



Supplier
Relationship
Management
Overview

Rev. February 2014



Welcome to SRM Overview!

This course is designed to provide Commonwealth Procurement Professionals and Requisitioners with an overview of SRM 7.0 to include:

- **Operational Procurement**
- **Purchasing and Sourcing**
- **Supplier Collaboration**



This course is presented on a series of slides. Navigate through the slides by selecting the NEXT and PREVIOUS buttons.



Previous



Next

You may exit the course at any time. When you return to the course, you can choose to resume the course at your most recent stopping point or choose to start from the beginning.

To start the course, select the NEXT button.

After successfully completing this course, you will be able to:

- Identify the benefits of SRM 7.0
- Understand the special features of SRM 7.0
- Understand how to navigate in SRM
- Understand terminology associated with SRM



- SRM 7.0: Introduction and Overview
 - What is SRM
 - Benefits of SRM
 - Special features of SRM 7.0
- Getting Started in SRM 7.0
 - Navigation
 - Functionality
 - Common Buttons
 - Terminology



SRM 7.0: Introduction and Overview



- SRM is an abbreviation for Supplier Relationship Management
- SRM is a fast, efficient, and dependable tool for order placement, order approval, goods receipt, and supplier invoice entry
- SRM consists of the following components:
 - Operational Procurement
 - Shopping Carts
 - Purchasing Card (P-Card) Orders
 - Purchasing & Sourcing
 - Solicitations
 - Contracts
 - Purchase Orders
 - Supplier Collaboration
 - Supplier Registration
 - Supplier Bid Response
 - Invoicing



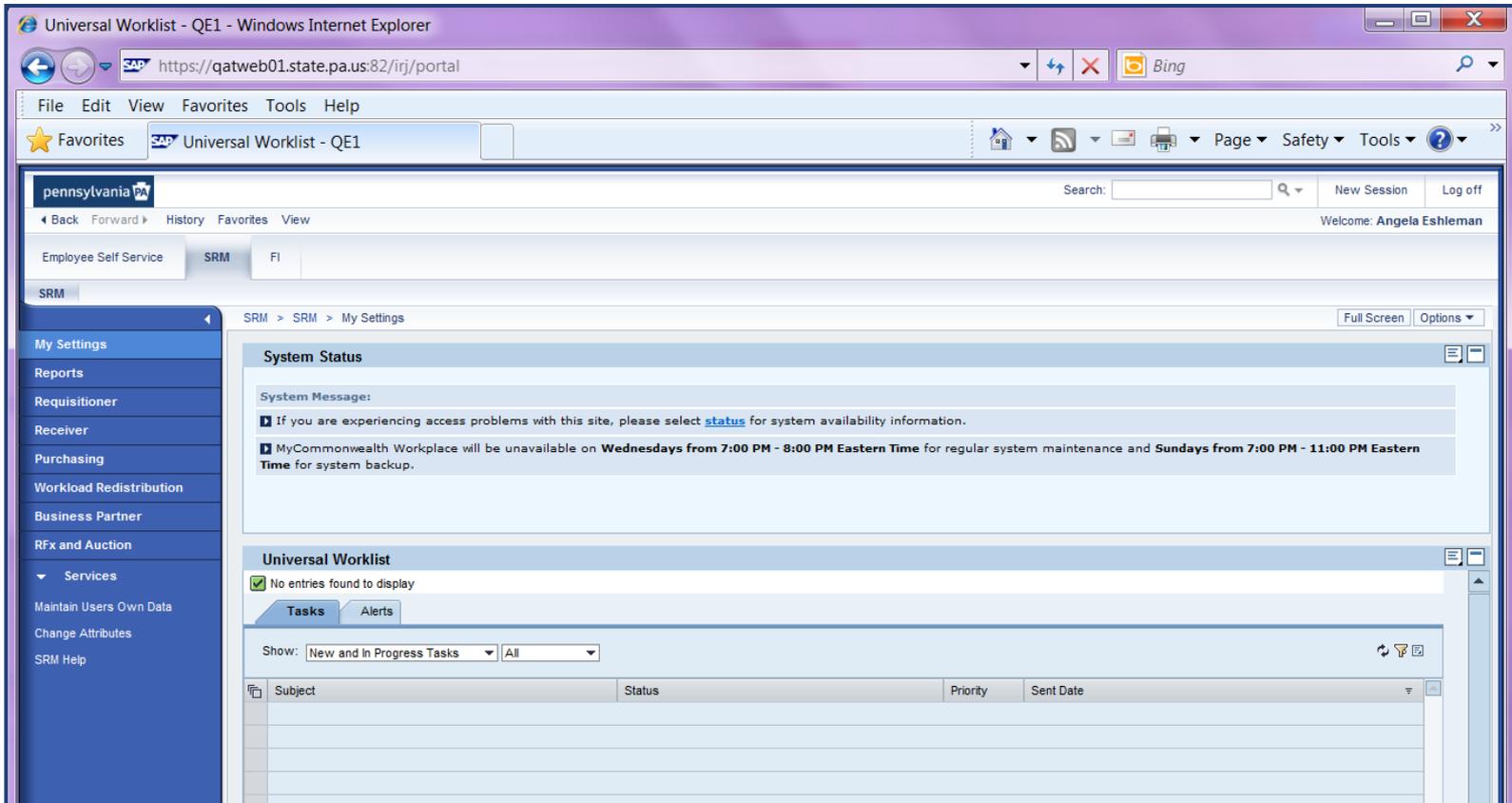
SRM Offers a number of benefits:

- Simplifies the purchasing process and improves accuracy and productivity by minimizing manual administrative tasks
- Supports agency-specific workflows
- Provides a friendly user interface
- Gives access to electronic catalogs, allowing the contract price to be viewed and automatically entered
- Allows electronic submission of orders to select suppliers and electronic submission of invoices by suppliers
- Improves procurement reporting capabilities



Logging In

The SAP SRM Portal Desktop is accessible through www.myworkplace.state.pa.us



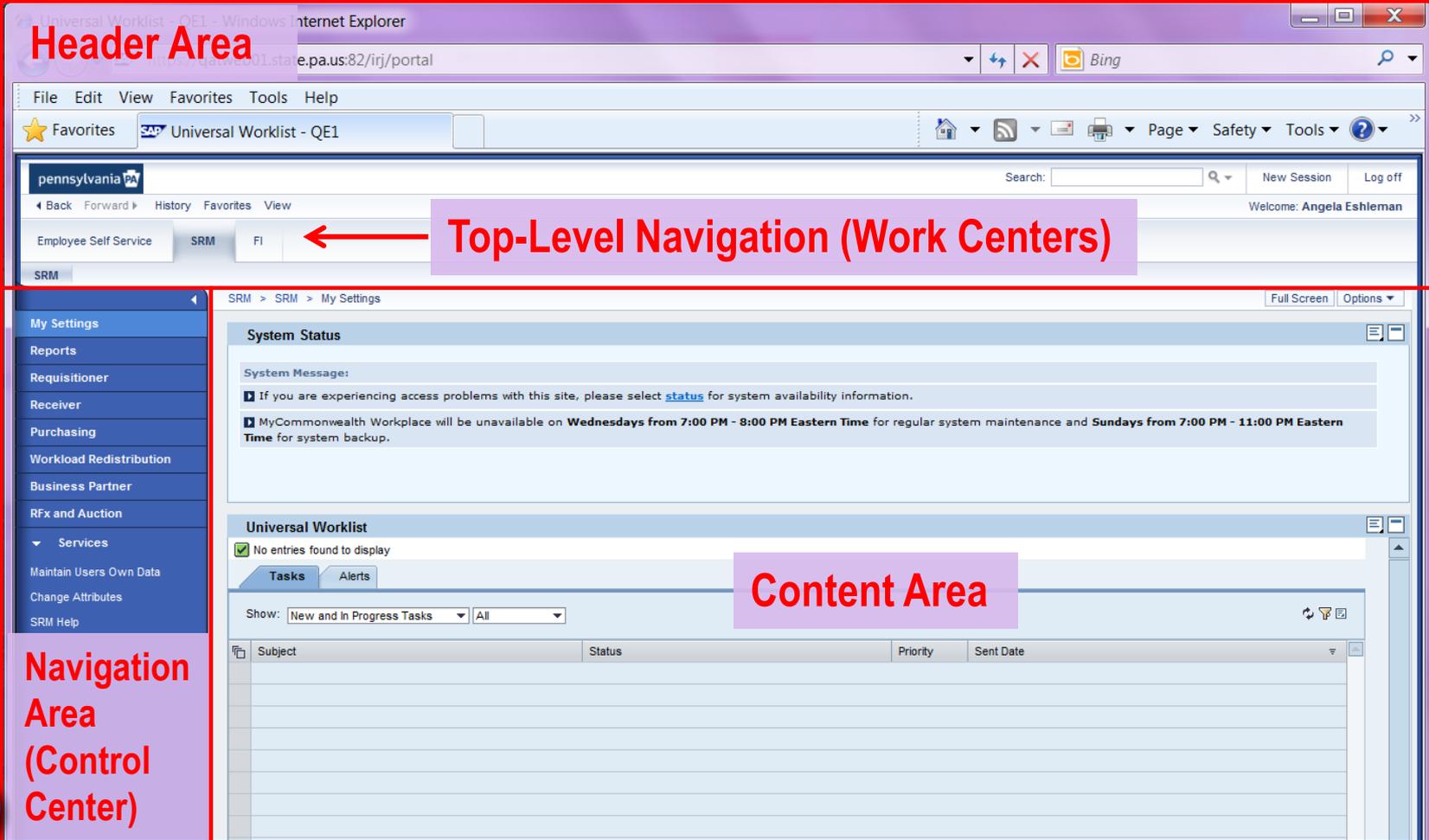
The screenshot displays the SAP SRM Portal Desktop interface within a Windows Internet Explorer browser window. The browser's address bar shows the URL `https://qatweb01.state.pa.us:82/irj/portal`. The page title is "Universal Worklist - QE1".

The interface includes a navigation menu on the left with options like "My Settings", "Reports", "Requisitioner", "Receiver", "Purchasing", "Workload Redistribution", "Business Partner", "RFx and Auction", "Services", "Maintain Users Own Data", "Change Attributes", and "SRM Help".

The main content area is titled "SRM > SRM > My Settings" and contains two sections:

- System Status:** Displays a "System Message" with two items:
 - 1. If you are experiencing access problems with this site, please select [status](#) for system availability information.
 - 2. 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:** Shows "No entries found to display" under the "Tasks" tab. Below this, there are filters for "Show: New and In Progress Tasks" and "All". A table with columns "Subject", "Status", "Priority", and "Sent Date" is visible but empty.

Portal Desktop Landscape



The screenshot shows the SRM 7.0 portal interface. A red box highlights the top portion of the page, which includes the browser window and the top navigation bar. A red arrow points to the 'SRM' tab in the navigation bar, which is labeled 'Top-Level Navigation (Work Centers)'. Below the navigation bar is a vertical sidebar on the left containing various menu items like 'My Settings', 'Reports', and 'Services'. This sidebar is labeled 'Navigation Area (Control Center)'. The main content area is labeled 'Content Area' and displays a 'System Status' section with a message about system availability and a 'Universal Worklist' section with a table of tasks.

Header Area

Top-Level Navigation (Work Centers)

Navigation Area (Control Center)

Content Area



Navigating the User Interface

- Roles
 - Your user role(s) are assigned by position
 - Access to your role(s) are within the *Control Center* (e.g., left navigation pane)
- Transactions
 - Upon selection of a specific role, the associated activities and transactions display as *Worksets* in 7.0

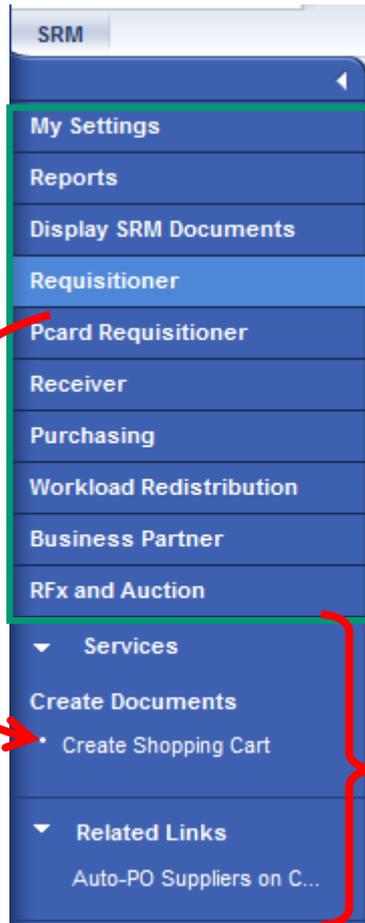


Navigating the User Interface

- *Worksets*
 - Groups of role-specific activities and/or transactions which display when the corresponding role is selected
 - Multiple levels of *Worksets* are permitted in SRM 7.0
- Document Landscape
 - SRM 7.0 document landscapes have elements contained in both SRM 5.0 and SAP R/3
 - Examples will be shown throughout the course



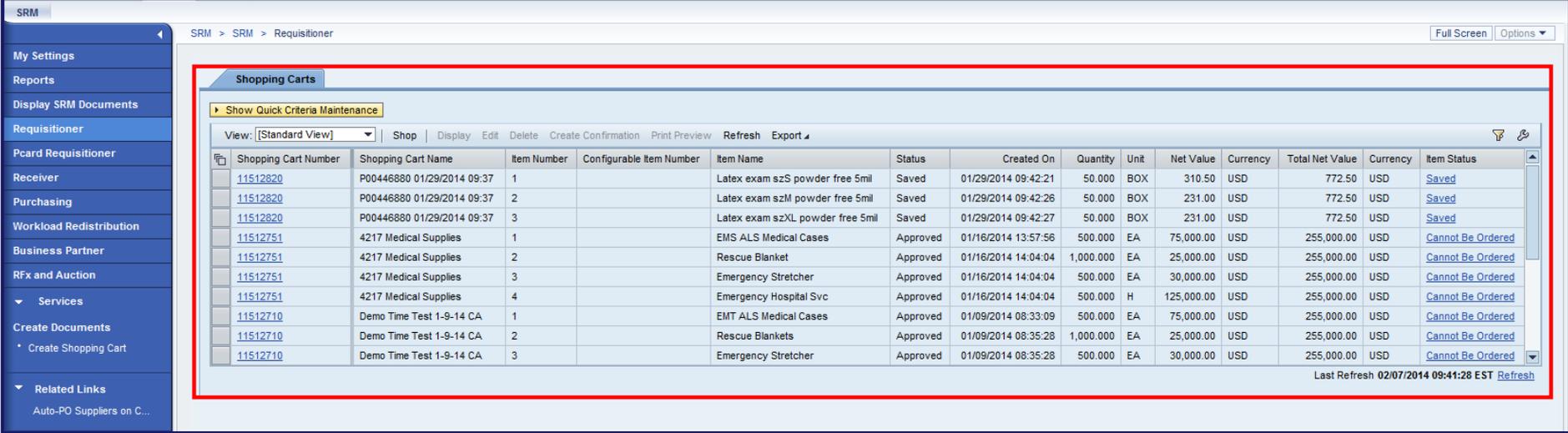
Control Center in SRM 7.0



- When a role is selected, *Worksets* assigned to the user are displayed
 - If applicable, an additional *Workset* is displayed below the initial result as shown in this screen capture



Personal Object Worklist (POWL)



SRM > SRM > Requisitioner

Full Screen | Options

Shopping Carts

Show Quick Criteria Maintenance

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

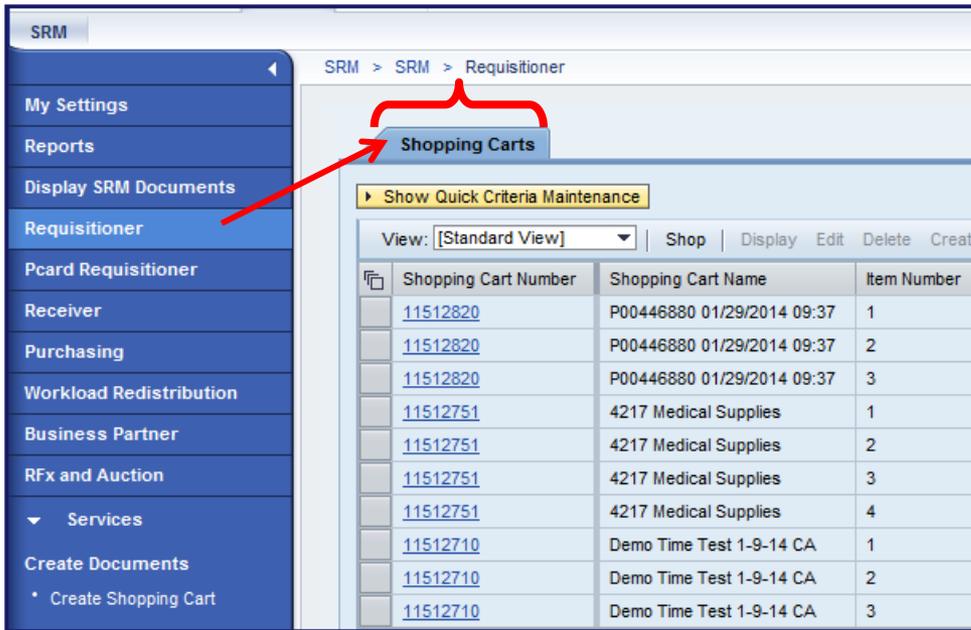
Shopping Cart Number	Shopping Cart Name	Item Number	Configurable Item Number	Item Name	Status	Created On	Quantity	Unit	Net Value	Currency	Total Net Value	Currency	Item Status
11512820	P00446880 01/29/2014 09:37	1		Latex exam szS powder free 5mil	Saved	01/29/2014 09:42:21	50.000	BOX	310.50	USD	772.50	USD	Saved
11512820	P00446880 01/29/2014 09:37	2		Latex exam szM powder free 5mil	Saved	01/29/2014 09:42:26	50.000	BOX	231.00	USD	772.50	USD	Saved
11512820	P00446880 01/29/2014 09:37	3		Latex exam szXL powder free 5mil	Saved	01/29/2014 09:42:27	50.000	BOX	231.00	USD	772.50	USD	Saved
11512751	4217 Medical Supplies	1		EMS ALS Medical Cases	Approved	01/16/2014 13:57:56	500.000	EA	75,000.00	USD	255,000.00	USD	Cannot Be Ordered
11512751	4217 Medical Supplies	2		Rescue Blanket	Approved	01/16/2014 14:04:04	1,000.000	EA	25,000.00	USD	255,000.00	USD	Cannot Be Ordered
11512751	4217 Medical Supplies	3		Emergency Stretcher	Approved	01/16/2014 14:04:04	500.000	EA	30,000.00	USD	255,000.00	USD	Cannot Be Ordered
11512751	4217 Medical Supplies	4		Emergency Hospital Svc	Approved	01/16/2014 14:04:04	500.000	H	125,000.00	USD	255,000.00	USD	Cannot Be Ordered
11512710	Demo Time Test 1-9-14 CA	1		EMT ALS Medical Cases	Approved	01/09/2014 08:33:09	500.000	EA	75,000.00	USD	255,000.00	USD	Cannot Be Ordered
11512710	Demo Time Test 1-9-14 CA	2		Rescue Blankets	Approved	01/09/2014 08:35:28	1,000.000	EA	25,000.00	USD	255,000.00	USD	Cannot Be Ordered
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

Last Refresh 02/07/2014 09:41:28 EST Refresh

- The POWL is located in the *content area* of the portal desktop



Personal Object Worklist (POWL)



SRM > SRM > Requisitioner

Shopping Carts

Show Quick Criteria Maintenance

View: [Standard View] | Shop | Display | Edit | Delete | Create

Shopping Cart Number	Shopping Cart Name	Item Number
11512820	P00446880 01/29/2014 09:37	1
11512820	P00446880 01/29/2014 09:37	2
11512820	P00446880 01/29/2014 09:37	3
11512751	4217 Medical Supplies	1
11512751	4217 Medical Supplies	2
11512751	4217 Medical Supplies	3
11512751	4217 Medical Supplies	4
11512710	Demo Time Test 1-9-14 CA	1
11512710	Demo Time Test 1-9-14 CA	2
11512710	Demo Time Test 1-9-14 CA	3

- It is a query-driven worklist containing procurement documents from your work area
 - The Active Queries displayed will vary depending upon the selected *Workset*



Personal Object Worklist (POWL)

Shopping Carts

Show Quick Criteria Maintenance

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
11512820	P00446880 01/29/2014 09:37	1		Latex exam szS powder free 5mil	Saved	01/29/2014 09:42:21	50.000	BOX	310.50	USD	772.50	USD	Saved
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11512751	4217 Medical Supplies	2		Rescue Blanket	Approved	01/16/2014 14:04:04	1,000.000	EA	25,000.00	USD	255,000.00	USD	Cannot Be Ordered
11512751	4217 Medical Supplies	3		Emergency Stretcher	Approved	01/16/2014 14:04:04	500.000	EA	30,000.00	USD	255,000.00	USD	Cannot Be Ordered
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11512710	Demo Time Test 1-9-14 CA	1		EMT ALS Medical Cases	Approved	01/09/2014 08:33:09	500.000	EA	75,000.00	USD	255,000.00	USD	Cannot Be Ordered
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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

Last Refresh 02/07/2014 09:41:28 EST [Refresh](#)

- Results of the selected query are displayed in a table format
- “One-Step” buttons are available at the top of each query



Personal Object Worklist (POWL)

Shopping Carts

Show Quick Criteria Maintenance

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

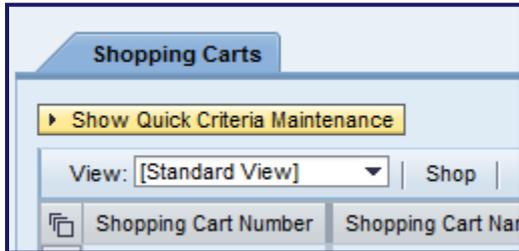
Shopping Cart Number	Shopping Cart Name	Item Number	Configurable Item Number	Item Name	Status	Created On	Quantity	Unit	Net Value	Currency	Total Net Value	Currency	Item Status
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11512710	Demo Time Test 1-9-14 CA	3		Emergency Stretcher	Approved	01/09/2014 08:35:28	500.000	EA	30,000.00	USD	255,000.00	USD	Cannot Be Ordered

Last Refresh 02/07/2014 09:41:28 EST Refresh

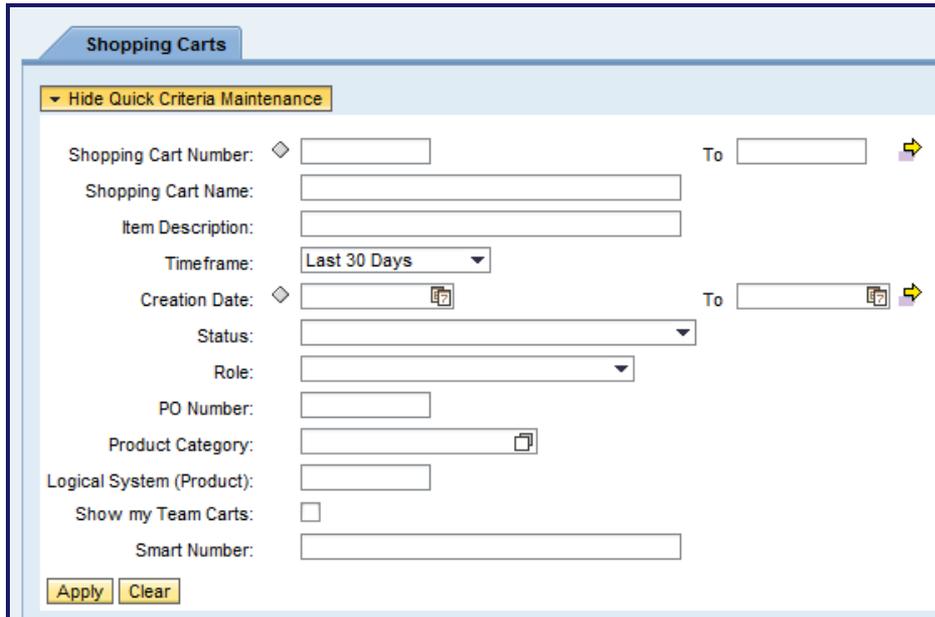
- To make additional One-Step options available, choose a document to work with



Personal Object Worklist (POWL)



- You may display additional fields for your query by selecting the **SEARCH CRITERIA** button



Shopping Carts

▼ Hide Quick Criteria Maintenance

Shopping Cart Number: To

Shopping Cart Name:

Item Description:

Timeframe: Last 30 Days

Creation Date: To

Status:

Role:

PO Number:

Product Category:

Logical System (Product):

Show my Team Carts:

Smart Number:

Apply Clear



Sample Document Landscape (Shopping Cart)

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

◀ Previous | Next ▶ | Order | Close | Save | Check

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		HVAC A/C Unit Maintenance	72151200	HVAC CONS SVC	12.000	MON	525.00	USD		1		02/21/2014	0	0		None
*	Undefined Item Type			80121800	FAMILY LAW SVCS	1.000		0.00	USD		1		02/07/2014	0	0		
*	Undefined Item Type			80121800	FAMILY LAW SVCS	1.000		0.00	USD		1		02/07/2014	0	0		
*	Undefined Item Type			80121800	FAMILY LAW SVCS	1.000		0.00	USD		1		02/07/2014	0	0		
*	Undefined Item Type			80121800	FAMILY LAW SVCS	1.000		0.00	USD		1		02/07/2014	0	0		
*	Undefined Item Type			80121800	FAMILY LAW SVCS	1.000		0.00	USD		1		02/07/2014	0	0		
*	Undefined Item Type			80121800	FAMILY LAW SVCS	1.000		0.00	USD		1		02/07/2014	0	0		
*	Undefined Item Type			80121800	FAMILY LAW SVCS	1.000		0.00	USD		1		02/07/2014	0	0		
*	Undefined Item Type			80121800	FAMILY LAW SVCS	1.000		0.00	USD		1		02/07/2014	0	0		
Total Value 6,300.00 USD Tax amount 0.00 USD Total Val. (Gross) 6,300.00 USD																	



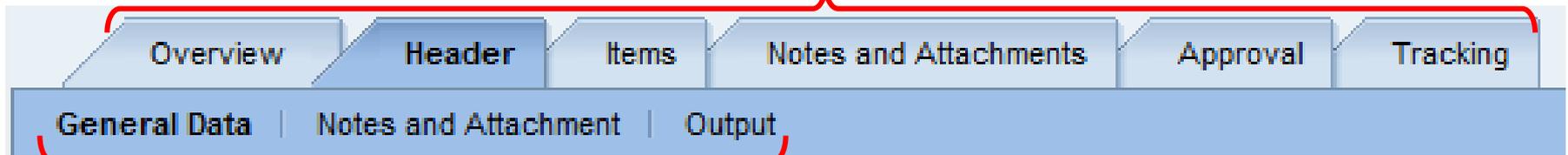
Sample Document Landscape (PO)

Title and Header Area



- Title and Header areas contain command buttons, and information about the document such as document number, document type, document date, total value, and supplier

Tab Pages



Sub Tabs

- Various data is contained throughout each of the tabs and sub-tabs. For example, Notes and Attachments tab would contain text and attachments.



Sample Document Landscape (PO)

Create Purchase Order

Order Save Print Preview Check Close Related Links

Enter at least one item or one line

Purchase Order Number: 4300004108 Purchase Order Type: Standard PO Status: In Process Document Date: 05/26/2013 Total Value (Gross): 0.00 USD Smart Number

Overview Header Items Notes and Attachments Approval Tracking

General Header Data

Smart Number:

Smart Number is External

Purchase Order Number: 4300004108

PO Name: 5810 Seating

Supplier: 152 PENNSYLVANIA INDUSTRIES FOR THE I

Requester: 317923 Cynthia Anderson

Recipient: 317923

Location: 300022

Ship-To Address: 354836

Purchasing Organization: CCPA Purchasing Organization

Purchasing Group: DGS Central Purchasing Group Show Members

Total Value (Net): 0.00 USD

Note to Supplier:

Internal Note:

Item Overview

Details Add Item Copy Paste Duplicate Delete Unselect Propose Sources of Supply Add Condition Remove Condition Exercise Option Process All Items Filter Settings

Line Number	Deleted	Item Type	Item Number	Product ID	Description	Product Category	Quantity	Unit	Gross Price	Currency	Per	Net Price	Option Type	Order Type	Condition	Option Status	Delivery Date	Account Assignment Type	Account Assignment Number
*		Material	0		managerial seating	58101000	1.000	EA	487.95	USD	1	0.00							
*		Material	0				0.000		0.00	USD	0	0.00							
*		Material	0				0.000		0.00	USD	0	0.00							
*		Material	0				0.000		0.00	USD	0	0.00							
*		Material	0				0.000		0.00	USD	0	0.00							
*		Material	0				0.000		0.00	USD	0	0.00							
*		Material	0				0.000		0.00	USD	0	0.00							
*		Material	0				0.000		0.00	USD	0	0.00							
*		Material	0				0.000		0.00	USD	0	0.00							
Total Value (Net) 0.00 USD Total Tax 0.00 USD Total Value (Gross) 0.00 USD																			

The area that data is entered is known as the Application Area.

Application Area

21

SMART BUYING


pennsylvania
 STATE OF PROCUREMENT

Search Feature

▼ Partner

Details Add Send E-Mail Call Clear

Function	Number	Match Code Icon
Requester	326419	
▼ Vendor	100012	AS
Service Agent		
Goods Recipient	326419	Alt
Ship-To Address	300001	EX
Location	90	DP

All Values: Requester

Search Criteria Personal Value List Settings Hide Search Criteria

Business Partner: ⇨

Name 1/last name: ⇨

Name 2/First name: ⇨

Search term 1: ⇨

Search term 2: ⇨

User Name: ⇨

E-Mail Address: ⇨

Org. Unit Name: ⇨

BP Org. Unit: ⇨

Restrict Number of Value List Entries To

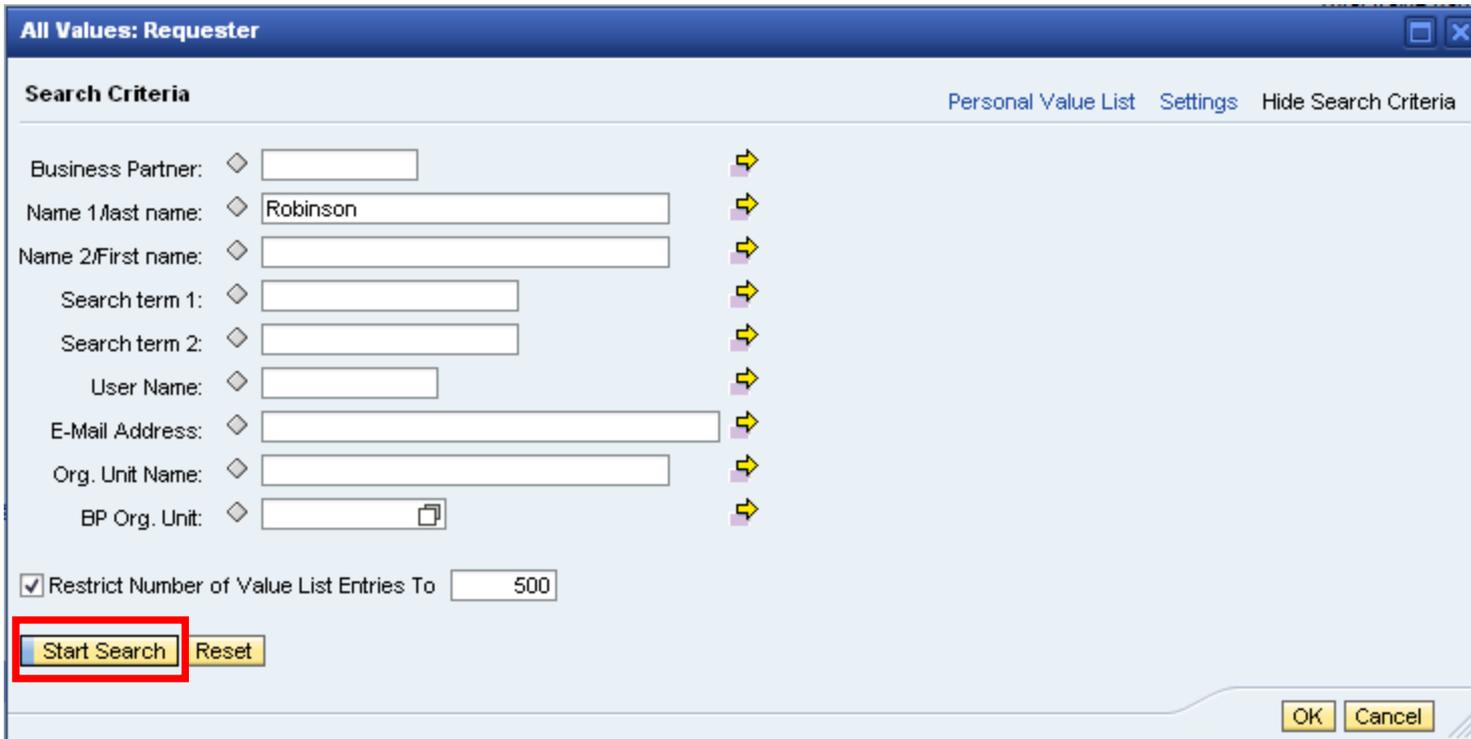
Start Search Reset

OK Cancel

- Select the match code icon to open a dialog box to input the search criteria



Search Feature



All Values: Requester

Search Criteria [Personal Value List](#) [Settings](#) [Hide Search Criteria](#)

Business Partner: ↕

Name 1/last name: ↕

Name 2/First name: ↕

Search term 1: ↕

Search term 2: ↕

User Name: ↕

E-Mail Address: ↕

Org. Unit Name: ↕

BP Org. Unit: ↕

Restrict Number of Value List Entries To

Start Search

- Enter the applicable criteria and select the **START SEARCH** button



Search Feature

All Values: Requester

Search Criteria [Personal Value List](#) [Settings](#) [Hide Search Criteria](#)

Business Partner: 

Name 1/last name: 

Name 2/First name: 

Search term 1: 

Search term 2: 

User Name: 

E-Mail Address: 

Org. Unit Name: 

BP Org. Unit: 

Restrict Number of Value List Entries To

Results List: 45 results found for Ilumber

Last name	First name	Org. Unit Name	BusinessPartner
Robinson	Robert	LIVR6320	324100
Robinson	Mary	LIVR6340	324467
Robinson	Alfonzo	GSAD4540	326419
Robinson	Mark	GSAD4540	326421
Robinson	Maretta	PWMAL0207	327572
Robinson	Deborah	PWMPH5103	327699
Robinson	Brittany	PWSEL3340	328712
Robinson	William	PWTOR0973	329508
Robinson	Matthew	GSPM3321	329967

- The Results List displays
- Highlight the desired item and select OK



Search Feature

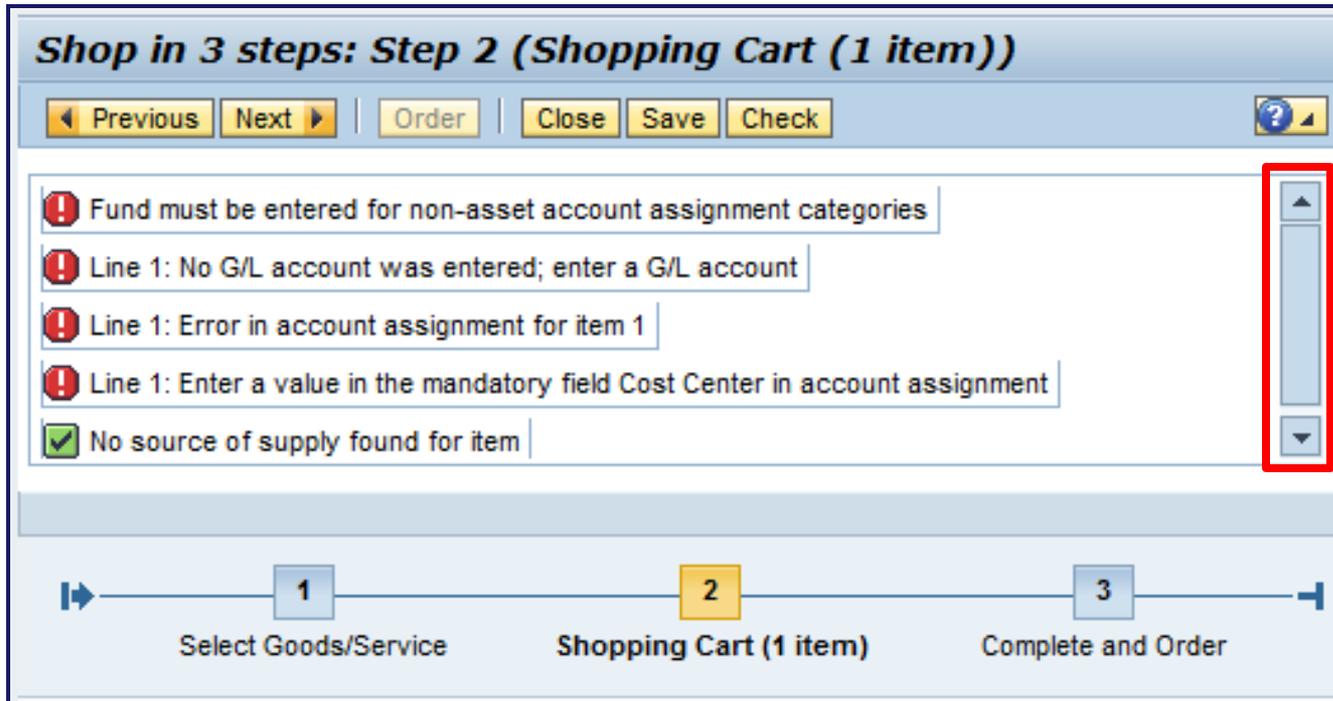
▼ Partner

Details Add Send E-Mail Call Clear

Function	Number	Name
▪ Requester	326419	Alf
▼ Vendor	100012	AS
▪ Service Agent		
▪ Goods Recipient	326419	Alf
▪ Ship-To Address	300001	EX
▪ Location	90	DPI

- The chosen value is transferred into the applicable field





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
- ✓ No source of supply found for item

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

- Tips, Warnings, and Error messages are located at the top of the screen rather than the bottom
- Up to five (5) error messages will display at a time, use the scroll bar on the left to see additional messages



Getting Started in SRM 7.0



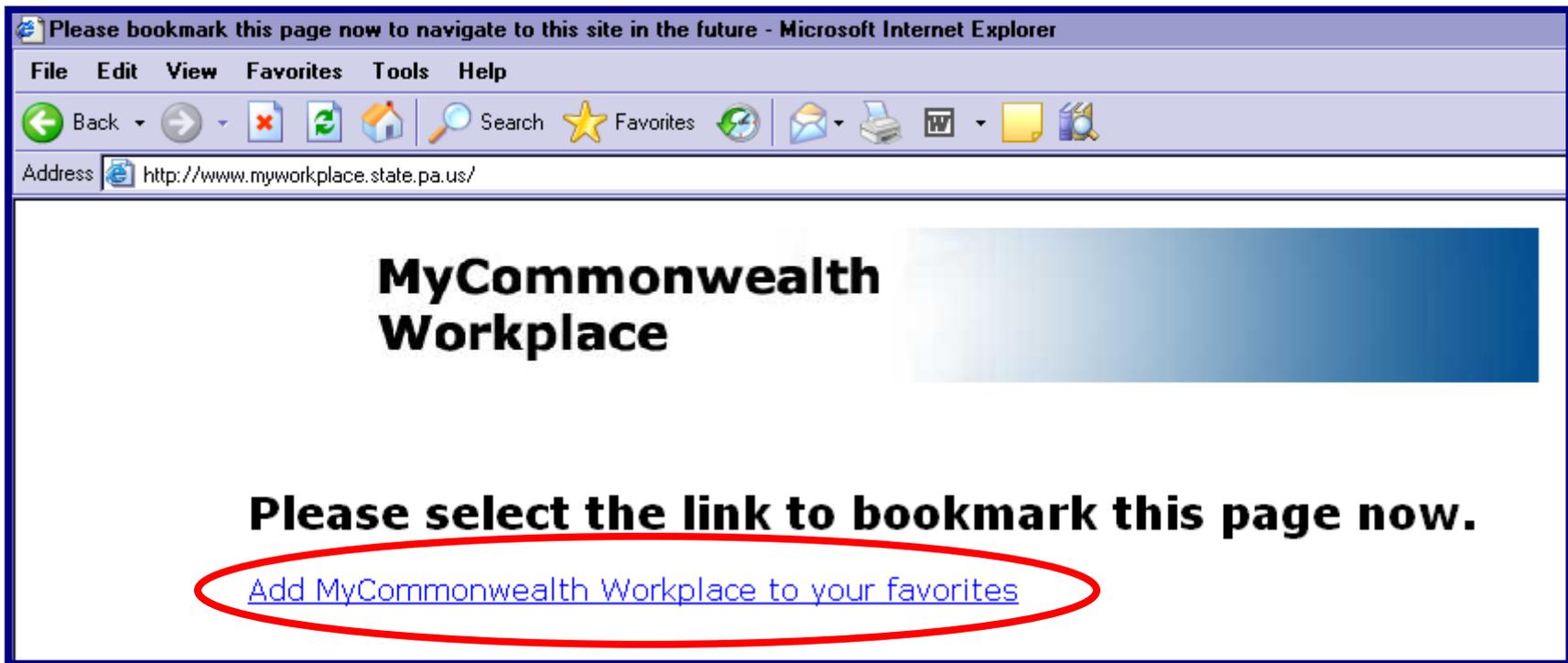
Logging On

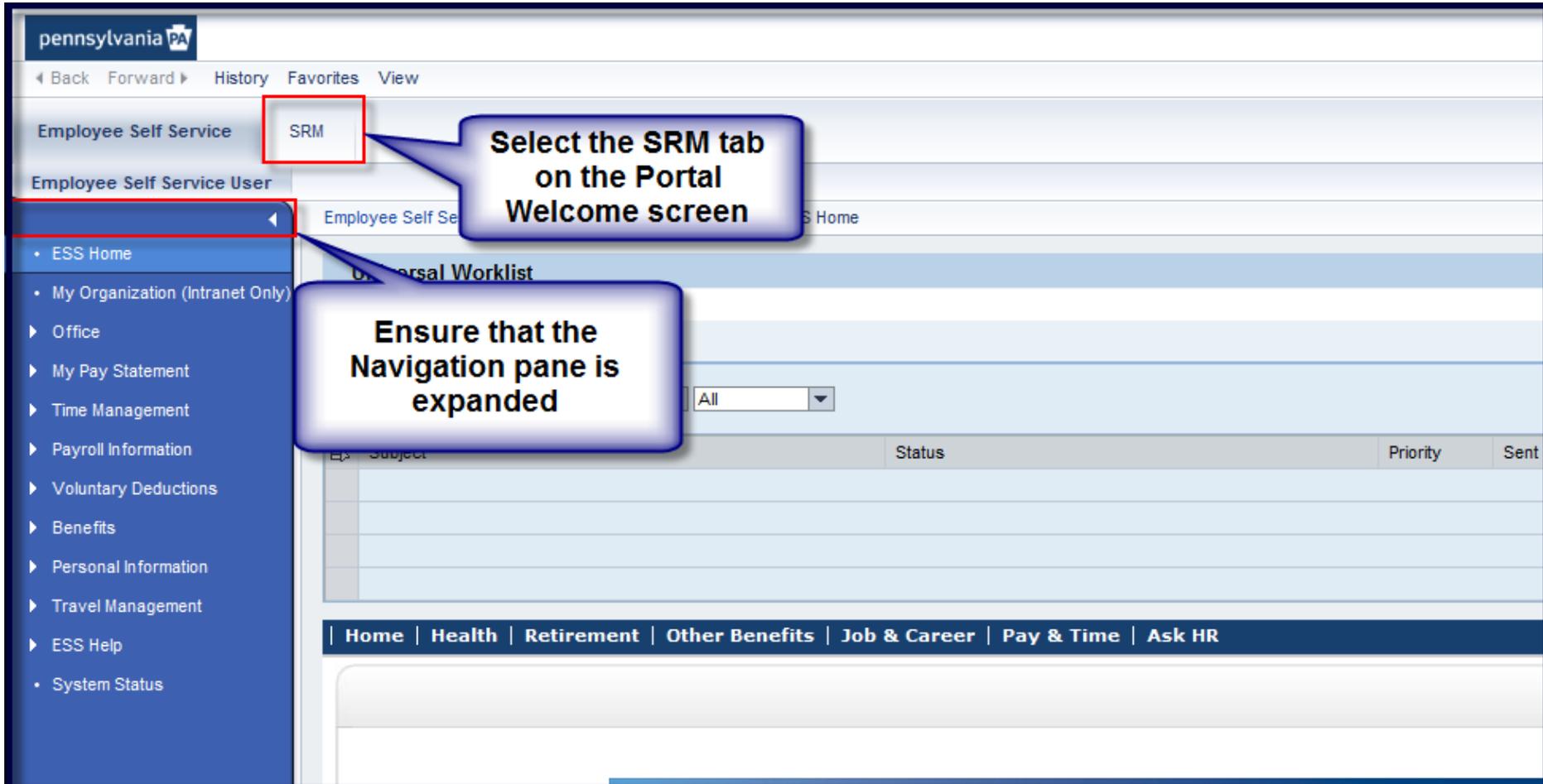
1. Launch Internet Explorer
2. Type www.myworkplace.state.pa.us into the address bar and select the Go button



Logging On

To bookmark the address as a favorite, select the link as shown below





The screenshot shows the Pennsylvania Employee Self Service portal. At the top, there is a navigation bar with "Back", "Forward", "History", "Favorites", and "View" buttons. Below this, the "SRM" tab is highlighted with a red box. A callout bubble points to it with the text: "Select the SRM tab on the Portal Welcome screen".

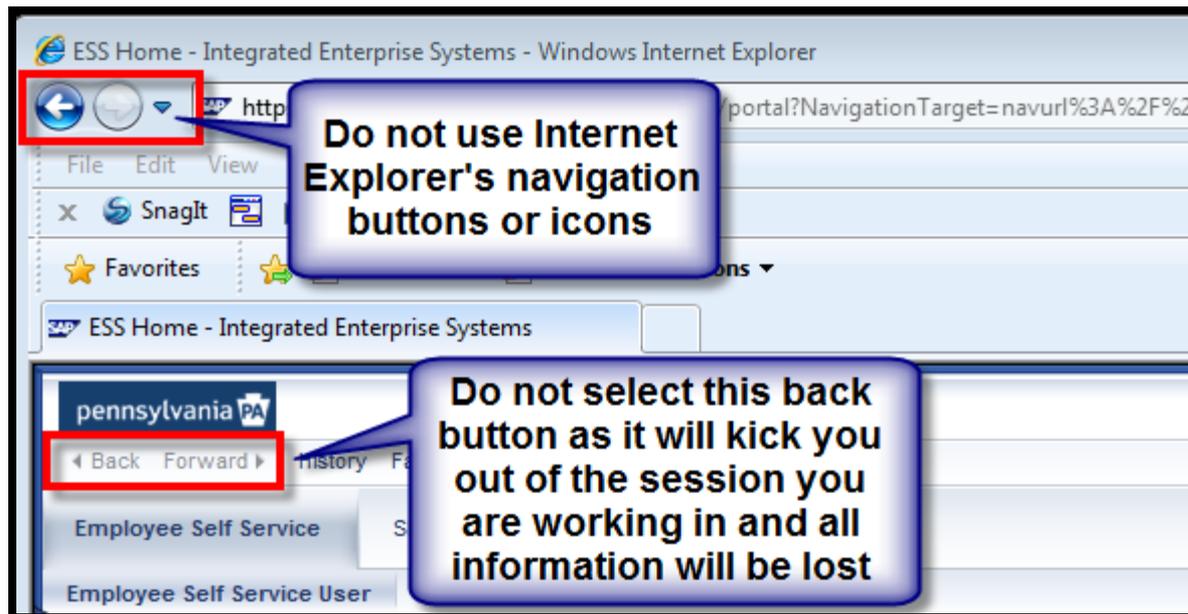
Below the SRM tab, the "Employee Self Service User" navigation pane is expanded, showing a list of options: "ESS Home", "My Organization (Intranet Only)", "Office", "My Pay Statement", "Time Management", "Payroll Information", "Voluntary Deductions", "Benefits", "Personal Information", "Travel Management", "ESS Help", and "System Status". A callout bubble points to this pane with the text: "Ensure that the Navigation pane is expanded".

The main content area shows a "Universal Worklist" table with columns for "Subject", "Status", "Priority", and "Sent". A dropdown menu is set to "All". At the bottom, there is a navigation bar with links: "Home", "Health", "Retirement", "Other Benefits", "Job & Career", "Pay & Time", and "Ask HR".

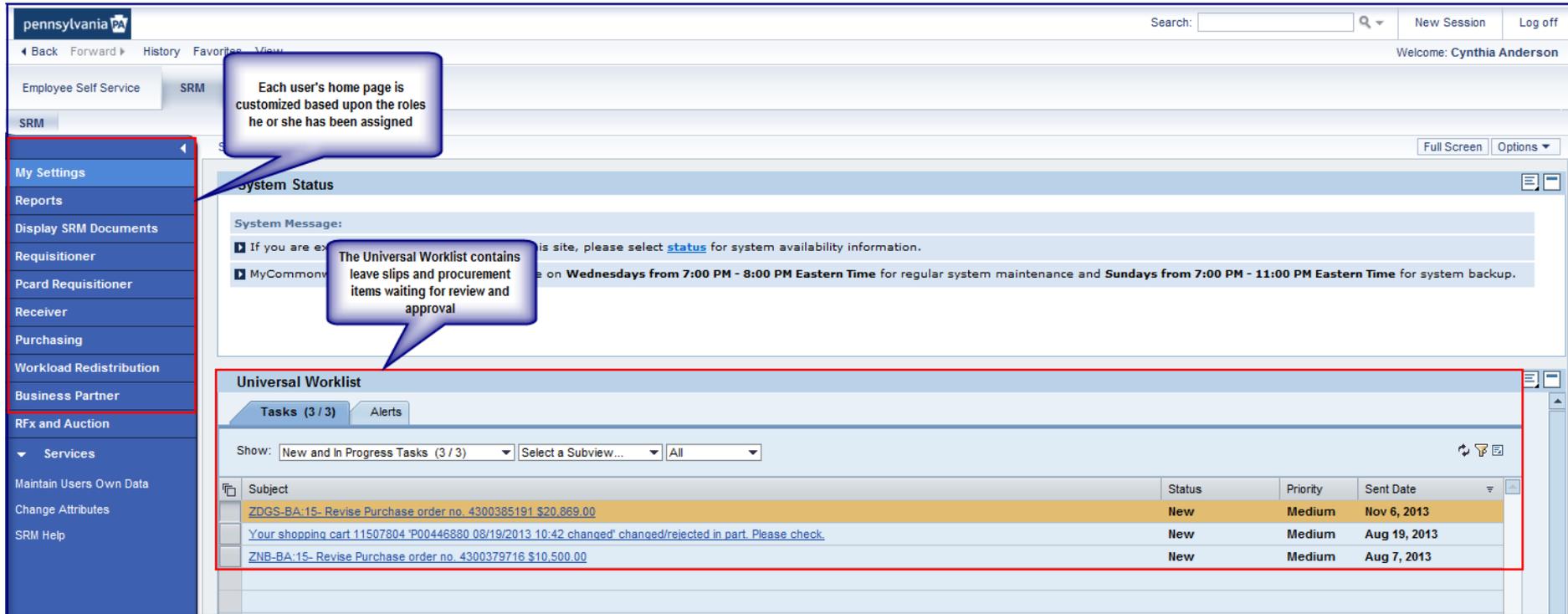


Navigation Tips

- You must use SRM's navigation buttons
- Using Internet Explorer's navigation buttons exits SRM and causes loss of data



SRM Home Page



Each user's home page is customized based upon the roles he or she has been assigned

The Universal Worklist contains leave slips and procurement items waiting for review and approval

System Status

System Message:

- If you are experiencing issues on this site, please select [status](#) for system availability information.
- MyCommonwealth will be down 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 (3 / 3) Alerts

Show: **New and In Progress Tasks (3 / 3)** Select a Subview... All

Subject	Status	Priority	Sent Date
ZDGS-BA:15- Revise Purchase order no. 4300385191 \$20,869.00	New	Medium	Nov 6, 2013
Your shopping cart 11507804 'P00446880 08/19/2013 10:42 changed' changed/rejected in part. Please check.	New	Medium	Aug 19, 2013
ZNB-BA:15- Revise Purchase order no. 4300379716 \$10,500.00	New	Medium	Aug 7, 2013



Function	SRM
Navigation	<p>Screens are simple to navigate</p> <p>SRM has a user-friendly look and feel</p>
Supplier per Cart	<p>Separate shopping carts are required for each supplier</p>
Searching	<p>Search criteria is user-friendly</p> <p>Product details are shown</p>
Creating Purchase Orders (PO)	<p>POs are automatically created for certain materials and suppliers</p>



Function	SRM
Account Assignment	<p>General Ledger (G/L) codes must be entered</p> <p>Users have the ability to set default account assignment preferences</p> <p>Cost assignments can be distributed based on quantity, percentage or value</p> <p>Online account search is available</p>



Function	SRM
Workflow	<p>Flexible approval, enables organizations to manage the requisitioning of goods</p> <p>Workflows are automatically in compliance with purchasing thresholds</p>



Function	SRM
Copying	Line item copying is available and easy to use User can distribute costs, change shipping address, and edit individual line items
Receiving	Partial quantities can be returned or canceled



Common Buttons

	<p>Command buttons appear throughout SRM</p> <ul style="list-style-type: none"> The buttons contain text that indicates what command will be performed
	<p>Action Item buttons appear in line items</p> <ul style="list-style-type: none"> The DETAILS button is used to review and/or add related data to a line item in a shopping cart The ADD ITEM button is used to add an item from another shopping cart and/or catalog The COPY/PASTE buttons are used to copy individual line items, completely transferring the item details and pasting to another line item The DUPLICATE button is used to copy all data from one line item to another without pasting The DELETE button is used to remove an item from the shopping cart

Common Buttons (cont'd)

	<ul style="list-style-type: none"> • When icons are grayed-out (inactive), the user is not able to perform that function
	<p>Match Code icon appears when search capability is available</p> <ul style="list-style-type: none"> • Select the Match Code to display applicable criteria • Asterisks (*) should be used before and after keywords • Capitalization does not affect search returns



Procurement – the act of obtaining or buying goods and services. The process includes preparation and processing of a requirement as well as the receipt and approval of payment.

Receiving – accepting delivery of a product or service

Requisition (shopping cart) – written request or order for goods or services

Requisitioner – individual who creates the requisition (shopping cart)

Workflow – term used to refer to the movement of work from one responsible party to another



Knowledge Check



1. SRM simplifies the purchasing process and improves accuracy and productivity by minimizing manual administrative tasks

a. True

b. False



2. One supplier can be added to a single cart

a. True

b. False



3. When icons are grayed-out, are users able to perform that function?

a. Yes

b. No



4. Can you use the Internet Explorer “Back” button/icon to navigate in SRM?

a. Yes

b. No



Select the link below to complete an online survey

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