



pennsylvania

DEPARTMENT OF GENERAL SERVICES



Supplier
Relationship
Management

SRM 7.0

**Approver for
Shopping Carts**

Course Number: TV0012



pennsylvania
DEPARTMENT OF GENERAL SERVICES



Welcome!

**Thank you for taking time
to complete this course**

Course Navigation



Course Navigation

The information in this course is presented on a series of animated slides. Select the **NEXT** button when you are ready to view the next slide. Select the **PREVIOUS** button to see a previously viewed slide.



PREVIOUS



NEXT

The buttons appear when the animation is complete.

Select the **NEXT** button now to start the course.

Course Objectives

- After successfully completing this course participants will be able to:
 - Identify major differences between SRM 5.0 and SRM 7.0
 - Access the SRM screens used to fulfill approval processes
 - Understand processes in the approval workflow
 - List the steps required to review/approve a shopping cart
 - List the steps required to review/reject a shopping cart
 - Edit a shopping cart



Topics of Discussion



- Approver Workflows and Business Processes
- Approving shopping carts
- Editing shopping carts
- Adding approvers
- Approving/rejecting a shopping cart/line item



Differences

SRM 5.0 vs SRM 7.0

Differences – SRM 5.0 vs SRM 7.0

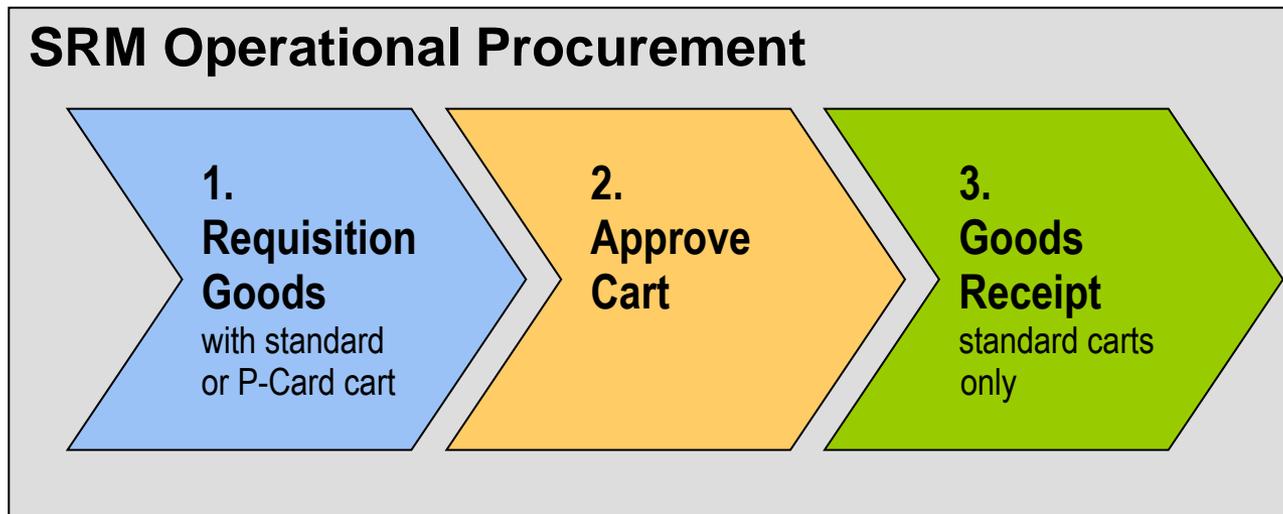
Category	SRM 5.0	SRM 7.0
Enterprise Inbox	Existed in SRM Agency Purchaser Role	Does not Exist, Use Universal Inbox



Approver Workflows and Business Processes

Operational Procurement Review

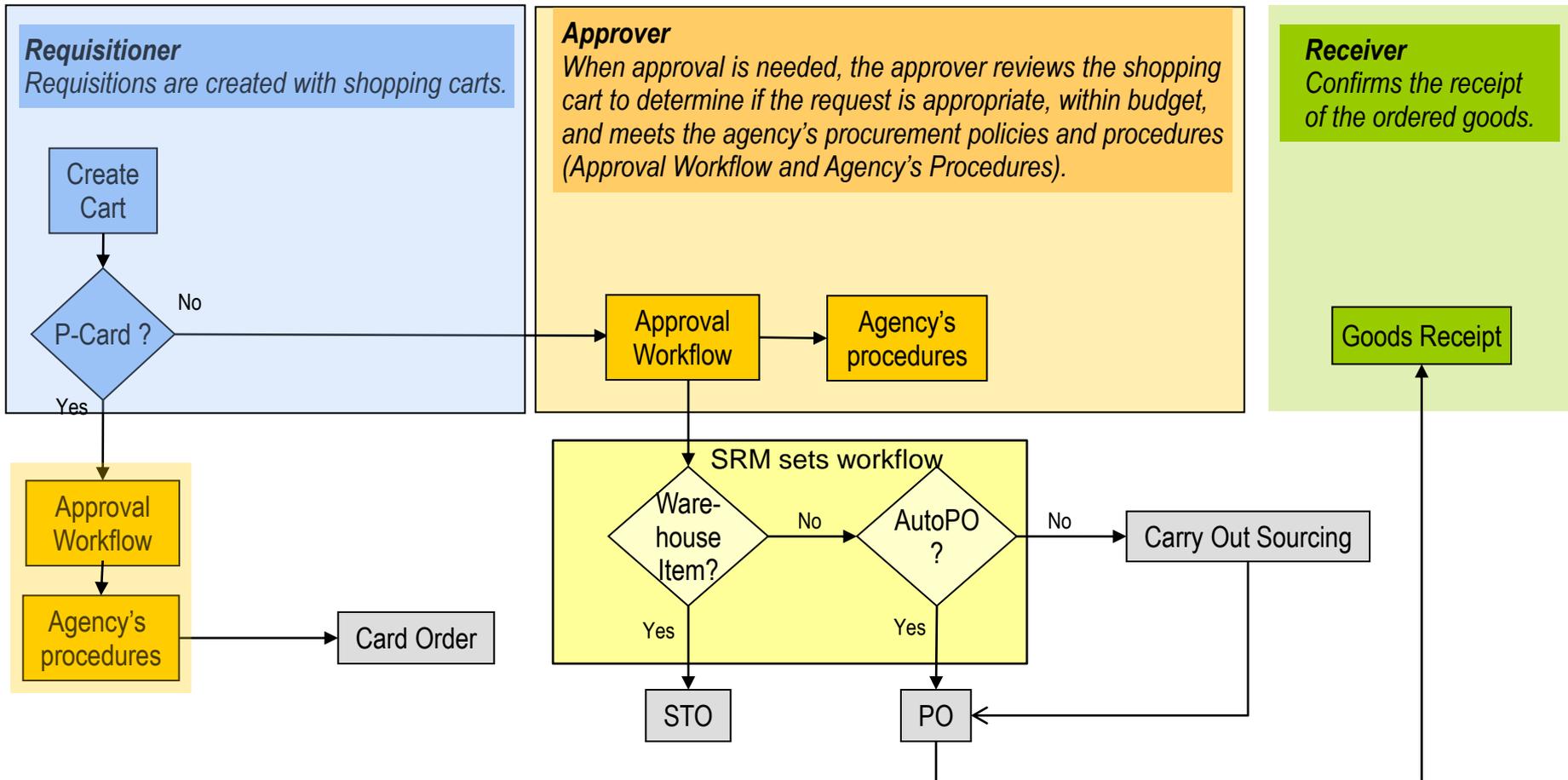
Operational Procurement consists of the following processes:



–The next slide shows the Operational Procurement workflow

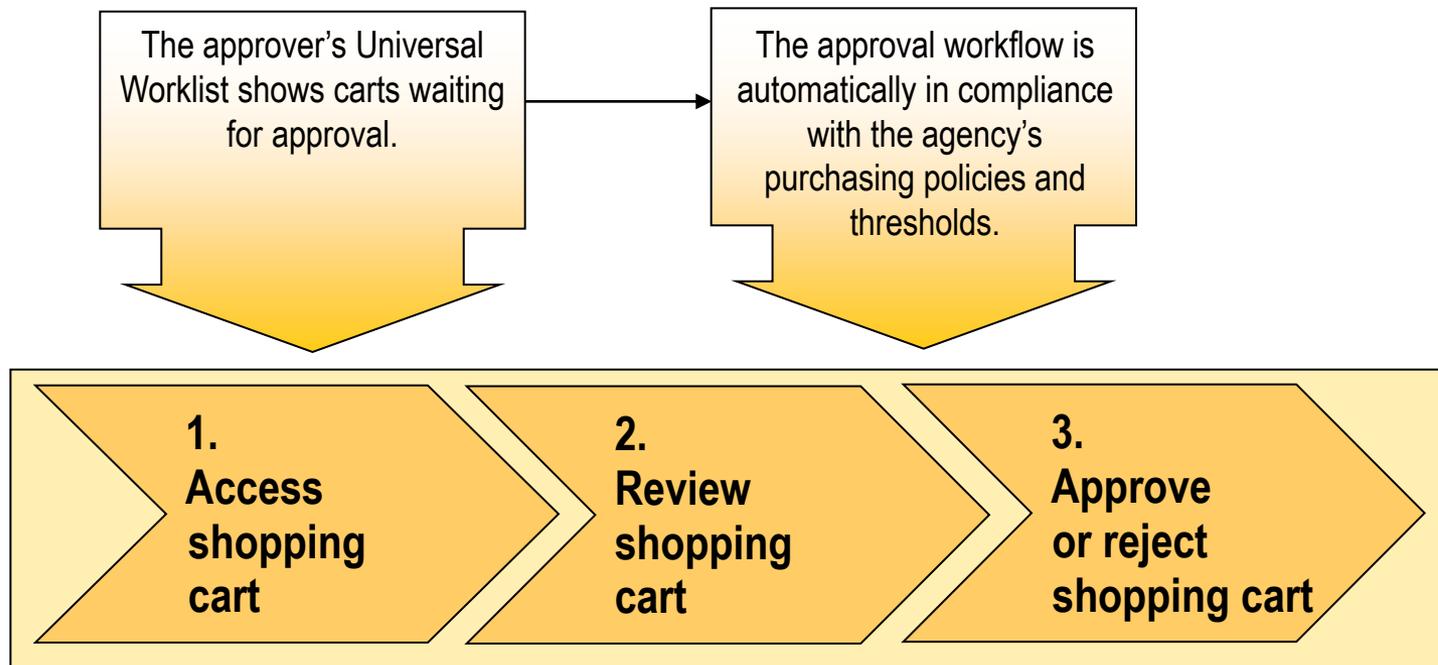
Operational Procurement Review

Operational Procurement Workflow Diagram



Operational Procurement Review

- The tasks found in the approval workflow ensure the three approval processes are completed:





Approver Business Rules and Processes



- When approving a cart, the Approver:
 - Reviews shopping cart awaiting approval to ensure that it is appropriate, within budget and meets the agency's procurement policies and procedures
 - Validates the cart's account information
 - Edits shopping cart as needed
 - Approves or rejects shopping cart
 - Adheres to the agency's established procurement procedures and policies



Approver Business Rules and Processes



- During approval, the Approver needs to review:
 - Total cart value
 - Items requested
 - Cost assignment
 - Delivery Address information
 - Source of supply/contract
 - Notes for approval



Approver Business Rules and Processes



- There are three types of carts that will need approval:
 - P-Card
 - Standard cart
 - Special categories



Approver Business Rules and Processes



- Workflow business rules
 - Individuals within the agency's organizational structure have SRM roles granting them an L1, L2, or L3 approval level
 - Requisitions needing approval are assigned by SRM approval role level and NOT by a name or position
 - If more than one person is assigned to an approval level within an organizational tier (e.g. unit, division, bureau), each person at that level receives the shopping cart for approval
 - Whoever approves the item first is the only approver for that particular approval level



Approver Business Rules and Processes



- Workflow business rules continued
 - If SRM does not locate an approver within the organizational tier; it looks for an approver at the same level within the next organizational tier.
 - After performing an agency-wide search for an approver, SRM routes the cart to an IES-monitored workflow inbox. The workflow administrator notifies the agency for a resolution before releasing the cart back to the agency.



Approver Business Rules and Processes



- P-Card approval workflow options:
 - 0–Step: no approval for all carts
 - 1–Step: approval for all carts
 - Approver is considered to be a Level 1 (L1) Approver
 - A combination of the above
 - 0–step for shopping carts within a specific dollar value range and 1–step approval for carts above this value



Approver Business Rules and Processes



- Standard cart approval workflow options:
 - 1–Step (Level 1 Approver (L1))
 - 2–Step (Level 2 Approver (L2))
 - 3–Step (Level 3 Approver (L3))
 - Or any combination of the above
 - The maximum number of approvers on the standard shopping cart is 3
- All carts must be approved by the Agency Budget Office

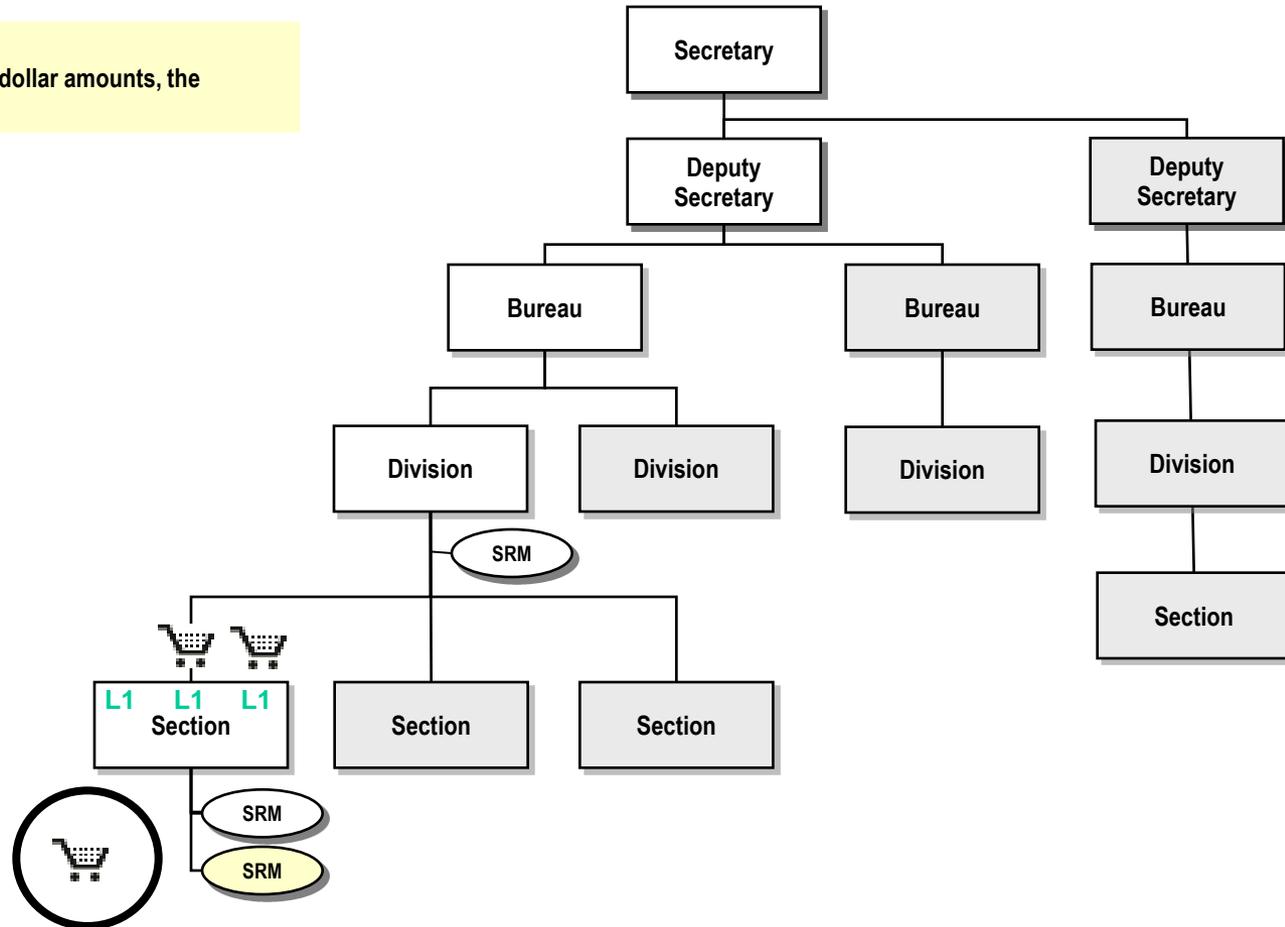
Approver Business Rules and Processes

1-Step Approval Example 1

Note:

- Depending on Agency need and dollar amounts, the workflow can be tailored

1. User creates shopping cart
2. SRM looks within the organizational tier for L1 Approver. If found, SRM waits for approval
3. Each L1 approver receives the approval request. Only one needs to approve the cart



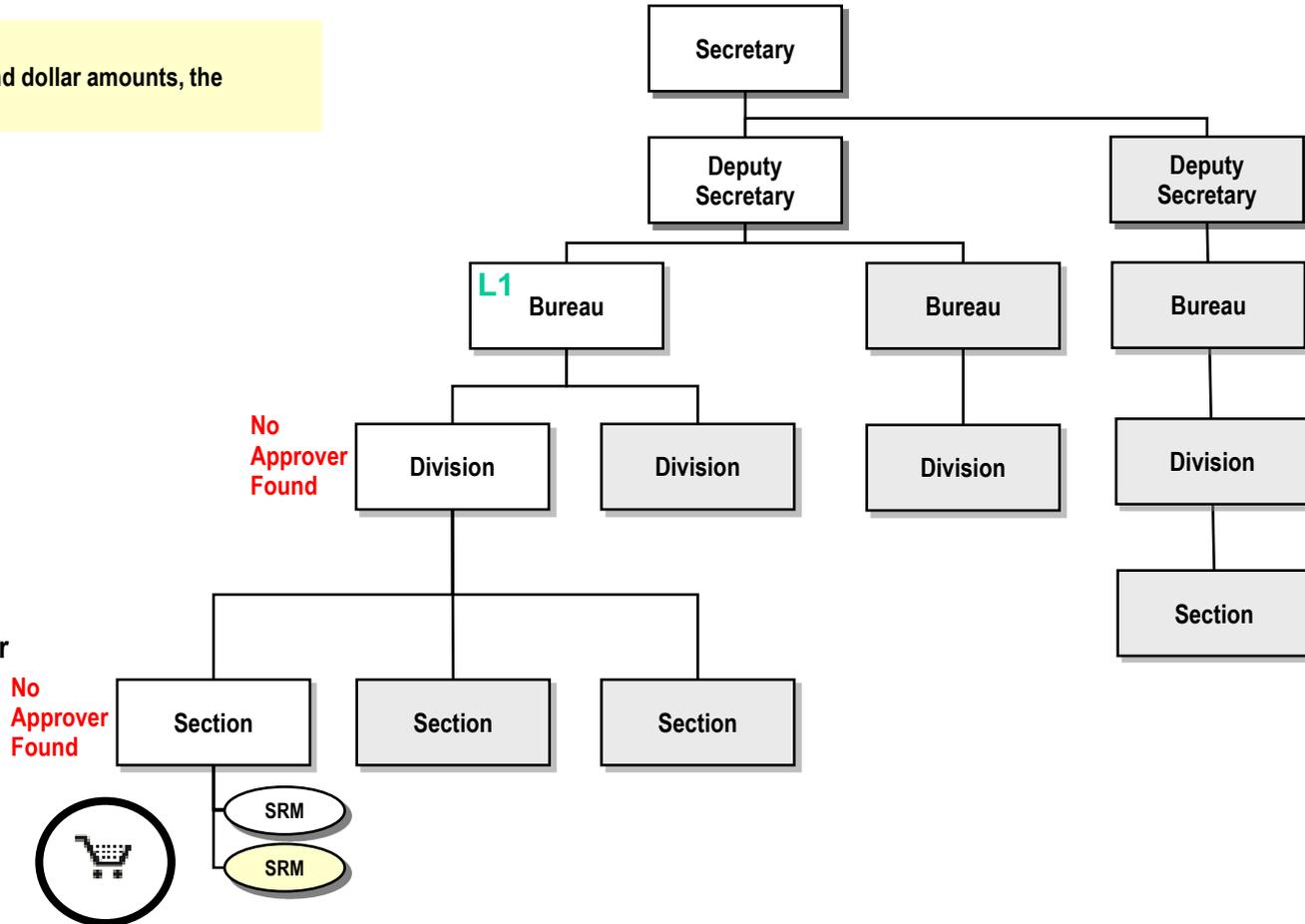
Approver Business Rules and Processes

1-Step Approval Example 2

Note:

- Depending on Agency need and dollar amounts, the workflow can be tailored

- User creates shopping cart
- SRM looks within the organizational tier for L1 Approver
- If not found, SRM looks at the next tier for L1 approver
- SRM continues to follow the organizational tiers until it finds an L1 Approver

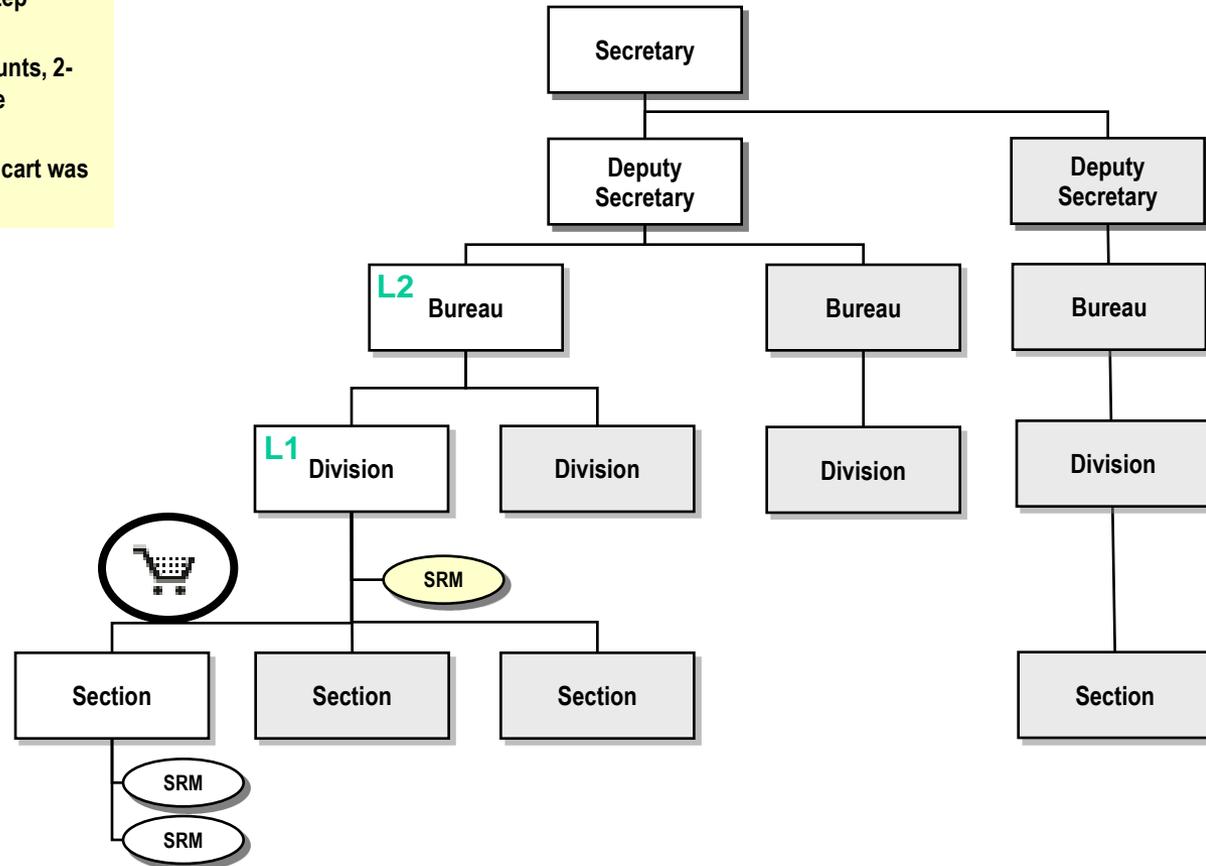


Approver Business Rules and Processes

Note:

- SRM follows same logic, as shown, for 3-Step approval process
- Depending on Agency need and dollar amounts, 2-steps could occur at higher levels within the organizational structure
- Approval levels always start at the level the cart was created

2-Step Approval Example 1



1. User creates shopping cart
2. SRM looks within organizational tier for L1 Approver and stops for approval
3. After L1 approval is granted, SRM looks at the next tier for the L2 approver

Approver Business Rules and Processes

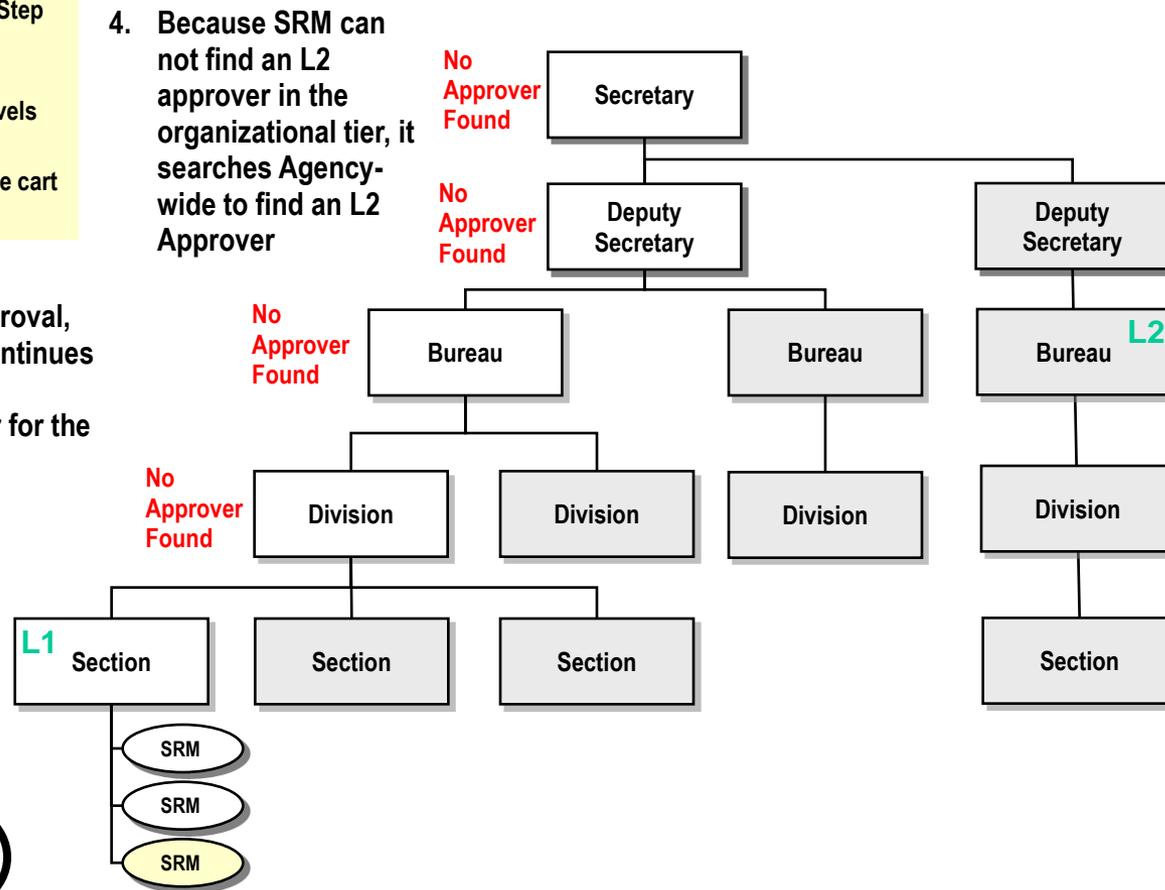
2-Step Approval Example 2

Note:

- SRM follows same logic, as shown, for 3-Step approval process
- Depending on Agency need and dollar amounts, 2-steps could occur at higher levels within the organizational structure
- Approval levels always start at the level the cart was created

2. SRM looks within organizational tier for L1 Approver and stops for approval

1. User creates shopping cart





Approver Business Rules and Processes



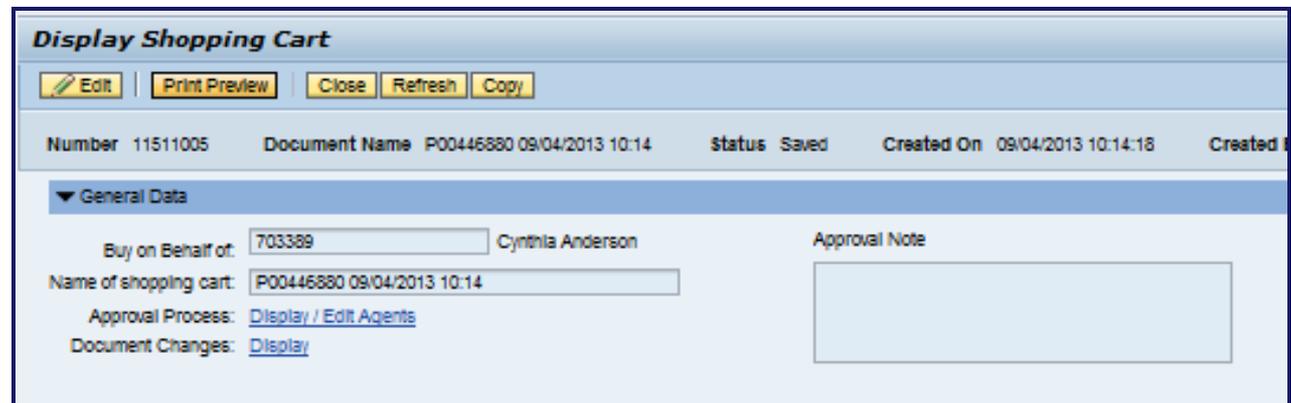
- Process changes
 - Auto-POs are created for carts under \$10,000 whose items are requisitioned from identified suppliers through catalogs and punch-outs
 - P-Card purchases are not processed over \$10,000

Approver Business Rules and Processes

- *Ad hoc* business rules

- Additional approvers can be added by requisitioners or approvers any time the defined strategy does not meet the approval needs of the cart
- Because special material approvers (the highest level approver for special category carts) are the last approver in the workflow sequence, they cannot add additional approvers
 - They can forward a cart or create a substitute approver if required
- Additional approvers can be used for Federal Grants, funds, project approvals, etc.

Select the [Display/Edit Agents](#) link to Ad Hoc additional approvers



Display Shopping Cart

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

Number	Document Name	Status	Created On	Created By
11511005	P00446880 09/04/2013 10:14	Saved	09/04/2013 10:14:18	

▼ General Data

Buy on Behalf of: Cynthia Anderson

Name of shopping cart:

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

Document Changes: [Display](#)

Approval Note:



Approver Business Rules and Processes



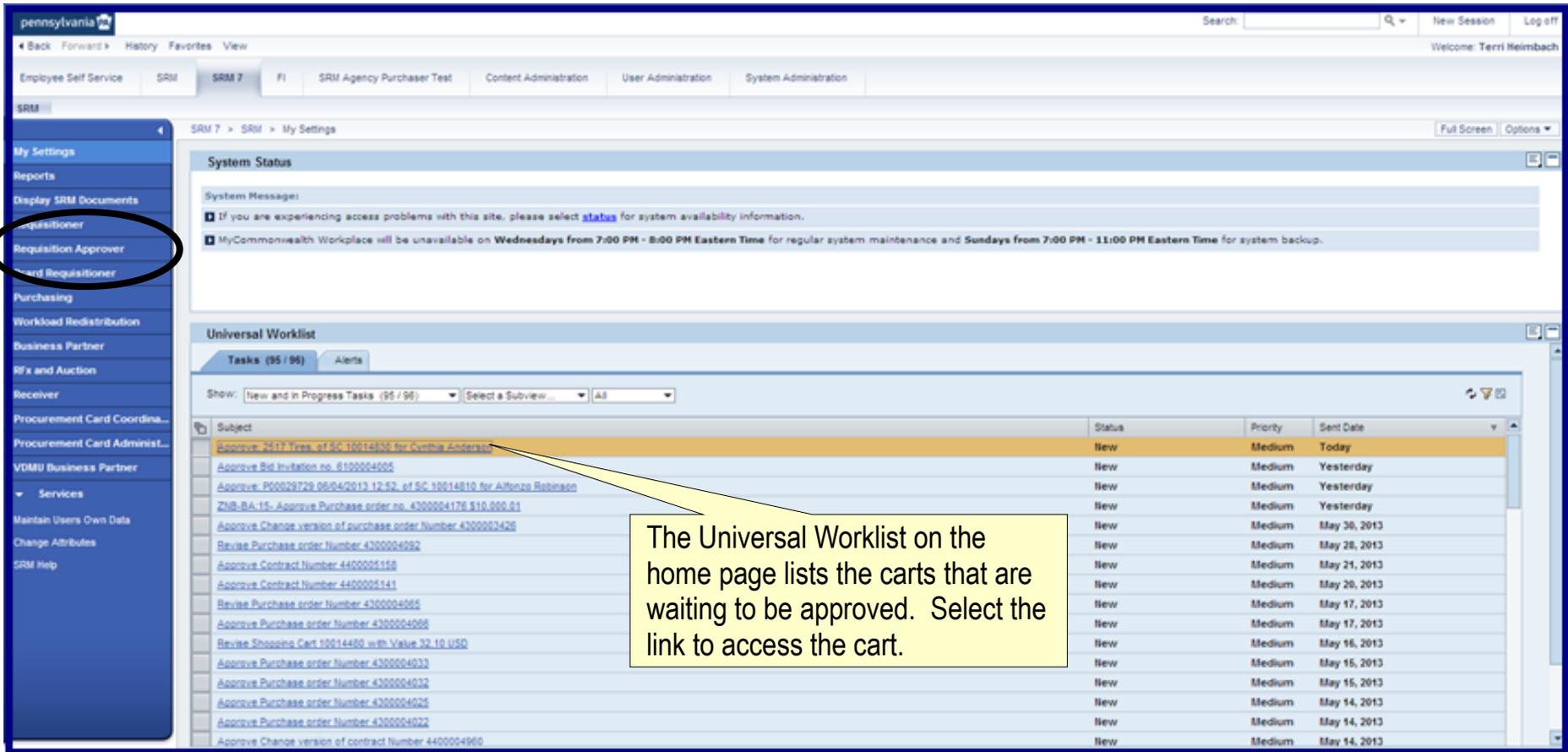
- Special category cart approval workflow is predefined based on Commonwealth policies:
 - The approver and the number of required approvers is dependent on the special category, for example:
 - Requisitions for computer hardware must be approved by the IT Director
 - Requisitions for training must be approved by the Training Officer
 - Requisitions for both computer hardware and computer training must be approved by the Information Technology (IT) Director and the Training Officer
 - Approval of the cart is not complete until each approver approves the appropriate item
 - *Ad hoc* approvers can not be added to a special category cart after the cart reaches the final approver



Approving Shopping Carts

Approving Shopping Carts

Approver SRM home page



SRM 7 > SRM > My Settings

System Status

System Message:

- If you are experiencing access problems with this site, please select [status](#) for system availability information.
- MyCommonwealth Workplace will be unavailable on **Wednesdays from 7:00 PM - 8:00 PM Eastern Time** for regular system maintenance and **Sundays from 7:00 PM - 11:00 PM Eastern Time** for system backup.

Universal Worklist

Tasks (95 / 96) Alerts

Show: **New and in Progress Tasks (95 / 96)** Select a Subview... All

Subject	Status	Priority	Sent Date
Approve 2517 Tires of SC 10014836 for Cynthia Anderson	New	Medium	Today
Approve Bid Invitation no. 6100004005	New	Medium	Yesterday
Approve P00029729 06/04/2013 12:52 of SC 10014810 for Alfonso Robinson	New	Medium	Yesterday
ZNR-BA-15- Approve Purchase order no. 4300004176 \$10,000.01	New	Medium	Yesterday
Approve Change version of purchase order Number 4300003426	New	Medium	May 30, 2013
Revise Purchase order Number 4300004092	New	Medium	May 28, 2013
Approve Contract Number 4400005158	New	Medium	May 21, 2013
Approve Contract Number 4400005141	New	Medium	May 20, 2013
Revise Purchase order Number 4300004065	New	Medium	May 17, 2013
Approve Purchase order Number 4300004086	New	Medium	May 17, 2013
Revise Shopping Cart 10014480 with Value 32.10 USD	New	Medium	May 16, 2013
Approve Purchase order Number 4300004033	New	Medium	May 15, 2013
Approve Purchase order Number 4300004032	New	Medium	May 15, 2013
Approve Purchase order Number 4300004025	New	Medium	May 14, 2013
Approve Purchase order Number 4300004022	New	Medium	May 14, 2013
Approve Change version of contract Number 4400004960	New	Medium	May 14, 2013

The Universal Worklist on the home page lists the carts that are waiting to be approved. Select the link to access the cart.

Approving Shopping Carts

Cart details

Approve Shopping Cart

[Approve](#) [Reject](#) [Edit](#) [Print Preview](#) [Close](#) [Save](#) [Check](#) [Inquire](#)

Number: 11510808 Document Name: Tires for Training Approval Status: Awaiting Approval Created On: 09/04/2013 07:38:52 Created By: Cynthia Anderson

General Data
 Buy on Behalf of: 703389 Cynthia Anderson Approval Note:
 Name of shopping cart: Tires for Training Approval
 Approval Process: [Display / Edit Agents](#)
 Document Changes: [Display](#)

Item Overview
[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	245/60R18		25172504	AUTOMOBILE/LIGHT TRU	100.000	EA	205.86	USD		1		10/22/2013	2	1	Awaiting Approval	GOODYEAR TIRE & RUBBER COMPANY INC(161302)

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

To review item details such as texts, attachments, and cost assignments, select the Details button.

Approving Shopping Carts

Cart details

Approve Shopping Cart

Number 11510808 Document Name Tires for Training Approval Status Awaiting Approval Created On 09/04/2013 07:38:52 Created By Cynthia Anderson

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	24560R18		25172504	AUTOMOBILE/LIGHT TRU	100.000	EA	205.86	USD		1		10/22/2013	2	1	Awaiting Approval	GOODYEAR TIRE & RUBBER COMPANY INC(161302)

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

Details for item 1 24560R18

Identification

Item Type:

Product ID:

Description: *

Product Category: AUTOMOBILE/LIGHT TRU

Organization

Purchasing Group: [Show Members](#)

Company Code: COMMONWEALTH OF PA

Further Properties

Supplier Product Number:

Values and Pricing

Unit: EA Each

Ordered Quantity:

Open Quantity / Unit: EA

The details of the cart appear. Each section of details is tabbed. Select the tab to see information represented in each section.

Proceed Using P-CARD?:

Approving Shopping Carts

Cost assignment details

Approve Shopping Cart

Approve | Reject | Edit | Print Preview | Close | Save | Check | Inquire

Number: 11510808 | Document Name: Tires for Training Approval | Status: Awaiting Approval | Created On: 09/04/2013 07:38:52 | Created By: Cynthia Anderson

General Data

Buy on Behalf of: 703389 Cynthia Anderson | Approval Note:

Name of shopping cart: Tires for Training Approval

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

Document Changes: [Display](#)

Item Overview

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	245/60R18	25172504	AUTOMOBILE/LIGHT TRU		100.00	EA	205.86	USD		1		10/22/2013	2	1	Awaiting Approval	GOODYEAR TIRE & RUBBER COMPANY INC(161302)

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

Details for Item 1 245/60R18

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

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 | Filter Settings

Number	Accounting Line Number	Percentage	Account Assignment Category	Assign Number	Account Assignment Description	General Ledger Account	General Ledger Description	Business Area
0001		100.00	Cost Center	1544001000	Dep Sec for Admin	6380713	Tires & Tubes	15

Clipboard

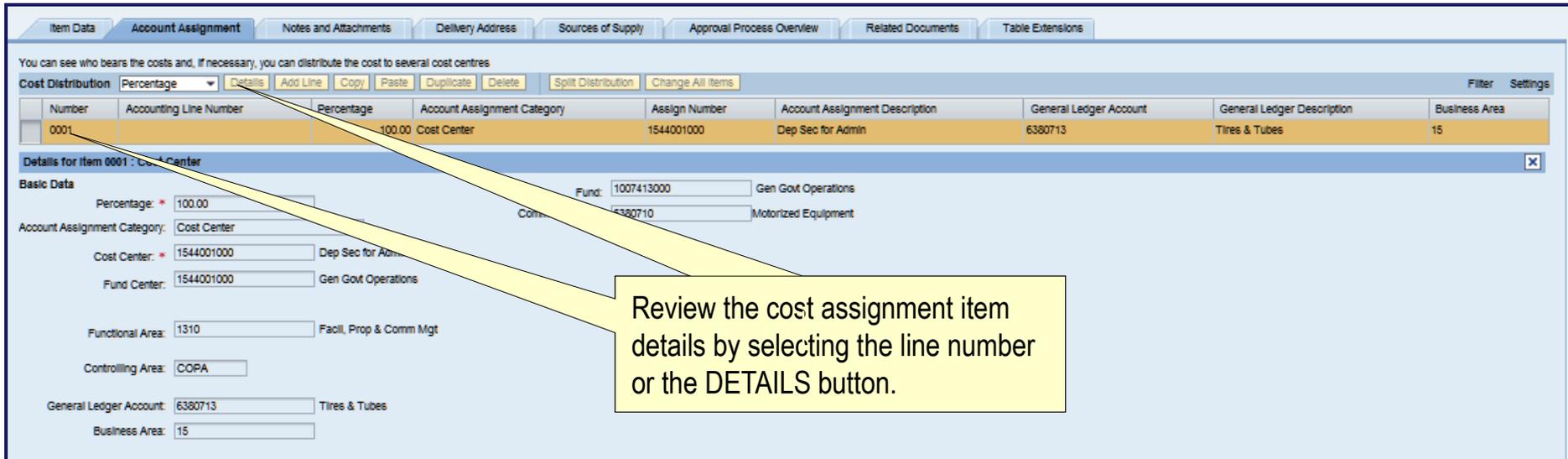
Delete Clipboard Content

Percentage	Account Assignment Description	Account Assignment	General Ledger Account

Review the cost assignment for each item in the cart by selecting the Cost Assignment tab.

Approving Shopping Carts

Cost assignment item details



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

Cost Distribution **Details** Filter Settings

Number	Accounting Line Number	Percentage	Account Assignment Category	Assign Number	Account Assignment Description	General Ledger Account	General Ledger Description	Business Area
0001		100.00	Cost Center	1544001000	Dep Sec for Admin	6380713	Tires & Tubes	15

Details for item 0001 : Cost Center

Basic Data

Percentage: * 100.00
 Account Assignment Category: Cost Center
 Cost Center: * 1544001000 Dep Sec for Admin
 Fund Center: 1544001000 Gen Govt Operations
 Functional Area: 1310 Facill. Prop & Comm Mgt
 Controlling Area: COPA
 General Ledger Account: 6380713 Tires & Tubes
 Business Area: 15

Fund: 1007413000 Gen Govt Operations
 Com: 6380710 Motorized Equipment

Review the cost assignment item details by selecting the line number or the DETAILS button.

Approving Shopping Carts

Cost assignment item details

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

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

Cost Distribution Filter Settings

Number	Accounting Line Number	Percentage	Account Assignment Category	Assign Number	Account Assignment Description	General Ledger Account	General Ledger Description	Business Area
0001		100.00	Cost Center	1544001000	Dep Sec for Admin	6380713	Tires & Tubes	15

Details for item 0001 : Cost Center

Basic Data

Percentage: *

Account Assignment Category:

Cost Center: *

Fund Center:

Functional Area:

Controlling Area:

General Ledger Account:

Business Area:

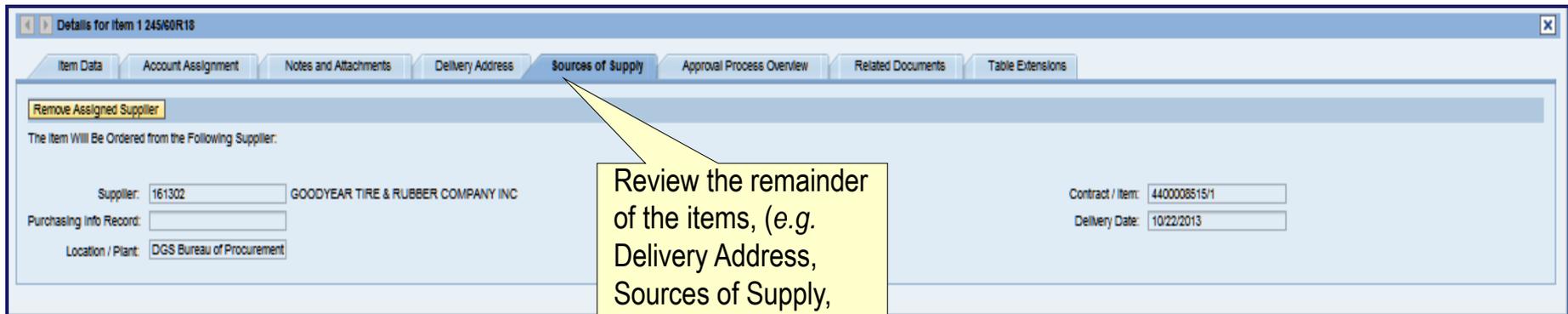
Fund:

Commitment item:

Review the cost assignment item details for accuracy.

Approving Shopping Carts

Accessing additional cart details



Details for Item 1245160R18

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

Remove Assigned Supplier

The Item Will Be Ordered from the Following Supplier:

Supplier: 161302 GOODYEAR TIRE & RUBBER COMPANY INC

Purchasing Info Record:

Location / Plant: DGS Bureau of Procurement

Contract / Item: 4400008615/1

Delivery Date: 10/22/2013

Review the remainder of the items, (e.g. Delivery Address, Sources of Supply, Approval Process Overview) by selecting on the appropriate tab.

Approving Shopping Carts

Internal and Vendor notes

Approve Shopping Cart

Number: 10014830 | Document Name: 2517 Tires | Status: Awaiting Approval | Created On: 06/05/2013 08:34:50 | Created By: Cynthia Anderson

General Data

Buy on Behalf of: 317923 Cynthia Anderson | Approval Note: [Text Area]

Name of shopping cart: 2517 Tires

Header Date: [Values](#)

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

Budget: [Display](#)

Document Changes: [Display](#)

Item Overview

Item	Quantity	Unit	Net Price / Limit	Currency	Option Type	Per	Order Type	Delivery Date	Notes	Attachments	Item Status	Supplier
SR17 Radial Tires	1		23,895.00	USD				07/09/2013	2	0	Awaiting Approval	JACK WILLIAMS TIRE COMPANY INC1234567890100012

Notes and Attachments

Category	Description
Vendor Text	Raised White Letters
Internal Note	Justification: Tires needed to replenish stock at DGS g...

Internal Note Dialog

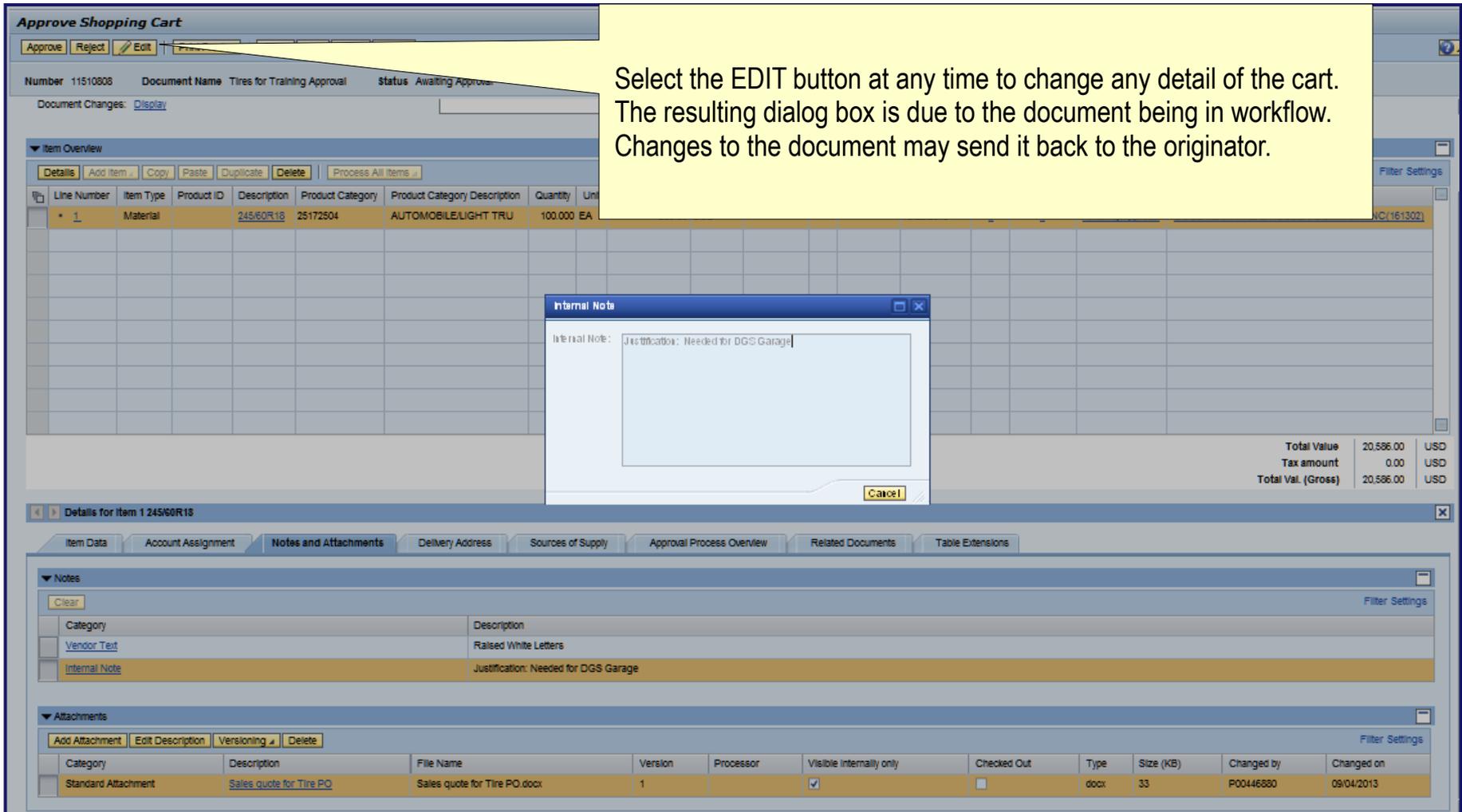
Internal Note: Justification: Tires needed to replenish stock at DGS garage for fleet vehicle.

Total Value: 23,895.00 USD
Tax amount: 0.00 USD
Total Val. (Gross): 23,895.00 USD

View vendor and internal notes in the Notes and Attachments section. Select either the Vendor Text or Internal Note to see the corresponding message.

Approving Shopping Carts

Editing carts



Approve Shopping Cart

Approve Reject Edit

Number 11510808 Document Name Tires for Training Approval Status Awaiting Approval

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	245/60R18		25172504	AUTOMOBILE/LIGHT TRU	100.000	EA

Internal Note

Internal Note: Justification: Needed for DGS Garage

Cancel

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

Details for item 1 245/60R18

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

Notes

Category	Description
Vendor Text	Raised White Letters
Internal Note	Justification: Needed for DGS Garage

Attachments

Category	Description	File Name	Version	Processor	Visible Internally only	Checked Out	Type	Size (KB)	Changed by	Changed on
Standard Attachment	Sales quote for Tire PO	Sales quote for Tire PO.docx	1		<input checked="" type="checkbox"/>	<input type="checkbox"/>	docx	33	P00446880	09/04/2013

Approving Shopping Carts

Editing carts continued

Approve Shopping Cart

Number 11510908 Document Name Tires for Training Approval Status Awaiting Approval Created By Cynthia Anderson

General Data
 Buy on Behalf of: 703389 Cynthia Anderson Approval Note:
 Name of shopping cart: Tires for Training Approval
 Approval Process: [Display / Edit Agents](#)
 Document Changes: [Display](#)

Item Overview

Line Number	Item Type	Product ID	Description	Product Category	Product Category Description	Quantity	Unit	Net Price / Limit
1	Material	245/60R18	25172504	AUTOMOBILE/LIGHT TRU	100.000	EA	205.8	

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

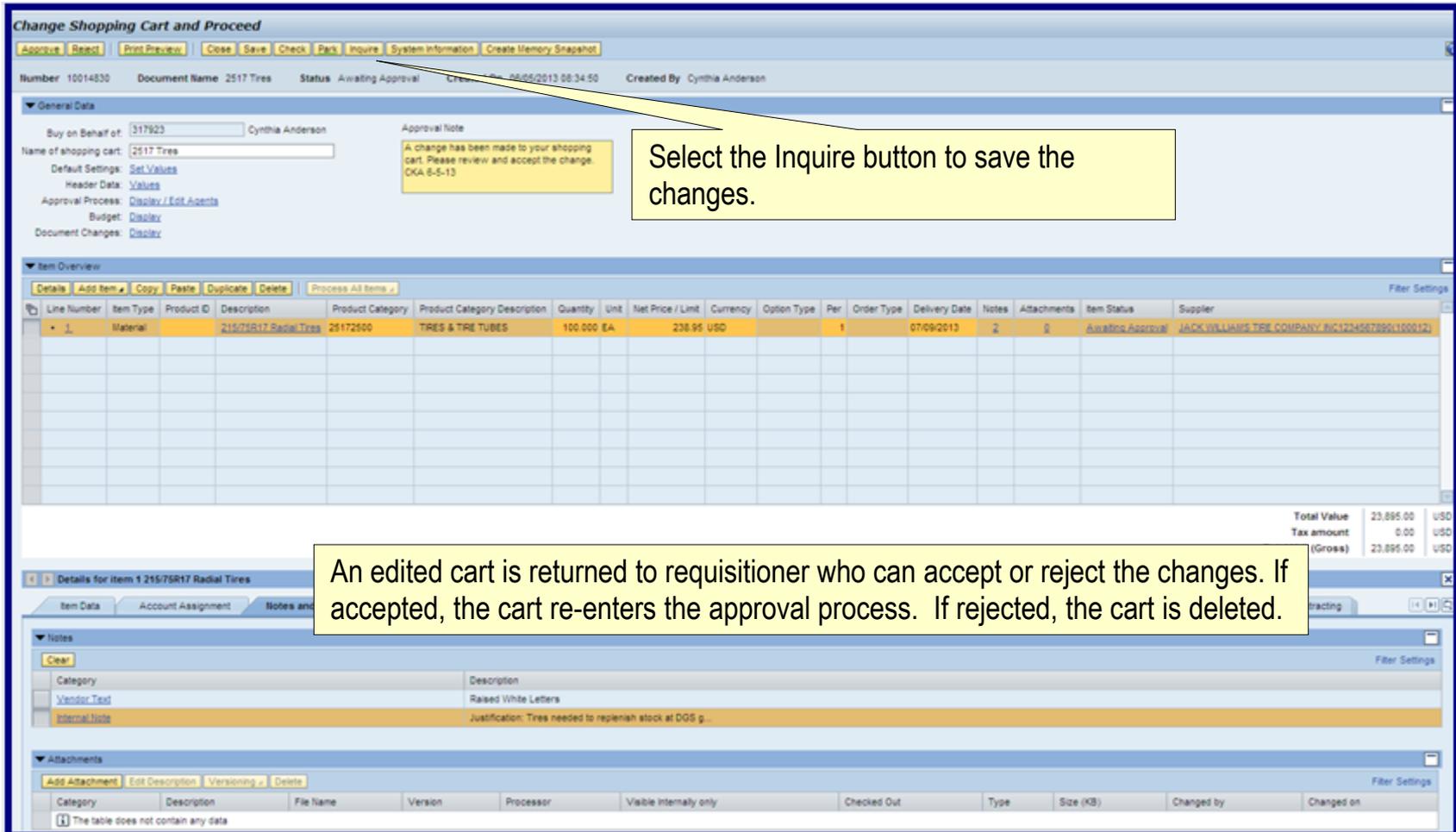
Details for item 1 245/60R18
 Notes and Attachments:

Category	Description
Vendor Text	Raised White Letters
Internal Note	Justification: Needed for DGS Garage

After making the changes, note the changes that were made in the Approval Note field with your initials and the date of the change. Select the CHECK button. Review and address any resulting messages and errors.

Approving Shopping Carts

Editing carts continued



Change Shopping Cart and Proceed

Buttons: Approve, Reject, Print Preview, Close, Save, Check, Pick, Inquire, System Information, Create Memory Snapshot

Number: 10014830 | Document Name: 2517 Tires | Status: Awaiting Approval | Created On: 06/05/2013 08:34:50 | Created By: Cynthia Anderson

General Data

Buy on Behalf of: 317923 Cynthia Anderson

Name of shopping cart: 2517 Tires

Default Settings: [Set Values](#)

Header Data: [Values](#)

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

Budget: [Display](#)

Document Changes: [Display](#)

Approval Note: A change has been made to your shopping cart. Please review and accept the change. OK: 6-5-13

Item Overview

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	21575R17 Radial Tires	25172500	TRES & TIRE TUBES	100.000	EA	238.95	USD			1		07/09/2013	2	0	Awaiting Approval	JACK WILLIAMS TIRE COMPANY, INC(1234567890100012)

Total Value: 23,895.00 USD
Tax amount: 0.00 USD
(Gross): 23,895.00 USD

Details for item 1 21575R17 Radial Tires

Notes:

Category	Description
Vendor Text	Raised White Letters
Internal Note	Justification: Tires needed to replenish stock at DOS g...

Attachments:

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										

Select the Inquire button to save the changes.

An edited cart is returned to requisitioner who can accept or reject the changes. If accepted, the cart re-enters the approval process. If rejected, the cart is deleted.

Approving Shopping Carts

Approving/Rejecting carts



Approve Shopping Cart

Number: 11510808 Document Name: Tires for Training Approval Status: Awaiting Approval Created On: 09/04/2013 07:38:52 Created By: Cynthia Anderson

Buy on Behalf of: 703389 Cynthia Anderson Approval Note:

Name of shopping cart: Tires for Training Approval
 Approval Process: [Display / Edit Agents](#)
 Document Changes: [Display](#)

Item Overview

[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	245/60R18	25172504	AUTOMOBILE/LIGHT TRU		100.000	EA	205.86	USD		1		10/22/2013	2	1	Awaiting Approval	GOODYEAR TIRE & RUBBER COMPANY INC(161302)

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

Select the Approve or Reject button for the appropriate action on the shopping cart.

Approving Shopping Carts

Approving/Rejecting carts

Display Document:

Action was successfully performed

A message will display indicating the action was successfully performed.

Number 11510808
Document Name Tires for Training Approval
Status Awaiting Approval
Created On 09/04/2013 07:38:52
Created By Cynthia Anderson

General Data

Buy on Behalf of: Cynthia Anderson
Approval Note:

Name of shopping cart:

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

Item Overview

[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	245/60R18		25172504	AUTOMOBILE/LIGHT TRU	100.000	EA	205.86	USD		1		10/22/2013	2	1	Awaiting Approval	GOODYEAR TIRE & RUBBER COMPANY INC.(161302)

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

Approving Shopping Carts

- What happens after approval?
 - If additional approvers are part of the cart, the cart goes to the next approver in the sequence.
 - After final approval:
 - If the purchase order is system generated, the order is sent to the supplier
 - If the purchase order is processed by a purchasing agent or DGS commodity specialists, the cart is transferred for further processing

Summary

- This overview addressed the Approver functions as they relate to SRM with a focus on:
 - Accessing the SRM screens used to fulfill approval processes
 - Approval workflow
 - Reviewing/approving a requisitioned shopping cart including the approval of special materials
 - Reviewing/rejecting a requisitioned shopping cart
 - Editing a shopping cart
- Please conclude this course by completing the following Knowledge Check

Knowledge Check



1. When approving a cart, the Approver: (select all that apply)
 - a. Reviews shopping cart to ensure it is appropriate, within budget and meets agency's procurement policies and procedures
 - b. Validates the cart's account information
 - c. Edits shopping cart as needed
 - d. Approves or rejects shopping cart
 - e. Adheres to the agency's established procurement procedures and policies

Knowledge Check



2. To approve, edit or reject a cart, which of the following must be reviewed? (select all that apply)
 - a. Items requested
 - b. Cost assignment
 - c. Ship to information
 - d. Source of supply/contract
 - e. Notes for approval

Knowledge Check



3. For process changes, which of the following is correct? (Select all that apply)
 - a. Auto-POs are created for carts under \$10,000 whose items are requisitioned from identified suppliers through catalogs and punch-outs
 - b. P-Card purchases are not processed over \$10,000

Knowledge Check



4. The maximum number of approvers on the standard shopping cart is 3.
 - a. True
 - b. False

Survey



Select the link below to complete an online survey.

<https://www.surveymonkey.com/s/V8T7D55>



You will receive credit for completing this course within 24 hours. Please select the “Log Off” button in the lower right corner to close this course.



pennsylvania

DEPARTMENT OF GENERAL SERVICES

SAP

Supplier
Relationship
Management

SRM 7.0

**Approver for
Shopping Carts**

Thank you!