SRM 7.0 Requisitioning

Supplier Relationship Management
Welcome!
Introductions
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

- Select the Attributes dropdown
Set User Attributes

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

- 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

Addresses and corresponding numbers are available online at: [www.dgs.pa.gov/procurement-resources/ship-to-address](http://www.dgs.pa.gov/procurement-resources/ship-to-address).
Set User Attributes: 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
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
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.
Team Shopping Cart Set-up

- 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

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

- The employee number populates the Name of Substitute field
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
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).

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

Once a substitute takes over and orders a cart, the cart will display in the substitute’s Team Cart POWL.
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
• 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
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
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
Contracts on eMarketPlace

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

[Image of eMarketplace website with highlighted Search Contracts section]
Contracts on eMarketPlace

This will open the Search Contracts screen as shown below.
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.
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.
Contracts on eMarketPlace

To view the contract detail, select the Contract Number link. A new screen will display as shown on the next slide.
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](image-url)
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.
Contracts on eMarketPlace: Overview

- To view the Contract Overview, select the blue “O” link

<table>
<thead>
<tr>
<th>CONTRACT DESCRIPTION/HIGHLIGHTS</th>
<th>CONTRACT INFORMATION</th>
</tr>
</thead>
<tbody>
<tr>
<td>This contract supplies all using agencies with Medical Supplies, Equipment and Nutritional Supplements. This is a 5 year contract with no renewals. McKesson Medical Supply is the only supplier for medical supplies and nutritional supplements. All other suppliers are for medical equipment.</td>
<td>Contract Change Revision Date:</td>
</tr>
<tr>
<td></td>
<td>Contract Title: Medical Supplies, Equipment and Nutritional Supplements</td>
</tr>
<tr>
<td></td>
<td>Contract Number: 4400009561</td>
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<tr>
<td></td>
<td>Solicitation Number: 6190022663</td>
</tr>
<tr>
<td></td>
<td>Original Validity Period: 7/1/2012 - 6/30/2017</td>
</tr>
<tr>
<td></td>
<td>Current Validity End Date &amp; Renewals Remaining: 6/30/2017 - No Renewals</td>
</tr>
<tr>
<td></td>
<td>Total Number of Contracts: 23</td>
</tr>
<tr>
<td></td>
<td>Point of Contact: Cheryl A. Barth-Taylor</td>
</tr>
<tr>
<td></td>
<td>Contact Phone Number: 717-703-2934</td>
</tr>
<tr>
<td></td>
<td>Contact Email Address: <a href="mailto:rhartney@pa.gov">rhartney@pa.gov</a></td>
</tr>
<tr>
<td></td>
<td>Pcard Accepted: YES NO</td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>PROCESS TO ORDER</td>
</tr>
<tr>
<td></td>
<td>Contract Type: Material</td>
</tr>
<tr>
<td></td>
<td>Contract Description: Catalog/Price List</td>
</tr>
<tr>
<td></td>
<td>End User Procedures: End User Procedures</td>
</tr>
<tr>
<td></td>
<td>Recommended EUP:</td>
</tr>
<tr>
<td></td>
<td>ITQ Procedures: ITQ Home</td>
</tr>
</tbody>
</table>
Contracts on eMarketPlace: Change Order

• To view the Change Notice, select the green “C” link

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COMMONWEALTH OF PENNSYLVANIA
DEPARTMENT OF GENERAL SERVICES
HARRISBURG

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

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.
• To view the Contract, select the orange “C” link
Copy of Fully Executed Contract

FULLY EXECUTED
Contract Number: 440010245
Contract Effective Date: 09/25/2012
Valid From: 08/14/2012 To: 06/30/2017

Purchasing Agent
Name: Barth Cheryl
Phone: 717-703-2934
Fax: 717-783-6241

Supplier Name/Address:
MCKESSON MEDICAL SURGICAL MINNESOTA SUPPLY INC.
8121 10TH Ave N
GOLDEN VALLEY MN 55427-0000 US

Supplier Phone Number: 800-800-8111
Supplier Fax Number: 800-237-9766

Contract Name:
Medical Supplies and Equipment

Payment Terms
NET 30

Solicitation No.: 6100022663
Issuance Date: 08/03/2012

Supplier Bid or Proposal No. (if applicable): 6500053308
Solicitation Submission Date: 08/14/2012

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.

<table>
<thead>
<tr>
<th>Item</th>
<th>Material/Service Desc</th>
<th>Qty</th>
<th>UOM</th>
<th>Price</th>
<th>Per Unit</th>
<th>Total</th>
</tr>
</thead>
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<tr>
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<td>Medical Supplies</td>
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<td>0.00</td>
<td>1</td>
<td>0.00</td>
<td>0.00</td>
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<tr>
<td>2</td>
<td>Medical Equipment</td>
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<td>1</td>
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<td>0.00</td>
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<tr>
<td>3</td>
<td>Nutritional Supplements</td>
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<td>0.00</td>
<td>1</td>
<td>0.00</td>
<td>0.00</td>
</tr>
</tbody>
</table>

Please Deliver To:
To be determined at the time of the Purchase Order unless specified below.

Header Text:
This contract is for the purchase of Medical Supplies, Equipment and Nutritional Supplements.

Supplier contact information:
MCKESSON MEDICAL SURGICAL MINNESOTA SUPPLY INC.
8121 10TH Ave N
GOLDEN VALLEY MN 55427-0000 US

Contact: Ross Browne
Telephone: 800-800-8111 Fax: 800-237-9766
Email: ross.browne@MCKESSON.COM

All contract questions should be directed to:
Cheryl Barth at cbarth@pa.gov
No further information for this contract.
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**
Contracts in SRM – Advanced Search

- 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
- **Contract Type:**
- **Status:** Released
- **Purchasing Organization:** 050008862
- **Supplier:**
- **Product:**
- **Product Category:**
- **Valid From:**

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

#### Search Results: 25 Contracts

<table>
<thead>
<tr>
<th>Number</th>
<th>Name</th>
<th>Purchasing Organization</th>
<th>Valid From</th>
<th>Valid To</th>
<th>Supplier</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>4400010725</td>
<td>Un-Armed &amp; Armed Security Guards</td>
<td>COPA Purchasing Organization</td>
<td>01/10/2012</td>
<td>07/31/2017</td>
<td>AM-GARD INC</td>
<td>Released</td>
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<td>4400010424</td>
<td>Un-Armed &amp; Armed Security Guards</td>
<td>COPA Purchasing Organization</td>
<td>01/10/2012</td>
<td>07/31/2017</td>
<td>MARLOWE E FREEMAN SR</td>
<td>Released</td>
</tr>
<tr>
<td>4400010376</td>
<td>Un-Armed &amp; Armed Security Guards</td>
<td>COPA Purchasing Organization</td>
<td>09/18/2012</td>
<td>07/31/2017</td>
<td>SECURITY GUARD INC</td>
<td>Released</td>
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<tr>
<td>4400010375</td>
<td>Un-Armed &amp; Armed Security Guards</td>
<td>COPA Purchasing Organization</td>
<td>09/16/2012</td>
<td>07/31/2017</td>
<td>GITTNGS PROTECTIVE SECURITY</td>
<td>Released</td>
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<td>4400010366</td>
<td>Un-Armed &amp; Armed Security Guards</td>
<td>COPA Purchasing Organization</td>
<td>09/11/2012</td>
<td>07/31/2017</td>
<td>Prestige Security Specialists Inc</td>
<td>Released</td>
</tr>
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<td>4400010364</td>
<td>Un-Armed &amp; Armed Security Guards</td>
<td>COPA Purchasing Organization</td>
<td>09/11/2012</td>
<td>07/31/2017</td>
<td>CAULEY DETECTIVE AGENCY INC</td>
<td>Released</td>
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<td>4400010361</td>
<td>Un-Armed &amp; Armed Security Guards</td>
<td>COPA Purchasing Organization</td>
<td>09/10/2012</td>
<td>07/31/2017</td>
<td>GRAHAM &amp; GRAHAM SECURITY &amp; SERVICES</td>
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<tr>
<td>4400010360</td>
<td>Un-Armed &amp; Armed Security Guards</td>
<td>COPA Purchasing Organization</td>
<td>09/10/2012</td>
<td>07/31/2017</td>
<td>FOND SECURITY SERVICE LLC</td>
<td>Released</td>
</tr>
<tr>
<td>4400010359</td>
<td>Un-Armed &amp; Armed Security Guards</td>
<td>COPA Purchasing Organization</td>
<td>09/10/2012</td>
<td>07/31/2017</td>
<td>SECURITY GUARDS INC</td>
<td>Released</td>
</tr>
</tbody>
</table>

- **Display the document from the Search Result**
• 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)
• 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.
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)

Find:

Browse:
- Old Shopping Carts and Templates
- Internal Goods/Services
- CI WEBSITE - VIEW ONLY
- Material/Service Contract Catalog (MSCC)
- PA Compute Services – Unisys
- Peripherals & Networking Gear - CDW-G
- Peripherals & Networking Gear - POMEROY
- 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)

Find:


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)

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

- 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
• 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
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.
Free Text: Step 2 (Shopping Cart)

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

- Select the DETAILS button or the Line Item Number to view the details of the line item
Line item detail is in a tabular format just below the Item Overview.
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.

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

- 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

- 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
- Select the ADD ATTACHMENT button to browse for a document
  - Attach the document by selecting the OK button
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.
• 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.
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).
Source of Supply

- Select the Filter option to narrow your search options

Select the column you want to filter by, e.g. the Contract column.
- Left click on the column to select (User-Defined Filter…)

Select the Filter option to narrow your search options

Select the column you want to filter by, e.g. the Contract column.
- Left click on the column to select (User-Defined Filter…)
Source of Supply

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

- Results for the searched contract displays.

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

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

- 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

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

- Select the ADD APPROVER button
Adding an Ad Hoc Approver

- 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

- 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
- Select the OK button to proceed
Adding an Ad Hoc Approver

- 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
Step 3 (Complete and Order)

- 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

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

http://eniesrwda01.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)

In this example, we are selecting the Material/Service Contract Catalog (MSCC).
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.
The results will display on the MSCC Catalog screen
Adjust the number of rows per page, if desired, using the dropdown arrow

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
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.
Select items to compare by placing checks in the boxes to the left of the items.

Select the COMPARE button.
The selected items are displayed side-by-side for simple comparison.
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

<table>
<thead>
<tr>
<th>Fields</th>
<th>Item 1</th>
<th>Item 2</th>
<th>Item 3</th>
<th>Item 4</th>
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</tr>
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<td>Category</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Short Description</td>
<td>GAUZE 4X4 PERF 4 PLY NS</td>
<td>GAUZE 4X4 VRSNL 4 PLY ST</td>
<td>GAUZE 4X4 YDS DERM ST</td>
<td>GAUZE PAD 4&quot;x4&quot;</td>
</tr>
<tr>
<td>Long Description</td>
<td>PERFORMANCE PLUS GAUZE SPONGE NON WOVEN NON STERILE 4&quot;x4&quot; 4 PLY</td>
<td>VERSALON NONWOVEN ALL PURPOSE SPONGES 4&quot;x4&quot; 4 PLY STERILE LINT FREE</td>
<td>DERNACEA GAUZE FLUFF ROLL 4&quot;x4&quot; YARDS STERILE</td>
<td>PERFORMANCE 4X4 GAUZE SPONGE 8 PLY NON STERILE</td>
</tr>
<tr>
<td>Product ID</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Product Group</td>
<td>MEDICAL EQUIP &amp;</td>
<td>MEDICAL EQUIP &amp;</td>
<td>MEDICAL EQUIP &amp;</td>
<td>MEDICAL EQUIP &amp;</td>
</tr>
<tr>
<td>Manufacturer Part Number</td>
<td>94442000</td>
<td>8044</td>
<td>441103</td>
<td>44082000</td>
</tr>
<tr>
<td>External Manufacturer</td>
<td>McKesson</td>
<td>KENDALL COMPANY</td>
<td>KENDALL COMPANY</td>
<td>McKesson</td>
</tr>
<tr>
<td>Delivery Time in Days</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Price Information</td>
<td>2.58 USD</td>
<td>1.91 USD</td>
<td>0.57 USD</td>
<td>2.74 USD</td>
</tr>
<tr>
<td>Price Base Quanity</td>
<td>200 Pack</td>
<td>25 Box</td>
<td>1 Each</td>
<td>200 Pack</td>
</tr>
<tr>
<td>Supplier Part Number</td>
<td>94442000</td>
<td>35262000</td>
<td>44032001</td>
<td>44082000</td>
</tr>
<tr>
<td>Minimum Quantity</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Total Price</td>
<td>0.01 USD</td>
<td>0.06 USD</td>
<td>0.57 USD</td>
<td>0.01 USD</td>
</tr>
</tbody>
</table>
MSCC: Compare Two or More Items in COPA Ecatalog or MSCC

• Select the Check Out link
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.
• 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://eniesrwda01.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)

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

Reminder: Supplier sites may vary when adding/or removing items to your Shopping Cart.
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.
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
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
Edit a Shopping Cart

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

Note: To delete all line items within the shopping cart, select the “Table Selection” menu and highlight “Select All” and the DELETE button.
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
```
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.
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.
Delete a Shopping Cart

- A message displays confirming Shopping Cart number xxxxxxxx was successfully deleted.
Check Shopping Cart Status
To check the status of your Shopping Cart:

- From the POWL, enter applicable criteria
- Select the APPLY button
The screen shown above displays the results of your search showing the Item Status. Select the Shopping Cart number to display the Shopping Cart.
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

- 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
• 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
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
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
Thank you!

SRM 7.0
Requisitioning