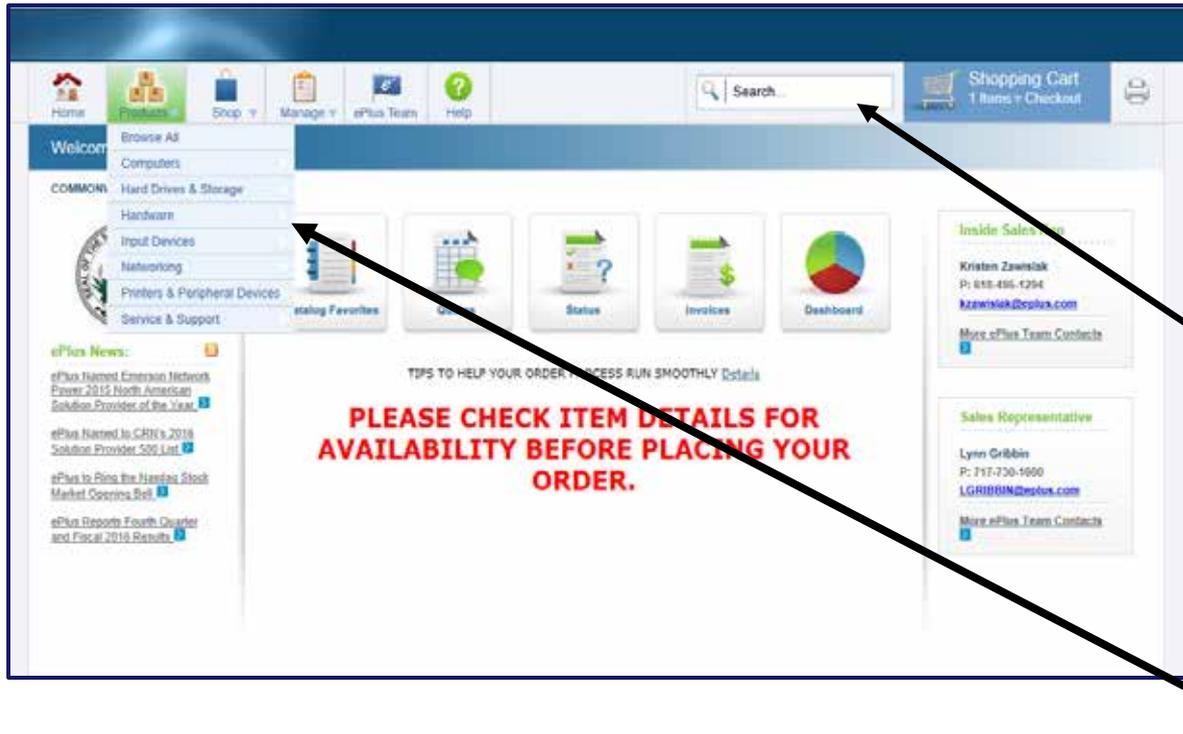
- For this example, we are going to select the Peripherals & Networking Gear – ePlus Catalog

Punch-Out Catalog: Selecting Goods/Services



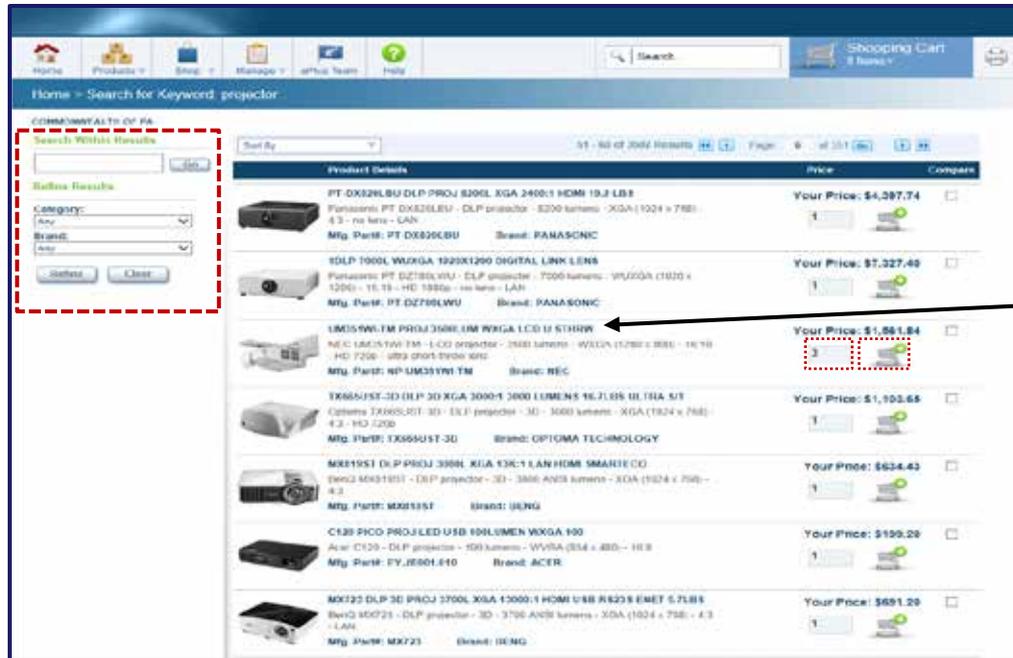
- The catalog displays in a new window
- Each site has its own look and feel, but allows the ability to search and select items for the Shopping Cart
- Some sites refer to the Shopping Cart as a Cart, while others refer to it as a Requisition or other similar term

Punch-Out Catalog: Selecting Goods/Services



- Displayed are various methods to search on the supplier site. You can search for an item by entering a keyword within the keyword search field OR
- Select the Products dropdown arrow to search for items required

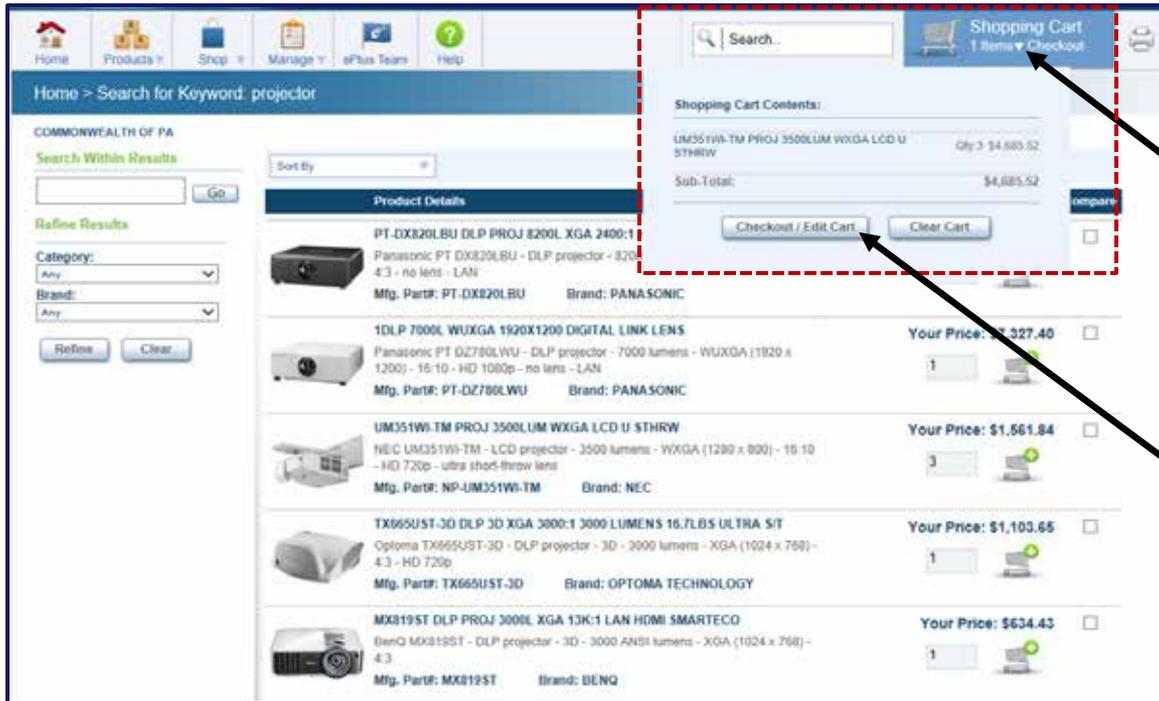
Punch-Out Catalog: Selecting Goods/Services



- Results displays with the ability to search within the results by "Category" or "Brand" to refine the search
- Once you locate an item, select the item to review the details. Enter the quantity to be ordered and select the shopping cart image to add items to the shopping cart

Note: To add additional items to the cart repeat same steps from previous slide

Punch-Out Catalog: Selecting Goods/Services



The screenshot displays a web application interface for a punch-out catalog. At the top, there is a navigation bar with icons for Home, Products, Shop, Manage, ePlus Team, and Help. Below this is a search bar with the text "Search for Keyword: projector". The main content area is divided into two sections: a left sidebar for refining results and a main product list.

Refine Results (Left Sidebar):

- Category: Any
- Brand: Any
- Buttons: Refine, Clear

Product List (Main Content):

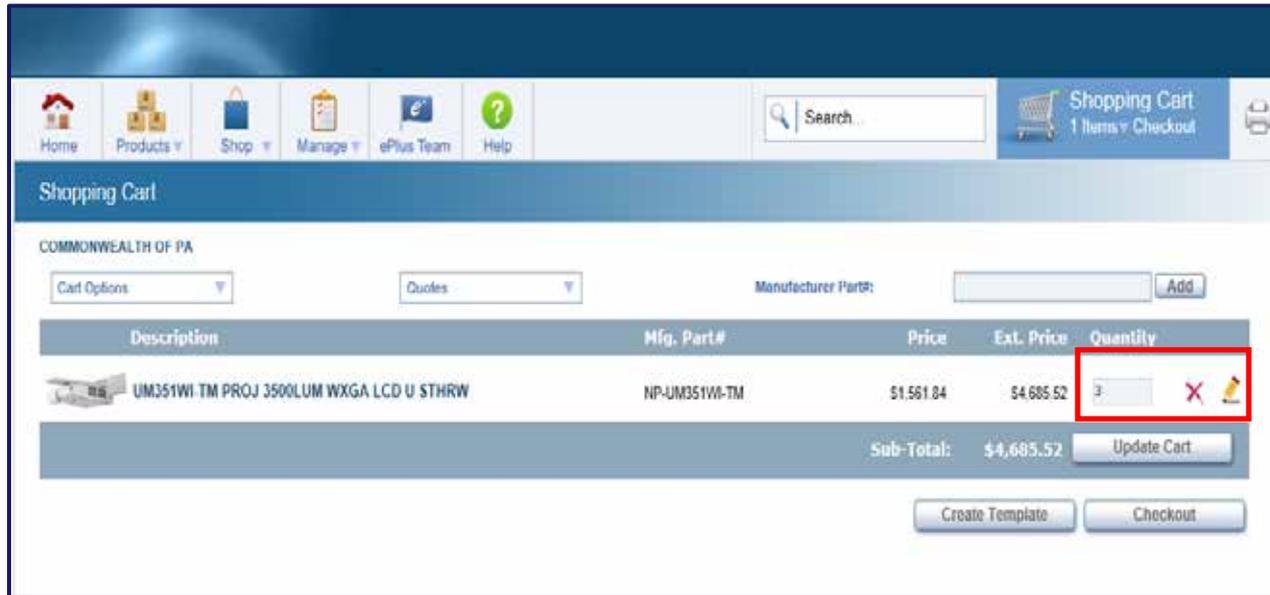
Product Details	Your Price
<p>PT-DX820LBU DLP PROJ 8200L XGA 2400:1 Panasonic PT-DX820LBU - DLP projector - 8200 4:3 - no lens - LAN Mfg. Part#: PT-DX820LBU Brand: PANASONIC</p>	
<p>1DLP 7000L WUXGA 1920X1200 DIGITAL LINK LENS Panasonic PT-DZ780LWU - DLP projector - 7000 lumens - WUXGA (1920 x 1200) - 16:10 - HD 1080p - no lens - LAN Mfg. Part#: PT-DZ780LWU Brand: PANASONIC</p>	\$3,327.40
<p>UM351W1-TM PROJ 3500LUM WXGA LCD U-STHRW NEC UM351W1-TM - LCD projector - 3500 lumens - WXGA (1280 x 800) - 16:10 - HD 720p - ultra short-throw lens Mfg. Part#: NP-UM351W1-TM Brand: NEC</p>	\$1,561.84
<p>TX665UST-3D DLP 3D XGA 3000:1 3000 LUMENS 16.7LBS ULTRA 5/1 Optoma TX665UST-3D - DLP projector - 3D - 3000 lumens - XGA (1024 x 768) - 4:3 - HD 720p Mfg. Part#: TX665UST-3D Brand: OPTOMA TECHNOLOGY</p>	\$1,103.65
<p>MX819ST DLP PROJ 3000L XGA 13K:1 LAN HDMI SMARTECO BenQ MX819ST - DLP projector - 3D - 3000 ANSI lumens - XGA (1024 x 768) - 4:3 Mfg. Part#: MX819ST Brand: BENQ</p>	\$634.43

Shopping Cart (Top Right Overlay):

- Search bar
- Shopping Cart: 1 Items
- Checkout button
- Shopping Cart Contents:
 - UM351W1-TM PROJ 3500LUM WXGA LCD U-STHRW Qty: 3 \$4,685.52
 - Sub-Total: \$4,685.52
- Buttons: Checkout / Edit Cart, Clear Cart, Compare

- To view the items added to the Shopping Cart, select the word ITEMS or select the dropdown arrow beside ITEMS
- Notice you have the option to CHECKOUT/ EDIT CART or CLEAR CART
- For this example, select EDIT CART

Punch-Out Catalog: Selecting Goods/Services



Description	Mfg. Part#	Price	Ext. Price	Quantity
UM351WI-TM PROJ 3500LUM WXGA LCD U STHRW	NP-UM351W-TM	\$1,561.84	\$4,685.52	3
		Sub-Total: \$4,685.52		Update Cart

- Upon selecting the EDIT CART, you will be taken into the Shopping Cart screen to verify the Shopping Cart items
- Here you can edit the quantity, update the shopping cart, add to list, or remove items
- If you are done shopping, select the CHECKOUT button to complete the order process on the Supplier site and transfer the cart back to the SRM Shopping Cart

Punch-Out Catalog: Selecting Goods/Services

Shop in 3 steps: Step 2 (Shopping Cart (1 item))

◀ Previous Next ▶ Order Close Save Check

! Fund must be entered for non-asset account assignment categories
! Line 1: No GL account was entered; enter a GL account
! Line 1: Error in account assignment for item 1
! Line 1: Enter a value in the mandatory field Cost Center in account assignment

1 Select Goods/Service 2 Shopping Cart (1 item) 3 Complete and Order

Items in Shopping Cart

Details Add Item Copy Paste Duplicate Delete Filter Settings

Line Number	Item Type	Product ID	Description	Product Category	Product Category Description	Quantity	Unit	Net Price / Limit	Currency	Option Type	Per	Order Type	Delivery Date	Notes	Attachments	Account Assignment	Item Status	Supplier
1	Material	UM351WLTM PROJ 3500LUM WXGA LCD U STRW		45111600	PROJECTORS & SUPPLE	3.000	EA	1,561.84	USD		1		06/09/2016			Cost Center (1)		EPPLUS TECHNOLOGY INC(186996)
*	Undefined item type			78121603	FREIGHT FEE	1.000		0.00	USD		1		07/26/2016					

- The information will transfer into the SRM Shopping Cart as displayed
- Complete all other applicable information such as Account Assignment, Delivery Date, Text, P-Card (if applicable), Justification, and any other relevant information

Punch-Out Catalog: Selecting Goods/Services

Shop in 3 steps: Step 2 (Shopping Cart (1 item))

Previous Next Order Close Save Check

Fund must be entered for non-asset account assignment categories
 Line 1: No G/L account was entered; enter a G/L account
 Line 1: Error in account assignment for item 1
 Line 1: Enter a value in the mandatory field Cost Center in account assignment

1 Select Goods/Service 2 Shopping Cart (1 item) 3 Complete and Order

Items in Shopping Cart

Details Add Item Copy Paste Duplicate Delete Filter Settings

Line Number	Item Type	Product ID	Description	Product Category	Product Category Description	Quantity	Unit	Net Price / Limit	Currency	Option Type	Per	Order Type	Delivery Date	Notes	Attachments	Account Assignment	Item Status	Supplier
1	Material	UM351WLTM PROJ 3500LUM WXGA LCD O STRW		4511600	PROJECTORS & SUPPLE	3.000	EA	1,561.84	USD		1		08/09/2016			Cost Center ID		EPLUS TECHNOLOGY INC1086996
*	Undefined item type			78T21603	FREIGHT FEE	1.000		0.00	USD		1		07/26/2016					

- Notice that you are in Step 2 of the Shopping Cart Wizard Screen

- Within the “Items in Shopping Cart” area, the line item detail displays the Description, Product Category, Product Category Description, Quantity, Unit (of measure), Net Price, Per and the Supplier. This information is all defaulted from the Supplier’s site.
 - The Delivery Date must be entered for each line item.
- To complete and order the Shopping Cart, all required fields for each line item must be entered as discussed earlier in the course

Exercise 2- Create a Shopping Cart from the Punch-Out Catalog

Exercise 1 – Create a Shopping Cart from the Punch-Out Catalog

<http://eniesrwda01.state.pa.us/gm/folder-1.11.97521?originalContext=1.11.93448>

- From the dropdown menu options, select Simulation

When the Simulation dialog box opens,

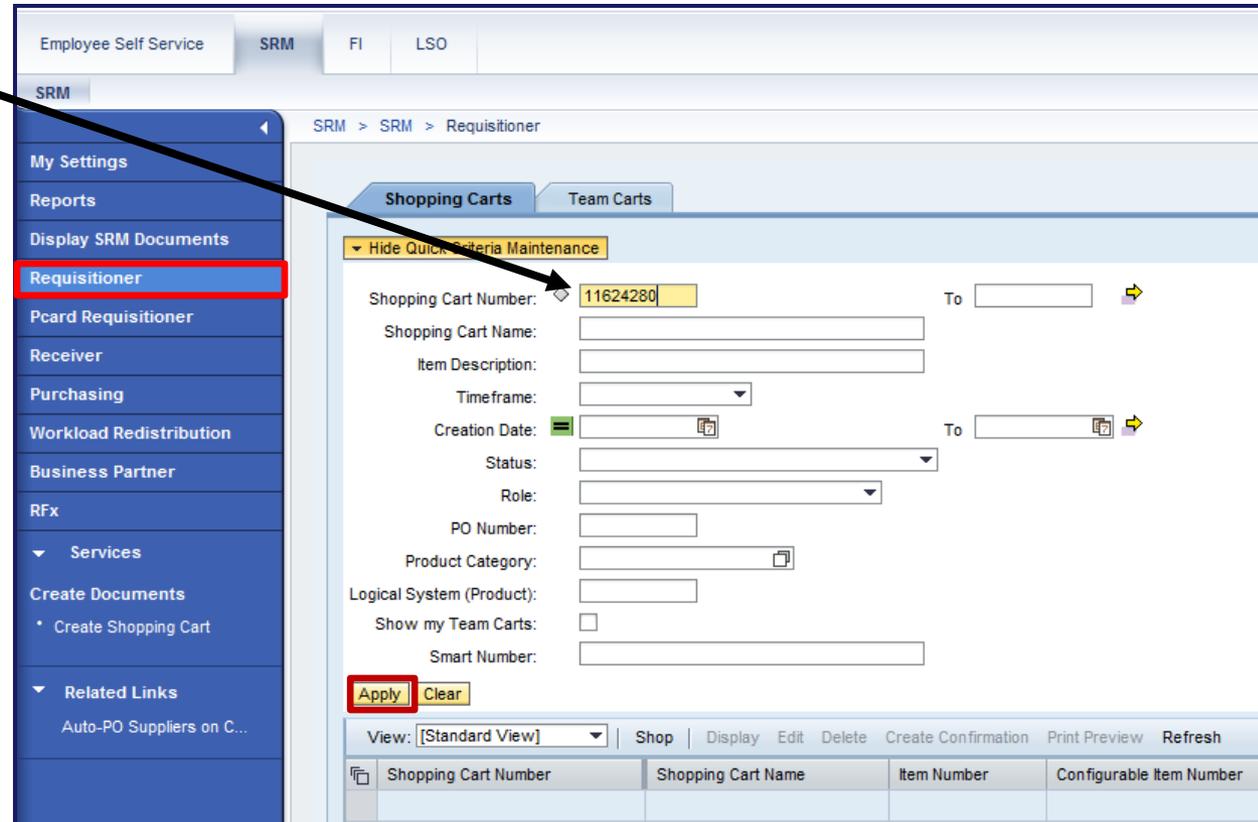
- Select “Click here for Interactive Tutorial”

This will start the interactive exercise.

Edit a Shopping Cart

Edit a Shopping Cart

- Select Requisitioner to open the POWL
- Enter the Shopping Cart number, or other applicable criteria to locate the Shopping Cart
- Select the APPLY button
- *Caution: Do NOT run your POWL queries without entering criteria, it will slow the system down considerably*



The screenshot shows the SRM Requisitioner interface. The left sidebar contains a navigation menu with the following items: My Settings, Reports, Display SRM Documents, Requisitioner (highlighted in red), Pcard Requisitioner, Receiver, Purchasing, Workload Redistribution, Business Partner, RFx, Services, Create Documents (with sub-item Create Shopping Cart), and Related Links (with sub-item Auto-PO Suppliers on C...). The main content area is titled 'SRM > SRM > Requisitioner' and has tabs for 'Shopping Carts' and 'Team Carts'. A search form is visible with the following fields: Shopping Cart Number (containing '11624280'), Shopping Cart Name, Item Description, Timeframe, Creation Date, Status, Role, PO Number, Product Category, Logical System (Product), Show my Team Carts (checkbox), and Smart Number. Below the search form are 'Apply' and 'Clear' buttons, with the 'Apply' button highlighted in red. At the bottom, there is a table with columns: Shopping Cart Number, Shopping Cart Name, Item Number, and Configurable Item Number. The table is currently empty.

Edit a Shopping Cart

- The Shopping Cart displays on the lower portion of the POWL screen
- Notice that the Shopping Cart number is displayed multiple times (this occurs only when ordering more than one item)
- Selection of the Shopping Cart number will open the Shopping Cart with all line items in one Shopping Cart

SRM > SRM > Requisitioner

Shopping Carts | Team Carts

Hide Quick Criteria Maintenance

Shopping Cart Number: To

Shopping Cart Name:

Item Description:

Timeframe:

Creation Date: To

Status:

Role:

PO Number:

Product Category:

Logical System (Product):

Show my Team Carts:

Smart Number:

View: [Standard View] | Shop | Display | Edit | Delete | Create Confirmation | Print Preview | Refresh | Export

Shopping Cart Number	Shopping Cart Name	Item Number	Configurable Item Number	Item Name	Status
11624280	4217 Medical Supplies	1		EMT ALS Medical Cases	Saved
11624280	4217 Medical Supplies	2		Rescue Blankets	Saved
11624280	4217 Medical Supplies	3		Emergency Stretcher	Saved

Edit a Shopping Cart

- The Shopping Cart document displays all line items
- Select the EDIT button to activate the "Edit" mode

Shop in 3 steps: Step 2 (Shopping Cart (3 items))

◀ Previous Next ▶ Order **Edit** Close

1 2 3

Select Goods/Service **Shopping Cart (3 items)** Complete and Order

Items in Shopping Cart

Details Add Item Copy Paste Duplicate Delete Process All Items ▾

Line Number	Item Type	Product ID	Description	Product Category	Product Category Description	Quantity	Unit
1	Material		EMT ALS Medical Cases	42171915	EMERGENCY MEDICAL TE	20.000	EA
2	Material		Rescue Blankets	42171701	EMERGENCY/RESCUE BLA	150.000	EA
3	Material		Emergency Stretcher	42171611	EMERGENCY RESPONSE L	20.000	EA

Edit a Shopping Cart

Shop in 3 steps: Step 2 (Shopping Cart (3 items))

◀ Previous Next ▶ Order Close Read Only Save Check

1 2 3

Select Goods/Service Shopping Cart (3 items) Complete and Order

Items in Shopping Cart

Details Add Item Copy Paste Duplicate Delete Process All Items Filter Settings

Line Number	Item Type	Product ID	Description	Product Category	Product Category Description	Quantity	Unit	Net Price / Limit	Currency	Option Type	Per	Order Type	Delivery Date	Notes	Attachments	Item Status	Supplier	
1	Material		EMT ALS Medical Cases	42171915	EMERGENCY MEDICAL TE	20.000	EA	360.00	USD		1		01/24/2014	1	0	Saved	None	
2	Material		Rescue Blankets	42171701	EMERGENCY/RESCUE BLA	150.000	EA	15.00	USD		1		01/24/2014	1	0	Saved	None	
3	Material		Emergency Stretcher	42171611	EMERGENCY RESPONSE L	20.000	EA	80.00	USD		1		01/24/2014	1	0	Saved	None	
	Undefined Item Type			80121800	FAMILY LAW SVCS	1.000		0.00	USD		1		01/08/2014	0	0			
	Undefined Item Type			80121800	FAMILY LAW SVCS	1.000		0.00	USD		1		01/08/2014	0	0			
	Undefined Item Type			80121800	FAMILY LAW SVCS	1.000		0.00	USD		1		01/08/2014	0	0			
	Undefined Item Type			80121800	FAMILY LAW SVCS	1.000		0.00	USD		1		01/08/2014	0	0			
	Undefined Item Type			80121800	FAMILY LAW SVCS	1.000		0.00	USD		1		01/08/2014	0	0			
	Undefined Item Type			80121800	FAMILY LAW SVCS	1.000		0.00	USD		1		01/08/2014	0	0			
	Undefined Item Type			80121800	FAMILY LAW SVCS	1.000		0.00	USD		1		01/08/2014	0	0			
	Undefined Item Type			80121800	FAMILY LAW SVCS	1.000		0.00	USD		1		01/08/2014	0	0			
																Total Value	11,050.00	USD
																Tax amount	0.00	USD
																Total Val. (Gross)	11,050.00	USD

- Once in the "Edit" mode, fields that are grayed out cannot be edited. Once edits have been made, select the CHECK button to ensure the Shopping Cart has no errors. Finish the Shopping Cart by selecting the ORDER button to save your changes.

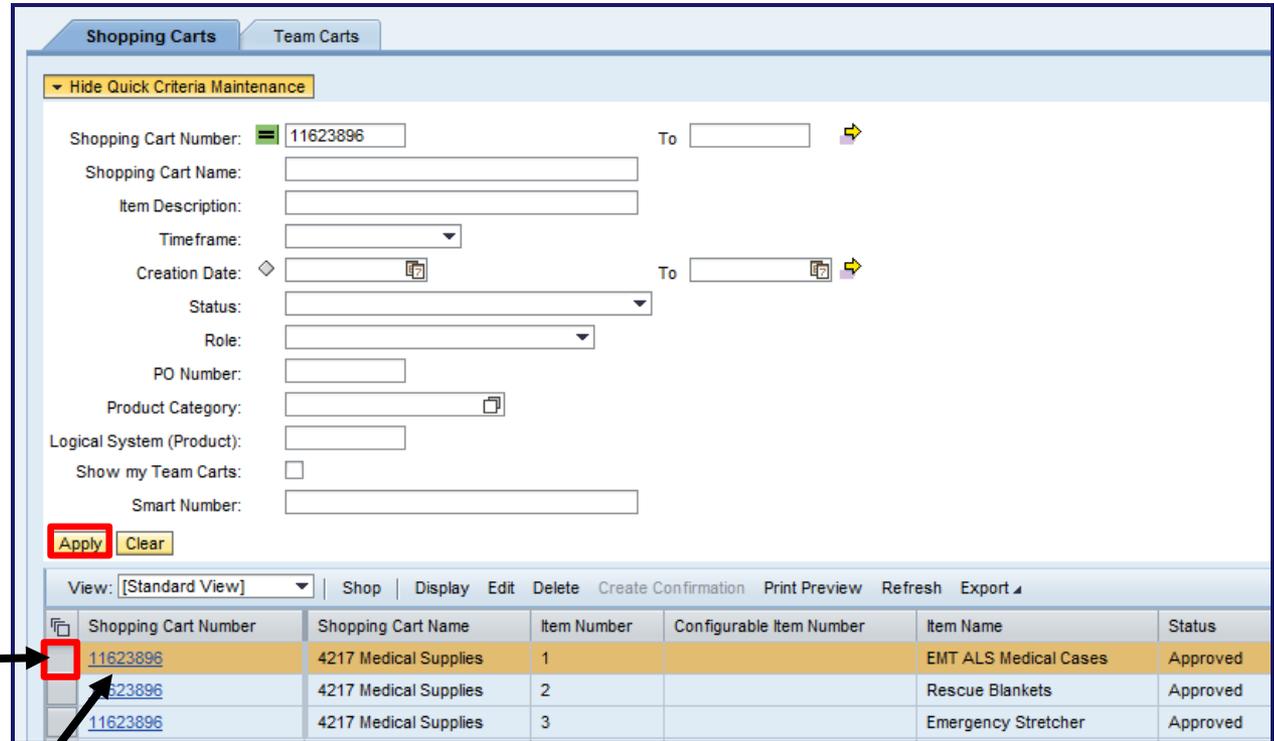
Delete a Shopping Cart

Delete a Shopping Cart

There are two methods for deleting a Shopping Cart, first:

From the POWL, enter the applicable criteria

- Select the APPLY button
- The Shopping Cart number displays on the lower portion of the POWL screen
- To open the Shopping cart select the *Gray* box to highlight the Shopping Cart number and select the DISPLAY button
- OR select the Shopping Cart number hyperlink to open the Shopping Cart



Shopping Carts | Team Carts

Hide Quick Criteria Maintenance

Shopping Cart Number: To

Shopping Cart Name:

Item Description:

Timeframe:

Creation Date: To

Status:

Role:

PO Number:

Product Category:

Logical System (Product):

Show my Team Carts:

Smart Number:

View: [Standard View] | Shop | Display | Edit | Delete | Create Confirmation | Print Preview | Refresh | Export

Shopping Cart Number	Shopping Cart Name	Item Number	Configurable Item Number	Item Name	Status
11623896	4217 Medical Supplies	1		EMT ALS Medical Cases	Approved
11623896	4217 Medical Supplies	2		Rescue Blankets	Approved
11623896	4217 Medical Supplies	3		Emergency Stretcher	Approved

Delete a Shopping Cart

- The Shopping Cart document displays with all Line Items in the Shopping Cart
- Select the EDIT button to activate the "Edit" mode

Display Shopping Cart

Number 11512722 Document Name 4217 EMT Medical Supplies Status Approved Created On 01/09/2014 15:29:10 Created By Virgen Colon

▼ Item Overview

Line Number	Item Type	Product ID	Description	Product Category	Product Category Description	Quantity	Unit
1	Material		EMT ALS Medical Cases	42171915	EMERGENCY MEDICAL TE	20.000	EA
2	Material		Rescue Blankets	42171701	EMERGENCY/RESCUE BLA	150.000	EA
3	Material		Emergency Stretcher	42171611	EMERGENCY RESPONSE L	20.000	EA

Delete a Shopping Cart

Once in "Edit" mode, the action buttons below the Item Overview become active

- You have the option to delete single or multiple line items within the cart by selecting the *Gray* box(s) and the DELETE button

Edit Shopping Cart

Read Only | Print Preview | Close | Check

Number 11512722 Document Name 4217 EMT Medical Supplies Status Approved Created On 01/09/2014 15:29:10 Created By Virgen Colon

▼ General Data

Buy on Behalf of: 720859 Virgen Colon Approval Note

Name of shopping cart: 4217 EMT Medical Supplies

Approval Process: [Display / Edit Agents](#)

Document Changes: [Display](#)

▼ Item Overview

Details | Add Item | Copy | Paste | Duplicate | Delete | Process All Items

Line Number	Item Type	Product ID	Description	Product Category	Product Category Description	Quantity	Unit
1	Material		EMT ALS Medical Cases	42171915	EMERGENCY MEDICAL TE	20.000	EA
2	Material		Rescue Blankets	42171701	EMERGENCY/RESCUE BLA	150.000	EA
3	Material		Emergency Stretcher	42171611	EMERGENCY RESPONSE L	20.000	EA

Note: To delete all line items within the shopping cart, select the "Table Selection" menu and highlight "Select All" and the DELETE button

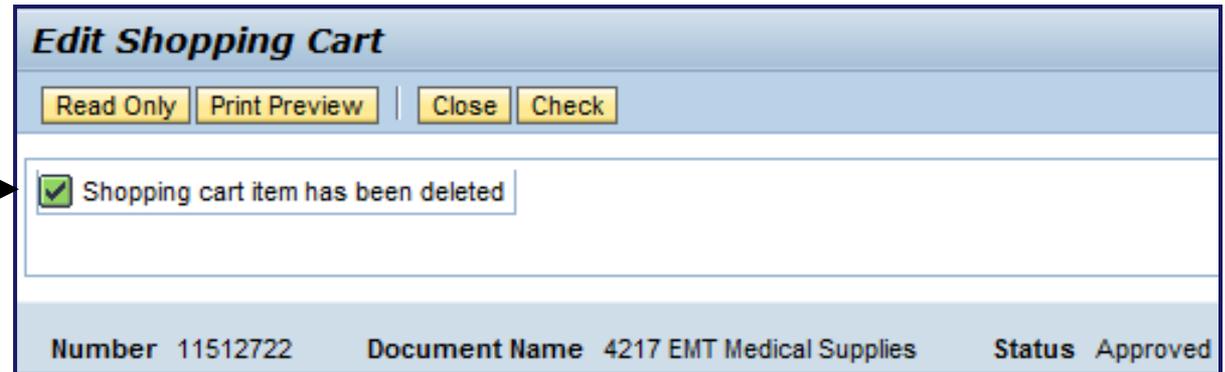
Items in Shopping Cart

Details | Add Item | Copy | Paste | Duplicate | Delete | Process All Items

Line Number	Item Type	Product ID	Description
1	Material		PROJECTOR UPGRADE V3 DLP
2	Material		UST-P1 DLP PROJECTOR
3	Material		EST P1 DLP PROJECTOR

Delete a Shopping Cart

- A message will display as shown



Edit Shopping Cart

Read Only | Print Preview | Close | Check

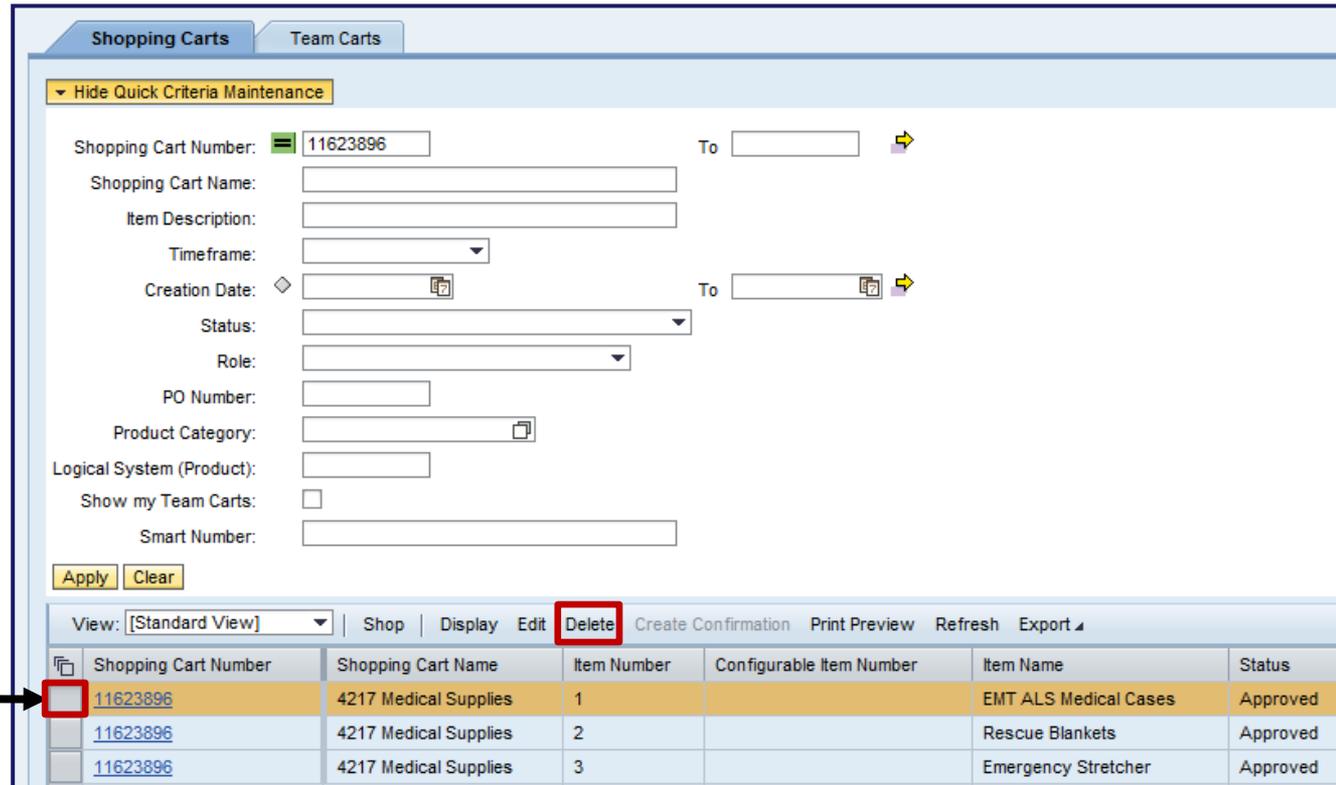
Shopping cart item has been deleted

Number 11512722 Document Name 4217 EMT Medical Supplies Status Approved

Delete a Shopping Cart

The second method of deleting a Shopping Cart is:

- From the POWL, enter the applicable criteria and select the APPLY button to search for the cart you want deleted
- Shopping cart number displays
- Select the *Gray* box to highlight the shopping cart number and select the DELETE button

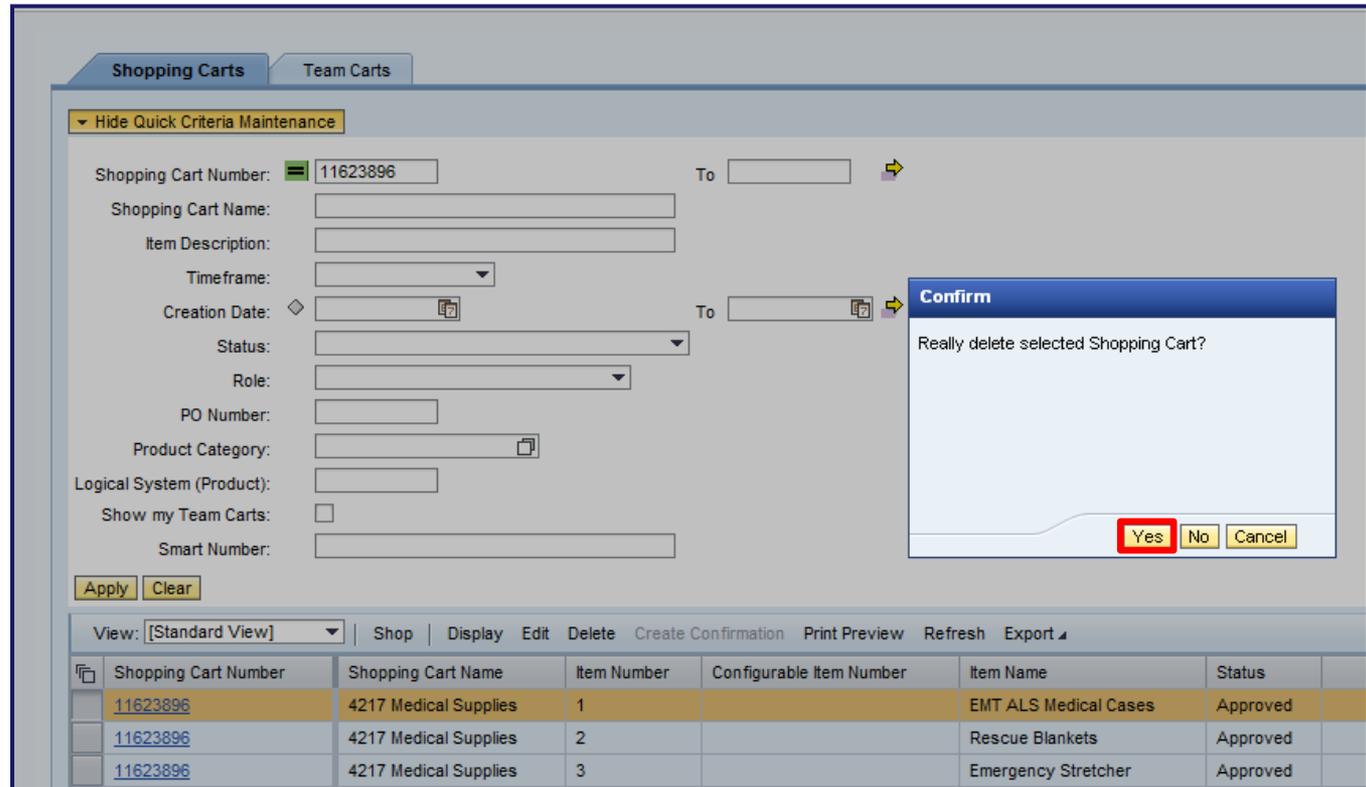


The screenshot shows the 'Shopping Carts' interface with search criteria and a table of results. The 'Delete' button in the toolbar is highlighted with a red box. A gray box in the table highlights the first row's shopping cart number.

Shopping Cart Number	Shopping Cart Name	Item Number	Configurable Item Number	Item Name	Status
11623896	4217 Medical Supplies	1		EMT ALS Medical Cases	Approved
11623896	4217 Medical Supplies	2		Rescue Blankets	Approved
11623896	4217 Medical Supplies	3		Emergency Stretcher	Approved

Delete a Shopping Cart

- A message box appears prompting you to confirm the Shopping Cart to be deleted by selecting the (YES, NO, or CANCEL) button
- Select the YES button to confirm Shopping Cart deletion



The screenshot shows a web application interface for managing shopping carts. The main window has tabs for "Shopping Carts" and "Team Carts". A "Hide Quick Criteria Maintenance" dropdown is visible. The form contains various fields for cart details, including "Shopping Cart Number" (11623896), "Shopping Cart Name", "Item Description", "Timeframe", "Creation Date", "Status", "Role", "PO Number", "Product Category", "Logical System (Product)", "Show my Team Carts" (checkbox), and "Smart Number". There are "Apply" and "Clear" buttons at the bottom of the form. A confirmation dialog box titled "Confirm" is overlaid on the right, asking "Really delete selected Shopping Cart?" with "Yes", "No", and "Cancel" buttons. The "Yes" button is highlighted with a red box. Below the form is a table with columns: Shopping Cart Number, Shopping Cart Name, Item Number, Configurable Item Number, Item Name, and Status. The table contains three rows of data for shopping cart 11623896.

Shopping Cart Number	Shopping Cart Name	Item Number	Configurable Item Number	Item Name	Status
11623896	4217 Medical Supplies	1		EMT ALS Medical Cases	Approved
11623896	4217 Medical Supplies	2		Rescue Blankets	Approved
11623896	4217 Medical Supplies	3		Emergency Stretcher	Approved

Delete a Shopping Cart

- A message displays confirming Shopping Cart number xxxxxxxx was successfully deleted

Shopping cart 0011623896 was successfully deleted

Shopping Carts Team Carts

Hide Quick Criteria Maintenance

Shopping Cart Number: To

Shopping Cart Name:

Item Description:

Timeframe:

Creation Date: To

Status:

Role:

PO Number:

Product Category:

Logical System (Product):

Show my Team Carts:

Smart Number:

Apply Clear

View: [Standard View] | Shop | Display | Edit | Delete | Create Confirmation | Print Preview | Refresh | Export

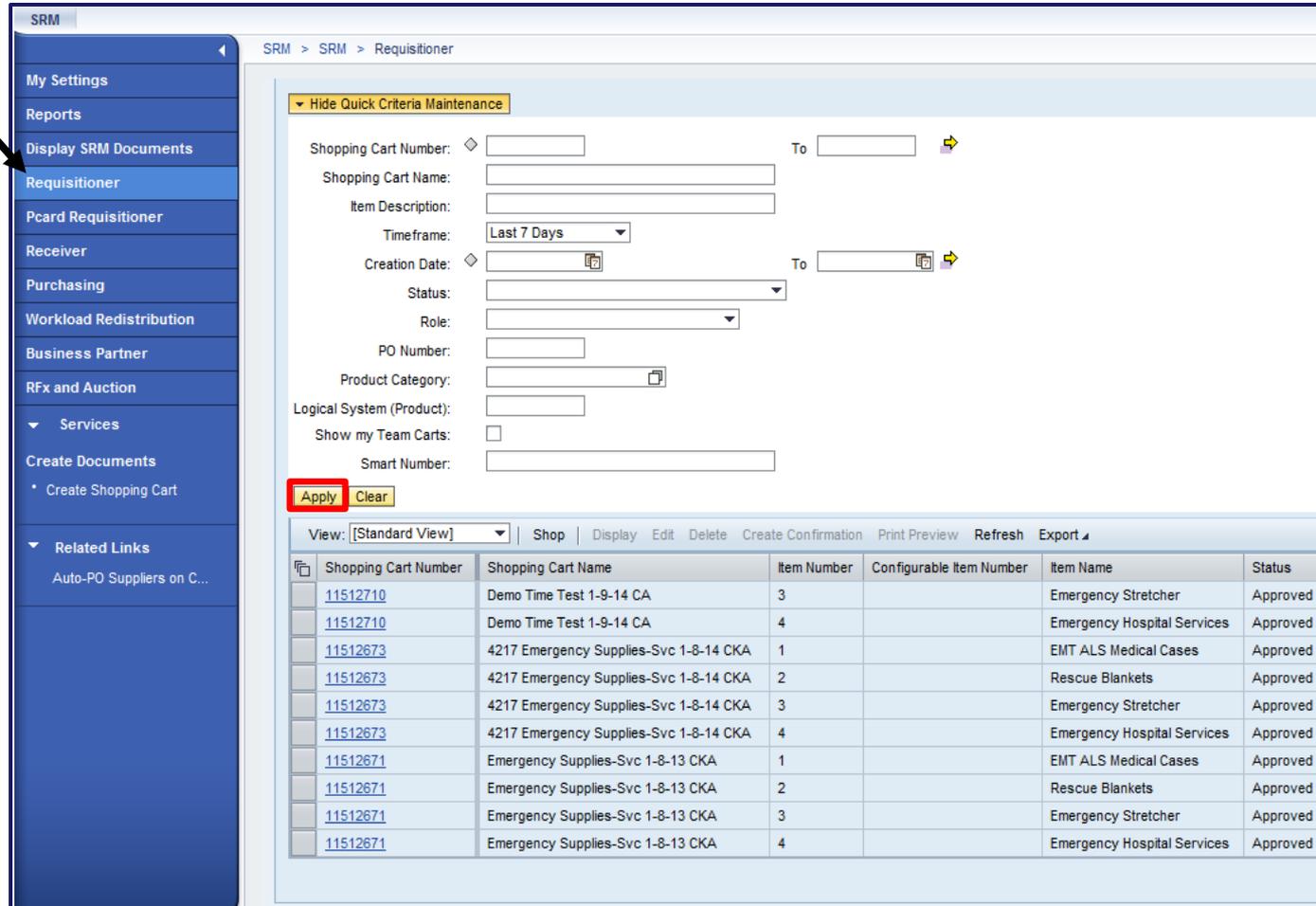
Shopping Cart Number	Shopping Cart Name	Item Number	Configurable Item Number	Item Name	Status
11623896	4217 Medical Supplies	1		EMT ALS Medical Cases	Approved
11623896	4217 Medical Supplies	2		Rescue Blankets	Approved
11623896	4217 Medical Supplies	3		Emergency Stretcher	Approved

Check Shopping Cart Status

Where do you go to check the status of a Shopping Cart

To check the status of your Shopping Cart:

- From the POWL, enter applicable criteria
- Select the APPLY button



The screenshot shows the SRM Requisitioner interface. On the left is a navigation menu with 'Requisitioner' selected. The main area contains search criteria for shopping carts, including fields for Shopping Cart Number, Name, Item Description, Timeframe (set to 'Last 7 Days'), Creation Date, Status, Role, PO Number, Product Category, Logical System (Product), Show my Team Carts, and Smart Number. Below the criteria are 'Apply' and 'Clear' buttons. At the bottom, there is a table of shopping carts with columns for Shopping Cart Number, Shopping Cart Name, Item Number, Configurable Item Number, Item Name, and Status.

Shopping Cart Number	Shopping Cart Name	Item Number	Configurable Item Number	Item Name	Status
11512710	Demo Time Test 1-9-14 CA	3		Emergency Stretcher	Approved
11512710	Demo Time Test 1-9-14 CA	4		Emergency Hospital Services	Approved
11512673	4217 Emergency Supplies-Svc 1-8-14 CKA	1		EMT ALS Medical Cases	Approved
11512673	4217 Emergency Supplies-Svc 1-8-14 CKA	2		Rescue Blankets	Approved
11512673	4217 Emergency Supplies-Svc 1-8-14 CKA	3		Emergency Stretcher	Approved
11512673	4217 Emergency Supplies-Svc 1-8-14 CKA	4		Emergency Hospital Services	Approved
11512671	Emergency Supplies-Svc 1-8-13 CKA	1		EMT ALS Medical Cases	Approved
11512671	Emergency Supplies-Svc 1-8-13 CKA	2		Rescue Blankets	Approved
11512671	Emergency Supplies-Svc 1-8-13 CKA	3		Emergency Stretcher	Approved
11512671	Emergency Supplies-Svc 1-8-13 CKA	4		Emergency Hospital Services	Approved

Check Shopping Cart Status

SRM > SRM > Requisitioner Full Screen | Options

Hide Quick Criteria Maintenance

Shopping Cart Number: To 

Shopping Cart Name:

Item Description:

Timeframe: Last 7 Days

Creation Date: To 

Status:

Role:

PO Number:

Product Category:

Logical System (Product):

Show my Team Carts:

Smart Number:

Apply **Clear**

View: [Standard View] | Shop | Display | Edit | Delete | Create Confirmation | Print Preview | Refresh | Export 

Shopping Cart Number	Shopping Cart Name	Item Number	Configurable Item Number	Item Name	Status	Created On	Quantity	Unit	Net Value	Currency	Total Net Value	Currency	Item Status
11512710	Demo Time Test 1-9-14 CA	3		Emergency Stretcher	Approved	01/09/2014 08:35:28	500.000	EA	30,000.00	USD	255,000.00	USD	Cannot Be Ordered
11512710	Demo Time Test 1-9-14 CA	4		Emergency Hospital Services	Approved	01/09/2014 08:35:28	500.000	HI	125,000.00	USD	255,000.00	USD	Cannot Be Ordered
11512673	4217 Emergency Supples-Svc 1-8-14 CKA	1		EMT ALS Medical Cases	Approved	01/08/2014 11:15:12	500.000	EA	75,000.00	USD	255,000.00	USD	Follow-on Document Created
11512673	4217 Emergency Supples-Svc 1-8-14 CKA	2		Rescue Blankets	Approved	01/08/2014 11:17:37	1,000.000	EA	25,000.00	USD	255,000.00	USD	Follow-on Document Created
11512673	4217 Emergency Supples-Svc 1-8-14 CKA	3		Emergency Stretcher	Approved	01/08/2014 11:17:37	500.000	EA	30,000.00	USD	255,000.00	USD	Follow-on Document Created
11512673	4217 Emergency Supples-Svc 1-8-14 CKA	4		Emergency Hospital Services	Approved	01/08/2014 11:17:37	500.000	EA	125,000.00	USD	255,000.00	USD	Follow-on Document Created
11512671	Emergency Supples-Svc 1-8-13 CKA	1		EMT ALS Medical Cases	Approved	01/08/2014 09:40:02	500.000	EA	75,000.00	USD	255,000.00	USD	In Purchaser's Worklist
11512671	Emergency Supples-Svc 1-8-13 CKA	2		Rescue Blankets	Approved	01/08/2014 10:02:09	1,000.000	EA	25,000.00	USD	255,000.00	USD	In Purchaser's Worklist
11512671	Emergency Supples-Svc 1-8-13 CKA	3		Emergency Stretcher	Approved	01/08/2014 10:02:09	500.000	EA	30,000.00	USD	255,000.00	USD	In Purchaser's Worklist
11512671	Emergency Supples-Svc 1-8-13 CKA	4		Emergency Hospital Services	Approved	01/08/2014 10:02:09	500.000	HI	125,000.00	USD	255,000.00	USD	In Purchaser's Worklist

Last Refreshed: 01/13/2014 08:11:01 EST 

- The screen shown above displays the results of your search showing the *Item Status*
- Select the Shopping Cart number to display the Shopping Cart

Check Shopping Cart Status

Display Shopping Cart

Number: 11519006 | Document Name: P00446300 09/04/2013 10:14 | Status: Awaiting Approval | Created On: 09/04/2013 10:14:18 | Created By: Cynthia Anderson

Item Overview

Line Number	Item Type	Product ID	Description	Product Category	Product Category Description	Quantity	Unit	Net Price / LHM	Currency	Option Type	Per	Order Type	Delivery Date	Notes	Attachments	Item Status	Supplier
1	Material	48181751	HARD HATS		HARD HATS	1,000.000	EA	12.50	USD		T		02/05/2014	-	\$	Awaiting Approval	State

Total Value: 12,500.00 USD
Tax amount: 0.00 USD
Total Val. (Gross): 12,500.00 USD

Details for Item 1 Hard Hats

Item Date | Account Assignment | Notes and Attachments | Delivery Address | Sources of Supply | **Approval Process Overview** | Related Documents | Table Extensions

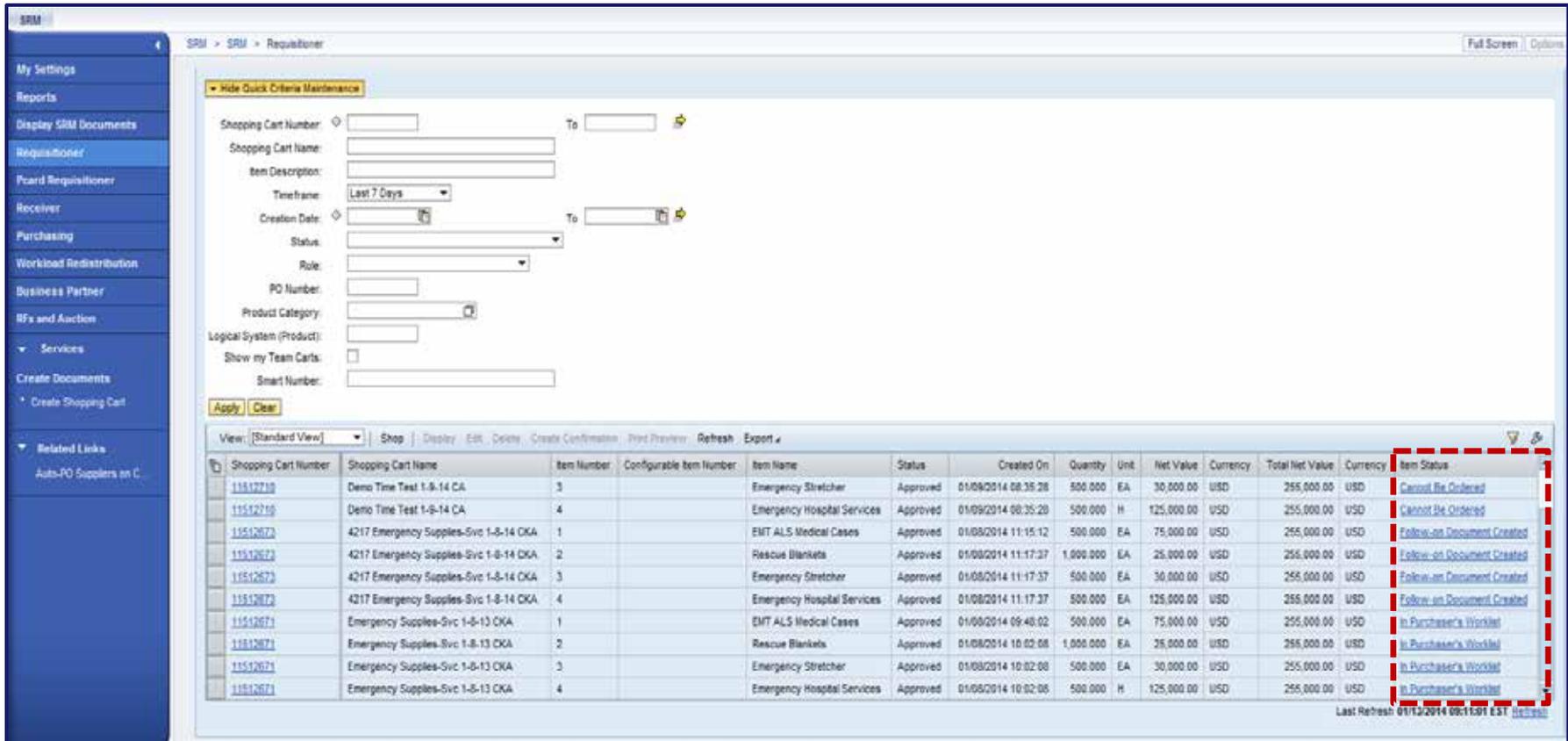
Current Status: Active
Current Process Step: SRM Shopping Cart Completion
Currently Processed By: Vicky Chisti-Angeles Ortiz
Approval Process Date: Download as XML

Approval Status Details for Selected Item

Sequence	Process Step	Level Status	Status	Processor	Received On	Processed On	Forwarded By	Agent Determination
001	SRM Shopping Cart Completion	Completed (Level was Processed)	Approved	Tarini Intertec LLC	9/17/2014 09:28:37	9/17/2014 09:29:33		Agents for 3C approval step
002	SRM Shopping Cart Completion	Active (Assigned Process is Running)	Open (No Decision Made)	Vicky Chisti-Angeles Ortiz	9/19/2014 09:29:36			Agents for 3C approval step

- In this example of the "Display Shopping Cart" screen, we see that line item 1 has "Awaiting Approval" in the Item Status column
- Select the DETAILS button and select the Approval Process Overview sub-tab to view the details of the approval workflow
- In this example, there are two levels of Approvals for the Shopping Cart. The status of one Approval shows the Shopping Cart is Approved while the other Approval shows the status as still being Open.

Check Shopping Cart Status



The screenshot shows the SRM Requisitioner interface. On the left is a navigation menu with options like 'My Settings', 'Reports', 'Display SRM Documents', 'Requisitioner', 'Board Requisitioner', 'Receiver', 'Purchasing', 'Workload Redistribution', 'Business Partner', 'RFx and Auction', 'Services', 'Create Documents', and 'Related Links'. The main area contains search criteria for shopping carts, including fields for Shopping Cart Number, Name, Description, Timeframe (set to 'Last 7 Days'), Creation Date, Status, Role, PO Number, Product Category, Logical System (Product), Show my Team Carts, and Smart Number. Below the search criteria is a table of results with columns: Shopping Cart Number, Shopping Cart Name, Item Number, Configurable Item Number, Item Name, Status, Created On, Quantity, Unit, Net Value, Currency, Total Net Value, Currency, and Item Status. The Item Status column contains links like 'Cannot Be Ordered', 'Follow-on Document Created', and 'In Purchaser's Worklist'. A red dashed box highlights the Item Status column.

Shopping Cart Number	Shopping Cart Name	Item Number	Configurable Item Number	Item Name	Status	Created On	Quantity	Unit	Net Value	Currency	Total Net Value	Currency	Item Status
11512710	Demo Time Test 1-8-14 CA	3		Emergency Stretcher	Approved	01/08/2014 08:35:28	500.000	EA	30,000.00	USD	255,000.00	USD	Cannot Be Ordered
11512710	Demo Time Test 1-8-14 CA	4		Emergency Hospital Services	Approved	01/09/2014 08:35:20	500.000	H	125,000.00	USD	255,000.00	USD	Cannot Be Ordered
11512673	4217 Emergency Supplies-Svc 1-8-14 CKA	1		EMT ALS Medical Cases	Approved	01/09/2014 11:15:12	500.000	EA	75,000.00	USD	255,000.00	USD	Follow-on Document Created
11512673	4217 Emergency Supplies-Svc 1-8-14 CKA	2		Rescue Blankets	Approved	01/08/2014 11:17:37	1,000.000	EA	25,000.00	USD	255,000.00	USD	Follow-on Document Created
11512673	4217 Emergency Supplies-Svc 1-8-14 CKA	3		Emergency Stretcher	Approved	01/08/2014 11:17:37	500.000	EA	30,000.00	USD	255,000.00	USD	Follow-on Document Created
11512673	4217 Emergency Supplies-Svc 1-8-14 CKA	4		Emergency Hospital Services	Approved	01/08/2014 11:17:37	500.000	EA	125,000.00	USD	255,000.00	USD	Follow-on Document Created
11512671	Emergency Supplies-Svc 1-8-13 CKA	1		EMT ALS Medical Cases	Approved	01/08/2014 09:48:02	500.000	EA	75,000.00	USD	255,000.00	USD	In Purchaser's Worklist
11512671	Emergency Supplies-Svc 1-8-13 CKA	2		Rescue Blankets	Approved	01/08/2014 10:02:08	1,000.000	EA	25,000.00	USD	255,000.00	USD	In Purchaser's Worklist
11512671	Emergency Supplies-Svc 1-8-13 CKA	3		Emergency Stretcher	Approved	01/08/2014 10:02:08	500.000	EA	30,000.00	USD	255,000.00	USD	In Purchaser's Worklist
11512671	Emergency Supplies-Svc 1-8-13 CKA	4		Emergency Hospital Services	Approved	01/09/2014 10:02:06	500.000	H	125,000.00	USD	255,000.00	USD	In Purchaser's Worklist

Last Refresh: 01/13/2014 08:11:01 EST

- Enter applicable search criteria in the POWL
- Review the information in the Item Status column of the POWL
- Displayed in the Item Status column are Shopping Carts with a status of "Follow-on Document Created"
- Select the number of the desired Shopping Cart to display the Shopping Cart

Check Shopping Cart Status

Display Shopping Cart

Number: 11511741 | Document Name: P00446000 10/07/2013 14:40 | Status: Approved | Created On: 10/07/2013 14:40:24 | Created By: Cynthia Anderson

General Data

Buy on Behalf of: 703388 | Cynthia Anderson | Approval Note

Name of shopping cart: P00446000 10/07/2013 14:40

Approval Process: [Display / Edit / Approve](#)

Document Changes: [Display](#)

Item Overview

Details | Add Item | Copy | Paste | Duplicate | Delete | Process All Items

Line Number	Item Type	Product ID	Description	Product Category	Product Category Description	Quantity	Unit	Net Price / Limit	Currency	Option Type	Per	Order Type	Delivery Date	Notes	Attachments	Item Status	Supplier
1	Material	24560R18	25172504	AUTOMOBILE	AUTOMOBILE LIGHT TRU	100.000	EA	205.86	USD		1		10/01/2013	2	1	Purchase order created	GOOD YEAR TIRE & RUBBER COMPANY INC(181362)

Total Value: 20,586.00 USD
Tax amount: 0.00 USD
Total Val. (Gross): 20,586.00 USD

Details for item 1 24560R18

Item Data | Account Assignment | Notes and Attachments | Delivery Address | Sources of Supply | Approval Process Overview | **Related Documents** | Table Extensions

History

View: United States Dollar

Document	Name	Document Number	Back-End Document Number	Status	Date	Quantity	Unit	Value	Currency
Shopping Cart	24560R18	11511741/1		Follow-on Document Created	10/07/2013	100.000	EA	20,586.00	USD
Purchase Order	24560R18	4000385201		Awaiting Approval	11/09/2014	100.000	EA	20,586.00	USD

- Select the DETAILS button to review the line item details
- To display the follow-on document information, select the Related Documents sub-tab
- Select one of the hyperlinked document numbers to open and review the information contained within the document

Summary

Now that you have successfully completed this course, you are able to:

- Set User Attributes
- Understand the *Team Shopping Cart* functionality
 - Utilize SRM search functions to shop for items
 - Locate and View Statewide Contracts
 - Create a Shopping Cart, by one of the following means:
 - Describe Requirement
 - MSCC Catalog
 - Punch-Out Catalog
 - Make necessary Edits to a Shopping Cart
 - Access a Shopping Cart to Delete a line item or the entire Shopping Cart
- Check the status of Shopping Carts

Knowledge Check

Knowledge Check

1. Team Shopping Carts may be accessed by any Requisitioner in SRM
 - a. True
 - b. False

Knowledge Check

2. Team Shopping is enabled in which area within the Requisitioning role?
 - a. The POWL
 - b. Maintain User's Own Data
 - c. Change Attributes
 - d. Business Partner

Knowledge Check

3. Which of the following catalogs takes you to a supplier's website to purchase?
 - a. Free Text (Describe Requirement)
 - b. Material/Service Contract Catalog (MSCC)
 - c. Punch-Out Catalog
 - d. COPA eCatalog

Knowledge Check

4. Can you use a P-Card to purchase from a Free Text (Describe Requirement) Shopping Cart?
 - a. Yes
 - b. No



pennsylvania

DEPARTMENT OF GENERAL SERVICES

SAP

Supplier
Relationship
Management

SRM 7.0

Requisitioning

Thank you!