

Processing a P-Card Requisition

Log into SRM

From the left navigation pane, select **Requisitioner**

Note: Individuals who do not have the Requisitioner role, and only process P-Card orders will use the P-Card Requisitioner role.

Select a Punch-out Catalog or Material/Service Contract Catalog (MSCC) to shop. After acquiring your items and sending them to your SRM shopping cart from the suppliers site, follow the instructions as shown below.

When creating a P-Card shopping cart in SRM, the following procedures below allow a user's P-Card information to auto-populate on all line items of the shopping cart.

Reminder: To place a P-Card order in the system, your SRM P-Card record must be maintained in SRM by your Agency P-Card Coordinator.

1. Select the DETAILS button or the line item number to access the item details

The screenshot shows the SRM Shopping Cart interface. At the top, it says "Shop in 3 steps: Step 2 (Shopping Cart (2 items))". Below this are navigation buttons: "Previous", "Next", "Order", "Close", "Save", and "Check". A progress bar shows three steps: "1 Select Goods/Service", "2 Shopping Cart (2 items)", and "3 Complete and Order".

The main section is titled "Items in Shopping Cart" and 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. There is also a "Filter Settings" link.

Line item 1 is highlighted in red, and the "Details" button next to it is also highlighted in red. The table contains the following data:

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		Plus-In CFL, Dimmable, Lamp Type Triple	39101619	COMPACT FLUORESCENT	5.000	EA	10.29	USD		1		11/16/2013	1	0		W.W. GRAINGER INC(162368)
2	Material		Linear Fluorescent Lamp, Lamp Shape T8	39101605	FLUORESCENT LAMPS	48.000	EA	2.56	USD		1		11/16/2013	1	0		W.W. GRAINGER INC(162368)
*	Undefined Item Type			78121603	FREIGHT FEE	1.000		0.00	USD		1		11/15/2013	0	0		
*	Undefined Item Type			78121603	FREIGHT FEE	1.000		0.00	USD		1		11/15/2013	0	0		
*	Undefined Item Type			78121603	FREIGHT FEE	1.000		0.00	USD		1		11/15/2013	0	0		
*	Undefined Item Type			78121603	FREIGHT FEE	1.000		0.00	USD		1		11/15/2013	0	0		
*	Undefined Item Type			78121603	FREIGHT FEE	1.000		0.00	USD		1		11/15/2013	0	0		
*	Undefined Item Type			78121603	FREIGHT FEE	1.000		0.00	USD		1		11/15/2013	0	0		
*	Undefined Item Type			78121603	FREIGHT FEE	1.000		0.00	USD		1		11/15/2013	0	0		
*	Undefined Item Type			78121603	FREIGHT FEE	1.000		0.00	USD		1		11/15/2013	0	0		

At the bottom right of the table, there is a summary section:

Total Value	174.33	USD
Tax amount	0.00	USD
Total Val. (Gross)	174.33	USD

2. In the Item Data section, select the “Proceed Using P-Card” checkbox.

Details for item 1 Linear Fluorescent Lamp, Lamp Shape T8

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

Identification

Item Type: Material
Product ID:
Description: Linear Fluorescent Lamp, Lamp Shape T8
Product Category: 39101605 FLUORESCENT LAMPS

Currency, Values and Pricing

Order Quantity / Unit: 48.000 EA Each
Ordered Quantity / Unit: 0.000
Open Quantity / Unit: 0.000
Price / Currency: 2.56 USD Price Unit 1

Organization

Purchasing Group: Local Purchasing Group Show Members
Company Code: COPA COMMONWEALTH OF PA

Service and Delivery

Goods Recipient: 703389 Cynthia Anderson
Delivery Date: 11/16/2013

Further Properties

Supplier Product Number: 6XT99

Proceed Using P-CARD?:

3. Once the, “Proceed Using P-Card” option is selected, the Procurement Card Number field will display. Choose the P-Card number from the drop-down menu

Procurement Card: MC XXXXXXXXXXXX9639

MC XXXXXXXXXXXX9639

4. Go to Step 3 of the Wizard to name the shopping cart

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

Name of shopping cart: 3900 Lamps
Number: 11512467
Approval Process: Display / Edit Agents
Note to Approver

5. Select the SAVE button

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

Previous Next Order Close Save Check

- Using the Shopping Cart POWL, enter your Shopping Cart number and select the APPLY button to locate your Shopping Cart. Select the Shopping Cart number to access the Shopping Cart and continue processing.

The screenshot shows the SRM Requisitioner interface. The 'Shopping Cart Number' field is highlighted with a red box and contains the value '11512467'. The 'Apply' button is also highlighted with a red box. Below the form is a table listing shopping cart items.

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
11512467	3900 Lamps	1		Linear Fluorescent Lamp, Lamp Shape T8,	Saved	11/15/2013 11:13:44	48,000	EA	122.88	USD	174.33	USD	Saved
11512467	3900 Lamps	2		Plug-In CFL, Dimmable, Lamp Type Triple	Saved	11/15/2013 11:13:45	5,000	EA	51.45	USD	174.33	USD	Saved

7. Select the EDIT button and review the Item data sub-tab of each line item



8. In the Item Overview, select the DETAILS button or the Item number to access the item details

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

Navigation: Previous, Next, Order, Close, Save, Check

Progress: 1 Select Goods/Service, 2 Shopping Cart (2 items), 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		Plug-In CFL, Dimmable, Lamp Type Triple	39101619	COMPACT FLUORESCENT	5.000	EA	10.29	USD		1		11/16/2013	1	0		W W GRAINGER INC(182388)
2	Material		Linear Fluorescent Lamp, Lamp Shape T8	39101605	FLUORESCENT LAMPS	48.000	EA	2.56	USD		1		11/16/2013	1	0		W W GRAINGER INC(182388)
*	Undefined Item Type			78121603	FREIGHT FEE	1.000		0.00	USD		1		11/15/2013	0	0		
*	Undefined Item Type			78121603	FREIGHT FEE	1.000		0.00	USD		1		11/15/2013	0	0		
*	Undefined Item Type			78121603	FREIGHT FEE	1.000		0.00	USD		1		11/15/2013	0	0		
*	Undefined Item Type			78121603	FREIGHT FEE	1.000		0.00	USD		1		11/15/2013	0	0		
*	Undefined Item Type			78121603	FREIGHT FEE	1.000		0.00	USD		1		11/15/2013	0	0		
*	Undefined Item Type			78121603	FREIGHT FEE	1.000		0.00	USD		1		11/15/2013	0	0		
*	Undefined Item Type			78121603	FREIGHT FEE	1.000		0.00	USD		1		11/15/2013	0	0		
*	Undefined Item Type			78121603	FREIGHT FEE	1.000		0.00	USD		1		11/15/2013	0	0		
Total Value: 174.33 USD Tax amount: 0.00 USD Total Val. (Gross): 174.33 USD																	

9. The P-Card information will auto-populate on each line of the shopping cart. Review each line to verify the information has populated accurately.

4 Details for item 1 Plug-In CFL, Dimmable, Lamp Type Triple

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

Identification

Item Type: Material
 Product ID:
 Description: Plug-In CFL, Dimmable, Lamp Type Triple
 Product Category: 39101619 COMPACT FLUORESCENT

Currency, Values and Pricing

Order Quantity / Unit: 5.000 EA Each
 Ordered Quantity / Unit: 0.000
 Open Quantity / Unit: 5.000 EA
 Price / Currency: 10.29 USD Price Unit 1

Organization

Purchasing Group: Local Purchasing Group Show Members
 Company Code: COPA COMMONWEALTH OF PA

Further Properties

Supplier Product Number: 1PHA5

Service and Delivery

Goods Recipient: 816273 Cheryl Moore
 Delivery Date: 11/21/2013

Proceed Using P-CARD?:
 Procurement Card: MC XXXXXXXXXXX9639

10. After reviewing each line item, continue with the shopping card process, complete additional shopping cart information as necessary, (for example: cost assignment, notes and attachments, delivery address, sources of supply); select the ORDER button to order the shopping cart