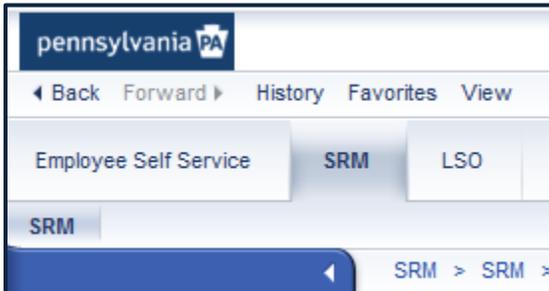


Creating a Describe Requirement Shopping Cart

Use this procedure when you want to create a Shopping Cart and are not able to utilize any of the existing contract catalogs.

1. Log into SRM via the web address www.myworkplace.state.pa.us
2. Select the SRM tab



3. Select Requisitioner from the left navigation pane
4. Select Create Shopping Cart from the Services workset



5. Select the **Describe what you need** link

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	MRO - ARBILL - SAFETY	MRO - Grainger, Gen Electric
	MRO - Schaedler - Electrical and Sylvania	MRO - Wesco - Phillips
	Material/Service Contract Catalog(MSCC)	Peripherals & Networking Gear - CDW-G
	Peripherals & Networking Gear - POMEROY	Peripherals & Networking Gear - ePlus
	Thermo Fisher Scientific	UniqueSource Products & Services
	VWR LAB SUPPLIES	

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

6. The Describe Requirement dialog box will display

- Allow the default **“Product Type”** to remain at **“Material”**. **Do not** change the product type field to **“Service”**. The system will identify if a material or service is being ordered based on the Product Category.
- Enter the description of the material or service in the Description field
- Enter a Justification in the Internal Note
- Select the match code icon in the Product Category to search for the proper Product Category. You may also use the following website to see additional detail on the description of the product category name www.unspsc.org.

Describe Requirement

Product Type: Material

* Description:

Internal Note:

Product Category: FREIGHT FEE

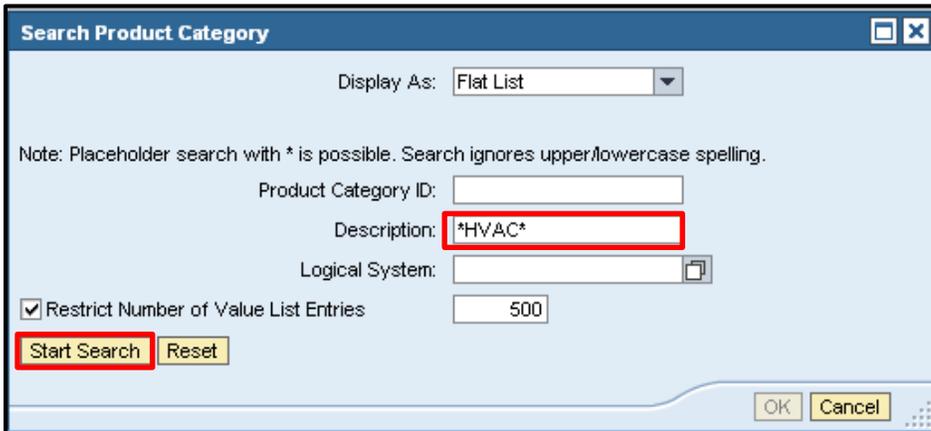
Quantity / Unit: 1.000

Net Price / Currency: 0.00 USD

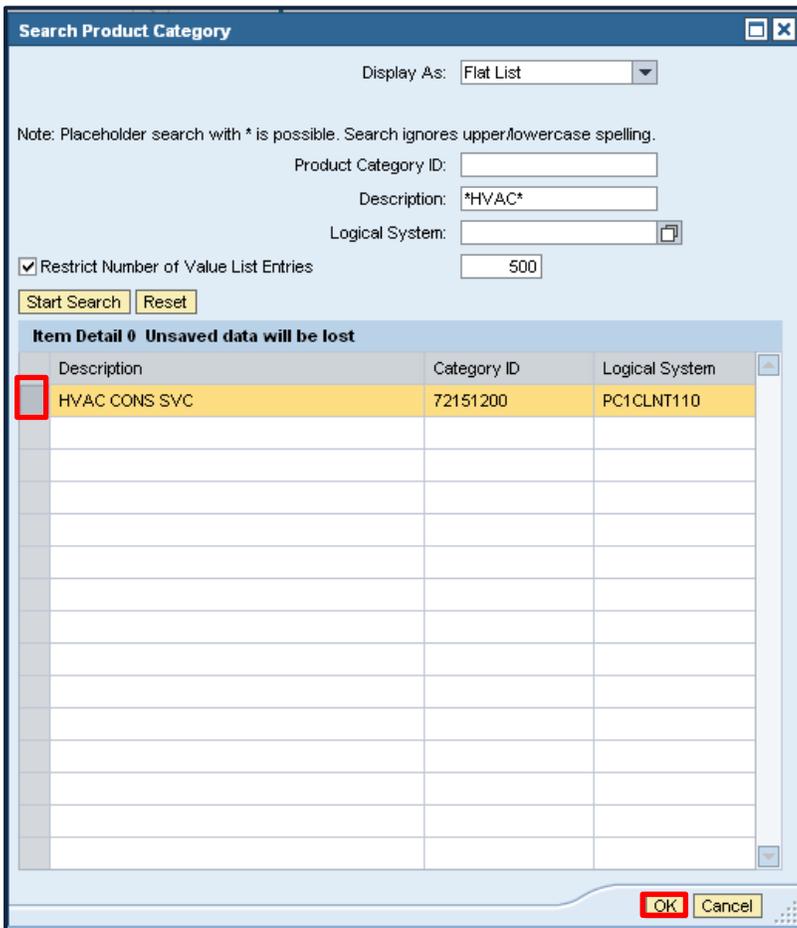
Delivery Date: 10/28/2014

OK Cancel

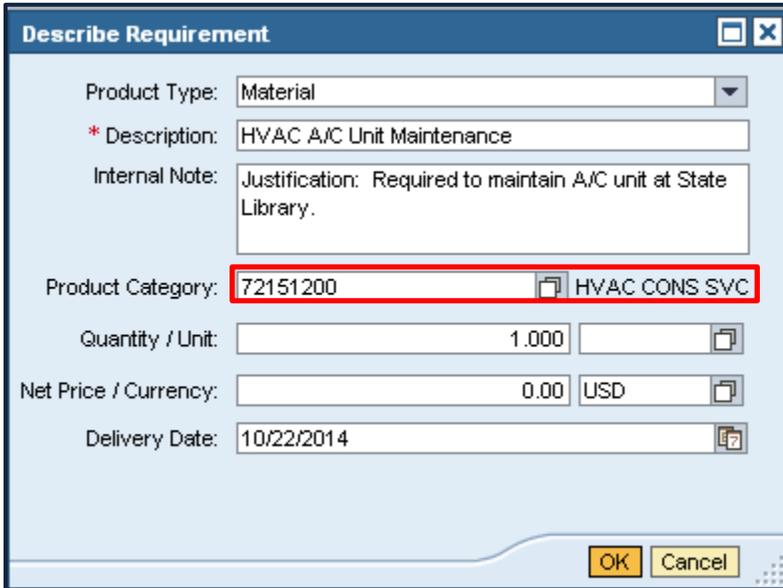
- i. The Search Product Category dialog box will display. Enter the applicable search criteria in the Description field. For example: *HVAC*
- ii. Select the START SEARCH button



- iii. Select the *gray* box
- iv. Select the OK button



- e. The Product Category ID number and description populates in the Product Category field



The 'Describe Requirement' dialog box contains the following fields:

- Product Type: Material
- * Description: HVAC A/C Unit Maintenance
- Internal Note: Justification: Required to maintain A/C unit at State Library.
- Product Category: 72151200 HVAC CONS SVC (highlighted with a red box)
- Quantity / Unit: 1.000
- Net Price / Currency: 0.00 USD
- Delivery Date: 10/22/2014

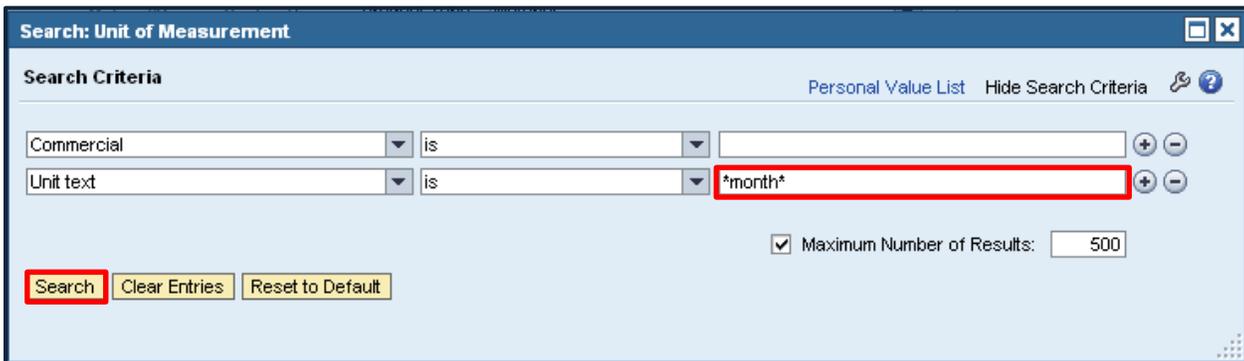
Buttons: OK, Cancel

- f. In the Quantity/Unit field, enter the Quantity
- g. Select the match code to search for the Unit



Quantity / Unit: 12 [Match Code Icon]

- i. When the All Values: Unit of Measurement dialog box displays, in the Unit text field, enter the unit of measure as shown in the example
- ii. Select the SEARCH button



The 'Search: Unit of Measurement' dialog box contains the following elements:

- Search Criteria: Commercial is []
- Search Criteria: Unit text is *month* (highlighted with a red box)
- Maximum Number of Results: 500
- Buttons: Search (highlighted with a red box), Clear Entries, Reset to Default

iii. When the results display, select the *gray* box

Search: Unit of Measurement

Search Criteria Personal Value List Hide Search Criteria ?

Commercial is + -
Unit text is *month* + -

Maximum Number of Results:

Search **Clear Entries** **Reset to Default**

Results List: 1 results found for Unit of Measurement

Commercial	Unit text
<input type="checkbox"/>	Month

iv. Upon selection of the *gray* box, the unit of measure populates the Unit field

Quantity / Unit:

- h. In the Net Price/Currency field, enter the Unit Price of the material or service. The USD defaults to the Currency field and should not be changed.
- i. Select the Calendar icon in the Delivery Date field

Net Price / Currency:

Delivery Date:

j. This will display a calendar that will allow you to select the Month/Year and Date you want to set for your delivery

November 2014

	Mo	Tu	We	Th	Fr	Sa	Su
44	27	28	29	30	31	1	2
45	3	4	5	6	7	8	9
46	10	11	12	13	14	15	16
47	17	18	19	20	21	22	23
48	24	25	26	27	28	29	30
49	1	2	3	4	5	6	7

This will take you to Step 2 of the Shopping Cart Process.

7. Enter additional line items by entering the following information (as shown in the example below):
 - a. Description
 - b. Product Category
 - c. Quantity
 - d. Unit
 - e. Net Price/Limit (Unit Price)
 - f. Per (how many units the price is valid for)
 - g. Delivery Date
8. Select the DETAILS button to access additional information on the line item

The screenshot shows the 'Items in Shopping Cart' window with a progress bar at the top indicating three steps: '1 Select Goods/Service', '2 Shopping Cart (2 Items)', and '3 Complete and Order'. Below the progress bar, there are buttons for 'Details', 'Add Item', 'Copy', 'Paste', 'Duplicate', and 'Delete'. The main area contains a table with the following columns: 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, and Supplier. The table lists two main items: 'HVAC A/C Unit Maintenance' and 'Emergency Services', each with a quantity of 1 and a unit price of \$525.00 and \$1,100.00 respectively. Below the table, there is a summary section with 'Total Value' of 11,800.00 USD, 'Tax amount' of 0.00 USD, and 'Total Val. (Gross)' of 11,800.00 USD.

9. Select the Account Assignment sub-tab
10. Select the DETAILS button

The screenshot shows the 'Details for item 1 HVAC A/C Unit Maintenance' window. At the top, there are tabs for 'Item Data', 'Account Assignment', 'Notes and Attachments', 'Delivery Address', 'Sources of Supply', and 'Approval Process Overview'. The 'Account Assignment' tab is selected. Below the tabs, there is a text box that says 'You can see who bears the costs and, if necessary, you can distribute the cost to several cost centres'. Below this text box, there are buttons for 'Details', 'Add Line', 'Copy', 'Paste', 'Duplicate', 'Delete', 'Split Distribution', and 'Change All Items'. The main area contains a table with the following columns: Number, Accounting Line Number, Percentage, Account Assignment Category, Assign Number, Account Assignment Description, General Ledger Account, General Ledger Description, and Business Area. The table lists one account assignment with a percentage of 100.00 and a cost center.

11. Enter your Account Assignment information. You only need to enter minimal information as the other information will default based off the information entered. For State Funds, enter your Cost Center, Fund, and General Ledger. For Federal Funds, enter the same as above plus the Grant Internal Order.
 - a. You can split your Account Assignment by Percentage, Quantity, or Value
 - b. You can Add lines to the Account Assignment, Copy, Paste, Duplicate (doesn't require pasting), or Delete
 - c. You can also Change All Items – this works when all line items have the exact same Account Assignment. You can enter the first line item's Account Assignment, select COPY, then select the CHANGE ALL ITEMS button and it will put the Account Assignment on all line items.

12. Navigate through the line items with the navigation arrows

Details for item 1 HVAC A/C Unit Maintenance

Account Assignment

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 Descr
0001		100.00	Cost Center	157714000	

Details for Item 0001 : Cost Center

Basic Data

Percentage: *

Account Assignment Category:

Fund: DGS Procurement

Commitment Item:

Cost Center: *

Fund Center: DGS Procurement

Functional Area:

Controlling Area:

General Ledger Account: Electrical Supplies

Business Area:

13. Select the Notes and Attachments sub-tab

14. Select the Vendor Text link to add text pertinent to the material/service such as description, quote #/date, validity period, information to the supplier, contact information

15. Select the Internal Note link to add text for COPA employees such as Justification

Details for item 1 HVAC A/C Unit Maintenance

Notes and Attachments

Notes

Clear Filter Settings

Category	Description
Vendor Text	-Empty-
Internal Note	Justification: Required to maintain A/C unit at State L...

Attachments

Add Attachment Edit Description Versioning z 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										

16. Select Delivery Address to verify the information is correct

Details for item 1 HVAC A/C Unit Maintenance

Delivery Address

Reset

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

Name:

C/O:

Fax Number/Extension:

Building:

Street / House Number:

District:

Country: USA

Additional Name:

Phone Number / Extension:

E-Mail:

Floor / Room:

Postal Code / City:

Postal Code / P.O. Box:

Region: Pennsylvania

17. Select the Sources of Supply to select a source of supply if one is available. If none is available, a preferred supplier may be entered. See the three examples below.

No Contract Available may enter a Preferred Supplier:

Details for item 1 HVAC A/C Unit Maintenance

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
No possible sources of supply found in the system

Sources of Supply

Assign Supplier Compare Suppliers

Supplier Number	Supplier Name	Contract	Item	Contract Item Description	Supplier Product Number	Net Price	Currency

You may suggest a preferred supplier to the purchasing department

Preferred Supplier:

Contract is Available, only one Contract Supplier is available:

Details for item 1 3945 SPE150 3GE 4EHWIC-4SM 256MBCF 1GB D

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

Remove Assigned Supplier

The Item Will Be Ordered from the Following Supplier:

Supplier: 188996 EPLUS TECHNOLOGY INC Contract / Item: 4400002815/1

Purchasing Info Record: Delivery Date: 02/26/2014

Location / Plant: DGS Bureau of Procurem

Contract is Available, must select a Contract Supplier:

- Select *gray* box; select ASSIGN SUPPLIER button

Details for item 1 245/60R18 Radial Tires

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

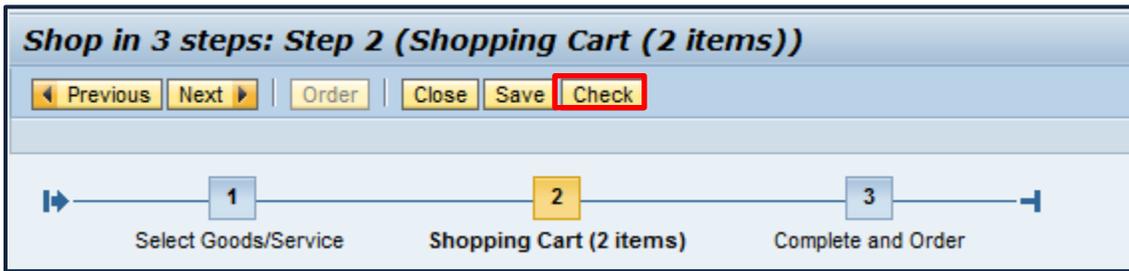
Supplier Number	Supplier Name	Contract	Item	Contract Item Description	Supplier Product Number	Net Price	Currency	Per	Unit	In Supplier List	Priority Rank	Priority Description	Interlinkage
101759	MICHELIN NORTH AMERICA INC	4400008516	1	TIRES, AUTO, TRUCK, OTR & FARM		205.69	USD	1	EA	No	0		No
161302	GOODYEAR TIRE & RUBBER COMPANY INC	4400008515	1	TIRES, AUTO, TRUCK, OTR & FARM		205.69	USD	1	EA	No	0		No
380896	TITAN TIRE CORPORATION	4400008517	1	TIRES, AUTO, TRUCK, OTR & FARM		205.69	USD	1	EA	No	0		No

You may suggest a preferred supplier to the purchasing department

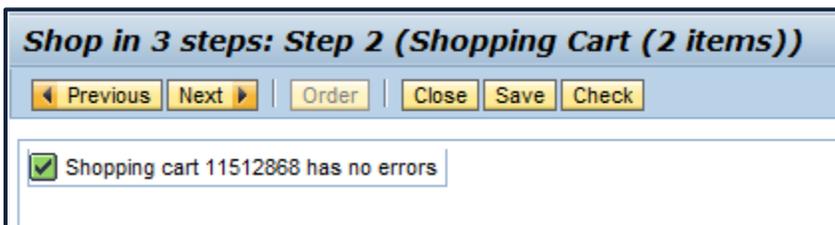
Preferred Supplier:

Shopping is just about finished.

18. Select the CHECK button to verify that the Shopping Cart has no errors



19. Should receive a message that states Shopping Cart has no errors. If you receive a message that states you have errors, you must resolve them before you can order the Shopping Cart.



20. Select Step 3, Complete and Order, to finish the Shopping Cart process



21. Name and Order your Shopping Cart

- a. Name your Shopping Cart by the DGS Naming Convention
 - i. 40 – Character Limit – includes letters, punctuation, and spaces
 - ii. The name must include
 1. 4 – digit UNSPSC code (Product Category)
 2. Space or Dash
 3. Noun that describes the item (no abbreviations)
 - iii. Example: 7215 HVAC Maintenance
- b. Select the ORDER button

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

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

1 2 3

Select Goods/Service Shopping Cart (2 items) Complete and Order

Name of shopping cart:

Number: 11512868

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

Note to Approver