



Supplier
Relationship
Management

SRM 7.0 *Delta*
Requisitioning



Welcome!

Thank you for taking time to complete this course.



Welcome



Course Navigation

The information in this course is presented on a series of 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.



Welcome



Welcome!

Introduction

What's New in SRM 7.0?

Walking through an SRM Order

Knowledge Check

This course is separated into topics, and those topics are shown on the menu to the left.

Select the **MENU** button on a slide at any time during the course to display this menu.

Then, simply select a topic's button to view that topic.



Introduction

Introduction



COURSE OBJECTIVES

- After successfully completing this course, participants will be able to:
 - List three key differences between SRM 5.0 and SRM 7.0
 - Understand the *Team Shopping Cart* functionality
 - Utilize SRM search functions to shop for items
 - Process a shopping cart
 - Check the status of shopping carts



What is New in SRM 7.0?

What is New in SRM 7.0?



Key Functional Differences SRM 5.0 vs. SRM 7.0

Function /Summary	SRM 5.0	SRM 7.0
SAP Purchase Requisitions (PRs) will workflow to SRM	<ul style="list-style-type: none"> • Inventory contracts reside in SAP <ul style="list-style-type: none"> – PRs are created and maintained in SAP 	<ul style="list-style-type: none"> • Procurements are performed “end to end” in SRM 7.0 <ul style="list-style-type: none"> – PRs generated in SAP will transfer into SRM as approved shopping carts
Shopping Cart line item Account Assignments may be split by value	<ul style="list-style-type: none"> • Functional in SRM 5.0 <ul style="list-style-type: none"> – Errors occur upon replication of the Purchase Order to SAP 	<ul style="list-style-type: none"> • Fully functional in SRM 7.0 <ul style="list-style-type: none"> – Purchase Orders replicate properly to SAP – Account Assignments split correctly by value

What is New in SRM 7.0?



Key Functional Differences SRM 5.0 vs. SRM 7.0

Function /Summary	SRM 5.0	SRM 7.0
Entry of Goods Receipts	<ul style="list-style-type: none"> • Entry of Goods Confirmations in SRM 	<ul style="list-style-type: none"> • Entry of Goods Receipts in SAP <ul style="list-style-type: none"> – Transaction is performed via a web-enabled interface on the Enterprise Portal
“Team” Shopping Cart	N/A	<ul style="list-style-type: none"> • Shopping carts can be made accessible to multiple Requisitioners <ul style="list-style-type: none"> – Access is assigned by the shopping cart creator – Assignments are restricted to Requisitioners within the same organization

What is New in SRM 7.0?



Key Functional Differences SRM 5.0 vs. SRM 7.0

Function /Summary	SRM 5.0	SRM 7.0
Screen navigation and layout	<ul style="list-style-type: none"> • Line item details are in a “top to bottom” layout <ul style="list-style-type: none"> – Each area of the shopping cart is expandable and collapsible 	<ul style="list-style-type: none"> • Line items details are “tabbed” <ul style="list-style-type: none"> – Tabs are positioned side-by-side, left to right
Shopping cart creation with no contract reference or via a catalog	<ul style="list-style-type: none"> • Function is entitled “Describe Requirement” 	<ul style="list-style-type: none"> • Now known as “Free Text”

What is New in SRM 7.0?



Key Functional Differences SRM 5.0 vs. SRM 7.0

Function /Summary	SRM 5.0	SRM 7.0
Shopping Cart Status	<ul style="list-style-type: none"> Status is displayed upon selection of the “Shopping Cart Status” link on the navigation pane 	<ul style="list-style-type: none"> Requisitioners’ shopping carts display within their Personal Object Worklist (POWL) <ul style="list-style-type: none"> – A “Status” column is included in the POWL display
“Save” button	<ul style="list-style-type: none"> The “hold’ button is used for incomplete shopping carts 	<ul style="list-style-type: none"> The ‘hold’ button is replaced with ‘save’

What is New in SRM 7.0?

Most key functions are unaffected by SRM 7.0, including:

Function /Summary	SRM 7.0
Ordering Carts	The “Shop in 3 Steps” wizard is present and operates as it has in SRM 5.0
Workflow	Approver workflows are automatically in compliance with purchasing thresholds
Auto Purchase Orders (POs)	POs are automatically created for certain products and vendors
P-Cards	P-Card functionality is integrated into the shopping cart process
Change Attributes	User Attributes must be set upon the first log-in
Suppliers per Cart	Separate shopping carts are required for each supplier



Requisitioning

Requisitioning



Walking Through SRM: A Brief Virtual Tour

Requisitioning



START THE TOUR!

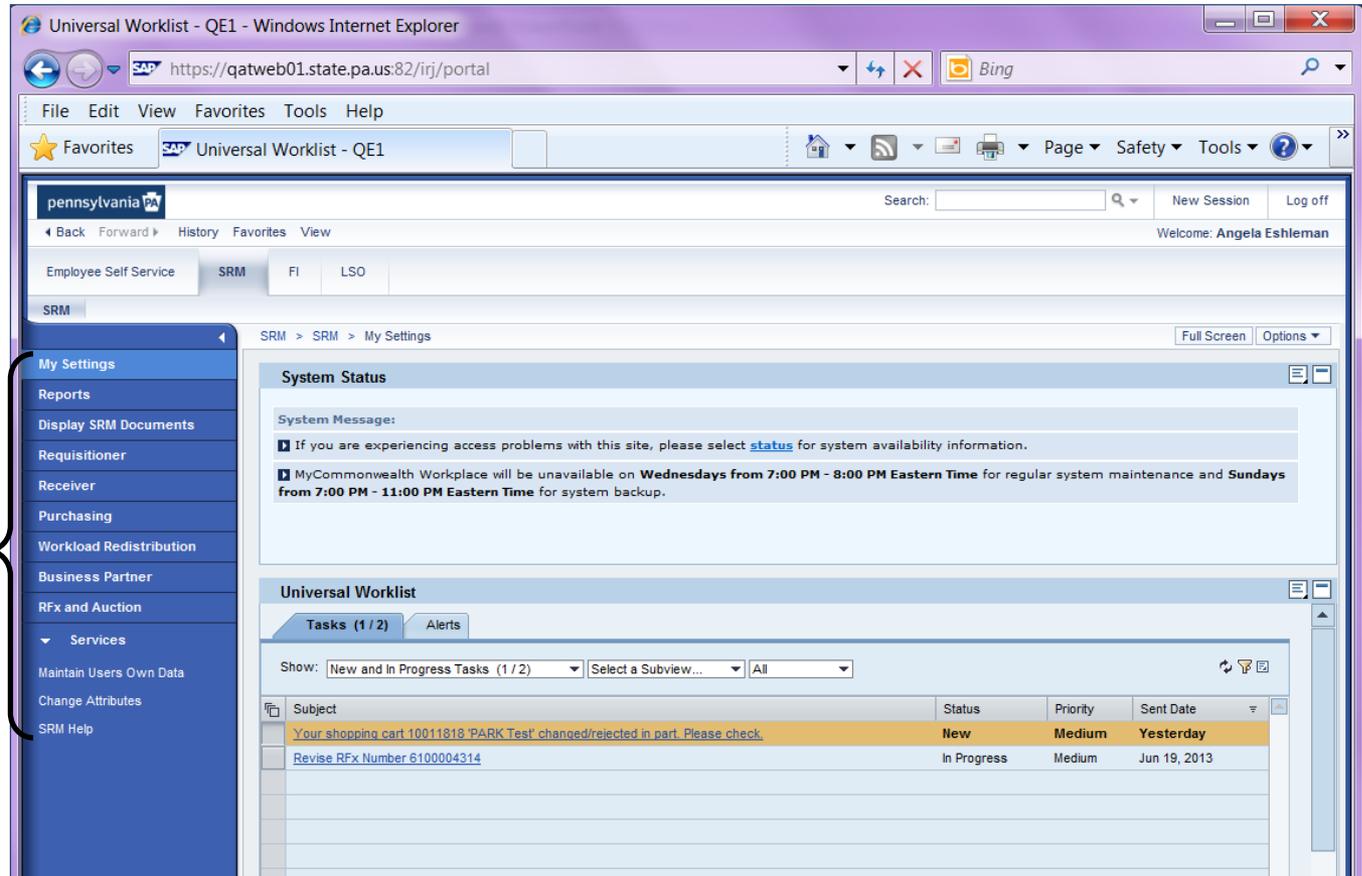
- A tour of SRM Requisitioning screens is displayed on the next series of slides
- Screen and functionality changes from SRM 5.0 to SRM 7.0 are highlighted on the screen shots
- A demonstration will be provided showing the creation of two types of shopping carts

Select the NEXT button in the upper right corner to begin the virtual tour

Requisitioning: Navigation



The first difference you will see is in the navigation pane



The screenshot shows a web browser window titled "Universal Worklist - QE1 - Windows Internet Explorer". The address bar shows the URL "https://qatweb01.state.pa.us:82/irj/portal". The browser's menu bar includes File, Edit, View, Favorites, Tools, and Help. The page header features the Pennsylvania logo, a search bar, and user information: "Welcome: Angela Eshleman".

The main content area is divided into a left navigation pane and a main workspace. The navigation pane is highlighted with a blue background and contains the following items:

- My Settings
- Reports
- Display SRM Documents
- Requisitioner
- Receiver
- Purchasing
- Workload Redistribution
- Business Partner
- RFX and Auction
- Services
- Maintain Users Own Data
- Change Attributes
- SRM Help

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

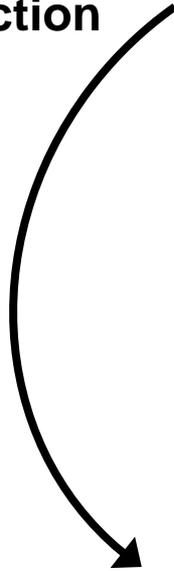
- System Status:** Displays system messages, including a notice about system availability: "MyCommonwealth Workplace will be unavailable on Wednesdays from 7:00 PM - 8:00 PM Eastern Time for regular system maintenance and Sundays from 7:00 PM - 11:00 PM Eastern Time for system backup."
- Universal Worklist:** Shows a table of tasks. The "Tasks (1/2)" tab is active. The table has columns for Subject, Status, Priority, and Sent Date.

Subject	Status	Priority	Sent Date
Your shopping cart 10011818 'PARK Test' changed/rejected in part. Please check.	New	Medium	Yesterday
Revise RFX Number 6100004314	In Progress	Medium	Jun 19, 2013

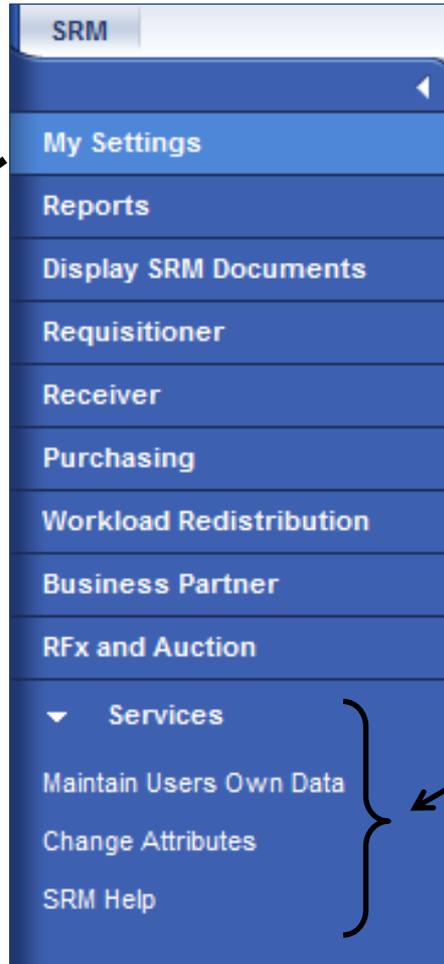
Requisitioning: Navigation



**Role/
Function**



Workset

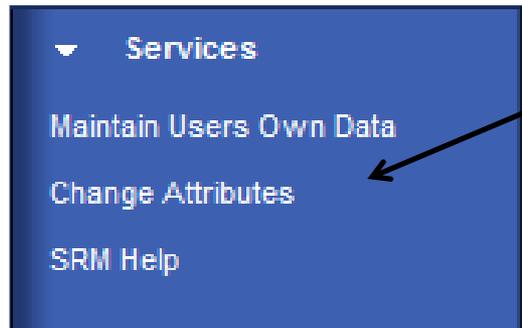
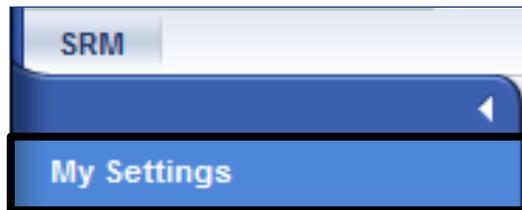


SRM

- My Settings
- Reports
- Display SRM Documents
- Requisitioner
- Receiver
- Purchasing
- Workload Redistribution
- Business Partner
- RFX and Auction
- Services
 - Maintain Users Own Data
 - Change Attributes
 - SRM Help

Each role/function now contains a “Workset” of services which display upon selection

Requisitioning: Navigation



- When you first login to SRM 7.0, verify that the Attributes you set in SRM 5.0 have carried over
- Establish “Team Shopping” settings by selecting the *Change Attributes* link

Requisitioning: Team Shopping

CHANGE ATTRIBUTES SCREEN

- Select the *User Account* tab

Display Document:

 Edit

Employee ID 317922 Name Ms. Angela Eshleman

▼ Personal Data

Form of Address: Academic Title:

First Name: Last Name:

Position **User Account**

<p>Organizational Assignment</p> <p>Department: <input type="text" value="GSPR2530"/> 00152530; GS Bus Prcs Cnstng Div</p> <p>Position: <input type="text" value="08640"/> 50266527; Admv Ofr 2</p> <p>Functional Assignment</p> <p>Department Head Of: <input type="text"/></p> <p>Purchasing Group: <input type="text" value="DGS Central"/> 50000080 ; DGS Central Purchasing Group</p> <p>Department Address</p> <p>Street/ House Number: <input type="text" value="515 North Office B"/></p> <p>Postal Code/ City: <input type="text" value="17125"/> <input type="text" value="Harrisburg"/></p> <p>Country: <input type="text" value="US"/></p>	<p>Department Address Details</p> <p>Building: <input type="text"/></p> <p>Floor/ Room Number: <input type="text"/> <input type="text"/></p> <p>Inhouse Mail: <input type="text"/></p> <p>Communication Type: <input type="text"/></p> <p>Phone Number/ Extension: <input type="text"/> <input type="text"/></p> <p>Fax Number / Extension: <input type="text"/> <input type="text"/></p> <p>E-Mail: <input type="text" value="P00068292@PA.LCL"/></p>
---	---

Attributes for Position Admv Ofr 2

Attribute:

Requisitioning: Team Shopping



- Select the EDIT button to proceed with the assignment

Your "Procurement Substitutes" will be the individual(s) processing shopping carts on your behalf

Display Document:

 Edit

Employee ID 317922 Name Ms. Angela Eshleman

▼ Personal Data

Form of Address: Academic Title:

First Name: Last Name:

Position **User Account**

Standard Settings

User ID:

E-Mail:

Time Zone:

Language:

Date Format:

Decimal Notation:

My Procurement Substitutes for Team Purchasing

[Settings](#)

Name of Substitute	Start Substitution On	End Substitution On

Persons I Represent As Substitute

[Settings](#)

Substitute For	Start Substitution On	End Substitution On
 The table does not contain any data		

Requisitioning: Team Shopping



▼ Personal Data

Form of Address: Academic Title:

First Name: Last Name:

Position **User Account**

Standard Settings

User ID:

E-Mail:

Time Zone:

Language:

Date Format:

Decimal Notation:

My Procurement Substitutes for Team Purchasing

[Settings](#)

Name of Substitute	Start Substitution On	End Substitution On
<input type="text"/>	<input type="text"/>	<input type="text"/>

Persons I Represent As Substitute

[Settings](#)

Substitute For	Start Substitution On	End Substitution On
<input type="text" value="The table does not contain any data"/>		

- Use the search function to locate your “Procurement Substitute’s” name

Requisitioning: Team Shopping



User Account Search □ ×

Search Criteria Hide Search Criteria

User:

Last name:

First name:

Results List: 1 results found for Name of Substitute

User	First name	Last name	E-Mail Address	User group	Valid from	Valid through
P00446880	Cynthia	Anderson	cyanderson@pa.lcl	15DGS	01/09/2004	12/31/9999

- After locating the individual's name, select OK

Requisitioning: Team Shopping



▼ Personal Data

Form of Address: Academic Title:

First Name: Last Name:

Position **User Account**

Standard Settings

User ID:

E-Mail:

Time Zone:

Language:

Date Format:

Decimal Notation:

My Procurement Substitutes for Team Purchasing [Settings](#)

[Add Line](#) [Remove](#)

Name of Substitute	Start Substitution On	End Substitution On
P00446880		

Persons I Represent As Substitute [Settings](#)

Substitute For	Start Substitution On	End Substitution On
The table does not contain any data		

The employee number populates the *Name of Substitute* field

– Complete the *Start Substitute On* and *End Substitute On* date fields

Requisitioning: Team Shopping

- Select the SAVE button to save the updates

- If additional “Procurement Substitutes” are required, select the ADD LINE button and repeat the previous steps

Edit Document:

Save Read Only Check

Employee ID 317922 Name Ms. Angela Eshleman

▼ Personal Data

Form of Address: Ms. Academic Title:

First Name: Angela Last Name: Eshleman

Position User Account

Standard Settings

User ID: P00068292

E-Mail: P00068292@pa.lcl

Time Zone:

Language:

Date Format: MM/DD/YYYY

Decimal Notation: 1,234,567.89

My Procurement Substitutes for Team Purchasing

Add Line Remove Settings

Name of Substitute	Start Substitution On	End Substitution On
P00446880	07/01/2013	07/15/2013

Persons I Represent As Substitute

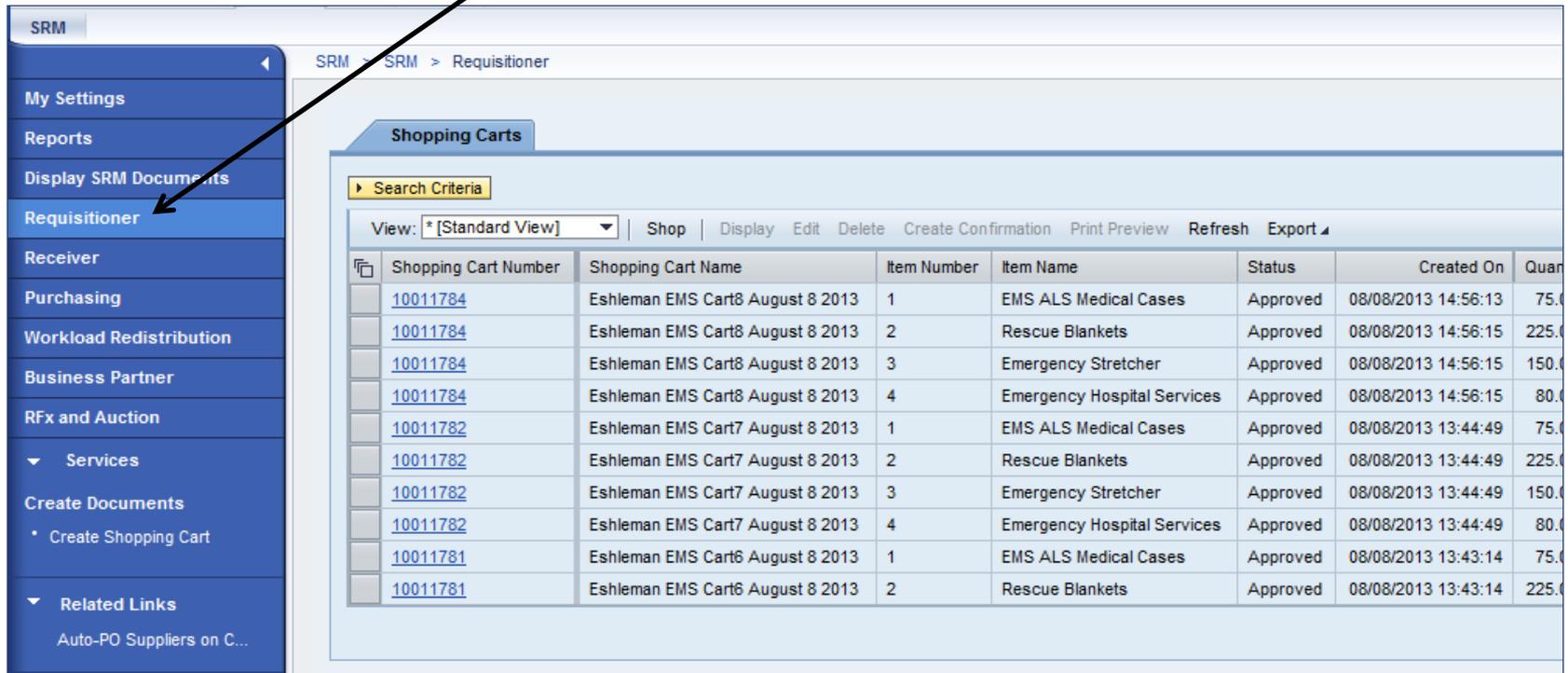
Settings

Substitute For	Start Substitution On	End Substitution On
 The table does not contain any data		

Requisitioning

PERSONAL OBJECT WORKLIST (POWL)

Here we selected the Requisitioner role

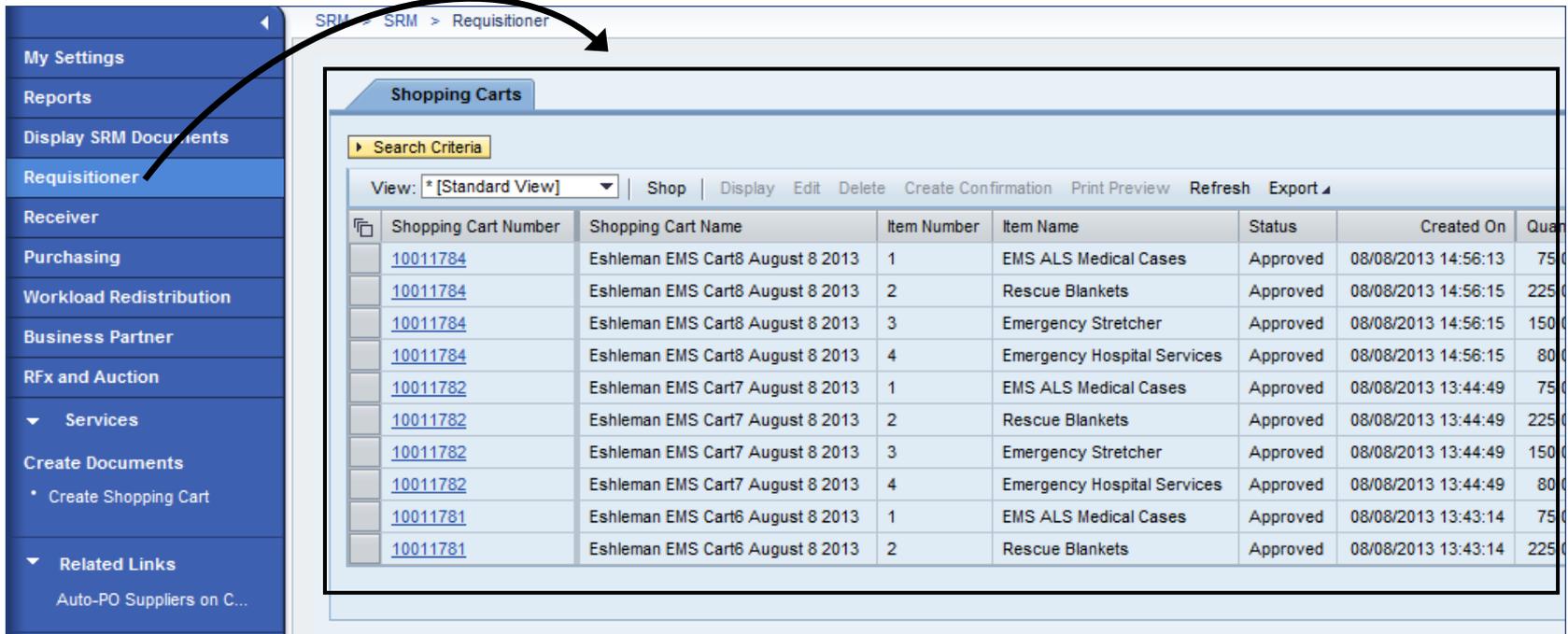


The screenshot shows the SRM (Supply Relationship Management) interface for a Requisitioner. The left sidebar contains a navigation menu with the following items: My Settings, Reports, Display SRM Documents, Requisitioner (highlighted with a blue bar and an arrow pointing to it), Receiver, Purchasing, Workload Redistribution, Business Partner, RFX and Auction, Services, Create Documents (with a sub-item 'Create Shopping Cart'), and Related Links (with a sub-item 'Auto-PO Suppliers on C...'). The main content area is titled 'Shopping Carts' and features a search criteria field and a table of shopping cart items. The table has columns for Shopping Cart Number, Shopping Cart Name, Item Number, Item Name, Status, and Created On. The data in the table is as follows:

Shopping Cart Number	Shopping Cart Name	Item Number	Item Name	Status	Created On	Quantity
10011784	Eshleman EMS Cart8 August 8 2013	1	EMS ALS Medical Cases	Approved	08/08/2013 14:56:13	75.0
10011784	Eshleman EMS Cart8 August 8 2013	2	Rescue Blankets	Approved	08/08/2013 14:56:15	225.0
10011784	Eshleman EMS Cart8 August 8 2013	3	Emergency Stretcher	Approved	08/08/2013 14:56:15	150.0
10011784	Eshleman EMS Cart8 August 8 2013	4	Emergency Hospital Services	Approved	08/08/2013 14:56:15	80.0
10011782	Eshleman EMS Cart7 August 8 2013	1	EMS ALS Medical Cases	Approved	08/08/2013 13:44:49	75.0
10011782	Eshleman EMS Cart7 August 8 2013	2	Rescue Blankets	Approved	08/08/2013 13:44:49	225.0
10011782	Eshleman EMS Cart7 August 8 2013	3	Emergency Stretcher	Approved	08/08/2013 13:44:49	150.0
10011782	Eshleman EMS Cart7 August 8 2013	4	Emergency Hospital Services	Approved	08/08/2013 13:44:49	80.0
10011781	Eshleman EMS Cart6 August 8 2013	1	EMS ALS Medical Cases	Approved	08/08/2013 13:43:14	75.0
10011781	Eshleman EMS Cart6 August 8 2013	2	Rescue Blankets	Approved	08/08/2013 13:43:14	225.0

Requisitioning: the POWL

Another new feature of SRM 7.0 is the POWL



The screenshot shows the SRM 7.0 interface. On the left is a navigation sidebar with the 'Requisitioner' role selected. The main content area displays a 'Shopping Carts' table. An arrow points from the 'Requisitioner' role in the sidebar to the table.

Shopping Cart Number	Shopping Cart Name	Item Number	Item Name	Status	Created On	Quantity
10011784	Eshleman EMS Cart8 August 8 2013	1	EMS ALS Medical Cases	Approved	08/08/2013 14:56:13	750
10011784	Eshleman EMS Cart8 August 8 2013	2	Rescue Blankets	Approved	08/08/2013 14:56:15	2250
10011784	Eshleman EMS Cart8 August 8 2013	3	Emergency Stretcher	Approved	08/08/2013 14:56:15	1500
10011784	Eshleman EMS Cart8 August 8 2013	4	Emergency Hospital Services	Approved	08/08/2013 14:56:15	800
10011782	Eshleman EMS Cart7 August 8 2013	1	EMS ALS Medical Cases	Approved	08/08/2013 13:44:49	750
10011782	Eshleman EMS Cart7 August 8 2013	2	Rescue Blankets	Approved	08/08/2013 13:44:49	2250
10011782	Eshleman EMS Cart7 August 8 2013	3	Emergency Stretcher	Approved	08/08/2013 13:44:49	1500
10011782	Eshleman EMS Cart7 August 8 2013	4	Emergency Hospital Services	Approved	08/08/2013 13:44:49	800
10011781	Eshleman EMS Cart6 August 8 2013	1	EMS ALS Medical Cases	Approved	08/08/2013 13:43:14	750
10011781	Eshleman EMS Cart6 August 8 2013	2	Rescue Blankets	Approved	08/08/2013 13:43:14	2250

Upon selecting the Requisitioner role, the POWL will display in the central area of your screen

Requisitioning: the POWL

The POWL is a query-driven worklist containing procurement documents (Business Objects) from your work area

Shopping Carts

Search Criteria Personalize

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

Shopping Cart Number	Shopping Cart Name	Item Number	Item Name	Status	Created On	Quantity	Unit	Net Value	Currency	Total Net Value	Item Status
10011784	Eshleman EMS Cart8 August 8 2013	1	EMS ALS Medical Cases	Approved	08/08/2013 14:56:13	75.000	EA	11,250.00	USD	45,875.00	Follow-on Document Created
10011784	Eshleman EMS Cart8 August 8 2013	2	Rescue Blankets	Approved	08/08/2013 14:56:15	225.000	EA	5,625.00	USD	45,875.00	Follow-on Document Created
10011784	Eshleman EMS Cart8 August 8 2013	3	Emergency Stretcher	Approved	08/08/2013 14:56:15	150.000	EA	9,000.00	USD	45,875.00	Follow-on Document Created
10011784	Eshleman EMS Cart8 August 8 2013	4	Emergency Hospital Services	Approved	08/08/2013 14:56:15	80.000	H	20,000.00	USD	45,875.00	Follow-on Document Created
10011782	Eshleman EMS Cart7 August 8 2013	1	EMS ALS Medical Cases	Approved	08/08/2013 13:44:49	75.000	EA	11,250.00	USD	45,875.00	In Purchaser's Worklist
10011782	Eshleman EMS Cart7 August 8 2013	2	Rescue Blankets	Approved	08/08/2013 13:44:49	225.000	EA	5,625.00	USD	45,875.00	In Purchaser's Worklist
10011782	Eshleman EMS Cart7 August 8 2013	3	Emergency Stretcher	Approved	08/08/2013 13:44:49	150.000	EA	9,000.00	USD	45,875.00	In Purchaser's Worklist
10011782	Eshleman EMS Cart7 August 8 2013	4	Emergency Hospital Services	Approved	08/08/2013 13:44:49	80.000	H	20,000.00	USD	45,875.00	In Purchaser's Worklist
10011781	Eshleman EMS Cart6 August 8 2013	1	EMS ALS Medical Cases	Approved	08/08/2013 13:43:14	75.000	EA	11,250.00	USD	45,875.00	In Purchaser's Worklist
10011781	Eshleman EMS Cart6 August 8 2013	2	Rescue Blankets	Approved	08/08/2013 13:43:14	225.000	EA	5,625.00	USD	45,875.00	In Purchaser's Worklist

Last Refresh 08/20/2013 14:48:35 EST [Refresh](#)

Requisitioning: the POWL



Shopping Carts

Search Criteria

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

Shopping Cart Number	Shopping Cart Name	Item Number	Item Name	Status	Created On	Q
10011784	Eshleman EMS Cart8 August 8 2013	1	EMS ALS Medical Cases	Approved	08/08/2013 14:56:15	7
10011784	Eshleman EMS Cart8 August 8 2013	2	Rescue Blankets	Approved	08/08/2013 14:56:15	22
10011784	Eshleman EMS Cart8 August 8 2013	3	Emergency Stretcher	Approved	08/08/2013 14:56:15	15
10011784	Eshleman EMS Cart8 August 8 2013	4	Emergency Hospital Services	Approved	08/08/2013 14:56:15	8
10011782	Eshleman EMS Cart7 August 8 2013	1	EMS ALS Medical Cases	Approved	08/08/2013 13:44:49	7
10011782	Eshleman EMS Cart7 August 8 2013	2	Rescue Blankets	Approved	08/08/2013 13:44:49	22
10011782	Eshleman EMS Cart7 August 8 2013	3	Emergency Stretcher	Approved	08/08/2013 13:44:49	15
10011782	Eshleman EMS Cart7 August 8 2013	4	Emergency Hospital Services	Approved	08/08/2013 13:44:49	8
10011781	Eshleman EMS Cart6 August 8 2013	1	EMS ALS Medical Cases	Approved	08/08/2013 13:43:14	7
10011781	Eshleman EMS Cart6 August 8 2013	2	Rescue Blankets	Approved	08/08/2013 13:43:14	22

“One-Step” buttons are available at the top of each query

Results of the selected query are displayed in a table format

Requisitioning: the POWL



Shopping Carts

Search Criteria Personalize

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

Shopping Cart Number	Shopping Cart Name	Item Number	Item Name	Status	Created On	Quantity	Unit	Net Value	Currency	Total Net Value	Item Status
10011853	Eshleman Entrance Mats 08-20-2013	1	MAT, ENTRANCE, 35.4'X8'CHAR	Saved	08/20/2013 17:47:01	50.000	EA	4,000.00	USD	4,000.00	Saved
10011852	Eshleman Bath Linens 08-20-2013	1	TOWEL, BATH, ECONOMICAL, WHT, 20X40	Saved	08/20/2013 17:31:46	576.000	EA	1,814.40	USD	2,275.65	Saved
10011852	Eshleman Bath Linens 08-20-2013	2	CLOTH, WASH, TERRY, WHT, WHTSTCH, .7LB, 12X12	Saved	08/20/2013 17:38:25	75.000	DZ	461.25	USD	2,275.65	Saved
10011851	Eshleman Health Care 08-20-2013	1	RAZOR, DISPOSABLE	Saved	08/20/2013 17:15:41	100.000	PAC	5,950.00	USD	11,995.00	Saved
10011851	Eshleman Health Care 08-20-2013	2	SOAP, BAR, SOLIDODOR, GOLD 3.5X 2.75X .5	Saved	08/20/2013 17:24:28	100.000	CS	5,325.00	USD	11,995.00	Saved
10011851	Eshleman Health Care 08-20-2013	3	SANITIZER, HAND, WATERLESS, 4OZ, 24/CS	Saved	08/20/2013 17:26:34	75.000	CS	720.00	USD	11,995.00	Saved
10011848	Eshleman Dental Care 8-20-2013	1	TOOTHBRUSHORAL-BADVCONTROLGRIP12DZ/CS	Saved	08/20/2013 16:27:38	1,250.000	EA	3,600.00	USD	15,212.50	Saved
10011848	Eshleman Dental Care 8-20-2013	2	TOOTH PASTE	Saved	08/20/2013 16:28:27	1,250.000	EA	3,687.50	USD	15,212.50	Saved
10011848	Eshleman Dental Care 8-20-2013	3	MOUTH WASH	Saved	08/20/2013 16:54:43	1,250.000	EA	3,987.50	USD	15,212.50	Saved
10011848	Eshleman Dental Care 8-20-2013	4	CLEANER, DENTURE, SUPR STRNGTH, TABLET	Saved	08/20/2013 16:55:55	750.000	EA	3,937.50	USD	15,212.50	Saved

Last Refresh 08/20/2013 18:16:40 EST [Refresh](#)

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

Requisitioning: the POWL



Shopping Carts

Search Criteria

View: * [Standard View] | Shop | Display | Edit | De

Shopping Cart Number	Shopping Cart Name
10011853	Eshleman_Entrance Mats 08-20-201
10011853	Eshleman_Bath Linens 08-20-2013

You may display additional fields for your query fields by selecting the SHOW CRITERIA button

Shopping Carts

Search Criteria

Shopping Cart Number: To ↗

Shopping Cart Name:

Item Description:

Timeframe:

Creation Date: To ↗

Status:

Role:

PO Number:

Product Category:

Logical System (Product):

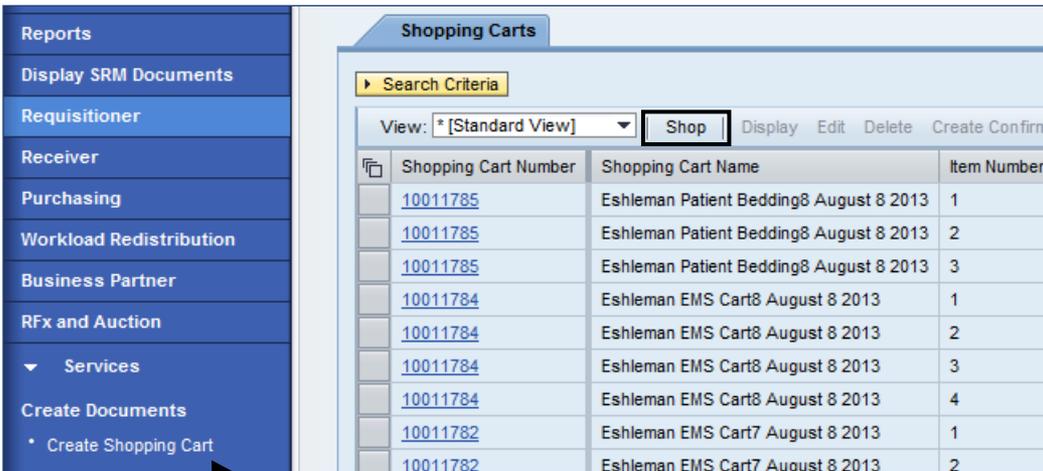
Smart Number:

Apply Clear

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

Shopping Cart Number	Shopping Cart Name	Item Number	Item Name
----------------------	--------------------	-------------	-----------

Requisitioning: Create Shopping Cart



Shopping Cart Number	Shopping Cart Name	Item Number
10011785	Eshleman Patient Bedding8 August 8 2013	1
10011785	Eshleman Patient Bedding8 August 8 2013	2
10011785	Eshleman Patient Bedding8 August 8 2013	3
10011784	Eshleman EMS Cart8 August 8 2013	1
10011784	Eshleman EMS Cart8 August 8 2013	2
10011784	Eshleman EMS Cart8 August 8 2013	3
10011784	Eshleman EMS Cart8 August 8 2013	4
10011782	Eshleman EMS Cart7 August 8 2013	1
10011782	Eshleman EMS Cart7 August 8 2013	2

- Create a shopping cart by selecting the *Create Shopping Cart* link, or use the One-Step SHOP button



Requisitioning: Create Shopping Cart



SHOP IN 3 STEPS

Notice that the *Shopping Cart Wizard* and *Browse Catalogs* are still prominent features in SRM 7.0

Shop in 3 steps: Step 1 (Select Goods/Service)

1
2
3

Select Goods/Service
Shopping Cart (empty)
Complete and Order

Find:

Browse:

Old Shopping Carts and Templates	CI WEBSITE - VIEW ONLY	COPA INTERNAL ECATALOG
Internal Goods/Services	COPA INTERNAL ECATALOG DGS - 1500	DELL - Hardware and Software Purchase
	LAB EQUIPMENT	MRO - Arbill
	MRO - Grainger	MRO - Schaedler
	MRO - Wesco	Material/Service Contract Catalog (MSCC)
	PIBH Products & Services	Peripherals & Networking Gear - POMEROY
	Peripherals & Networking Gear - ePlus	

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

Requisitioning: Create Shopping Cart

Other features such as *Find* and *Free Text* (Describe Requirement) also remain available, with minor changes

Shop in 3 steps: Step 1 (Select Goods/Service)

◀ Previous Next ▶ Order Close

1 → ← 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](#)
[Internal Goods/Services](#) [COPA INTERNAL ECATALOG DGS - 1500](#) [DELL - Hardware and Software Purchase](#)
[LAB EQUIPMENT](#) [MRO - Arbill](#)
[MRO - Grainger](#) [MRO - Schaedler](#)
[MRO - Wesco](#) [Material/Service Contract Catalog \(MSCC\)](#)
[PIBH Products & Services](#) [Peripherals & Networking Gear - POMEROY](#)
[Peripherals & Networking Gear - ePlus](#)

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



Requisitioning: Create Shopping Cart from *Free Text*



STEP 1 (SELECT GOODS/SERVICE)

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

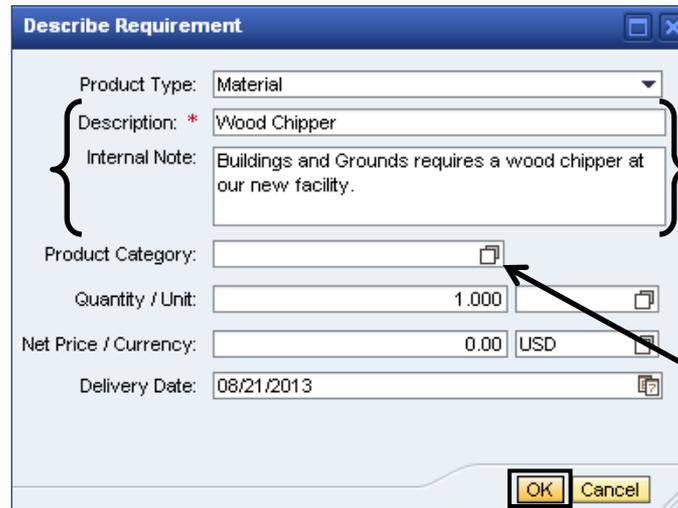
Browse: [Old Shopping Carts and Templates](#) [CI WEBSITE - VIEW ONLY](#) [COPA INTERNAL ECATALOG](#)
[Internal Goods/Services](#) [COPA INTERNAL ECATALOG DGS - 1500](#) [DELL - Hardware and Software Purchase](#)
[LAB EQUIPMENT](#) [MRO - Arbill](#)
[MRO - Grainger](#) [MRO - Schaedler](#)
[MRO - Wesco](#) [Material/Service Contract Catalog \(MSCC\)](#)
[PIBH Products & Services](#) [Peripherals & Networking Gear - POMEROY](#)
[Peripherals & Networking Gear - ePlus](#)

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

- In this example, we are selecting *Free Text*

Requisitioning

- When the input screen displays, fill in the required *Description* field
 - Also complete the *Internal Note* field, if applicable



- Enter the applicable Product Category number if it is known, or select the matchcode icon to perform a search
- Select OK

Requisitioning



Search Product Category

Display As: Flat List

Note: Placeholder search with * is possible. Search ignores upper/lowercase spelling.

Product Category ID:

Description:

Logical System:

Restrict Number of Value List Entries

Start Search **Reset**

Item Detail 0 Unsaved data will be lost

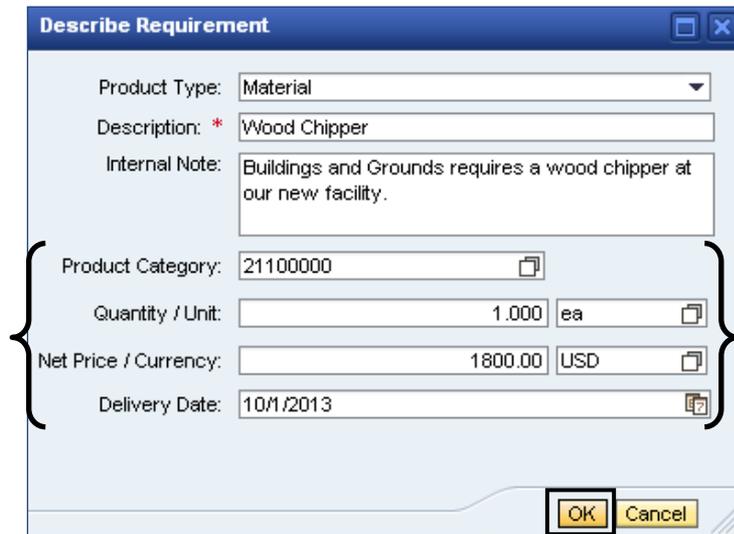
Description	Category ID	Logical System
AGRICULTURAL OILS	12162003	QC6CLNT110
AGRICULTURAL & FORES	21100000	QC6CLNT110
AGRICULTURAL TRACTOR	25101901	QC6CLNT110
AGRICULTURAL & FARM	30222800	QC6CLNT110
AGRI BLD CON SVC	72121200	QC6CLNT110
AGRICULTURE & FOREST	86101500	QC6CLNT110
AGRICULTURE VOCATION	86101504	QC6CLNT110
AGRICULTURAL COMMERC	93141901	QC6CLNT110
AGRICULTURAL INSTITU	93141903	QC6CLNT110
AGRICULTURAL/RURAL C	93141904	QC6CLNT110
AGRICULTURAL RESEARC	93141905	QC6CLNT110
AGRICULTURAL INDUSTR	94101501	QC6CLNT110

OK **Cancel**

- Make an entry in the *Description* field
- Select the START SEARCH button

- When the search results display, highlight the row for the desired item
- Select OK

Requisitioning



Describe Requirement

Product Type: Material

Description: * Wood Chipper

Internal Note: Buildings and Grounds requires a wood chipper at our new facility.

Product Category: 21100000

Quantity / Unit: 1.000 ea

Net Price / Currency: 1800.00 USD

Delivery Date: 10/1/2013

OK Cancel

- The Product Category field is populated
- Complete the remaining fields:
 - Quantity
 - Unit of Measure
 - Price
 - Delivery Date
- Select OK

Requisitioning



STEP 2 (SHOPPING CART)

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

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
 No source of supply found for item

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

Items in Shopping Cart

Filter Settings

Line Number	Item Type	Product ID	Description	Product Category	Product Category Description	Quantity	Unit	Net Price / Limit	Currency	Per	Delivery Date	Notes	Attachments	Supplier
1	Material		Wood Chipper	21100000	AGRICULTURAL & FORES	1.000	EA	1,800.00	USD	1	10/01/2013	1	0	None
	Undefined Item Type					1.000		0.00	USD	1	08/21/2013	0	0	
	Undefined Item Type					1.000		0.00	USD	1	08/21/2013	0	0	
	Undefined Item Type					1.000		0.00	USD	1	08/21/2013	0	0	
	Undefined Item Type					1.000		0.00	USD	1	08/21/2013	0	0	

Total Value 1,800.00 USD
Tax amount 0.00 USD
Total Val. (Gross) 1,800.00 USD

- Select the DETAILS button to view the details of the line item



Requisitioning



Line Item Details

In SRM 7.0, you will see that the details of a line item are displayed in a tabular format below the item overview. This is different than the expand/collapse format currently used in SRM 5.0.

You will also see that the tab names have changed slightly. However, the contents are still very similar to 5.0, as shown in the upcoming slides.

Requisitioning



SRM 5.0	SRM 7.0
Basic Data	Item Data
Cost Assignment	Account Assignment
Documents and Attachments	Notes and Attachments
Ship-To Address/ Performance Location	Delivery Address
Source of Supply/Service Agents	Sources of Supply
Availability	Approval Process Overview

Requisitioning

Line item detail in tabular format (SRM 7.0)

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	Per	Delivery Date	Notes	Attachments	Supplier
1	Material		Wood Chipper	21100000	AGRICULTURAL & FORES	1.000	EA	1,800.00	USD	1	10/01/2013	2	2	None
	Undefined Item Type					1.000		0.00	USD	1	08/21/2013	0	0	
	Undefined Item Type					1.000		0.00	USD	1	08/21/2013	0	0	

Total Value 1,800.00 USD
Tax amount 0.00 USD
Total Val. (Gross) 1,800.00 USD

Details for item 1 Wood Chipper

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

Identification

Item Type: Material

Product ID:

Description: * Wood Chipper

Product Category: 21100000 AGRICULTURAL & FORES

Organization

Purchasing Group: DGS Central Purchasing Group [Show Members](#)

Company Code: COPA COMMONWEALTH OF PA

Further Properties

Supplier Product Number:

Currency, Values and Pricing

Order Quantity / Unit: 1.000 EA Each

Ordered Quantity / Unit: 0.000

Open Quantity / Unit: 0.000

Price / Currency: 1,800.00 USD Price Unit 1

Service and Delivery

Location / Plant: 73 DGS

Storage Location:

Goods Recipient: 337344 Angela Eshleman

Delivery Date: 10/01/2013

Proceed Using P-CARD?:

Requisitioning

Line item detail in expand/collapse format (SRM 5.0)

Step 2: Shopping Cart

To change item details (assets and cost assignment), select the link below or select 

Items in Shopping Cart

Good / Service	Description	Category	Required on	Quantity	Price / Limit	Action
	<u>Wood Chipper</u>	AGRICULTURAL & FORES	10/01/2013	1.000 EA	1,800.00 USD Per 1 EA	  
Total Value (Net) :					1,800.00 USD	
Tax Amount :					0.00 USD	
Total Value (Gross) :					1,800.00 USD	

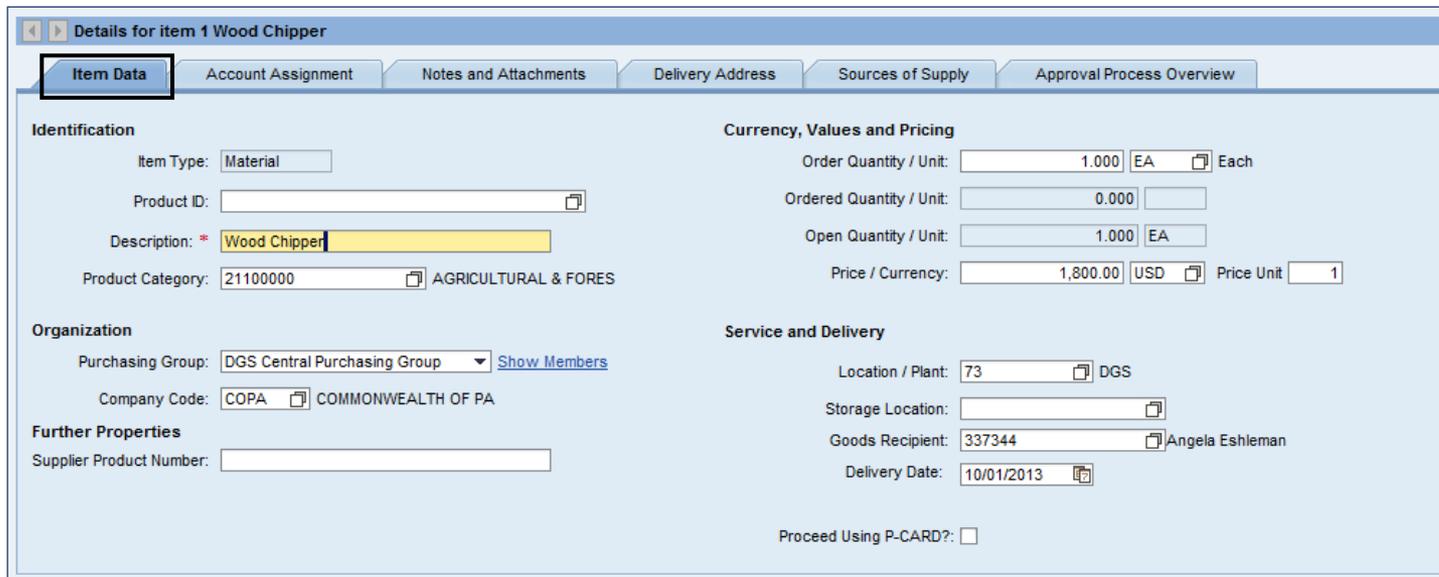
Item Details: Wood Chipper ✕

- ▶ Basic Data
- ▶ Cost Assignment
- ▶ Documents and Attachments
- ▶ Ship-To Address/Performance Location
- ▶ Sources of Supply / Service Agents

Refresh Check < Back Continue >

Requisitioning

The **Item Data** tab in SRM 7.0 contains the same fields as the SRM 5.0 **Basic Data** tab



Details for item 1 Wood Chipper

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

Identification

Item Type: Material

Product ID:

Description: * Wood Chipper

Product Category: 21100000 AGRICULTURAL & FORES

Currency, Values and Pricing

Order Quantity / Unit: 1.000 EA Each

Ordered Quantity / Unit: 0.000

Open Quantity / Unit: 1.000 EA

Price / Currency: 1,800.00 USD Price Unit 1

Organization

Purchasing Group: DGS Central Purchasing Group [Show Members](#)

Company Code: COPA COMMONWEALTH OF PA

Further Properties

Supplier Product Number:

Service and Delivery

Location / Plant: 73 DGS

Storage Location:

Goods Recipient: 337344 Angela Eshleman

Delivery Date: 10/01/2013

Proceed Using P-CARD?:

- Populate open fields as applicable

Requisitioning

The **Account Assignment** tab is enhanced in SRM 7.0 to allow for Cost Distribution by *Value*

Details for item 1 Wood Chipper

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

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

Cost Distribution: Percentage (dropdown) | Details | Add Line | Copy | Paste | Duplicate | Delete | Split Distribution | Change All Items

Number	Accounting Line Number	Percentage	Account Assignment Category	Assign Number	Account Assignment Description	General Ledger Account
0001		100.00	Cost Center	1522110211	Bur Vehicle Mgmt	6361100

Details for Item 0001 : Cost Center

Basic Data

Percentage: * 100.00

Account Assignment Category: Cost Center

Cost Center: * 1522110211 Bur Vehicle Mgmt

Fund Center: 1522110000 Purchasing Fund

Functional Area: 1310 Facil, Prop and Comm Mgt

Controlling Area: COPA

General Ledger Account: 6361100 Office Supplies

Business Area: 15

Fund: 5000900000 Purchasing Fund

Commitment Item: 6361100 Office Supplies

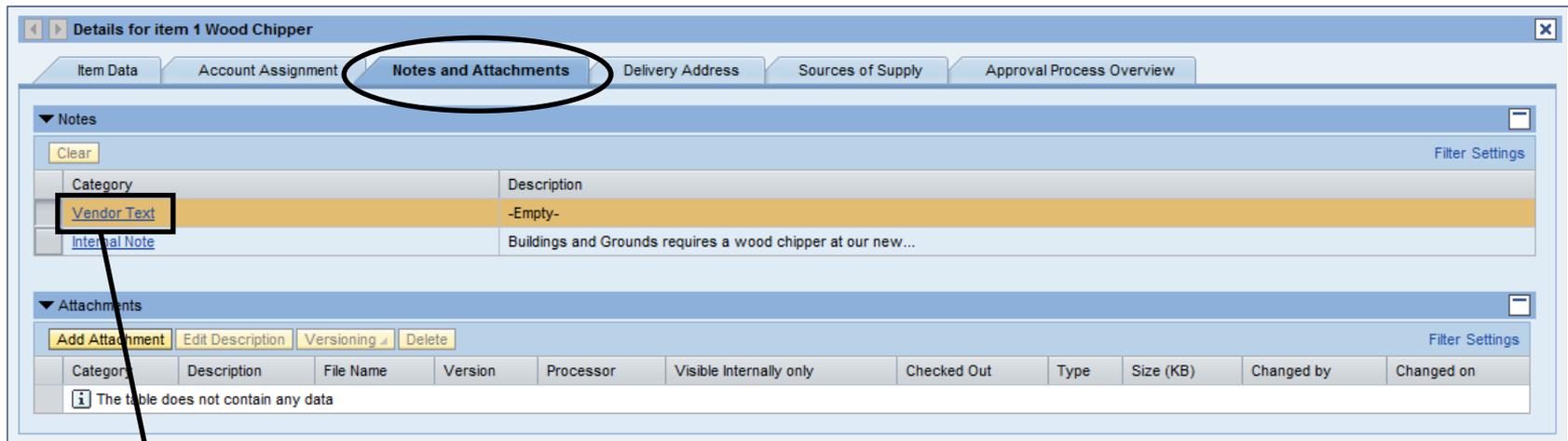
Cost Distribution: Percentage (dropdown)

Number	Accounting Line Number	Percentage
0001		Percentage
		By Quantity
		By Value

- Complete required fields as applicable

Requisitioning

Notes and Attachments tab



Details for item 1 Wood Chipper

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

Notes

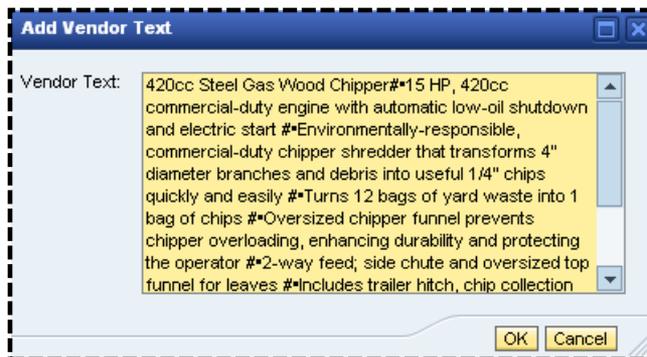
Clear Filter Settings

Category	Description
Vendor Text	-Empty-
Internal Note	Buildings and Grounds requires a wood chipper at our new...

Attachments

Add Attachment Edit Description Versioning 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										



Add Vendor Text

Vendor Text: 420cc Steel Gas Wood Chipper#*15 HP, 420cc commercial-duty engine with automatic low-oil shutdown and electric start #*Environmentally-responsible, commercial-duty chipper shredder that transforms 4" diameter branches and debris into useful 1/4" chips quickly and easily #*Turns 12 bags of yard waste into 1 bag of chips #*Oversized chipper funnel prevents chipper overloading, enhancing durability and protecting the operator #*2-way feed; side chute and oversized top funnel for leaves #*Includes trailer hitch, chip collection

OK Cancel

- Select the *Vendor Text* link to add a note
 - Type or paste the text into the box and select OK
- If needed, use the CLEAR button to remove an existing note

Requisitioning



Details for item 1 Wood Chipper

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

▼ Notes

Clear Filter Settings

Category	Description
Vendor Text	420cc Steel Gas Wood Chipper#*15 HP, 420cc commercial-du...
Internal Note	Buildings and Grounds requires a wood chipper at our new...

▼ Attachments

Add Attachment Edit Description Versioning 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										

Add Attachment

Here, you can upload a file and attach it to the selected item

File: C:\Users\laeshleman\Desktop Browse...

Description: Specifications for Wood C

Visible Internally only:

OK Cancel

- Select the ADD ATTACHMENT button to browse for the document
 - Attach the document by selecting OK

Requisitioning



Details for item 1 Wood Chipper

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

▼ Notes

Clear Filter Settings

Category	Description
Vendor Text	420cc Steel Gas Wood Chipper#*15 HP, 420cc commercial-du...
Internal Note	Buildings and Grounds requires a wood chipper at our new...

▼ Attachments

Add Attachment | **Edit Description** | Versioning ▾ | Delete Filter Settings

Category	Description	File Name	Version	Processor	Visible Internally only	Checked Out	Type	Size (KB)	Changed by	Changed on
Standard Attachment	SPECIFICATIONS FOR WOOD CHIPPER	Product Description for Wood Chipper.docx	1		<input type="checkbox"/>	<input type="checkbox"/>	docx	18	P00068292	08/21/2013

- 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

Requisitioning

Delivery Address tab



Details for item 1 Wood Chipper

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

Reset

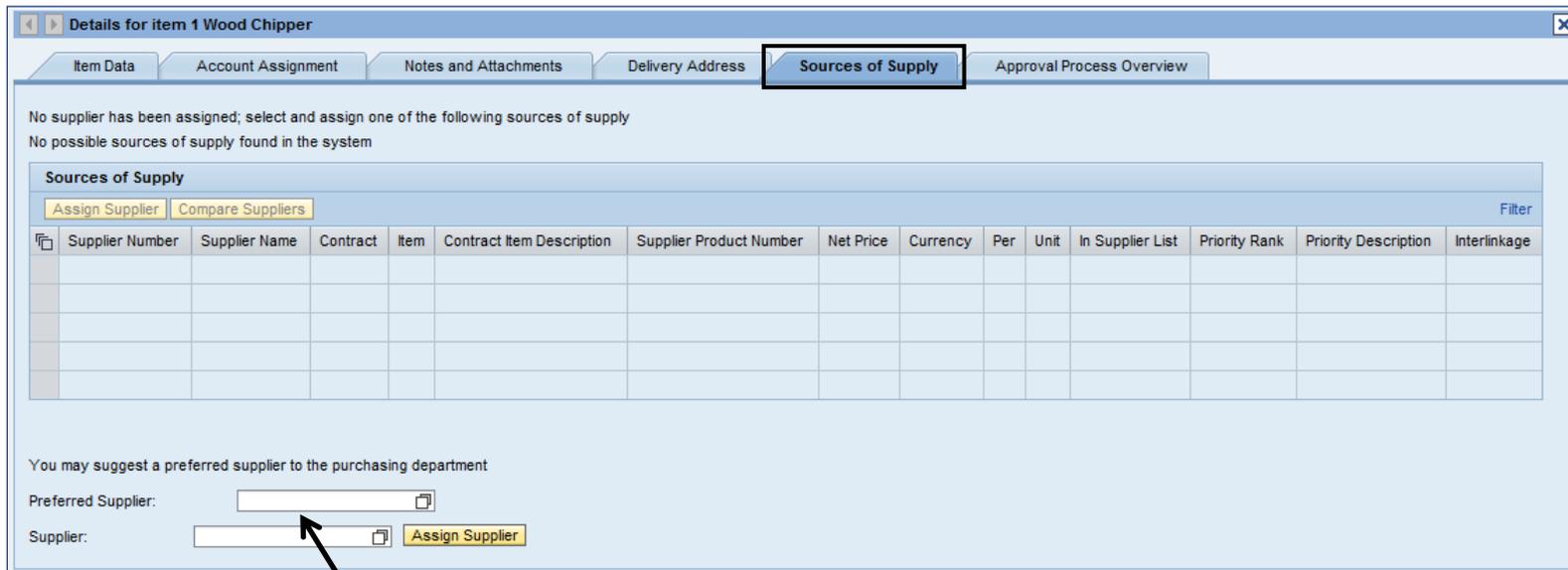
If the item is to be delivered to a different address, enter the new address here

Name:	<input type="text" value="EXEC BRANCH"/>	Additional Name:	<input type="text" value="Executive Branch"/>
C/O:	<input type="text"/>	Phone Number / Extension:	<input type="text"/>
Fax Number/Extension:	<input type="text"/>	E-Mail:	<input type="text"/>
Building:	<input type="text"/>	Floor / Room:	<input type="text" value="1F"/> <input type="text" value="1R"/>
Street / House Number:	<input type="text" value="5645 Heyward Street"/>	Postal Code / City:	<input type="text" value="15432"/> <input type="text" value="Harrisburg"/>
District:	<input type="text" value="d1"/>	Postal Code / P.O. Box:	<input type="text"/>
Country:	<input type="text" value="US"/> USA	Region:	<input type="text" value="PA"/> Pennsylvania

- Edit the displayed address if applicable

Requisitioning

The **Sources of Supply** tab in SRM 7.0 has a slightly different look, but contains the same information as SRM 5.0



Details for item 1 Wood Chipper

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 Filter

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

You may suggest a preferred supplier to the purchasing department

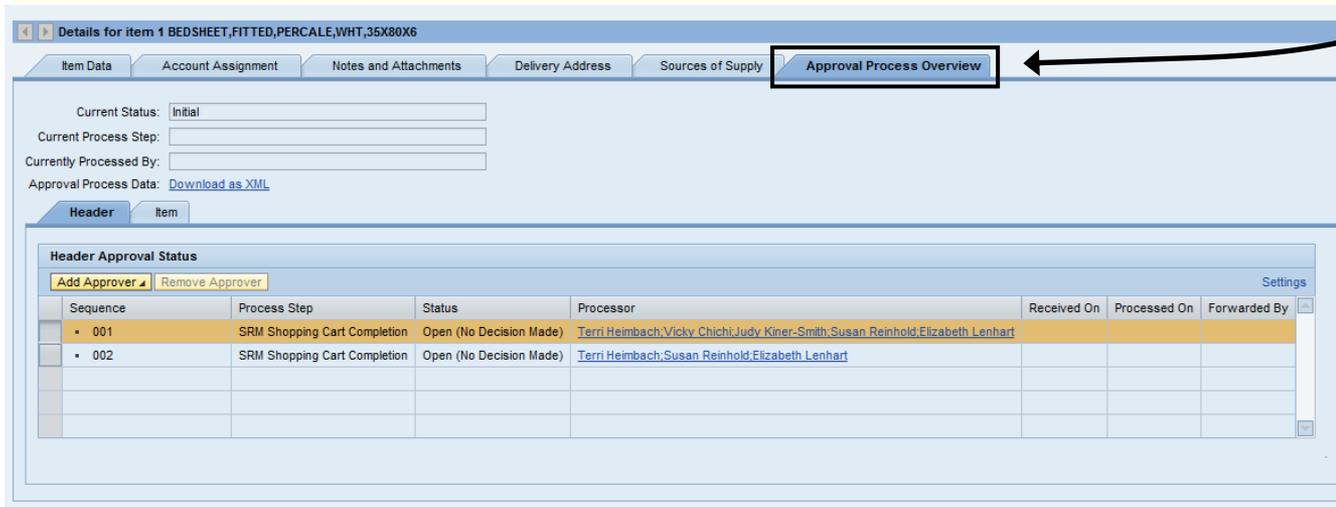
Preferred Supplier:

Supplier: Assign Supplier

- Add a Preferred Supplier, if applicable

Requisitioning

The **Approval Process Overview** tab is new for SRM 7.0



Details for item 1 BEDSHEET,FITTED,PERCALE,WHT,35X80X6

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

Current Status:
 Current Process Step:
 Currently Processed By:
 Approval Process Data: [Download as XML](#)

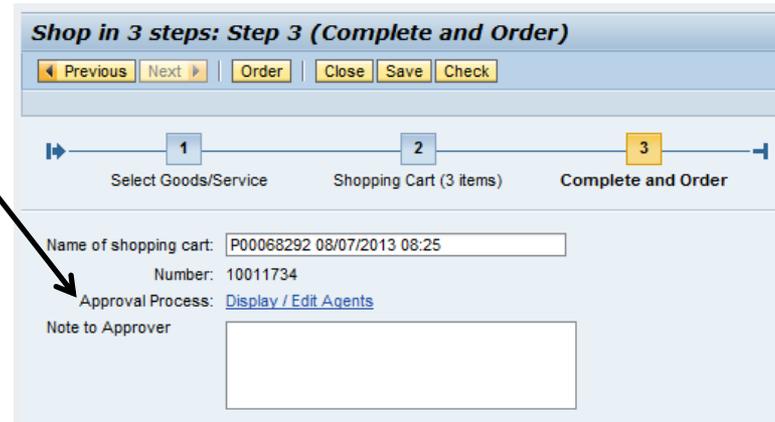
Header | Item

Header Approval Status

[Add Approver](#) | [Remove Approver](#) | [Settings](#)

Sequence	Process Step	Status	Processor	Received On	Processed On	Forwarded By
• 001	SRM Shopping Cart Completion	Open (No Decision Made)	Terri Heinbach;Vicky Chichi;Judy Kiner-Smith;Susan Reinhold;Elizabeth Lenhart			
• 002	SRM Shopping Cart Completion	Open (No Decision Made)	Terri Heinbach;Susan Reinhold;Elizabeth Lenhart			

However, the link to the Approval Process remains available in Step 3



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

[Previous](#) | [Next](#) | [Order](#) | [Close](#) | [Save](#) | [Check](#)

1 | 2 | 3

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

Name of shopping cart:
 Number: 10011734
 Approval Process: [Display / Edit Agents](#)
 Note to Approver:

Requisitioning



Details for item 1 Wood Chipper

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

Current Status:
 Current Process Step:
 Currently Processed By:
 Approval Process Data: [Download as XML](#)

Header | Item

Header Approval Status

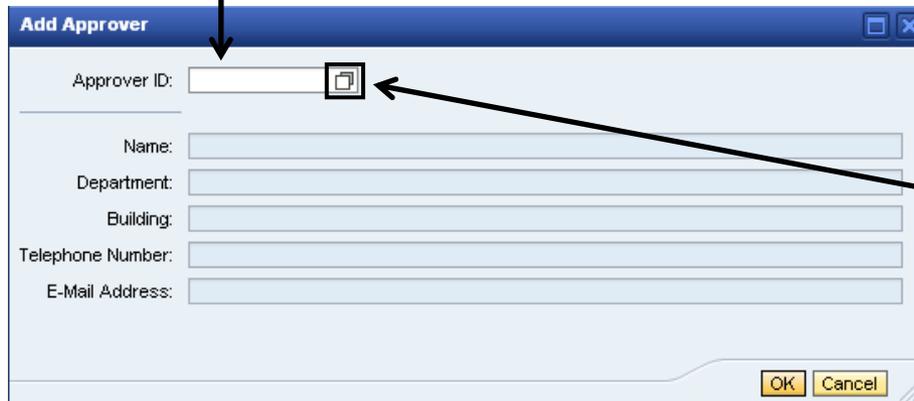
		Status	Processor	Received
<div style="border: 1px solid black; padding: 2px;"> Add Approver Remove Approver Add Approver Above Selected Line Add Approver Below Selected Line </div>				
	SRM Shopping Cart Completion	Open (No Decision Made)	Terri Heimbach;Vicky Chichi;Judy Kiner-Smith;Susan Reinhold;Elizabeth Lenhart	
• 002	SRM Shopping Cart Completion	Open (No Decision Made)	Terri Heimbach;Susan Reinhold;Elizabeth Lenhart	

- If additional approvals are required, select the ADD APPROVER button and then choose one of the dropdown options

Requisitioning



- When the input screen displays, type in the applicable employee number



The screenshot shows the 'Add Approver' form with the following fields: Approver ID, Name, Department, Building, Telephone Number, and E-Mail Address. The 'Approver ID' field is empty and has a small square icon with a magnifying glass next to it. The 'OK' and 'Cancel' buttons are at the bottom right.

- If the employee number is not known, select the match code icon to perform a search



The screenshot shows the 'Add Approver' form with the following fields: Approver ID (00093747), Name (Edward Myslewicz), Department, Building, Telephone Number, and E-Mail Address (EMYSLEWICZ@PA.GOV). The 'Approver ID' field has a small square icon with a magnifying glass next to it. The 'OK' button is highlighted with a black box.

- Select the OK button to proceed

Requisitioning



Details for item 1 Wood Chipper

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

Current Status:
 Current Process Step:
 Currently Processed By:
 Approval Process Data: [Download as XML](#)

Header | Item

Header Approval Status

[Add Approver](#) | [Remove Approver](#) | [Settings](#)

Sequence	Process Step	Status	Processor	Received On	Processed On	Forwarded By
001	SRM Shopping Cart Completion	Open (No Decision Made)	Edward Myslewicz			
002	SRM Shopping Cart Completion	Open (No Decision Made)	Terri Heimbach;Vicky Chichi;Judy Kiner-Smith;Susan Reinhold;Elizabeth Lenhart			
003	SRM Shopping Cart Completion	Open (No Decision Made)	Terri Heimbach;Susan Reinhold;Elizabeth Lenhart			

- The Ad Hoc approver's name displays in the assigned sequence



Requisitioning



- To continue adding items to the shopping cart, select Step 1
- To complete the order, select Step 3

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

Previous Next Order Close Save Check

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

Total Value	1,800.00	USD
Tax amount	0.00	USD
Total Val. (Gross)	1,800.00	USD

Details for item 1 Wood Chipper

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

Current Status:
 Current Process Step:
 Currently Processed By:
 Approval Process Data: [Download as XML](#)

Header Item

Header Approval Status

Add Approver Remove Approver Settings

Sequence	Process Step	Status	Processor	Received On	Processed On	Forwarded By
001	SRM Shopping Cart Completion	Open (No Decision Made)	Edward Myslewicz			
002	SRM Shopping Cart Completion	Open (No Decision Made)	Terri Heimbach;Vicky Chichi;Judy Kiner-Smith;Susan Reinhold;Elizabeth Lenhart			
003	SRM Shopping Cart Completion	Open (No Decision Made)	Terri Heimbach;Susan Reinhold;Elizabeth Lenhart			

Requisitioning



STEP 3 (COMPLETE AND ORDER)

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

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

Name of shopping cart: ←
 Number: 10011881
 Approval Process: [Display / Edit Agents](#)
 Note to Approver:

- Enter the name of the shopping cart
- Select the ORDER button
- Or, select the SAVE button and retrieve the shopping cart later via your POWL

Shop in 3 steps

Shopping cart "Eshleman_Wood Chipper 08-21-2013" with number 10011881 ordered successfully

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		Wood Chipper	21100000	AGRICULTURAL & FORES	1.000	EA	1,800.00	USD		1		10/01/2013	2	2	Awaiting Approval	None	
																Total Value	1,800.00	USD
																Tax amount	0.00	USD
																Total Val. (Gross)	1,800.00	USD



Requisitioning: Create Shopping Cart from a Catalog



STEP 1 (SELECT GOODS/SERVICE)

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
Internal Goods/Services	COPA INTERNAL ECATALOG DGS - 1500	DELL - Hardware and Software Purchase
	LAB EQUIPMENT	MRO - Arbill
	MRO - Grainger	MRO - Schaedler
	MRO - Wesco	Material/Service Contract Catalog (MSCC)
	PIBH Products & Services	Peripherals & Networking Gear - POMEROY
	Peripherals & Networking Gear - ePlus	

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

- In the second example, we are selecting the Material/Service Contract Catalog (MSCC)



Requisitioning: Create Shopping Cart from a Catalog



- The appearance and functionality of the MDM catalog is unchanged from SRM 5.0

Back to application

SRM-MDM Product Catalog

Items: 0
Price: 0.00

Search Search Criteria

Keyword: [Search](#) [Reset Search](#) [Advanced Search](#)

Supplier Part Number: Contains Product ID: Contains

Contract: Contains Long Description: Contains

Category Supplier

- [All]
- [None]

Select Supplier

- [All]
- BF GOODRICH
- CORRECTIONAL INDUSTRIES
- Goodyear Tire and Rubber Co.
- Hot Diggity
- Raspberry Company
- STABUS

Found 350 item(s) of 350 and showing 1 to 10

Products

List View

[Add to Cart](#) [View Cart](#) [Compare](#) Results Per Page: 10 [Image On](#)

Select	Quantity	Action	Product ID	Short Description	Supplier	Supplier Part Number	Order Unit	Price Information	Price Base Quantity	Minimum Quantity	Minimum Quantity UoM	Special Search Terms
<input type="checkbox"/>	1		326855	27 TIRE,TRUCK,COMM-LH ALL POS-11R255-H	BF GOODRICH	001-035-2145	Each	36.00 USD	1 Each	1	Each	210202 1:4400006339;
<input type="checkbox"/>	1		326856	27 TIRE,TRUCK,COMM-LH ALL POS-11R285-H	BF GOODRICH	001-025-2051	Each	25.00 USD	1 Each	1	Each	210202 1:4400006339;
<input type="checkbox"/>	1		326864	28 TIRE,TRUCK,COMM-LH ALL POS-11R215-H	BF GOODRICH	002-563-5698	Each	85.00 USD	1 Each	1	Each	210202 1:4400006339;
<input type="checkbox"/>	1			Alloy Rims	Goodyear Tire and Rubber Co.	006-897-4100	Each	80.00 USD	1 Each	1	Each	210219 1:4400006193;
<input type="checkbox"/>	1		305983	APRON,BIB	CORRECTIONAL INDUSTRIES	001-0010-0001	Each	5.75 USD	1 Each	1	Each	170796 1:4400002052;

Requisitioning: Create Shopping Cart from a Catalog

[Back to application](#)

SRM-MDM Product Catalog

Items: 0
Price: 0.00

Search Search Criteria

Keyword: [Advanced Search](#)

Supplier Part Number: Product ID:

Contract: Long Description:

Category Supplier

- [All]
- [None]

Select Supplier

- [All]
- CORRECTIONAL INDUSTRIES
- BF GOODRICH
- Goodyear Tire and Rubber Co.
- Hot Diggity
- Raspberry Company
- STARBUCKS

- Products are found by placing entries in the various search fields, such as:
 - Keyword
 - Supplier
 - Description

Requisitioning: Create Shopping Cart from a Catalog



Found 8 item(s) of 350 and showing 1 to 8

Products

List View

Add to Cart

 Results Per Page: 10

Select	Quantity	Action	Product ID	Short Description	Supplier	Supplier Part Number	Order Unit	Price Information	Price Base Quantity	Minimum Quantity	Minimum Quantity UoM	Special Search Terms
<input checked="" type="checkbox"/>	250		306258	BAG, LAUNDRY, SELF LCK, 12COVER, BLU, 24X30	CORRECTIONAL INDUSTRIES	001-0010-0028	Each	18.25 USD	1 Each		Each	170796 1:4400002052;
<input type="checkbox"/>	1		306259	BAG, LAUNDRY, SELF LCK, 12COVER, GRN, 24X30	CORRECTIONAL INDUSTRIES	001-0010-0029	Each	18.25 USD	1 Each		Each	170796 1:4400002052;
<input type="checkbox"/>	1		306260	BAG, LAUNDRY, SELF LCK, 12COVER, ORN, 24X30	CORRECTIONAL INDUSTRIES	001-0010-0030	Each	22.50 USD	1 Each		Each	170796 1:4400002052;
<input type="checkbox"/>	1		306261	BAG, LAUNDRY, SELF LCK, 12COVER, WHT, 24X30	CORRECTIONAL INDUSTRIES	001-0010-0031	Each	22.50 USD	1 Each		Each	170796 1:4400002052;
<input type="checkbox"/>	1		306262	BAG, LAUNDRY, SELF LCK, 12COVER, YEL, 24X30	CORRECTIONAL INDUSTRIES	001-0010-0032	Each	22.50 USD	1 Each		Each	170796 1:4400002052;
<input checked="" type="checkbox"/>	250		306263	BAG, LAUNDRY, SELF LCK, 18COVER, BLU, 40X40	CORRECTIONAL INDUSTRIES	001-0010-0033	Each	22.50 USD	1 Each		Each	170796 1:4400002052;
<input type="checkbox"/>	1		306264	BAG, LAUNDRY, SELF LCK, 18COVER, GRN, 40X40	CORRECTIONAL INDUSTRIES	001-0010-0034	Each	22.50 USD	1 Each		Each	170796 1:4400002052;
<input type="checkbox"/>	1		306265	BAG, LAUNDRY, SELF LCK, 18COVER, YEL, 40X40	CORRECTIONAL INDUSTRIES	001-0010-0035	Each	24.75 USD	1 Each		Each	170796 1:4400002052;

- Items may be placed in the shopping cart using several different methods, including:
 - Entering the ordering quantity in the item's *Quantity* column
 - Placing a checkmark in the box next to the *Quantity*
 - Selecting the ADD TO CART button

Requisitioning: Create Shopping Cart from a Catalog



[Back to application](#)

SRM-MDM Product Catalog

Items: 2 Price: 10,187.50 USD [View Cart](#) [Check Out](#)

Search Search Criteria

Keyword: [Search](#) [Reset Search](#) [Advanced Search](#)

Supplier Part Number: Contains Product ID: Contains

- To exit the catalog and continue processing the shopping cart, select the *Check Out* link

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

Previous Next Order Close Save Check

1 Select Goods/Service 2 Shopping Cart (2 items) 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	Per	Delivery Date	Notes	Attachments	Supplier
1	Material	306258	BAG,LAUNDRY,SELF LCK,12COVER,BLU,24X30	24111506	LAUNDRY NETS/BAGS	250.000	EA	18.25	USD	1	09/04/2013	1	0	CORRECTIONAL INDUSTRIES(170796)
2	Material	306263	BAG,LAUNDRY,SELF LCK,18COVER,BLU,40X40	24111506	LAUNDRY NETS/BAGS	250.000	EA	22.50	USD	1	09/04/2013	1	0	CORRECTIONAL INDUSTRIES(170796)
	Undefined Item Type					1.000		0.00	USD	1	08/20/2013	0	0	

Requisitioning: Create Shopping Cart from a Catalog



Details for item 1 BAG,LAUNDRY,SELF LCK,12COVER,BLU,24X30

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

Identification

Item Type:

Product ID:

Description: [Show Item In Catalog](#)

Product Category: LAUNDRY NETS/BAGS

Organization

Purchasing Group: [Show Members](#)

Company Code: COMMONWEALTH OF PA

Further Properties

Supplier Product Number:

Currency, Values and Pricing

Order Quantity / Unit: EA Each

Ordered Quantity / Unit:

Open Quantity / Unit: EA

Price / Currency: USD Price Unit

Service and Delivery

Location / Plant: DGS

Storage Location:

Goods Recipient: Angela Eshleman

Delivery Date:

Proceed Using P-CARD?

- Note: If you have been assigned a P-Card, and the contract you are ordering from is P-Card Enabled, select the *Proceed Using P-CARD?* checkbox located on the *Item Data* tab
 - Refer to the next slide for the definition of the term P-Card Enabled

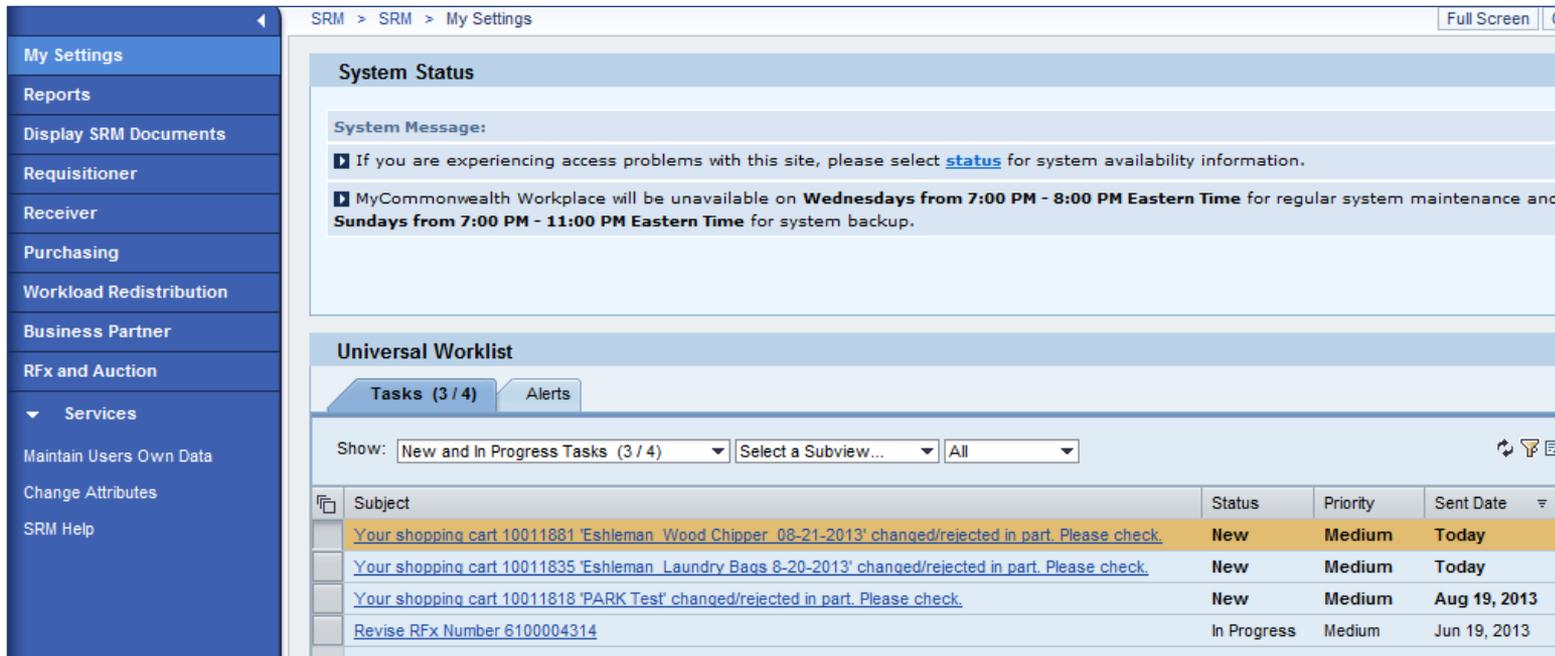
Requisitioning: Create Shopping Cart from a **Catalog**



- 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

Requisitioning: Edit/Delete Cart

- The appearance and functionality of the Universal Worklist is unchanged from SRM 5.0
 - Follow the existing processes for editing and deleting shopping carts



SRM > SRM > My Settings Full Screen | 0

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 (3 / 4) Alerts

Show: ↻ 🔍 📄

Subject	Status	Priority	Sent Date
Your shopping cart 10011881 'Eshleman Wood Chipper 08-21-2013' changed/rejected in part. Please check.	New	Medium	Today
Your shopping cart 10011835 'Eshleman Laundry Bags 8-20-2013' changed/rejected in part. Please check.	New	Medium	Today
Your shopping cart 10011818 'PARK Test' changed/rejected in part. Please check.	New	Medium	Aug 19, 2013
Revise RFX Number 6100004314	In Progress	Medium	Jun 19, 2013



Summary



- Thank you for participating in the Requisitioning in SRM 7.0 ***Delta*** course
 - Please complete this course by completing the following Knowledge Check



Knowledge Checks



Knowledge Check



1. Which of the following describes functionality new to SRM 7.0:
 - a. POWL
 - b. Team Shopping
 - c. Punch out Catalogs
 - d. all of the above
 - e. A and B



Knowledge Check



2. SAP Purchase Requisitions are automatically workflowed into SRM for processing
 - a. True
 - b. False



Knowledge Check



3. Team shopping carts may be accessed by any Requisitioner in SRM
 - a. True
 - b. False



Knowledge Check



4. 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

Survey



Select the link below to complete an online survey:

<https://www.surveymonkey.com/s/LPVP>
HBM



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.



Supplier
Relationship
Management

SRM 7.0 *Delta*
Requisitioning

Thank you!