



**SAP**

**S**upplier  
**R**elationship  
**M**anagement

**SRM 7.0 Sourcing  
Procurement  
Document  
Approver**

Course Number:  
V001

# Course Navigation



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

# Course Objectives

- After successfully completing this course, you will be able to:
  - Identify major differences between SRM 5.0 and SRM 7.0
  - Understand the navigation changes and new features of SRM 7.0
  - Recognize approval thresholds and levels, Contract types, and Solicitation types
  - Review procurement documents
  - Approve and reject procurement documents

# Topics of Discussion

- Differences between SRM 5.0 and SRM 7.0
- SRM 7.0: Introduction and Overview
- Approval Thresholds and Levels
- Reviewing Procurement Documents
- Approving and Rejecting Documents
  - Approving Purchase Orders (POs)
  - Approving Solicitations
  - Approving Contracts
- Knowledge Check



# DIFFERENCES

## SRM 5.0 vs SRM 7.0

# Differences: SRM 5.0 vs SRM 7.0

- In the approval process, there have been some changes in the workflow thresholds, however the business processes have not changed
- What has changed in SRM 7.0 is the document landscape
- The following slides will provide you with some of those changes for each of the document types

# Solicitations & Contracts

## Differences: SRM 5.0 vs SRM 7.0

Category	SRM 5.0	SRM 7.0
System messages	Tips, Warnings, and Error messages are located at the bottom of the screen	Tips, Warnings, and Error messages are located at the top of the screen; the quantity of Tips and Warning messages has been reduced
Document Builder	XI server is used in conjunction with Document Builder	Document Builder is available without XI
Attributes	More than 25 mandatory "Attributes" exist, and must be added manually to the Solicitation document	Attributes are now known as Questions, have been reduced to two, and are defaulted into the Solicitation document
Print Preview	Suppliers may not "print preview" an incomplete bid	Print preview is available for suppliers' incomplete bids

# Solicitations & Contracts

## Differences: SRM 5.0 vs SRM 7.0

Category	SRM 5.0	SRM 7.0
Inventory Contracts	Inventory Contracts reside in the core SAP system	Inventory Contracts reside in SRM
Invoicing Plan Contracts	Invoicing Plan Contracts reside in the core SAP system	Invoicing Plan Contracts reside in SRM
Sole Source Contracts	No Sole Source Contract types exist	Three Sole Source Contract document types:  Agency Sole Source Service Statewide Sole Source Service Statewide Sole Source Supply  Note: Sole Source Contract Approval Workflow is shown on slides 33 & 34

# Purchase Orders

## Differences: SRM 5.0 vs SRM 7.0

Category	SRM 5.0	SRM 7.0
Basic Data and Partner Info	Sub-tab which contains Basic Data and Partner is called Basic Data	Sub-tab which contains Basic Data and Partner is called General Data
Account Assignment	Unable to use Cost Distribution - Value	Able to use Cost Distribution - Value
Text and Attachments	Sub-tab is called Documents	Sub-tab is called Notes and Attachments
Workflow	Used the Approval Agent Report to view the Workflow	Able to view workflow on the Approval tab in the PO
	Workflow history is not retained	Workflow history is retained
Liquidating Commitments	Selection of the "No further Confirmation expected" and "No further Invoices expected" checkboxes were done under the Statistics sub-tab	Selection of the "No Further Confirmations" and "No Further Invoices" radio buttons are done under the Related Documents sub-tab
Invoicing Plan	Formerly done in SAP, select doc type Periodic Invoicing Plan	Now done in SRM, select doc type ZP Invoicing Plan; additional information entered in the Payment sub-tab
Validity Period	Did not exist	Exists in the Header tab - General Data, used for reporting purposes
Inventory POs	May not be created in SRM	May be created in SRM; known as Plan Driven Procurement (PDP)
Deletion/Cancellation	POs are deleted if unneeded	Ability to Cancel POs – Liquidate POs



# SRM 7.0: Introduction and Overview

# Introduction to SRM 7.0

- Switching from SRM 5.0 to SRM 7.0 can feel very disorienting at first
  - Similar to walking into your kitchen at home and finding out that someone has rearranged the contents of your cabinets
- When using 7.0, do not try to make comparisons with 5.0 because just about everything has a new location

# Overview of SRM 7.0

- SRM 7.0 incorporates all functionality from SRM 5.0
  - Many of the currently unused buttons and fields have been removed in 7.0 as requested by end users
- SRM 7.0 contains an enhanced user interface and new features, such as:
  - Personal Object Worklist (POWL)
  - “Team” Shopping Cart
  - Plan Driven Procurement (PDP)
  - Use of *Worksets*

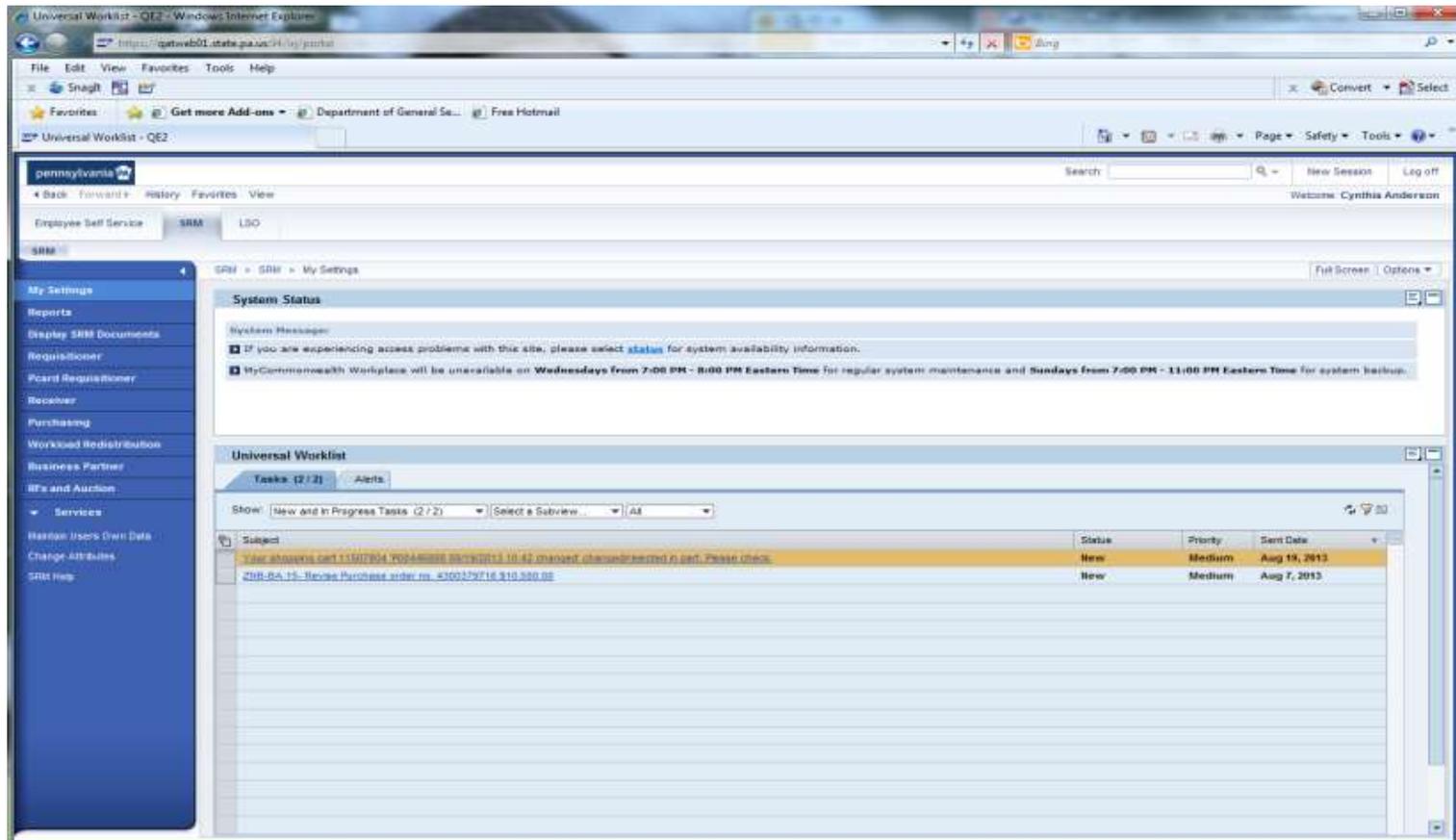
# Overview of SRM 7.0

- Other new functionality and features of SRM 7.0 will be “transparent” to the end user
  - Validation of P-Card process data
  - Reduction of Material Group numbers
  - Technical changes to workflow functions

# Overview of SRM 7.0

## Logging In

The SAP/SRM Portal Desktop continues to be accessible through MyCommonwealth Workplace.



The screenshot displays the SAP/SRM Portal Desktop interface within a browser window. The page title is "Universal Worklist - QE2". The browser address bar shows the URL "https://sapweb01.state.pa.us/ehp/portal". The page features a navigation menu on the left with options like "My Settings", "Reports", "Requestor", and "Receiver". The main content area is titled "SRM" and "My Settings". It includes a "System Status" section with a "System Message" and a "Universal Worklist" section with a table of tasks.

**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**

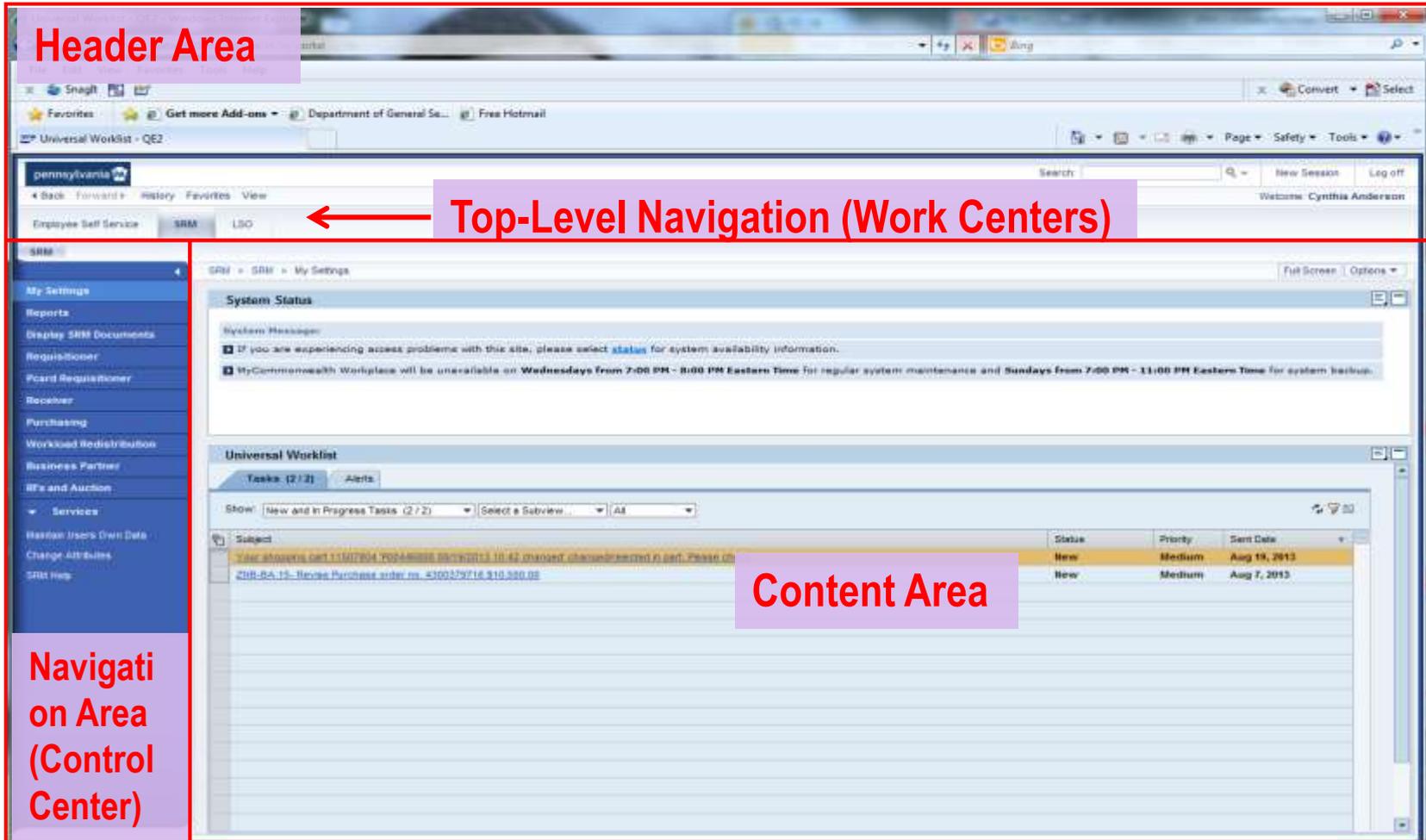
Tasks: (2 / 2) Alerts

Show: New and In Progress Tasks (2 / 2) Select a Subview: All

Subject	Status	Priority	Sent Date
<a href="#">User abogers cert 11507804 P0244888 09/03/13 10:42 manager_charandresmd@pa.gov, Please check</a>	New	Medium	Aug 19, 2013
<a href="#">ZUR-RA 15 - Review Purchase order no. 4300179716 \$10,500.00</a>	New	Medium	Aug 7, 2013

# Overview of SRM 7.0

## Portal Desktop Landscape



The screenshot shows the SRM 7.0 portal interface. A red box highlights the main content area, and a purple box highlights the left navigation menu. Red arrows and text boxes provide labels for these areas.

**Header Area** (purple box): Located at the top of the page, containing the Pennsylvania logo, search bar, and user information (Welcome, Cynthia Anderson).

**Top-Level Navigation (Work Centers)** (red arrow and purple box): Located below the header, showing navigation links for Employee Self Service, SRM, and LSO.

**Content Area** (purple box): The main body of the page, containing system status messages and a universal worklist table.

**Navigation Area (Control Center)** (purple box): A vertical menu on the left side of the page, listing various SRM functions such as My Settings, Reports, and Purchasing.

Subject	Status	Priority	Sent Date
Your shopping cart 11507804 P02448888 8/13/13 10:42 changed character/created 0 cart. Please co...	New	Medium	Aug 13, 2013
ZHR-BA-15--Revised Purchase order no. 4300259716 \$10,580.08	New	Medium	Aug 7, 2013

# Overview of SRM 7.0

## Navigating the User Interface

- Roles
  - Your user role(s) in 7.0 are identical to those assigned in 5.0
  - Access to your role(s) remain within the *Control Center* (e.g., left navigation pane)
- Transactions
  - Upon selection of a specific role, the associated activities and transactions display as *Worksets* in 7.0

# Overview of SRM 7.0

## Navigating the User Interface

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

# Overview of SRM 7.0

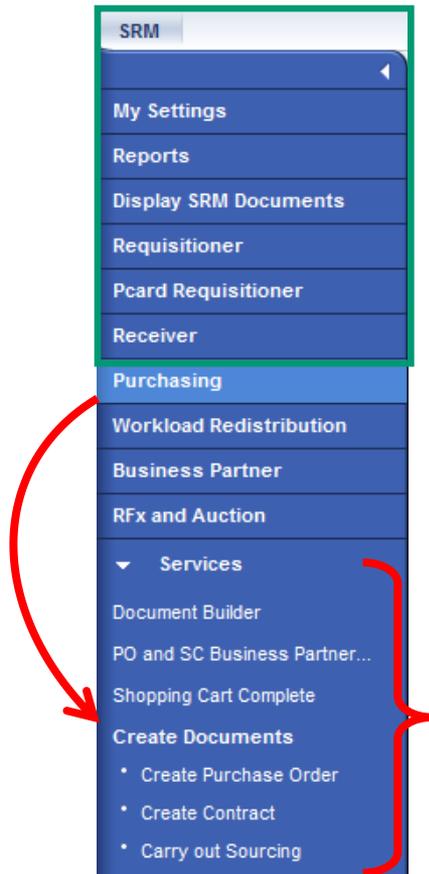
## Control Center in SRM 5.0



- Multiple menus were expanded in order to access a specific transaction
  - The transaction was then selected from the displayed list

# Overview of SRM 7.0

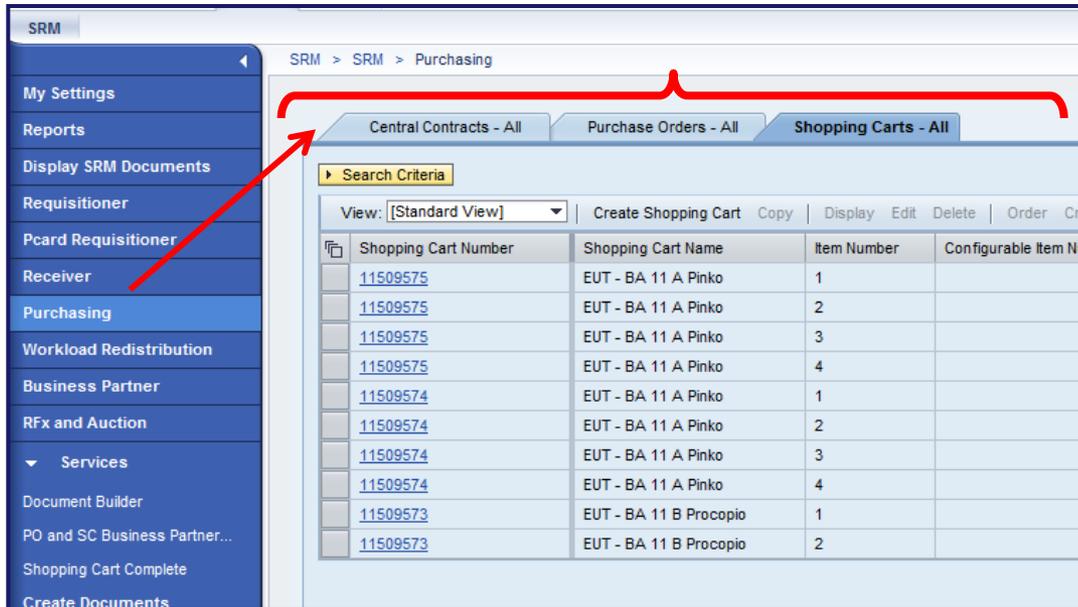
## Control Center in SRM 7.0



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

# Overview of SRM 7.0

## Personal Object Worklist (POWL)



SRM > SRM > Purchasing

Central Contracts - All | Purchase Orders - All | **Shopping Carts - All**

Search Criteria

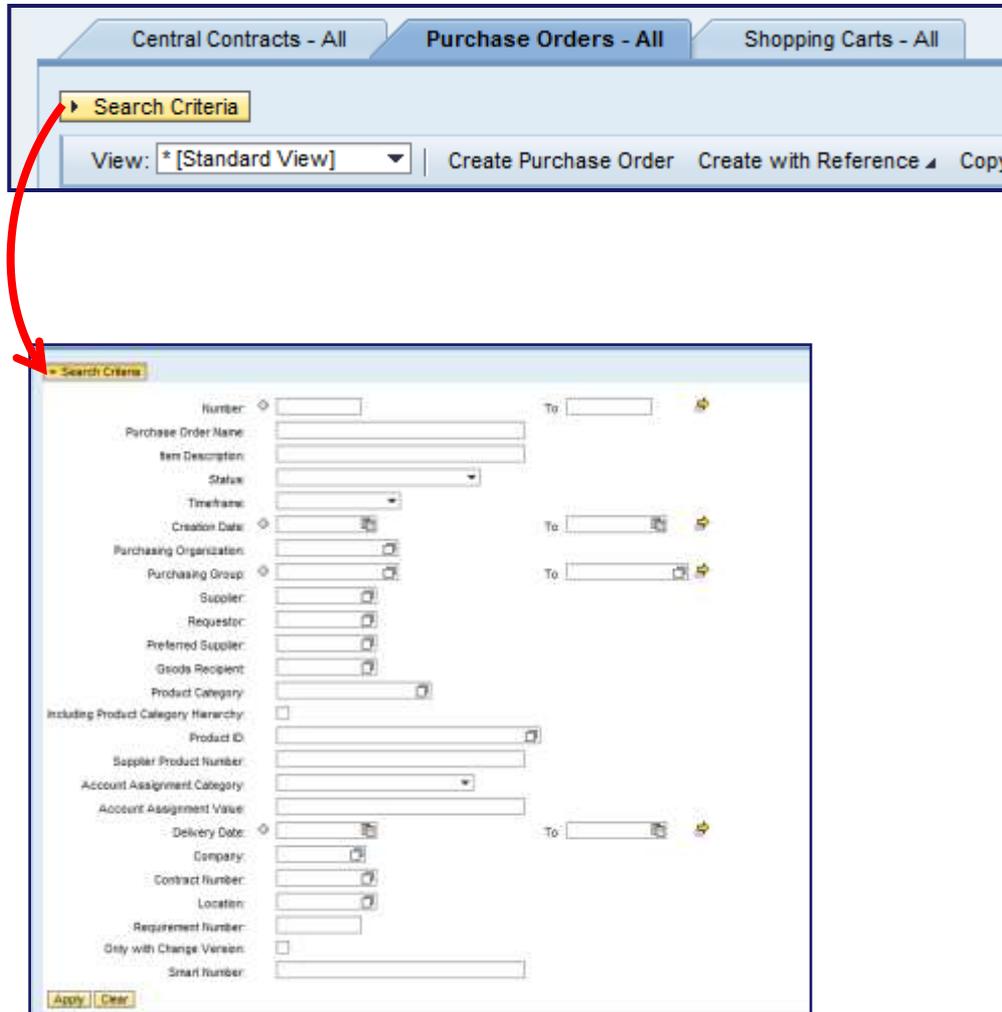
View: [Standard View] | Create Shopping Cart | Copy | Display | Edit | Delete | Order | Cre

Shopping Cart Number	Shopping Cart Name	Item Number	Configurable Item Nu
<a href="#">11509575</a>	EUT - BA 11 A Pinko	1	
<a href="#">11509575</a>	EUT - BA 11 A Pinko	2	
<a href="#">11509575</a>	EUT - BA 11 A Pinko	3	
<a href="#">11509575</a>	EUT - BA 11 A Pinko	4	
<a href="#">11509574</a>	EUT - BA 11 A Pinko	1	
<a href="#">11509574</a>	EUT - BA 11 A Pinko	2	
<a href="#">11509574</a>	EUT - BA 11 A Pinko	3	
<a href="#">11509574</a>	EUT - BA 11 A Pinko	4	
<a href="#">11509573</a>	EUT - BA 11 B Procopio	1	
<a href="#">11509573</a>	EUT - BA 11 B Procopio	2	

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

# Overview of SRM 7.0

## Personal Object Worklist (POWL)



Central Contracts - All | Purchase Orders - All | Shopping Carts - All

Search Criteria

View: \* [Standard View] | Create Purchase Order | Create with Reference | Copy

Search Criteria

Number: [ ] To: [ ]

Purchase Order Name: [ ]

Item Description: [ ]

Status: [ ]

Timeframe: [ ]

Creation Date: [ ] To: [ ]

Purchasing Organization: [ ] To: [ ]

Purchasing Group: [ ] To: [ ]

Supplier: [ ]

Requester: [ ]

Preferred Supplier: [ ]

Goods Recipient: [ ]

Product Category: [ ]

Including Product Category Hierarchy: [ ]

Product ID: [ ]

Supplier Product Number: [ ]

Account Assignment Category: [ ]

Account Assignment Value: [ ]

Delivery Date: [ ] To: [ ]

Company: [ ]

Contract Number: [ ]

Location: [ ]

Requirement Number: [ ]

Only with Change Version: [ ]

Smart Number: [ ]

Apply | Clear

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

# Overview of SRM 7.0

## Sample Document Landscape (PO)

**Create Purchase Order**

Order Save Print Preview Check Costs Related Links

Enter at least one item or one line

Purchase Order Number: 430004106 Purchase Order Type: Standard PO Status: In Process Document Date: 05/20/2013 Total Value (Gross): 0.00 USD Smart Number:

Overview Header Items Notes and Attachments Approval Tracing

**General Header Data**

Smart Number:   
 Smart Number is External

Purchase Order Number: 430004106

PO Item: **MSG Seating**

Supplier:  [PENN STATE UNIVERSITY \(04-10\)](#)

Requester:  [Cynthia Anderson](#)

Recipient:

Location:

Ship-To Address:

Purchasing Organization:  [CORA Purchasing Organization](#)

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

Total Value (Net):  0.00 USD

Note to Supplier:

Internal Note:

**Item Overview**

Details Add Item Copy Item Customize Delete Unassign Process Sources of Supply Add Conditions Remove Conditions Exit Item Cycle Process All Items Filter Settings

Line Number	Deleted	Item Type	Item Number	Product ID	Description	Product Category	Quantity	Unit	Gross Price	Currency	Per	Net Price	Option Type	Order Type	Condition	Option Status	Delivery Date	Account Assignment Type	Account Assignment Number
*		Material	0		managerial seating	56121100	1.000	EA	467.99	USD	1	0.00							
*		Material	0				0.000		0.00	USD	0	0.00							
*		Material	0				0.000		0.00	USD	0	0.00							
*		Material	0				0.000		0.00	USD	0	0.00							
*		Material	0				0.000		0.00	USD	0	0.00							
*		Material	0				0.000		0.00	USD	0	0.00							
*		Material	0				0.000		0.00	USD	0	0.00							
*		Material	0				0.000		0.00	USD	0	0.00							
*		Material	0				0.000		0.00	USD	0	0.00							
Total Value (Net): 0.00 USD Total Tax: 0.00 USD Total Value (Gross): 0.00 USD																			

This is an example of a document landscape. Displayed is the initial tab (Overview) upon creation or entry of a PO.

# Overview of SRM 7.0

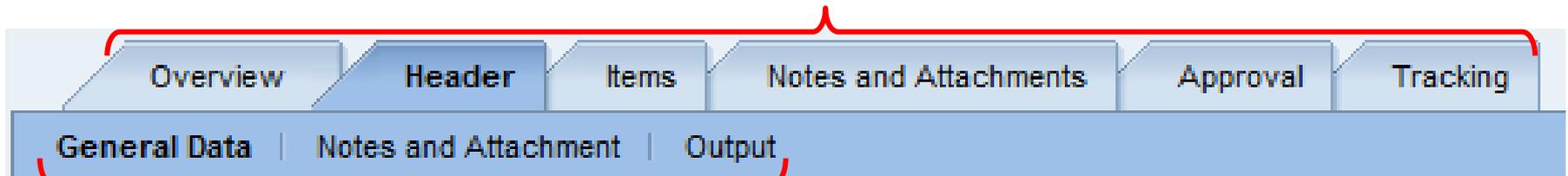
## Sample Document Landscape (PO)

### Title and Header Area



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

### Tab Pages



### Sub Tabs

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

# Overview of SRM 7.0

## Sample Document Landscape (PO)

**Create Purchase Order**

Order Save Print Preview Check Close Related Links

Enter at least one item or one line

Purchase Order Number: 430004100 Purchase Order Type: Standard PO Status: In Process Document Date: 05/26/2012 Total Value (Gross): 0.00 USD Smart Number

Overview Header Items Notes and Attachments Approval Tracking

**General Header Data**

Smart Number:

Smart Number is External

Purchase Order Number: 430004100

PO Name: 5812 Seating

Supplier: 152  [PENNY VANH INDUSTRIES FOR THE](#)

Requester: 117623  [Cynthia Anderson](#)

Recipient: 117623

Location: 100022

Ship-To Address: 10482

Purchasing Organization: COPA Purchasing Organization

Purchasing Group: 005 Central Purchasing Group  [Show Details](#)

Total Value (Net): 0.00 USD

Note to Supplier:

Internal Note:

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

**Item Description**

Line Number	Deleted	Item Type	Item Number	Product ID	Description	Product Category	Quantity	Unit	Gross Price	Currency	Per	Net Price	Option Type	Order Type	Condition	Option Status	Delivery Date	Account Assignment Type	Account Assignment Number
1		Material			managerial seating	58121500	1.000	EA	467.95	USD	1	0.00							
*		Material					0.000		0.00	USD	0	0.00							
*		Material					0.000		0.00	USD	0	0.00							
*		Material					0.000		0.00	USD	0	0.00							
*		Material					0.000		0.00	USD	0	0.00							
*		Material					0.000		0.00	USD	0	0.00							
*		Material					0.000		0.00	USD	0	0.00							
*		Material					0.000		0.00	USD	0	0.00							
*		Material					0.000		0.00	USD	0	0.00							
*		Material					0.000		0.00	USD	0	0.00							
<p>Total Value (Net) 0.00 USD Total Tax 0.00 USD Total Value (Gross) 0.00 USD</p>																			

**Application Area**

# Overview of SRM 7.0

## Changes to the Search Feature

▼ Partner

Details Add Send E-Mail Call Clear

Function	Number	Match Code
Requester	326419	<input type="checkbox"/>
▼ Vendor	100012	AS
Service Agent		
Goods Recipient	326419	Alf
Ship-To Address	300001	EXE
Location	90	DPL

All Values: Requester

Search Criteria Personal Value List Settings Hide Search Criteria

Business Partner:  →

Name 1/last name:  →

Name 2/First name:  →

Search term 1:  →

Search term 2:  →

User Name:  →

E-Mail Address:  →

Org. Unit Name:  →

BP Org. Unit:   →

Restrict Number of Value List Entries To

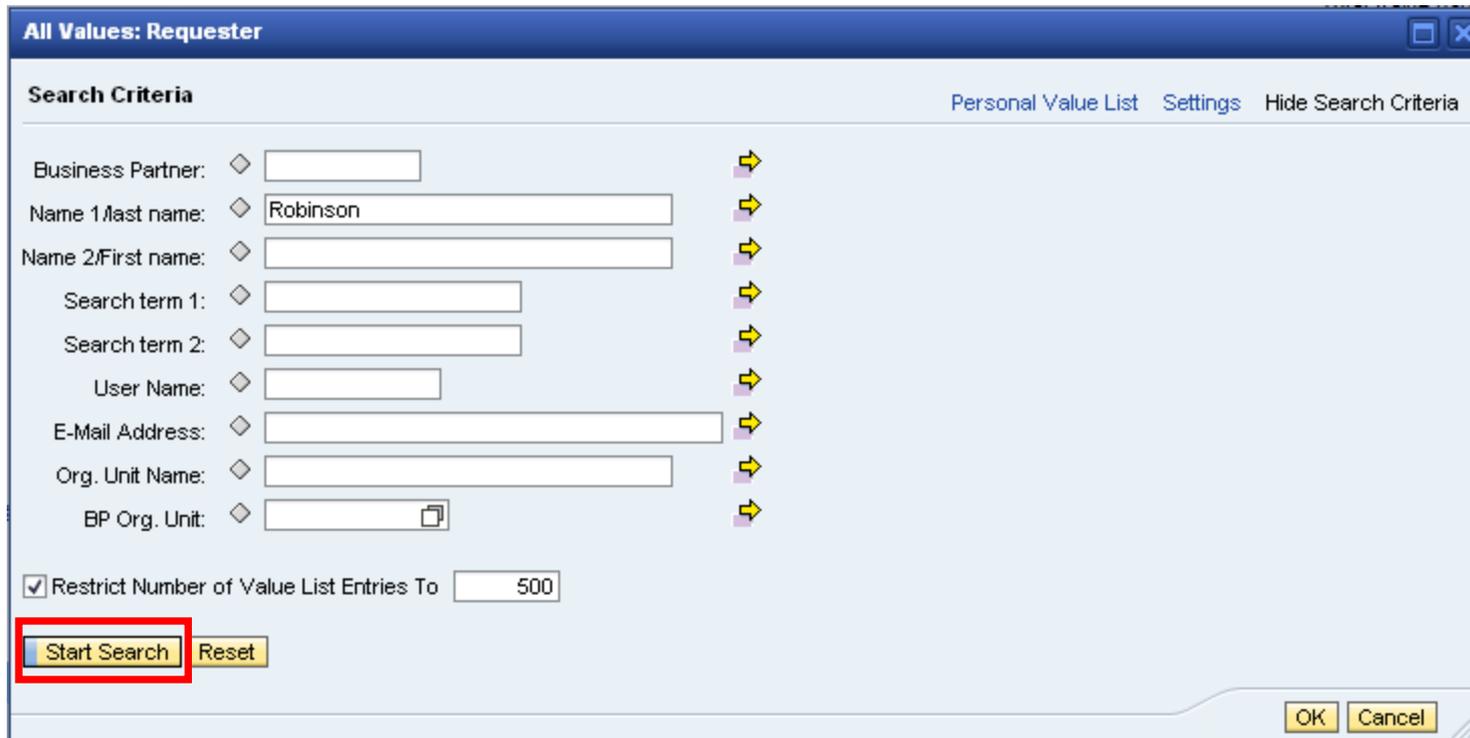
Start Search Reset

OK Cancel

- You will notice a slight change in the Search feature's appearance
  - Select the match code icon to open a dialog box to input the search criteria

# Overview of SRM 7.0

## Changes to the Search Feature



**All Values: Requester**

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

Business Partner:  

Name 1/last name:  

Name 2/First name:  

Search term 1:  

Search term 2:  

User Name:  

E-Mail Address:  

Org. Unit Name:  

BP Org. Unit:  

Restrict Number of Value List Entries To

**Start Search**

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

# Overview of SRM 7.0

## Changes to the Search Feature

**All Values: Requester**

Search Criteria Personal Value List Settings Hide Search Criteria

Business Partner:  

Name 1/last name:  

Name 2/First name:  

Search term 1:  

Search term 2:  

User Name:  

E-Mail Address:  

Org. Unit Name:  

BP Org. Unit:  

Restrict Number of Value List Entries To

**Results List: 45 results found for Ilumber**

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

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

# Overview of SRM 7.0

## Changes to the Search Feature

▼ Partner			
<input type="button" value="Details"/> <input type="button" value="Add"/> <input type="button" value="Send E-Mail"/> <input type="button" value="Call"/> <input type="button" value="Clear"/>			
Function	Number	Name	
▪ Requester	326419	<a href="#">Alf...</a>	
▼ Vendor	100012	<a href="#">AS...</a>	
▪ Service Agent			
▪ Goods Recipient	326419	<a href="#">Alf...</a>	
▪ Ship-To Address	300001	<a href="#">EX...</a>	
▪ Location	90	<a href="#">DPI...</a>	

- The chosen value is transferred into the applicable field



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# Approval Thresholds and Levels

# Approval Thresholds and Levels

## Solicitations approval levels

DGS Bid Document Types	Thresholds	Approval Strategy
Request For Proposal Material	N/A	Commodity Manager, DGS Legal
Invitation For Bid Material Supplier Price Request Material	N/A	Commodity Manager
Request For Proposal Service	N/A	Commodity Manager, DGS Legal
Invitation For Bid Service Supplier Price Request Service	N/A	Commodity Manager
RFQU Material RFQU Service	N/A	None – however Ad-Hoc approvals are supported for this bid document type. Ad-Hoc approvals cannot be used for other bid document types.
RFQ-IT ITQ Material	N/A	Commodity Manager, OA Legal
RFQ-IT ITQ Service	N/A	Commodity Manager, OA Legal

Request for Quote (RFQ)  
Invitation to Qualify (ITQ)

**Note:** In the case of Information Technology (IT) Procurements, workflow will route to appropriate Office of Administration (OA) roles.

# Approval Thresholds and Levels

## Solicitations approval levels

Agency Bid Types	Thresholds	Approval Strategy
Invitation For Bid Material Invitation For Bid Services Supplier Price Request Material Supplier Price Request Service	N/A	Agency Head
Request For Proposal Material Request For Proposal Service RFQ-IT ITQ Material RFQ-IT ITQ Service	N/A	Agency Head, Agency Legal
RFQU Material RFQU Service	N/A	None – however Ad-Hoc approvals are supported for this bid document type. Ad-Hoc approvals cannot be used for other bid document types

**Note:** In the case of IT Procurements, workflow will route to appropriate OA roles.

# Approval Thresholds and Levels

## Agency Contract approval thresholds & levels

Agency Contract Types	Thresholds	Approval Strategy
<b>Materials:</b> Agency Contract Agency ITQ	\$10K-\$20K \$20K-∞	Agency Legal Agency Head, Agency Legal  <b>* Comptroller no longer in process except for Non-Standard Terms &amp; Conditions</b>
<b>Services:</b> Agency Contract Agency Sole Source Service	\$10K-\$25K \$25K-∞	Agency Head, Agency Legal Agency Head, Agency Legal, Attorney General  <b>* Comptroller no longer in process except for Non-Standard Terms &amp; Conditions</b>

### Important Note:

If Non-Standard Terms & Conditions are checked, Office of General Counsel (OGC) & Attorney General are added to the process. Except for Independent Agencies – Attorney General only is added to the process.

# Approval Thresholds and Levels

## Department of General Services: Contract approval thresholds & levels

DGS Contract Types	Thresholds	Approval Strategy
<b>Materials:</b> Statewide ITQ Statewide Dealer/Reseller Statewide Multi-award Statewide Regular Contract Statewide Header Statewide Sole Source Material	\$10K-\$50K \$50K-\$100K \$100K-\$1M \$1M-∞**	DGS Legal ACM,DGS Legal ACM,CM,DGS Legal ACM, CM, CPO, Treasury, DGS Legal
<b>Services:</b> Statewide ITQ Statewide Dealer/Reseller Statewide Multi-award Statewide Regular Contract Statewide Header Statewide Sole Source Service	\$10K-\$50K \$50K-\$100K \$100K-\$1M \$1M-∞**	DGS Legal ACM,DGS Legal ACM,CM,DGS Legal ACM, CM, CPO, DGS Legal  <b>*Comptroller no longer in process except for Non-Standard Terms &amp; Conditions</b>

Definitions of Approval Roles are listed below:

Associate Commodity Manager (ACM)

Commodity Manager (CM)

Chief Procurement Officer (CPO)

### Important Note:

If Non-Standard Terms & Conditions are checked, OGC & Attorney General are added to the process.

Except for Independent Agencies - Attorney General only is added to the process.

# Approval Thresholds and Levels

## Agency PO approval thresholds & levels

Agency Purchase Order Types	Thresholds	Approval Strategy
Emergency Material	\$10K- ∞	CPO Exception: Independent Agencies – Agency Head Only For changes: No workflow required
Emergency Services	\$10K- ∞	CPO Exception: Independent Agencies – Agency Head Only For changes: No workflow required
Emergency PO OA OIT Services: Supplies:	\$10K - ∞ \$10K - ∞	Office of IT – Director of Services Office of IT – Director of Goods For changes: No workflow required
Auto-generated PO (Contract only)	\$0-\$10K	No release required.
Standard Material –Contract Reference	\$20K-∞	Comptroller <b>* Threshold increased from 10K to 20K</b>
Standard Material – No Contract Reference	\$10K- ∞	Agency Head, Comptroller, Agency Legal <b>* Comptroller threshold increased from 5K to 10K</b>
Standard Services – Contract Reference	\$20K-∞	Comptroller <b>* Comptroller threshold increased from 10K to 20K</b>
Standard Services – No Contract Reference	\$10K-\$25K \$25K- ∞	Agency Head, Comptroller, Agency Legal Agency Head, Comptroller, Agency Legal, Attorney General <b>*Comptroller threshold increased from 5K to 10K</b>
Sole Source Service	\$10K- \$25K \$25K - ∞	Agency Head, Comptroller, Agency Legal Agency Head, Comptroller, Agency Legal, Attorney General

### Important Note:

If Non-Standard Terms & Conditions are checked, OGC & Attorney General are added to the process.

Except for Independent Agencies - Attorney General only is added to the process.

# Approval Thresholds and Levels

## DGS PO approval thresholds & levels

DGS Purchase Order Types	Thresholds	Approval Strategy
DGS issued Material	\$10K-\$50K \$50K-\$100K \$100K-\$1M \$1M-∞	Comptroller, DGS Legal ACM, Comptroller, DGS Legal ACM, CM, Comptroller, DGS Legal ACM, CM, CPO, Comptroller, Treasury, DGS Legal
DGS issued Service	\$10K-\$25K \$25K-\$50K \$50K-\$100K \$100K-\$1M \$1M-∞	Comptroller, DGS Legal Comptroller, DGS Legal, Attorney General ACM, Comptroller, DGS Legal, Attorney General ACM, CM, Comptroller, DGS Legal, Attorney General ACM, CM, CPO, Comptroller, DGS Legal, Attorney General
Sole Source Service	\$10K- \$25K \$25K - ∞	Agency Head, Comptroller, Agency Legal Agency Head, Comptroller, Agency Legal, Attorney General
Sole Source Supply	\$10K- ∞	DGS Secretary, Comptroller, DGS Legal, Treasury, Sole Source Board

### Important Note:

If Non-Standard Terms & Conditions are checked, OGC & Attorney General are added to the process.

Except for Independent Agencies - Attorney General only is added to the process.



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# SRM Approval Workflow

# SRM Approval Workflow

With established workflow business rules, SRM:

1. Identifies the approvers for all procurement documents
2. Routes procurement documents to everyone assigned to an approval level
3. Searches throughout the organization for an approver at the identified level if an approver is not found
4. Re-initiates the approval process when necessary

# SRM Approval Workflow

1. SRM routes procurement documents to everyone assigned to an approval level
  - As an approver, you will see all the documents that need approval at your level
    - Select only those that are consistent with your agency's identified approval guidelines
  - If more than one person is assigned to an approval level within an organizational tier (e.g. unit, division, bureau), each person at that level receives the document for approval

# SRM Approval Workflow

2. SRM searches throughout the organization for an approver at the identified level if an approver is not found
  - If SRM does not locate an approver within the organizational tier, it looks for an approver at the same approval level within the next organizational tier
  - If an approver is not located after exhausting the organization's hierarchy and performing an agency-wide search for an approver, the workflow administrator within Integrated Enterprise Systems (IES) notifies the agency for resolution
3. SRM re-initiates the approval process when necessary, based on changes made to a Solicitation, PO, or Contract

# SRM Approval Workflow

Changes to Solicitations may or may not require approval.

Examples of Solicitation changes that do not require approval:

- Extensions to the end date and open date
- Changes to delivery information

Examples of Solicitation changes that do require approval:

- Changes to legal forms or Terms and Conditions
- Changes to scope of work
- Changes to specifications
- Any change that would substantially alter the original procurement document

# SRM Approval Workflow

Changes to POs that trigger changes to the approval process can be placed in one of two categories:

- Changes that trigger a new approval workflow
- Changes that trigger re-release of the PO and approval by the Comptroller

# SRM Approval Workflow

PO changes that trigger a new approval workflow:

1. Standard Terms and Conditions are changed to Non-Standard Terms and Conditions
2. Reference to a Contract is deleted
3. Increase in POs total value
  - If the increase in value meets the guidelines for a new approval workflow, the PO must be approved by the approvers identified with the new workflow
4. Product category changes
  - A change from service to material initiates the material workflow
  - A change from material to service initiates the service workflow
  - Documents containing both service and material follow the service workflow

# SRM Approval Workflow

PO changes that trigger a re-release of the PO and approval by the Comptroller:

1. Account Assignment Category changes
2. First two digits of the general ledger account changes
3. Fund changes to digits 1 through 5 and/or 8 through 10
  - Example: Fund = 1 2 3 4 5 06 7 8 9  
Fund change = 2 2 3 4 5 06 7 8 9
4. Increase in POs total value
  - If the increase in value falls within the current approval workflow, the PO must be approved by the Comptroller

# SRM Approval Workflow

## Changes to DGS POs:

- When a change causes the value of a DGS PO to increase, SRM routes the PO to approvers based on one of the following:
  - The amount of change, if the change keeps the value of the PO within the original threshold
  - The value of the PO, if the change causes the PO to escalate to the next threshold

# SRM Approval Workflow



Initial PO value = \$15,500

Approvers at this threshold =

- Comptroller
- DGS Legal



Value of 1<sup>st</sup> change = \$14,000

PO value = \$29,500

No change to threshold.

(Thus, workflow by incremental change)

The PO is re-released and approved by the Comptroller.



Value of 2<sup>nd</sup> change = \$37,000

PO value = \$66,500 and moves to a new threshold. The PO is re-released and approved at the new threshold level

Approvers at the new threshold =

- ACM
- Comptroller
- DGS Legal
- Attorney General



Value of 3<sup>rd</sup> change = \$14,000

PO value = \$80,500

No change to threshold.

(Thus, workflow by incremental change)

PO is re-released and approved by the Comptroller

Example: We have a service PO without reference to a Contract with Standard Terms and Conditions. The value of the PO is \$15,500. The table at the right lists the approval thresholds and levels. Let us walk through three edits.

Initial PO Value and Changes 1 & 3

Value of Change 2

Thresholds	Approval Workflow
\$0 – \$10,000	• None
\$10,000.01 – \$50,000	• Comptroller, DGS Legal
\$50,000.01 – \$100,000	• ACM, Comptroller, DGS Legal, AG
\$100,000.01 – \$1,000,000	• ACM, CM, Comptroller, DGS Legal, AG
\$1,000,000.01 - ∞	• ACM, CM, CPO, Comptroller, DGS Legal, AG

# SRM Approval Workflow

The approval process for Contracts is re-initiated when:

- A change to a Contract increases the target value and quantity
- Standard Terms and Conditions are changed to Non-Standard Terms and Conditions
- The product category changes
  - A change from service to material initiates the material workflow
  - A change from material to service initiates the service workflow
  - Documents containing both service and material follow the service workflow

# SRM Approval Workflow

## Changes to DGS Contracts:

- When a change causes the value of a DGS Contract to increase, SRM routes the Contract to approvers based on one of the following:
  - The amount of change, if the change keeps the value of the Contract within the original threshold
  - The value of the Contract, if the change causes the Contract to escalate to the next threshold

# SRM Approval Workflow



Initial Contract value = \$60,000

Approvers at this threshold =

- ACM
- DGS Legal



Value of 1<sup>st</sup> change = \$10,000

Contract value = \$70,000  
No change to threshold.  
(Thus, workflow by incremental change)

The \$10,000 increase must be approved. Approvers at the \$10,000 threshold =  
DGS Legal



Value of 2<sup>nd</sup> change = \$31,000

Contract value = \$101,000 and moves to a new threshold

Approvers at the new threshold =

- ACM
- CM
- DGS Legal



Value of 3<sup>rd</sup> change = \$30,000

Contract value = \$131,000  
No change to threshold.  
(Thus, workflow by incremental change)

The \$30,000 increase must be approved. Approvers at the \$30,000 threshold =  
DGS Legal

Example: We have a statewide service Contract with a value of \$60,000. The table at the right lists the approval thresholds and levels. Let us walk through three edits.

**Change values – changes 1 & 3**

**Initial Contract value**

**Change value – change 2**

Thresholds	Approval Workflow
\$0 – \$10,000	• None
\$10,000.01 – \$50,000	• DGS Legal
\$50,000.01 – \$100,000	• ACM • DGS Legal
\$100,000.01 – \$1,000,000	• ACM • CM • DGS Legal
\$1,000,000.01 - ∞	• ACM • CM • CPO • DGS Legal



pennsylvania

DEPARTMENT OF GENERAL SERVICES

# Reviewing Procurement Documents

# Reviewing Documents

- There are three types of documents that might need approval:
  - Solicitations
  - Contracts
  - POs

# Reviewing Documents

## General Approval Guidelines

- Review the document to ensure the items requested and the final document are in line with procurement and legal policies
- Review the document to ensure that the request or final document is appropriately coded for budget and payment
  - POs created from carts have account information; Solicitations and Contracts do not have account information
- Review the document to ensure that the appropriate award method was utilized
- Approve or reject the document only after carefully reviewing it

# Reviewing Documents

Three basic tasks need to be completed when reviewing procurement documents:

1. Select the document needing approval
2. Review the document's details
3. Approve or reject the document

# Reviewing Documents

- Universal Worklist accessed from the Employee Self Service (ESS) Home Page, will display all tasks (i.e.: leave, travel expense report, procurement document approvals)
  - Only Human Resources and LSO processes should be handled from this tab



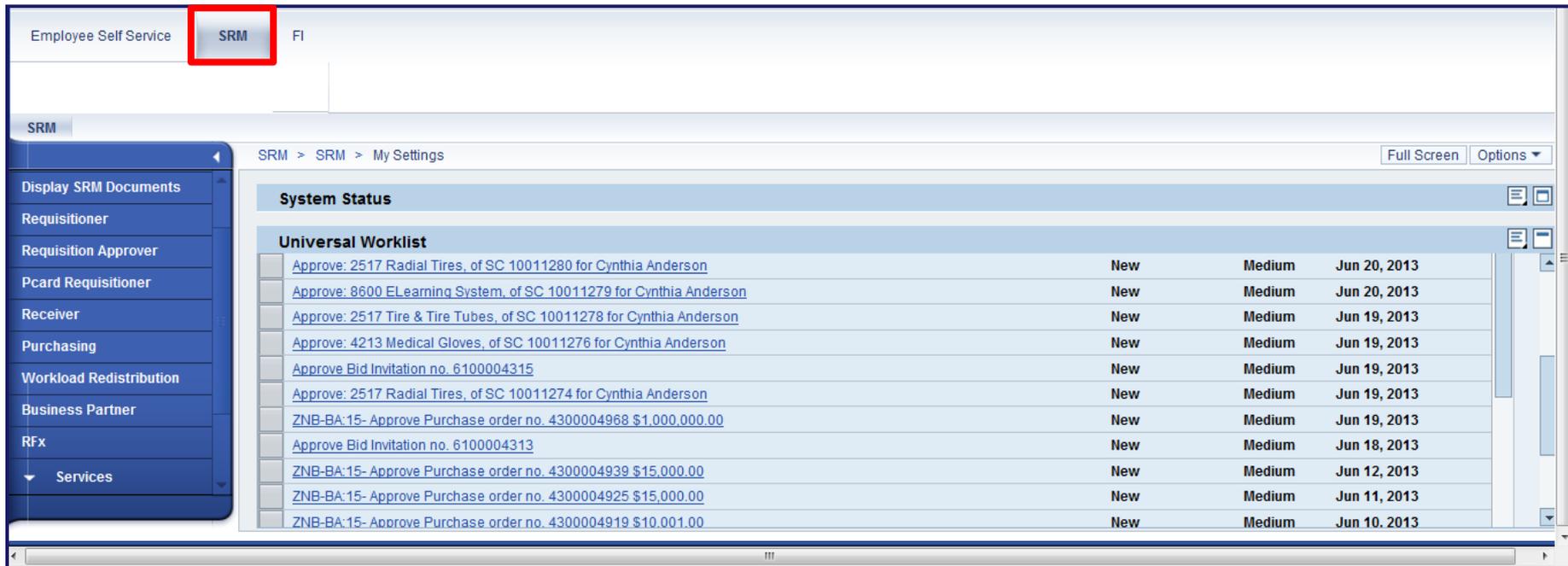
The screenshot shows the Employee Self Service (ESS) interface. The 'Employee Self Service' tab is highlighted in red. The main content area displays the 'Universal Worklist' with the following table:

Task Description	Status	Priority	Due Date
<a href="#">Approve: P0002959 / 06/23/2009 11:32, of SC 10007841 for 1 em SRM_Heimbach</a>	new	medium	Jun 23, 2009
<a href="#">ZNB-BA-15- Approve Change version of purchase order no. 4300002541 \$100,000.00</a>	New		May 28, 2009
<a href="#">Approve: Name of Shopping Cart Goes Here, of SC 10007549 for Terri SRM_Heimbach</a>	New	Medium	Mar 24, 2009
<a href="#">ZAWC-BA-15- Approve Contract no. 4400001585 \$25000.00</a>	New	Medium	Feb 3, 2009
<a href="#">ZAWC-BA-15- Approve Change version of contract no. 4400001522 \$30000.00</a>	New	Medium	Nov 20, 2008
<a href="#">AH-Approve shopping cart 10007065 of Toniann Noss value \$36.04</a>	New		Nov 12, 2008
<a href="#">DL2 - Expense report for 00091007 Ankabrandt.G. 0000000011</a>	New	Medium	Jul 16, 2008
<a href="#">DL1 - Expense report for 00091007 Ankabrandt.G. 0000000011</a>	New	Medium	Jul 16, 2008
<a href="#">SUPV - Expense report for 00091007 Ankabrandt.G. 0000000011</a>	New	Medium	Jul 16, 2008
<a href="#">DL2 - Expense report for 00091007 Ankabrandt.G. 0000000001</a>	New	Medium	Jul 8, 2008

The interface also includes a navigation menu on the left with options like 'ESS Home', 'My Organization (Intranet...)', 'Office', 'My Pay Statement', 'Time Management', 'Payroll Information', 'Voluntary Deductions', 'Benefits', 'Personal Information', and 'Travel Management'. At the bottom, there is a footer with links for 'Home', 'Health', 'Retirement', 'Other Benefits', 'Job & Career', 'Pay & Time', 'Ask HR', and 'Site Map'.

# Reviewing Documents

- Universal Worklist accessed from the SRM Home Page, will display only procurement tasks (i.e.: Solicitations, Contracts, POs, Shopping Carts)
  - This is where all procurement documents should be processed



Employee Self Service **SRM** FI

SRM

SRM > SRM > My Settings Full Screen Options

**System Status**

**Universal Worklist**

<a href="#">Approve: 2517 Radial Tires, of SC 10011280 for Cynthia Anderson</a>	New	Medium	Jun 20, 2013
<a href="#">Approve: 8600 ELearning System, of SC 10011279 for Cynthia Anderson</a>	New	Medium	Jun 20, 2013
<a href="#">Approve: 2517 Tire &amp; Tire Tubes, of SC 10011278 for Cynthia Anderson</a>	New	Medium	Jun 19, 2013
<a href="#">Approve: 4213 Medical Gloves, of SC 10011276 for Cynthia Anderson</a>	New	Medium	Jun 19, 2013
<a href="#">Approve Bid Invitation no. 6100004315</a>	New	Medium	Jun 19, 2013
<a href="#">Approve: 2517 Radial Tires, of SC 10011274 for Cynthia Anderson</a>	New	Medium	Jun 19, 2013
<a href="#">ZNB-BA:15- Approve Purchase order no. 4300004968 \$1,000,000.00</a>	New	Medium	Jun 19, 2013
<a href="#">Approve Bid Invitation no. 6100004313</a>	New	Medium	Jun 18, 2013
<a href="#">ZNB-BA:15- Approve Purchase order no. 4300004939 \$15,000.00</a>	New	Medium	Jun 12, 2013
<a href="#">ZNB-BA:15- Approve Purchase order no. 4300004925 \$15,000.00</a>	New	Medium	Jun 11, 2013
<a href="#">ZNB-BA:15- Approve Purchase order no. 4300004919 \$10,001.00</a>	New	Medium	Jun 10, 2013

# Reviewing Documents

Universal Worklist

Tasks (93 / 94) Alerts

Show: New and In Progress Tasks (93 / 94) | Select a Subview... | All

Subject	Status	Priority	Sent Date
<a href="#">Complete Shopping Cart 10014723 with Value 10,923.75 USD</a>	New	Medium	Today
<a href="#">Revise Purchase order Number 4300004092</a>	New	Medium	May 28, 2013
<a href="#">Approve RFX Number 6100003951</a>	New	Medium	May 22, 2013
<a href="#">Approve RFX Number 6100003950</a>	New	Medium	May 22, 2013
<a href="#">Approve Contract Number 4400005159</a>	New	Medium	May 21, 2013
<a href="#">Approve Contract Number 4400005141</a>	New	Medium	May 20, 2013
<a href="#">Revise Purchase order Number 4300004065</a>	New	Medium	May 17, 2013
<a href="#">Revise Purchase order Number 4300004066</a>	New	Medium	May 17, 2013
<a href="#">Complete Shopping Cart 10014480 with Value 32.10 USD</a>	New	Medium	May 16, 2013
<a href="#">Revise Purchase order Number 4300004033</a>	New	Medium	May 15, 2013
<a href="#">Revise Purchase order Number 4300004032</a>	New	Medium	May 15, 2013
<a href="#">Revise Purchase order Number 4300004025</a>	New	Medium	May 14, 2013
<a href="#">Revise Purchase order Number 4300004022</a>	New	Medium	May 14, 2013
<a href="#">Revise Change version of contract Number 4400004960</a>	New	Medium	May 14, 2013
<a href="#">Approve Contract Number 4400005080</a>	New	Medium	May 13, 2013
<a href="#">Revise Purchase order Number 4300003909</a>	New	Medium	May 6, 2013
<a href="#">Complete Shopping Cart 10014262 with Value 10.00 USD</a>	In Progress	Medium	Apr 26, 2013
<a href="#">Revise Change version of purchase order Number 4300003877</a>	New	Medium	Apr 26, 2013
<a href="#">Approve Bid Invitation no. 6100003731</a>	New		Nov 27, 2012
<a href="#">Approve Bid Invitation no. 6100003681</a>	New		Aug 1, 2012

[Approve Contract Number 4400006569](#)

- View the document you wish to approve by selecting the link in the Universal Worklist

# Reviewing Documents

- The General Header Data on the Overview tab is displayed when a Purchase Order is selected

**Display Purchase Order (Approval Mode)**

Approve | Reject | Save | Print Preview | Close | Related Links

Purchase Order Number: 4300383009 (Change Version) | Purchase Order Type: Standard PO | Status: Awaiting Approval | Document Date: 09/03/2013 | Total Value (Gross): 20,585.00 USD | Smart Number: | Supplier: [GOODYEAR TIRE & RUBBER COMPANY INC](#)

Overview | Header | Items | Notes and Attachments | Approval | Tracking

**General Header Data**

Smart Number: 2517 Tires for Training  
 Smart Number is External

Purchase Order Number: 4300383009  
 PO Name: 2517 Tires for Training

Supplier: \* 161302 [GOODYEAR TIRE & RUBBER COMPANY INC](#)  
 Requester: \* 703389 [Cynthia Anderson](#)  
 Recipient: \* 703389 [Cynthia Anderson](#)  
 Location: 301375 [DGS Bureau of Procurement](#)  
 Ship-To Address: 1 [EXEC BRANCH](#)

Purchasing Organization: \* [COPA Purchasing Organization](#)  
 Purchasing Group: \* [DGS Central Purchase Purchasing Group](#) [Show Members](#)

Total Value (Net): 20,585.00

Note to Supplier:   
 Internal Note:

**Item Overview**

Details | Add Item | Copy | Paste | Duplicate | Delete | Undelete | Propose Sources of Supply | Add Condition | Remove Condition | Process All Items | Filter Settings

Line Number	Deleted	Item Type	Item Number	Product ID	Description	Product Category	Quantity	Unit	Gross Price	Currency	Per	Net Price	Option Type	Order Type	Condition	Option Status	Delivery Date	Account Assignment Type	Account Assignment Number
* 1		Material	1		245/60R18 All Season Tires	25172504	100.000	EA	205.85	USD	1	205.85					09/18/2013	Cost Center	1544001000

Total Value (Net) 20,585.00 USD  
 Total Tax 0.00 USD  
 Total Value (Gross) 20,585.00 USD

# Reviewing Documents

- The RFX Parameters on the RFX Information tab is displayed when a RFX document is selected

**Approve RFX :**

Save Print Preview Close Related Links Approve Reject

RFX Number 6100004531 Smart Number Test Approval 8-26-13 Type Invitation For Bid Status Awaiting Approval Created On 08/26/2013 14:58:30 Created By Cynthia Anderson Time Zone EST  
 Number of Suppliers 1 Number of Items 1 Version Number Version Type Active Version External Version Number

RFX Information Bidders Items Notes and Attachments Conditions Approval Tracking

RFX Parameters Questions Notes and Attachments Conditions

**Identification**

Smart Number: Test Approval 8-26-13  
 Smart Number is External  
 RFX Type: Invitation For Bid  
 Bid Description: 4618 Hard Hat  
 Publication Type: Public RFX

**Event Parameters**

Detailed Price Information: Price with Conditions  
 Follow-On Document: Purchase Order  
 Bidder Can Change RFX Responses:   
 Allow Multiple RFX Responses for Each Company:

**Scenario Award/Contract**

**Organization**

Purchasing Organization: COPA Purchasing Organization  
 Purchasing Group: XC3 - DGS Cynthia K Anderson [Show Members](#)

**Dates**

Start Date: 08/27/2013 15:00:00  
 Submission Deadline: \* 08/28/2013 08:00:00  
 Opening Date: 08/28/2013 09:00:00

**Partners and Delivery Information**

Details Add Send E-Mail Call Clear Filter Settings

Function	Number	Name	Phone Number
Requester	337326	<a href="#">Cynthia Anderson</a>	
Goods Recipient			
Responsible Employee	337326	<a href="#">Cynthia Anderson</a>	
Ship-To Address	300001	<a href="#">EXEC BRANCH</a>	
Location	73	<a href="#">DGS</a>	717-787-5996



# Reviewing Documents

- The COMPARE button displays all changes between two selected document versions

Version Overview

Detail Compare

Version	Document/Version Type
C1	Change Document
2	Active Document



Version
C1
2

- Select the gray box of the two versions that the Approver wants to compare by holding the Ctrl button on your keyboard

# Reviewing Documents

- The Compare shows only the data that is different in both versions
  - Any changes that exist are displayed under the headings “Header” and “Item”
- Select the OUTPUT PREVIEW button for ease in viewing the differences in versions

Version Overview

Detail Compare

Version	Document/Version Type
C1	Change Document
2	Active Document

Version Comparison

Comparison Between Version 1 and Version 3

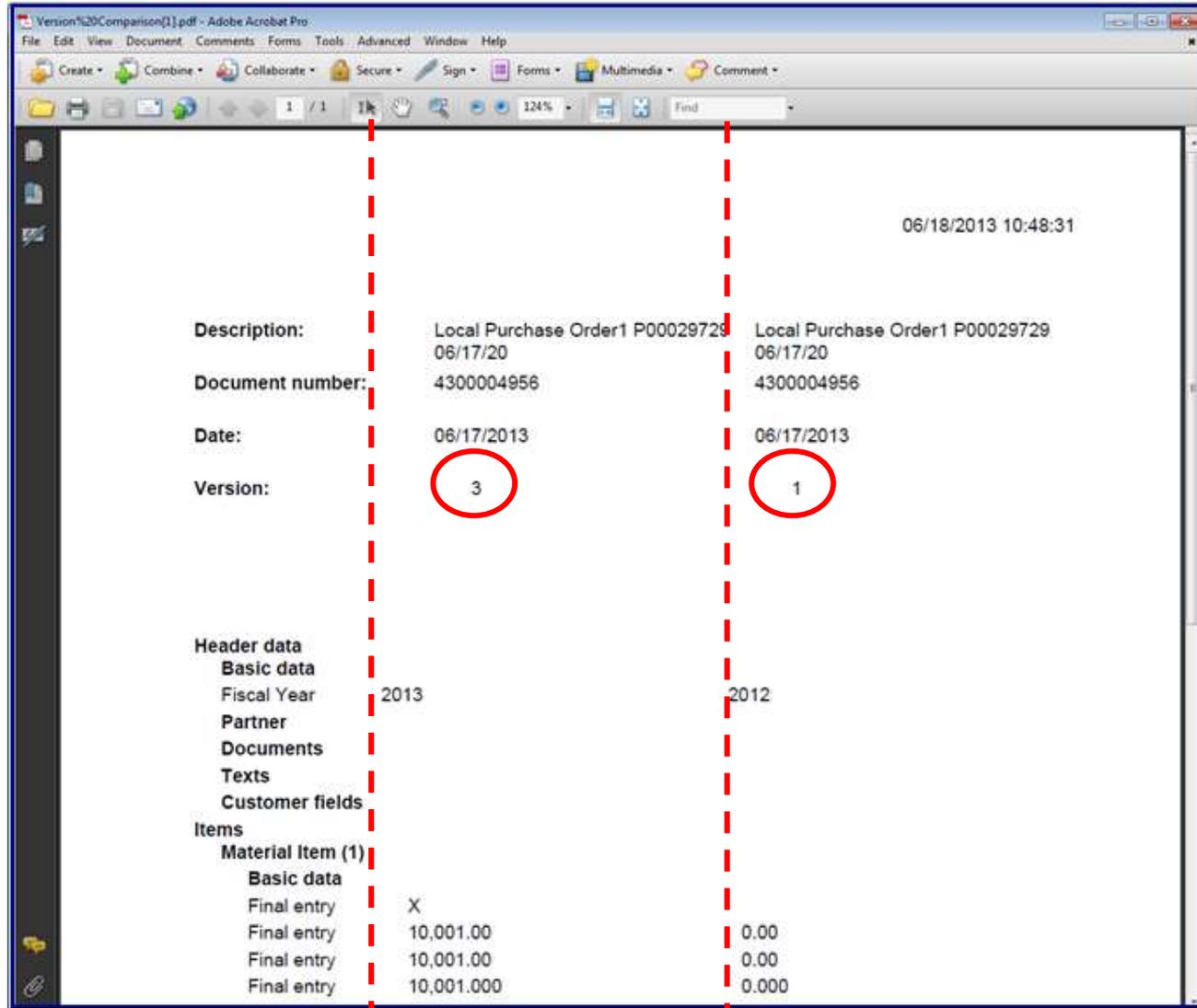
Output Preview Expand All Collapse All Settings

Header - Item/Attribute	Version 1	Version 3
▼ Header		
▼ Basic Data		
• Fiscal Year	2012	2013
▼ (1) Test		
▼ Basic Data		
• Number confs	0	1
• Quant. confirm.	0.000	10,001.000
• Quant. enter confirm	0.000	10,001.000
• Quant. released conf.	0.00	10,001.00
• Value enter. confirm	0.00	10,001.00
• Final entry		X
• Final invoice		X

Cancel

# Reviewing Documents

- A separate window opens to display the document in a PDF format
  - Print the page(s) or view on-screen
  - The differences in each version is displayed side-by-side



Version%20Comparison[1].pdf - Adobe Acrobat Pro

File Edit View Document Comments Forms Tools Advanced Window Help

Create Combine Collaborate Secure Sign Forms Multimedia Comment

1 / 1 124% Find

06/18/2013 10:48:31

<b>Description:</b>	Local Purchase Order1 P00029729 06/17/20	Local Purchase Order1 P00029729 06/17/20
<b>Document number:</b>	4300004956	4300004956
<b>Date:</b>	06/17/2013	06/17/2013
<b>Version:</b>	3	1
<b>Header data</b>		
<b>Basic data</b>		
Fiscal Year	2013	2012
Partner		
Documents		
Texts		
Customer fields		
<b>Items</b>		
<b>Material Item (1)</b>		
<b>Basic data</b>		
Final entry	X	
Final entry	10,001.00	0.00
Final entry	10,001.00	0.00
Final entry	10,001.000	0.000

# Reviewing Documents

- Repeat the comparison process, if necessary, with other version combinations

Version Overview

[Detail](#) [Compare](#)

Version	Document/Version Type
<a href="#">C1</a>	Change Document
<a href="#">2</a>	Active Document

# Reviewing Documents

- Change Documents shows the Old Value, New Value, Changed By, Changed On, Changed At, and Version
- It also breaks out the information by the tab or sub-tab the change is located in, as shown in the example below:

Header/Item Attribute	Old Value	New Value	Changed By	Changed On	Changed At	Version
▼ Change Documents						
• Changed Since		○ Changed From/To		Search	Expand All	Collapse All
▼ Header						
▼ Basic Data						
• Logical System of Logistics Backend		QC8CLNT110	WF-BATCH	03/01/2013	13:25:34	2
• Follow-On Document Object ID in Back-En...		4300004840	WF-BATCH	03/01/2013	13:25:34	2
• Follow-On Document Object Type in Back-...		BUS2012	WF-BATCH	03/01/2013	13:25:34	2
▼ Status						
• Awaiting Approval Indicator: Status is inactive		X	WF-BATCH	03/01/2013	13:25:06	2
• Ordered Newly Added			WF-BATCH	03/01/2013	13:25:06	2
• Change was Transmitted Newly Added			WF-BATCH	03/01/2013	13:25:12	2
• In Transfer to Execution Syst. Indicator: St...		X	WF-BATCH	03/01/2013	13:25:34	2
▼ Item Number 1 - LI 1 Q: CRC13022205 Expires 3...						
▼ Basic Data						
• Follow-On Object Item in Back-End System		06001	WF-BATCH	03/01/2013	13:25:34	2
• Follow-On Document Object ID in Back-En... 1		4300004840	WF-BATCH	03/01/2013	13:25:34	2
• Follow-On Document Object Type in Back-...	BUS2201	BUS2012	WF-BATCH	03/01/2013	13:25:34	2

# Reviewing Documents

- Document attachments needing approval are located on the Notes and Attachments tab

**Display Purchase Order (Approval Mode)**

Approve Reject Save Print Preview Close Related Links

Purchase Order Number 4300383009 (Change Version) Purchase Order Type Standard PO Status Awaiting Approval Document Date 09/03/2013 Total Value (Gross) 20,585.00 USD Smart Number  
Supplier [GOODYEAR TIRE & RUBBER COMPANY INC](#)

Overview Header Items **Notes and Attachments** Approval Tracking

▼ Notes

Add Clear Filter Settings

Assigned To	Category	Text Preview
Item01"245/60R18 All Season Tires"	<a href="#">Item Text</a>	Most commonly used tire sizes and types are net priced a...
Item01"245/60R18 All Season Tires"	<a href="#">Material PO Text</a>	Raised White Letters

▼ Attachments

Add Attachment Edit Description Versioning Delete Create Qualification Profile Filter Settings

Assigned To	Category	Description	File Name	Version	Processor	Visible Internally only	Checked Out	Type	Size (KB)	Changed by	Changed on
Item01"245/60R18 All Season Tires"	Standard Attachment	<a href="#">Sales quote for Tire PO</a>	Sales quote for Tire PO.docx	1		<input checked="" type="checkbox"/>	<input type="checkbox"/>	docx	33	P00446880	09/03/2013

# Reviewing Documents



Item Overview

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

Line Number	Deleted	Item Type	Item Number	Product ID	Description	Product Category	Quantity	Unit	Gross Price	Currency	Per	Net Price	Option Type	Order Type	Condition	Option Status	Delivery Date
1		Material	1	215/75R15 Radial Tires	25172500		20.000	EA	221.50	USD	1	221.50					05/21/2013
2		Material	2	225/70R17 Radial Tires	25172500		20.000	EA	247.75	USD	1	247.75					05/21/2013
		Material	0				0.000		0.00	USD	0	0.00					
		Material	0				0.000		0.00	USD	0	0.00					
		Material	0				0.000		0.00	USD	0	0.00					
		Material	0				0.000		0.00	USD	0	0.00					
		Material	0				0.000		0.00	USD	0	0.00					
		Material	0				0.000		0.00	USD	0	0.00					
		Material	0				0.000		0.00	USD	0	0.00					
		Material	0				0.000		0.00	USD	0	0.00					

1

- Each Line Item is associated with the procurement document
  - Select the ITEM NUMBER or DETAILS button to review corresponding data

# Reviewing Documents

- Items tab - General Data screen displays the item details for review

**Display Purchase Order (Approval Mode)**

Purchase Order Number 4300383009 (Change Version)    Purchase Order Type Standard PO    Status Awaiting Approval    Document Date 09/03/2013    Total Value (Gross) 20,585.00 USD    Smart Number  
 Supplier [GOODYEAR TIRE & RUBBER COMPANY INC](#)

---

Details for item 1 245/60R18 All Season Tires

▼ Basic

<p><b>Identification</b></p> <p>Item Number: <input type="text" value="1"/></p> <p>Item Type: <input type="text" value="Material"/></p> <p>Product ID: <input type="text"/></p> <p>Description: <input type="text" value="245/60R18 All Season Tires"/></p> <p>Product Category: <input type="text" value="25172504"/> AUTOMOBILE/LIGHT TRU</p> <p>Catalog: <input type="text"/></p> <p>Contract / Item: <input type="text" value="4400008515"/> <input type="text" value="1"/> <a href="#">Show Contract</a></p> <p><b>Further Properties</b></p> <p>Supplier Product Number: <input type="text"/></p> <p>Reason Code: <input type="text"/></p>	<p><b>Currency, Values and Pricing</b></p> <p>Quantity / Unit: <input type="text" value="100.000"/> EA ( <input type="text" value="0"/> EA is equivalent to: <input type="text" value="0"/> )</p> <p>Gross Price / Per: <input type="text" value="205.85"/> USD <input type="text" value="1"/> EA</p> <p>Net Value: <input type="text" value="20,585.00"/> USD</p> <p>Net Price: <input type="text" value="205.85"/> USD</p> <p>Tax Code / Amount: <input type="text" value="10:AP Sales Tax, exempt"/> <input type="text" value="0.00"/></p> <p><b>Service and Delivery</b></p> <p>Delivery Date: <input type="text" value="09/18/2013"/></p> <p>Underdelivery/Overdelivery Tolerance: <input type="text" value="0.00"/> % / <input type="text" value="0.00"/> %</p> <p>Storage Location: <input type="text"/></p> <p><b>Status and Statistics</b></p> <p>Item Deleted: <input type="text" value="No"/></p> <p>Closeout Status: <input type="checkbox"/></p> <p>Cancelled: <input type="checkbox"/></p>
--	--

# Reviewing Documents

- Items tab also contains a Notes and Attachments sub-tab which contains text pertaining specifically to the item

**Display Purchase Order (Approval Mode)**

Approve | Reject | Save | Print Preview | Close | Related Links

Purchase Order Number: 4300383009 (Change Version) | Purchase Order Type: Standard PO | Status: Awaiting Approval | Document Date: 09/03/2013 | Total Value (Gross): 20,585.00 USD | Smart Number

Supplier: [GOODYEAR TIRE & RUBBER COMPANY INC](#)

Overview | Header | **Items** | Notes and Attachments | Approval | Tracking

Details for item 1 24S60R18 All Season Tires

General Data | Prices and Conditions | Account Assign

Documents | Extended PO History | Payment

**Item Text**

Item Text: Most commonly used tire sizes and types are net priced and available through MSCC. #Tires not available in MSCC may be located in the attached reference price list. Applicable discount rates for each category are listed in the leader data for the reference Goodyear 2011 Federal Open Market & Net State Price Book dated 3-1-11 attached.

Cancel

**Notes**

Clear | Filter Settings

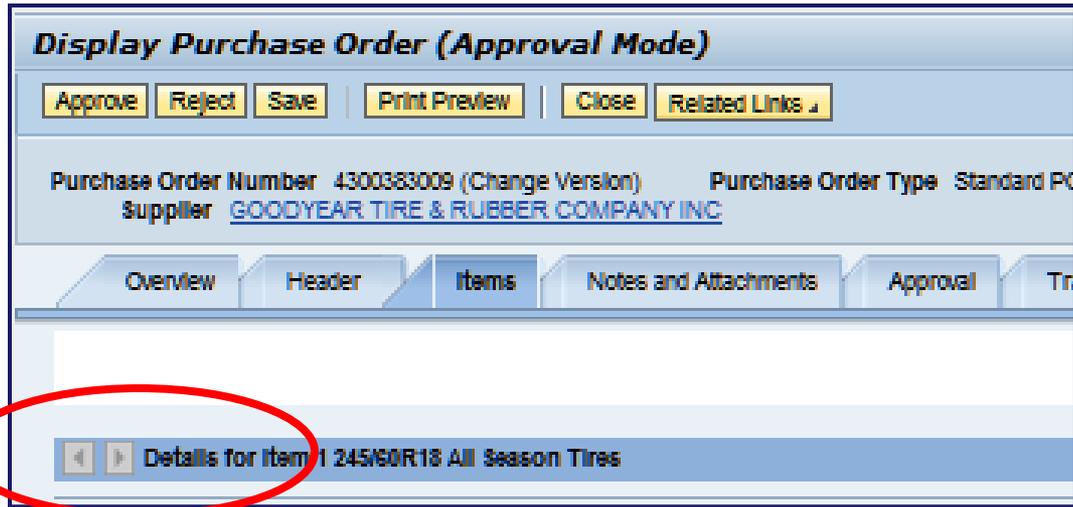
Category	Description
Item Text	Most commonly used tire sizes and types are net priced a...
Internal Note	-Empty-
Vendor Remark	-Empty-
Material PO Text	Raised White Letters
Shipping Instructions	-Empty-

**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	<a href="#">Sales quote for Tire PO</a>	Sales quote for Tire PO.docx	1		<input checked="" type="checkbox"/>	<input type="checkbox"/>	docx	33	P00446890	09/03/2013

# Reviewing Documents



**Display Purchase Order (Approval Mode)**

Approve | Reject | Save | Print Preview | Close | Related Links ▾

Purchase Order Number 4300383009 (Change Version) | Purchase Order Type Standard PO  
Supplier [GOODYEAR TIRE & RUBBER COMPANY INC](#)

Overview | Header | **Items** | Notes and Attachments | Approval | Tr

◀ ▶	Details for item 1 245/50R18 All Season Tires
-----	---

- If more than one line item exists, move to the next line by selecting the NEXT button

# Reviewing Documents

## SRM Tabs: By Approver

Approver	Data	SRM tab
Agency Head	Value, Supplier, Valid to/from dates	Header tab – General Data sub-tab
	Statement of work	Header tab – Notes and Attachments sub-tab
Legal	Terms and Conditions	Header tab – Notes and Attachments sub-tab
	Attributes	Header tab – Questions sub-tab
Comptrollers	Account Assignment	Item tab - Account Assignment sub-tab for each item
	Value, Valid to/from dates	Header tab – General Data sub-tab
	Plant	Header tab – General Data sub-tab (listed as Location in SRM)
Attorney General	Terms and Conditions	Header tab – Notes and Attachments sub-tab
	Attributes	Header tab – Questions sub-tab
Treasury	Value, Valid to/from dates	Header tab – General Data sub-tab

# Reviewing Documents

## SRM Tabs: Alphabetical Order

Data	SRM tab
Account Assignments	Item tab - Account Assignment sub-tab for each item
Attributes	Header tab – Questions sub-tab
Conditions	Items tab – Prices and Conditions sub-tab
Justification	Header tab – Notes and Attachments sub-tab
Plant (listed as Location in SRM)	Header tab – General Data sub-tab (listed as Location in SRM)
Purchasing Group	Overview tab – General Header Data sub-tab
Statement of Work	Header tab – Notes and Attachments sub-tab
Supplier	Header tab – General Data sub-tab
Terms and Conditions	Header tab – Notes and Attachments sub-tab
Valid to/from dates	Header tab – General Data sub-tab
Value	Header tab – General Data sub-tab

# Reviewing Documents

## Viewing Approval Workflow

- The Approval tab is available to view approval workflow

**Display Purchase Order**

Edit | Print Preview | Check | Close | Show my Tasks | Copy | Related Links

Purchase Order Number 4300403597    Purchase Order Type DGS Created PO    Status Awaiting Approval    Document Date 03/04/2014    Total Value (Gross) 21,000.00 USD    Smart Number  
 Supplier [GALLS LLC](#)

Overview | Header | Items | Notes and Attachments | **Approval** | Tracking

Current Status:     Header Approval Note

Current Process Step:

Currently Processed By:

Approval Process Data: [Download as XML](#)

Header | Item

**Header Approval Status**

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

Sequence	Process Step	Status	Processor	Received On	Processed On	Forwarded By
001	SRM Purchase Order Approval	Open (No Decision Made)	<a href="#">Corey Mccue;Debra Chernicoff;Joseph Mayanja;Rita Shaffer;Debra Hoffman;Jennifer J</a>	03/04/2014 13:56:35		
002	SRM Purchase Order Approval	Open (No Decision Made)	<a href="#">Charles Anderson;Pamela Cross;Andrew Clark;Erin Verano;Patrick Kerwin;Joshua Sor</a>			

- Select the hyperlinked names to view a list of approvers



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# Approving and Rejecting Documents

# Approving and Rejecting Documents

After approving a document, SRM will workflow it to the next approval level or to the final step. The final step is dependent on the type of document:

- Solicitations: Upon final approval, it is automatically visible to suppliers through the PA Supplier Portal
- Contracts: Upon final approval, Contracts must be sent to the supplier
- POs: Upon final approval (if approval is required), the fully executed PO is sent to the supplier

# Approving and Rejecting Documents

**Display Purchase Order**

[Edit](#) | [Print Preview](#) | [Check](#) | [Close](#) | [Show my Tasks](#) | [Copy](#) | [Related Links](#)

**Purchase Order Number** 4300385191    **Purchase Order Type** DGS Created PO    **Status** Awaiting Approval    **Document Date** 10/21/2013    **Total Value (Gross)** 20,869.00 USD

[Overview](#) | [Header](#) | [Items](#) | [Notes and Attachments](#) | **[Approval](#)** | [Tracking](#)

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

Sequence	Process Step	Status
▪ 001	SRM Purchase Order Approval	Approved
▪ 002	SRM Purchase Order Approval	Open (No Decision Made)

- When rejecting a document, be sure to first record the reason for the rejection in the Header Approval Note field on the Approval tab



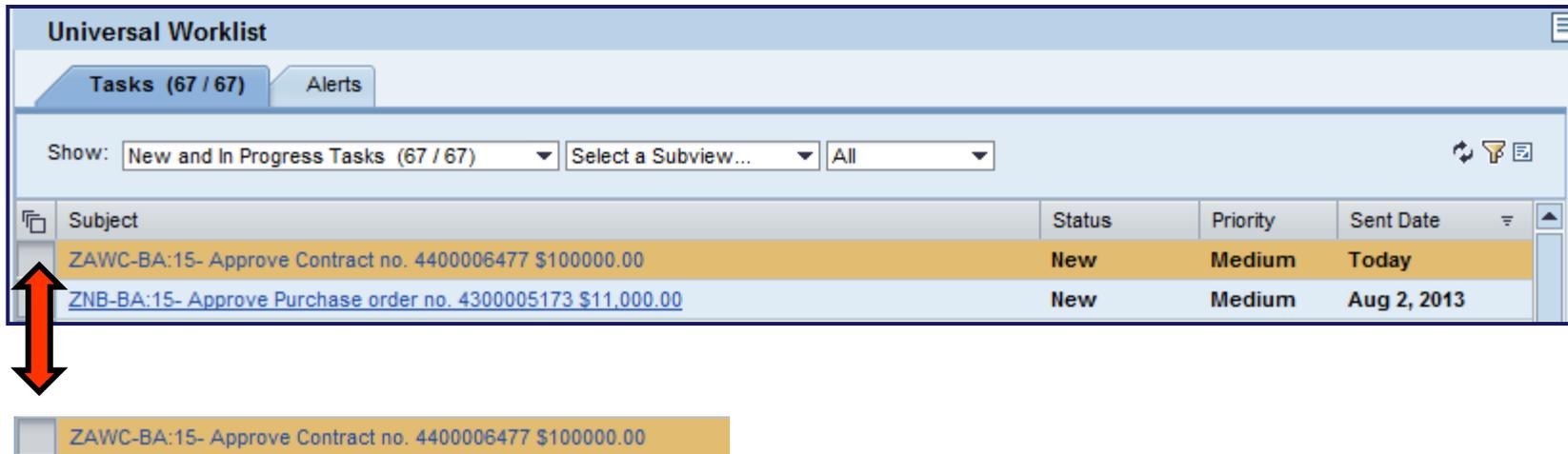
**pennsylvania**  
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# **Approving Solicitations**

# Approving Solicitations

- Access the Universal Worklist
- Access the Solicitation needing approval by selecting the Description



**Universal Worklist**

Tasks (67 / 67) Alerts

Show:      

Subject	Status	Priority	Sent Date
ZAWC-BA:15- Approve Contract no. 4400006477 \$100000.00	New	Medium	Today
ZNB-BA:15- Approve Purchase order no. 4300005173 \$11,000.00	New	Medium	Aug 2, 2013

ZAWC-BA:15- Approve Contract no. 4400006477 \$100000.00

# Approving Solicitations

- The type of Solicitation is shown in the header
- View additional Partner details by selecting the DETAILS button

**Approve Rfx :**

Save | Print Preview | Close | Related Links | Approve | Reject

Rfx Number: 6100004531    Smart Number: Test Approval 8-26-13    Type: Invitation For Bid    Status: Awaiting Approval    Created On: 08/26/2013 14:58:30    Created By: Cynthia Anderson    Time Zone: EST

Number of Suppliers: 1    Number of Items: 1    Version Number:    Version Type: Active Version    External Version Number:

RFX Information | Bidders | Items | Notes and Attachments | Conditions | Approval | Tracking

Rfx Parameters | Questions | Notes and Attachments | Conditions

**Identification**

Smart Number: Test Approval 8-26-13

Smart Number is External

Rfx Type: Invitation For Bid

Bid Description: 4618 Hard Hat

Publication Type: Public Rfx

**Event Parameters**

Detailed Price Information: Price with Conditions

Follow-On Document: Purchase Order

Bidder Can Change Rfx Responses:

Allow Multiple Rfx Responses for Each Company:

**Scenario Award/Contract**

**Organization**

Purchasing Organization: COPA Purchasing Organization

Purchasing Group: XC3 - DGS Cynthia K Anderson [Show Members](#)

**Dates**

Start Date: 08/27/2013 15:00:00

Submission Deadline: \* 08/28/2013 08:00:00

Opening Date: 08/28/2013 09:00:00

**Partners and Delivery Information**

Details | Add | Send E-Mail | Call | Clear Filter Settings

Function	Number	Name	Phone Number
• Requester	337326	<a href="#">Cynthia Anderson</a>	
• Goods Recipient			
• Responsible Employee	337326	<a href="#">Cynthia Anderson</a>	
• Ship-To Address	300001	<a href="#">EXEC BRANCH</a>	
• Location	73	<a href="#">DGS</a>	717-787-5996

# Approving Solicitations

- Access a list of changes made to the document by selecting the Change Documents on the Tracking tab

Change Documents					
<input type="radio"/> Changed Since <input type="text"/>		<input type="radio"/> Changed From/To <input type="text"/>		<input type="text"/> <input type="button" value="Search"/>	
Header/Item Attribute	Old Value	New Value	Changed By	Changed On	Changed At
▼ Header					
▼ Basic Data					
• External Smart Number	X		Angela Eshleman	06/19/2013	11:43:52
• Name	Cindy_Test Approval 2		Angela Eshleman	06/19/2013	11:46:21
• Name of SRM Document		Cindy_Test Approval 2	Angela Eshleman	06/19/2013	11:46:21
▶ Attachments					
▼ Item Number 1 - Trees					
▶ Basic Data					
▶ Item Number 2 - Tire Valves					

# Approving Solicitations

- All texts and attachments are located on the Notes and Attachments tab
  - Doc Builder documents (Terms & Conditions) should be label as such in the Attachments section
  - Open the Terms & Conditions and review for completeness and accuracy
  - Make sure the “Visible Internally Only” checkboxes are selected for the correct documents

RFX Number: 6100004315    Smart Number: Cindy\_Test Approval2    Type: Request For Proposal    Status: Awaiting Approval    Created On: 06/18/2013 18:03:00    Created By: Ms. Angela Estlerman    Time Zone: EST    Number of Suppliers: 1    Number of Items: 2    Version Number

Version Type: Active Version    External Version Number

RFX Information    Bidders    Items    **Notes and Attachments**    Conditions    Approval    Tracking

▼ Notes Filter Settings

Add    Clear

Assigned To	Category	Text Preview
Document Header	Terms and Conditions	This specification covers the general requirements for a...

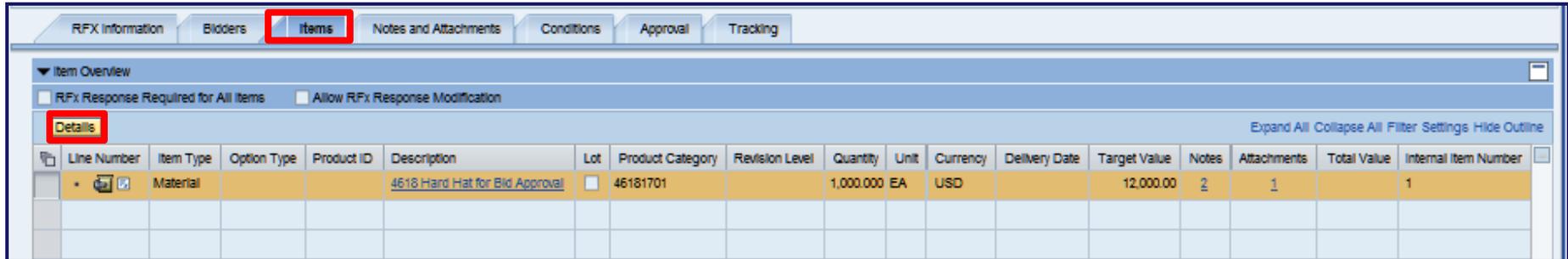
▼ Attachments Filter Settings

Add Attachment    Edit Description    Versioning    Delete

Assigned To	Category	Description	File Name	Version	Processor	Visible Internally only	Checked Out	Type	Size (KB)	Changed by	Changed on
Document Header	Standard Attachment	Sales Quote for Tire	Sales quote for Tire PO.docx	1		<input checked="" type="checkbox"/>	<input type="checkbox"/>	docx	33	P00968292	06/18/2013



# Approving Solicitations



Item Overview

RFx Response Required for All Items  Allow RFx Response Modification

**Details** Expand All Collapse All Filter Settings Hide Outline

Line Number	Item Type	Option Type	Product ID	Description	Lot	Product Category	Revision Level	Quantity	Unit	Currency	Delivery Date	Target Value	Notes	Attachments	Total Value	Internal Item Number
•	Material			4618 Hard Hat for Bid Approval	<input type="checkbox"/>	46181701		1,000,000	EA	USD		12,000.00	2	1		1

- Select the LINE NUMBER or DETAIL button to review corresponding data for each line item
- Select the Conditions tab to display any conditions for the line item

# Approving Solicitations

**Approve RFX :**

Save Print Preview Close Related Links **Approve** **Reject**

RFX Number 6100004531 Smart Number Test Approval 8-26-13  
Number of Suppliers 1 Number of Items 1 Version Number

- After reviewing the necessary data, approve or reject the Solicitation
- To approve the Solicitation, select the APPROVE button
- Select the REJECT button if there are errors in the Solicitation



pennsylvania

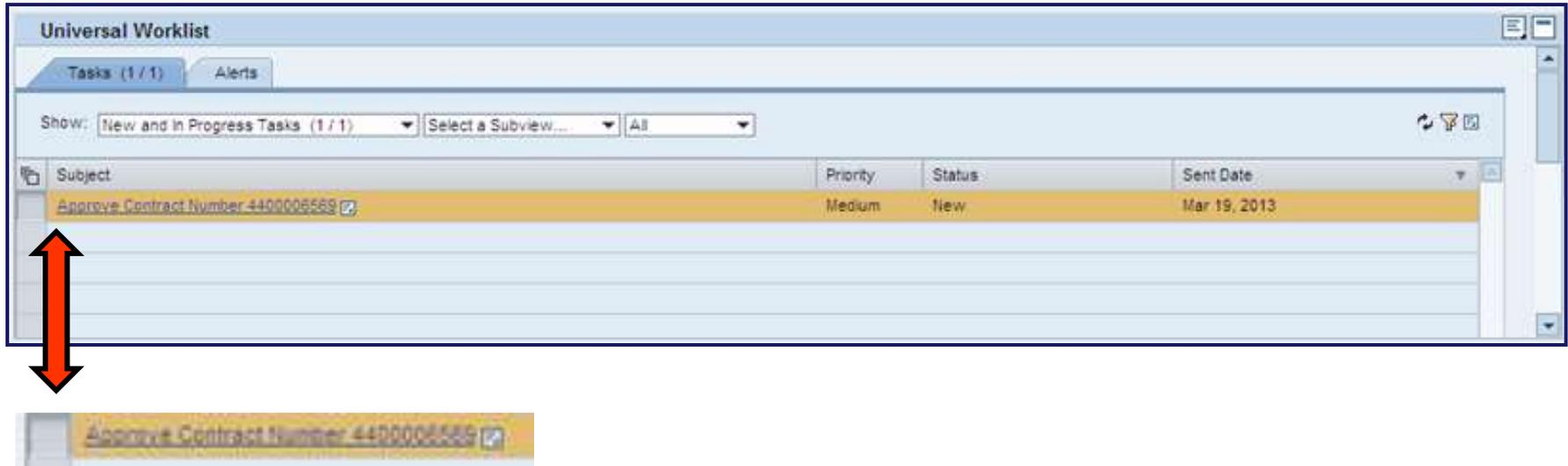
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# Approving Contracts

# Approving Contracts

- Access the Universal Worklist
- Access the Contract needing approval by selecting the Description



The screenshot displays the 'Universal Worklist' application window. It features a 'Tasks (1 / 1)' tab and an 'Alerts' tab. Below the tabs, there are filters for 'Show: New and In Progress Tasks (1 / 1)', 'Select a Subview...', and 'All'. A table lists the tasks with columns for Subject, Priority, Status, and Sent Date. The first task is highlighted in yellow and has a red double-headed arrow pointing to a zoomed-in view of the task description below.

Subject	Priority	Status	Sent Date
Approve Contract Number 4400006569 <input checked="" type="checkbox"/>	Medium	New	Mar 19, 2013

Approve Contract Number 4400006569

# Approving Contracts

- The type of Contract is shown at the top of the screen
- View additional item details by selecting the DETAILS button

**Approve Agency Contract 4400011838**

[Approve](#) [Reject](#) [Close](#) [Release](#) [Save](#) [Check](#) [Print Preview](#) [Related Links](#)

Contract Number: 4400011838    Smart Number:    Contract Type: Agency Contract    Status: Awaiting Approval    Supplier: [117919 HERRE BROS INC](#)    Contract Owner: [703389 Cynthia Anderson](#)

[Overview](#) [Header](#) [Items](#) [Notes and Attachments](#) [Conditions](#) [Approval](#) [Tracking](#)

**General Header Data**

Contract Number:     Contract Owner:  [Cynthia Anderson](#)  
 Smart Number:     Target Value/ Currency:    
 Smart Number Is External    Release Value:    
 Contract Description:     Basic Contract:   
 Supplier: \*  [HERRE BROS INC](#)  
 Valid From / To: \*  -   
 Purchasing Organization: \*   
 Purchasing Group: \*  [Show Members](#)

Items: [Details](#) [select](#) [Exercise Option](#) [Duplicate](#) Filter Settings

Line Number	Item Category	Item Number	Product ID	Description	Product Category	Target Quantity	Option Status	Unit	Target Value	Price	Currency	Price Per	Price Unit	Reference Item Number
<a href="#">1</a>	Normal	1		1 YR HVAC Maintenance per SOW	72151200	0.000		YR	9,000.00	9,000.00	USD	1	YR	0
<a href="#">2</a>	Normal	2		1 YR Emergency Response M-F Nrm Hrs	72151200	0.000		YR	1,000.00	1,000.00	USD	1	YR	0
<a href="#">3</a>	Normal	3		1 YR Emergency Response M-F OT Hrs	72151200	0.000		YR	1,100.00	1,100.00	USD	1	YR	0
<a href="#">4</a>	Normal	4		1 YR Emergency Response Holiday/Weekends	72151200	0.000		YR	2,000.00	2,000.00	USD	1	YR	0

# Approving Contracts

- If changes were made to the Standard Terms and Conditions, the Non Standard Terms & Conditions checkbox should be marked
  - If the box is not checked, reject the Contract

Overview	Header	Items	Notes and Attachments	Conditions	Approval	Tracking
Basic Data	Condition	Hierarchy	Notes and Attachments	Output		
<p>▼ Basic</p> <p><b>Identification</b></p> <p>Smart Number: <input type="text"/></p> <p><input type="checkbox"/> Smart Number is External</p> <p>Contract Number: <input type="text" value="4400006193"/></p> <p>Contract Type: <input type="text" value="SW Regular Contract"/></p> <p>Basic Contract: <input type="checkbox"/></p> <p>Reason Code: <input type="text"/></p> <p><b>Organization</b></p> <p>Purchasing Organization: * <input type="text" value="COPA Purchasing Organization"/></p> <p>Purchasing Group: * <input type="text" value="XB1 - DGS Angela L Eshleman"/> <a href="#">Show Members</a></p> <p><b>Dates</b></p> <p>Valid From / To: * <input type="text" value="11/03/2011"/> - <input type="text" value="11/02/2015"/></p> <p>Alert Expiration: <input type="text" value="0"/> Day(s)</p> <p><b>Currency, Values and Pricing</b></p> <p>Currency: * <input type="text" value="USD"/></p> <p>Display Currency/ Exchange Rate Date: <input type="text"/> <input type="text"/></p> <p>Target Value: <input type="text" value="50,000,000.00"/> USD</p> <p>Alert Release Value: <input type="text" value="0"/> %</p> <p>Release Value: <input type="text" value="155,033.28"/> USD</p> <p><b>Service and Delivery</b></p> <p>Under/ Overdelivery Tolerance: <input type="text" value="0.00"/> % / <input type="text" value="0.00"/> %</p> <p><b>Status and Statistics</b></p> <p>Created On: <input type="text" value="11/03/2011"/></p> <p>Created By: <input type="text" value="P00068292"/></p> <p>Closeout Status: <input type="text" value="None"/></p> <p>Contract Name: <input type="text"/></p> <p><b>Non Standard Terms &amp; Conditions:</b> <input type="checkbox"/></p>						

# Approving Contracts

- Access a list of changes made to the document by selecting the Change Documents on the Tracking tab

Display SW MRAwd Hrchy Serv 4400005248

[Close](#) [Refresh](#) [Edit](#) [Copy](#) [Check](#) [Renew](#) [Send E-Mail](#) [Print Preview](#) [Related Links](#)

Contract Number: 4400005248    Smart Number: Child 1    Contract Type: SW MRAwd Hrchy Serv    Status: Released    Supplier: [100012 BERTZL-TEST CHANGE FOR 100017 TO SEE](#)    Contract Owner: 218212 Alliance Business

Overview    Header    Items    Notes and Attachments    Conditions    Approval    **Tracking**

▼ History

View: United States Dollar Filter Settings

Document	Name	Document Number	Back-End Document Number	Status	Date	Value	Currency
Central Contract	Child 1	<a href="#">4400005248</a>		Released	06/05/2013	10,000.01	USD

▼ Status

System Status  
Created > Complete > Document Completed > Released

▼ Version Overview

[Detail](#) [Compare](#)

Version	Document/Version Type	Created On	Changed On	Document Name
1	Active Document	06/05/2013 09:57:07	06/05/2013 10:02:41	Child 1

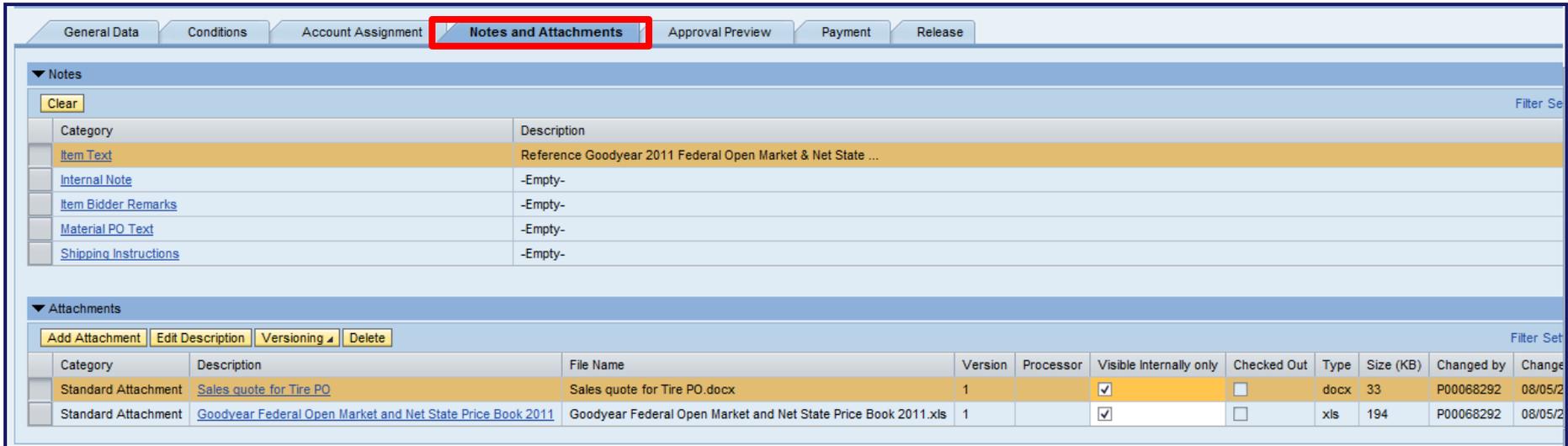
▼ Change Documents

Changed Since:    
  Changed From/To:     
 [Search](#)   
 [Expand All](#)   
 [Collapse All](#)   
 [Hide Query](#)   
 [Filter](#)   
 [Settings](#)

Header/Item Attribute	Old Value	New Value	Changed By	Changed On	Changed At	Version
Header						

# Approving Contracts

- All texts and attachments are located on the Notes and Attachments sub-tab
  - Review all texts
  - Review all attachments – select the link - attachments will open in a separate window



The screenshot shows a software interface with several tabs: General Data, Conditions, Account Assignment, **Notes and Attachments** (highlighted in red), Approval Preview, Payment, and Release.

**Notes Section:**

Category	Description
<a href="#">Item Text</a>	Reference Goodyear 2011 Federal Open Market & Net State ...
<a href="#">Internal Note</a>	-Empty-
<a href="#">Item Bidder Remarks</a>	-Empty-
<a href="#">Material PO Text</a>	-Empty-
<a href="#">Shipping Instructions</a>	-Empty-

**Attachments Section:**

Category	Description	File Name	Version	Processor	Visible Internally only	Checked Out	Type	Size (KB)	Changed by	Change
Standard Attachment	<a href="#">Sales quote for Tire PO</a>	Sales quote for Tire PO.docx	1		<input checked="" type="checkbox"/>	<input type="checkbox"/>	docx	33	P00068292	08/05/2
Standard Attachment	<a href="#">Goodyear Federal Open Market and Net State Price Book 2011</a>	Goodyear Federal Open Market and Net State Price Book 2011.xls	1		<input checked="" type="checkbox"/>	<input type="checkbox"/>	xls	194	P00068292	08/05/2

# Approving Contracts



- Review each attachment thoroughly
- If the information in the attachment is incorrect, the document should be rejected and reason noted in the Header Approval Note on the Approval tab

# Approving Contracts

**Approve Agency Contract 4400011838**

Approve Reject Close Release Save Check Print Preview Related Links

Contract Number 4400011838 Smart Number Contract Type Agency Contract Status Awaiting Approval Supplier 117919 HERRE BROS INC Contract Owner 703389 Cynthia Anderson

Overview Header **Items** Notes and Attachments Conditions Approval Tracking

Items

Details Select Exercise Option Duplicate Filter Settings

Line Number	Item Category	Item Number	Product ID	Description	Product Category	Target Quantity	Option Status	Unit	Target Value	Price	Currency	Price Per	Price Unit	Reference Item Number
1	Normal	1		1 YR HVAC Maintenance per SOW	72151200	0.000		YR	9,000.00	9,000.00	USD	1	YR	0
2	Normal	2		1 YR Emergency Response M-F Nrm Hrs	72151200	0.000		YR	1,000.00	1,000.00	USD	1	YR	0
3	Normal	3		1 YR Emergency Response M-F OT Hrs	72151200	0.000		YR	1,100.00	1,100.00	USD	1	YR	0
4	Normal	4		1 YR Emergency Response Holiday/Weekends	72151200	0.000		YR	2,000.00	2,000.00	USD	1	YR	0

- Select the ITEM NUMBER or DETAIL button to review corresponding data for each line item
- Select the Conditions tab to display the conditions for the line item

# Approving Contracts

DGS Approvers might need to approve Hierarchical Contracts. These Contracts do not need approval at both the child and parent level – they are approved at the parent level only.

- Changing a Child Contract associated with a multi-award Hierarchical Contract triggers the approval workflow so that the Parent Contract can be re-released
- Changing a Child Contract associated with a distributor/reseller Hierarchical Contract does not trigger the approval workflow, the Parent Contract is not re-released

All Hierarchical Contracts requiring Treasury approval must have the Child Contract numbers recorded in the Header Approval Note field on the Approval tab.

# Approving Contracts



*Use case not known 4400006477*

[Approve](#) [Reject](#) [Close](#) [Release](#) [Save](#) [Check](#) [Print Preview](#) [Related Links ▾](#)

Contract Number [4400006477](#) Smart Number  Contract Type [Agency Contract](#) Status [Awaiting Approval](#) Supplier [100037 BF GOODRICH](#) Contract Owner [337344 Angela Eshleman](#)

- After reviewing the necessary data, approve or reject the Contract
- To approve the Contract, select the APPROVE button
- Select the REJECT button if there are errors in the Contract



# Approving POs

# Approving POs

- Access Universal Worklist
- Access the PO needing approval by selecting the Description



Universal Worklist

Tasks (41 / 41) Alerts

Show:

Subject	Status	Priority	Sent Date
<a href="#">ZNR-BA-15- Approve Purchase order no. 4300004939 \$15,000.00</a>	New	Medium	Jun 12, 2013
<a href="#">ZNR-BA-15- Approve Purchase order no. 4300004925 \$15,000.00</a>	New	Medium	Jun 11, 2013
<a href="#">ZNR-BA-15- Approve Purchase order no. 4300004919 \$10,001.00</a>	New	Medium	Jun 10, 2013
<a href="#">ZNR-BA-15- Revise Purchase order no. 4300004917 \$20,000.00</a>	New	Medium	Jun 10, 2013
<a href="#">ZNR-BA-15- Approve Purchase order no. 4300004915 \$15,000.00</a>	New	Medium	Jun 10, 2013
<a href="#">Approve no.</a>	New	Medium	Jun 10, 2013

[ZNR-BA-15- Approve Purchase order no. 4300004939 \\$15,000.00](#)

# Approving POs

- The PO's General Header Data information on the Overview tab is displayed

**Display Purchase Order (Approval Mode)**

Approve | Reprint | Save | Print Preview | Close | Related Links

Purchase Order Number: 4300004127    Purchase Order Type: Standard PO    Status: Awaiting Approval    Document Date: 05/30/2013    Total Value (Gross): 10,023.75 USD    Smart Number    Supplier: JACK WILLIAMS TRE COMPANY, INC124582780

Overview | Header | Items | Notes and Attachments | Approval | Tracking

**General Header Data**

Smart Number: Local Purchase Order (PO044)    Note to Supplier:

Smart Number is External    Internal Note:

Purchase Order Number: 4300004127

PO Name:

Supplier: 100012 JACK WILLIAMS TRE COMPANY, INC124582780

Requester: 317923 Cynthia Anderson

Recipient: 317923 Cynthia Anderson

Location: 300025 General Services

Ship-To Address: 354838 ELEC BRANCH

Purchasing Organization: COPA Purchasing Organization

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

Total Value (Net): 10,023.75 USD

---

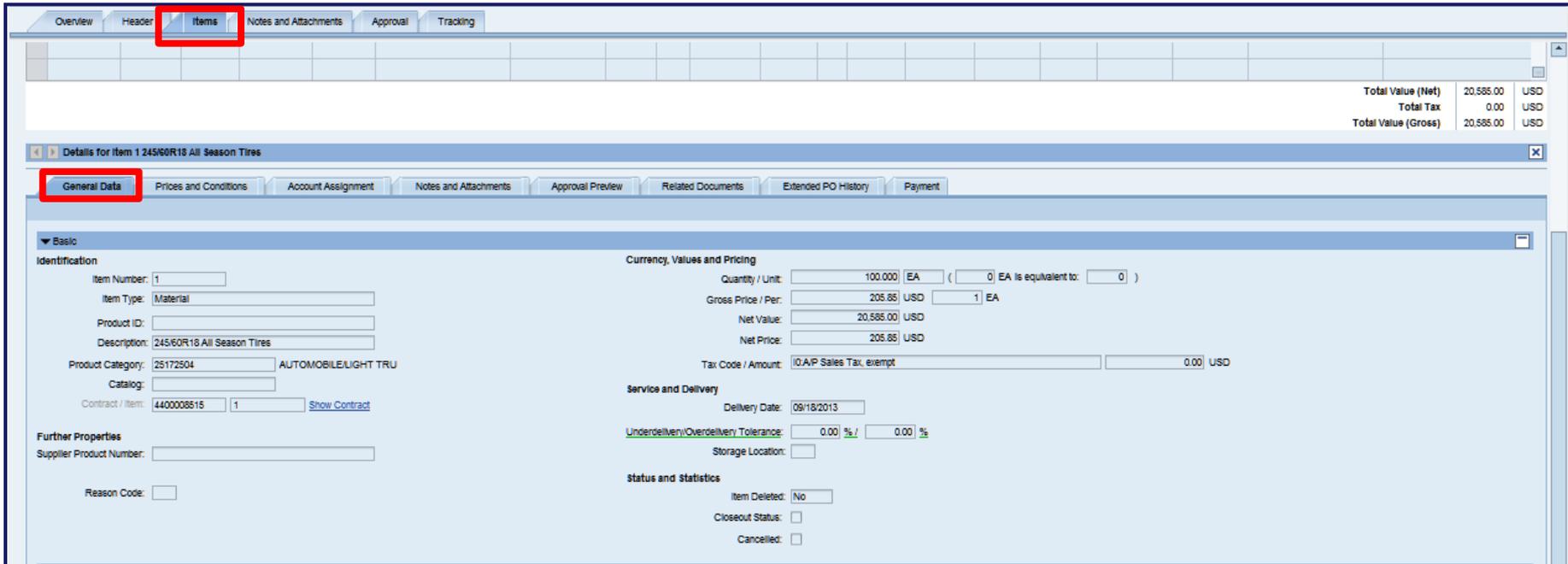
**Item Overview**

Details | Add Item | Copy | Paste | Customize | Delete | Unlink | [Propose Sources of Supply](#) | [Add Condition](#) | [Remove Condition](#) | [Exercise Option](#) | [Process All Items](#) | Filter Settings

Line Number	Deleted	Item Type	Item Number	Product ID	Description	Product Category	Quantity	Unit	Gross Price	Currency	Per	Net Price	Option Type	Order Type	Condition	Option Status	Delivery Date	Account Assignment Type	Account Assignment Number
1		Material		226/72R17 Radial Tyre_25172500		45,000	EA	242.75	USD		1	343.75					06/05/2013	Cost Center	552210211

Total Value (Net) 10,023.75 USD  
Total Tax 0.00 USD  
Total Value (Gross) 10,023.75 USD

# Approving POs



The screenshot displays a procurement system interface. At the top, there are navigation tabs: Overview, Header, **Items** (highlighted with a red box), Notes and Attachments, Approval, and Tracking. Below these tabs, a summary table shows financial data:

Total Value (Net)	20,585.00	USD
Total Tax	0.00	USD
Total Value (Gross)	20,585.00	USD

Below the summary table, there is a sub-tabbed area for 'Details for Item 1 245/60R18 All Season Tires'. The 'General Data' sub-tab is highlighted with a red box. This sub-tab contains several sections:

- Basic** (expanded):
  - Identification:** Item Number: 1, Item Type: Material, Product ID: [empty], Description: 245/60R18 All Season Tires, Product Category: 25172504 AUTOMOBILE/LIGHT TRU, Catalog: [empty], Contract / Item: 4400008515 1 Show Contract.
  - Further Properties:** Supplier Product Number: [empty], Reason Code: [empty].
- Currency, Values and Pricing:** Quantity / Unit: 100.000 EA ( 0 EA is equivalent to: 0 ), Gross Price / Per: 205.85 USD 1 EA, Net Value: 20,585.00 USD, Net Price: 205.85 USD, Tax Code / Amount: 10:AP Sales Tax, exempt 0.00 USD.
- Service and Delivery:** Delivery Date: 09/18/2013, Underdeliver/Overdeliver Tolerance: 0.00 % / 0.00 %, Storage Location: [empty].
- Status and Statistics:** Item Deleted: No, Closeout Status: [empty], Cancelled: [empty].

- Review all information on the Item tab – General Data sub-tab to ensure that it is correct
  - The Approver cannot edit any data

# Approving POs



Overview **Header** Items Notes and Attachments Approval Tracking

General Data Notes and Attachment Output

▼ Basic

**Identification**

Smart Number: 2517 Tires for Training  
 Smart Number is External  
 New Serial Part for Smart Number

Purchase Order Number: 4300383009  
 PO Name: \* 2517 Tires for Training

Corresponding Novation Purchase Order:

Purchase Order Type: Standard PO

**Non Standard Terms & Conditions:**

Reason Code:

**Organization**

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

**Currency, Values and Pricing**

Total Value (Net): 20,585.00  
 Total Value (Gross): 20,585.00 USD  
 Tax Value: 0.00 USD

**Service and Delivery**

Commitment Documents: [Display](#)

**Status and Statistics**

Document Date: 09/03/2013  
 FM Posting Date: \* 09/03/2013  
 Posting Period: \* 003

Cancelled:

Closeout Status: None

Validity Start Date:   
 Validity End Date:

- Review all information on the Header tab – General Data sub-tab to ensure that it is correct
  - Note: the Non Standard Terms & Conditions checkbox, MUST be checked if the Terms and Conditions are NOT standard

# Approving POs

- View additional details by selecting the links

Overview	Header	Items	Notes and Attachments	Approval	Tracking
<b>General Header Data</b>					
Smart Number:	<input type="text" value="2517 Tires for Training"/>				
	<input checked="" type="checkbox"/> Smart Number is External				
Purchase Order Number:	<input type="text" value="4300383009"/>				
PO Name:	<input type="text" value="2517 Tires for Training"/>				
Supplier: *	<input type="text" value="161302"/>	<a href="#">GOODYEAR TIRE &amp; RUBBER COMPANY INC</a>			
Requester: *	<input type="text" value="703389"/>	<a href="#">Cynthia Anderson</a>			
Recipient: *	<input type="text" value="703389"/>	<a href="#">Cynthia Anderson</a>			
Location:	<input type="text" value="301375"/>	<a href="#">DGS Bureau of Procurement</a>			
Ship-To Address:	<input type="text" value="1"/>	<a href="#">EXEC BRANCH</a>			
Purchasing Organization: *	<input type="text" value="COPA Purchasing Organization"/>				
Purchasing Group: *	<input type="text" value="DGS Central Purchase Purchasing Group"/>	<a href="#">Show Members</a>			
Total Value (Net):	<input type="text" value="20,585.00"/>				

# Approving POs



Overview | **Header** | Items | Notes and Attachments | Approval | Tracking

General Data | Notes and Attachment | Output

▼ Basic

**Identification**

Smart Number:   
 Smart Number is External  
 New Serial Part for Smart Number

Purchase Order Number:   
PO Name: \*

Corresponding Novation Purchase Order:

Purchase Order Type:

Non Standard Terms & Conditions:   
Reason Code:

**Organization**

Purchasing Organization:   
Purchasing Group:  [Show Members](#)

**Currency, Values and Pricing**

Total Value (Net):   
Total Value (Gross):  USD  
Tax Value:  USD

**Service and Delivery**

Commitment Documents: [Display](#)

**Status and Statistics**

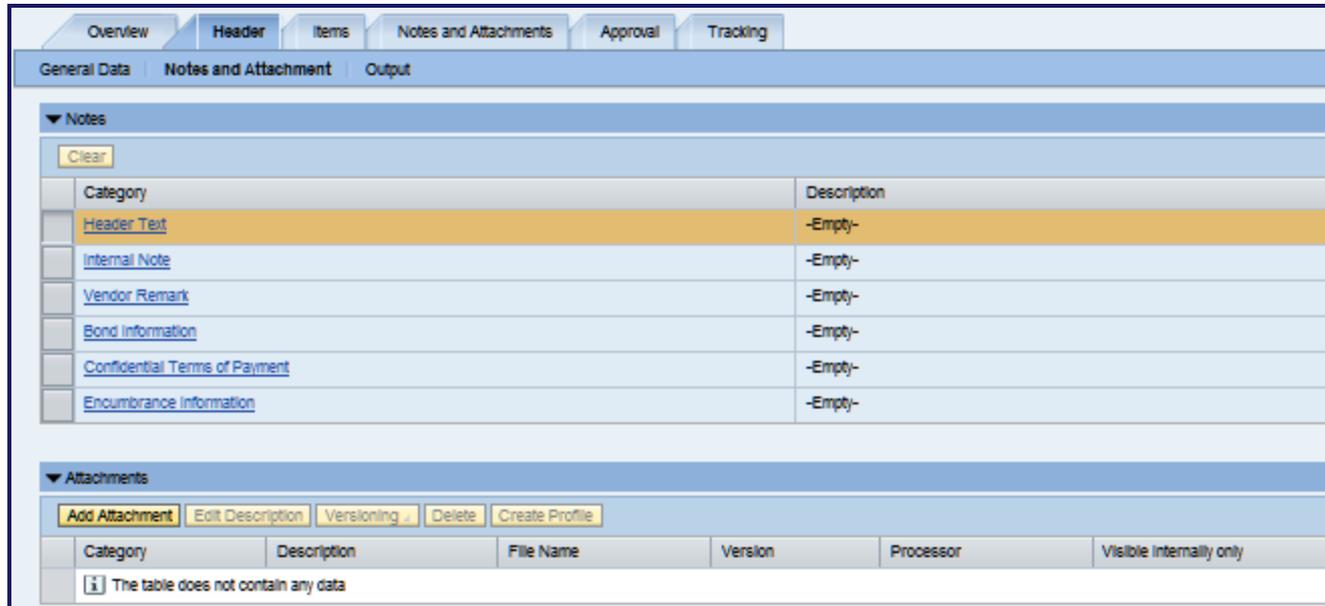
Document Date:   
FM Posting Date: \*   
Posting Period: \*

Cancelled:   
Closeout Status:

Validity Start Date:   
Validity End Date:

- Continue reviewing each of the Header sub-tabs
  - The Notes and Attachments sub-tab contains attachments

# Approving POs



Overview | **Header** | Items | Notes and Attachments | Approval | Tracking

General Data | **Notes and Attachment** | Output

▼ Notes

Clear

Category	Description
Header Text	-Empty-
Internal Note	-Empty-
Vendor Remark	-Empty-
Bond information	-Empty-
Confidential Terms of Payment	-Empty-
Encumbrance Information	-Empty-

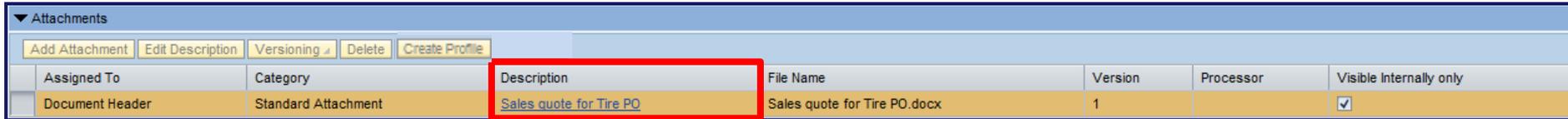
▼ Attachments

Add Attachment | Edit Description | Versioning | Delete | Create Profile

Category	Description	File Name	Version	Processor	Visible internally only
The table does not contain any data					

- All texts and attachments are located on the Notes and Attachments sub-tab

# Approving POs

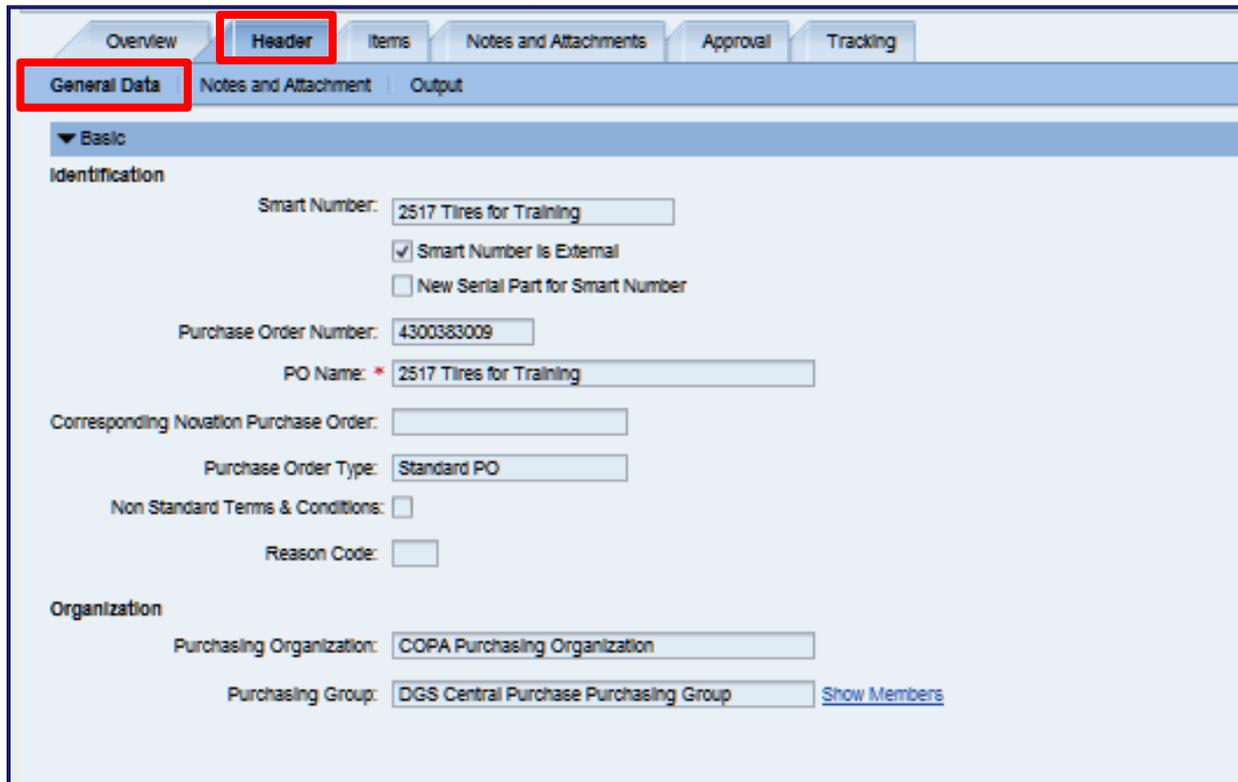


Attachments						
Add Attachment Edit Description Versioning Delete Create Profile						
Assigned To	Category	Description	File Name	Version	Processor	Visible Internally only
Document Header	Standard Attachment	<a href="#">Sales quote for Tire PO</a>	Sales quote for Tire PO.docx	1		<input checked="" type="checkbox"/>

- Open the attachment in a new window by selecting the document description
- Review each attachment thoroughly

# Approving POs

- If there were changes to the Standard Terms and Conditions, be certain that the Non-Standard Terms & Conditions checkbox on the General Data sub-tab is checked
  - If the box is not checked, reject the PO



The screenshot displays the 'Header' tab of a purchase order system. The 'General Data' sub-tab is selected. Under the 'Basic' section, the 'Identification' group contains the following fields:

- Smart Number: 2517 Tires for Training
- Smart Number is External
- New Serial Part for Smart Number
- Purchase Order Number: 4300383009
- PO Name: \* 2517 Tires for Training
- Corresponding Novation Purchase Order: [Empty]
- Purchase Order Type: Standard PO
- Non Standard Terms & Conditions:
- Reason Code: [Empty]

The 'Organization' group contains the following fields:

- Purchasing Organization: COPA Purchasing Organization
- Purchasing Group: DGS Central Purchase Purchasing Group [Show Members](#)

# Approving POs

General Data | Prices and Conditions | Account Assignment | Notes and Attachments | Approval Preview | **Related Documents** | Extended PO History | Payment

**Document Control**

Purchase Order Response  Invoice Expected  
 Shipping Notification  Confirmation-Based Invoice Verification  
 Goods Receipt / Confirmation of Performance of Service  Evaluated Receipt Settlement

**Statistics**

**Goods Receipt / Confirmation of Performance of Service**

Confirmed Quantity:  EA  
 Confirmed Value:  USD  
 No Further Confirmation:  Yes  No

**Invoice**

Invoiced Quantity:  EA  
 Invoiced Value:  USD  
 No Further Invoice:  Yes  No

**History**

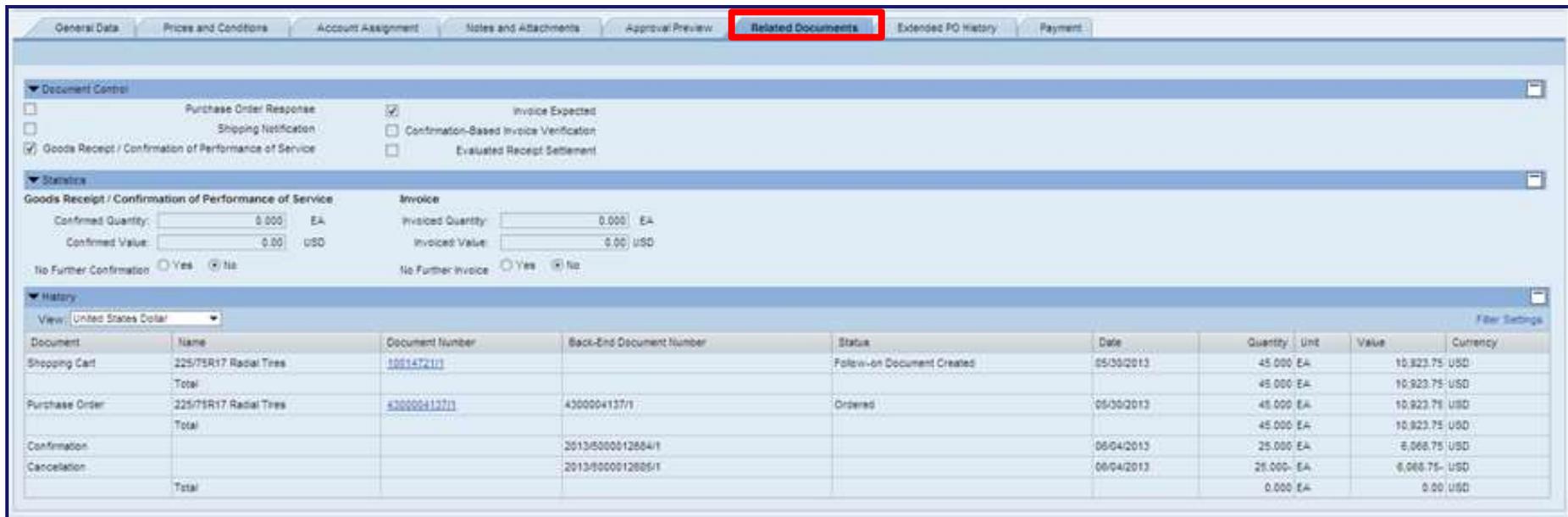
View: United States Dollar Filter Settings

Document	Name	Document Number	Back-End Document Number	Status	Date	Quantity	Unit	Value	Currency
Shopping Cart	225/75R17 Radial Tires	<a href="#">100147211</a>		Follow-on Document Created	05/30/2013	45.000	EA	10,923.75	USD
	Total					45.000	EA	10,923.75	USD
Purchase Order	225/75R17 Radial Tires	<a href="#">43000041271</a>	43000041271	Ordered	05/30/2013	45.000	EA	10,923.75	USD
	Total					45.000	EA	10,923.75	USD
Confirmation			2013/0000012884/1		06/04/2013	25.000	EA	6,068.75	USD
Cancellation			2013/0000012885/1		06/04/2013	25.000	EA	6,068.75	USD
	Total					0.000	EA	0.00	USD

- The Related Documents tab provides a history of the PO's activity

# Approving POs

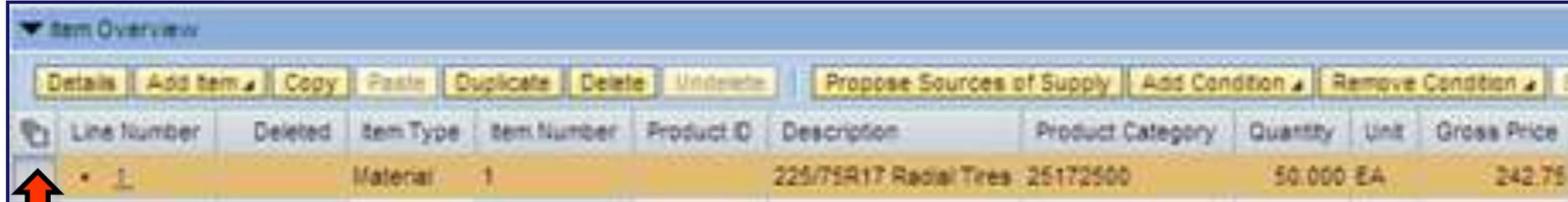
- Display SRM Documents directly from the PO
  - Access by selecting the document number link



The screenshot shows the 'Related Documents' tab in a software interface. The 'Document Control' section has several checkboxes, with 'Goods Receipt / Confirmation of Performance of Service' checked. The 'Statistics' section shows 'Confirmed Quantity' and 'Confirmed Value' for 'Goods Receipt / Confirmation of Performance of Service' and 'Invoiced Quantity' and 'Invoiced Value' for 'Invoice'. The 'History' section is expanded to show a table of document events.

Document	Name	Document Number	Back-End Document Number	Status	Date	Quantity	Unit	Value	Currency
Shopping Cart	225/75R17 Radial Tires	<a href="#">100147211</a>		Follow-on Document Created	05/30/2013	45,000	EA	10,923.75	USD
	Total					45,000	EA	10,923.75	USD
Purchase Order	225/75R17 Radial Tires	<a href="#">43000041371</a>	43000041371	Ordered	06/00/2013	45,000	EA	10,923.75	USD
	Total					45,000	EA	10,923.75	USD
Confirmation			201345000126841		06/04/2013	25,000	EA	6,568.75	USD
Cancellation			201345000126851		06/04/2013	20,000	EA	6,068.75	USD
	Total					0,000	EA	0.00	USD

# Approving POs



Line Number	Deleted	Item Type	Item Number	Product ID	Description	Product Category	Quantity	Unit	Gross Price
1		Material	1		225/75R17 Radial Tires	25172500	50.000	EA	242.75

1

- Select the ITEM NUMBER or DETAIL button to review corresponding data for each line item

# Approving POs

- Select the Account Assignment tab to view Cost Center and General Ledger information

General Data | Prices and Conditions | **Account Assignment** | Notes and Attachments | Approval Preview | Related Documents | Extended PO History | Payment

Cost Distribution | Percentage | Details | Add Line | Copy | Paste | Duplicate | Delete | Split Distribution | Change All Items | Filter | Settings

Number	Accounting Line Number	Percentage	Account Assignment Category	Assign Number	Account Assignment Description	General Ledger Account	General Ledger Description	Business Area
0001		100.00	Cost Center	1522110211	Vehicle Management	6361100	Office Supplies	15
0002		0.00	Cost Center					
0003		0.00	Cost Center					
0004		0.00	Cost Center					
0005		0.00	Cost Center					
0006		0.00	Cost Center					

Details for Item 0001 : Cost Center

Basic Data | Percentage: 100.00 | Fund: 5000900000 | Purchasing Fund | Commitment Item: 6361100 | Office Supplies

Account Assignment Category: Cost Center

Cost Center: 1522110211 | Vehicle Management

Fund Center: 1522110000 | Purchasing Fund

Functional Area: 1210 | Facility, Property and Co.

Controlling Area: COPA

General Ledger Account: 6361100

Business Area: 15

# Approving POs

**Display Purchase Order (Approval Mode)**

[Approve](#) [Reject](#) [Print](#) [Print Preview](#) [Close](#) [Related Links](#)

Purchase Order Number: 4300004137    Purchase Order Type: Standard PO    Status: Awaiting Approval    Document Date: 05/30/2013    Total Value (Gross): 10,923.75 USD    Smart Number:    Supplier: JACK WILLIAMS THE COMPANY INC123456789

Overview    Header    Items    Notes and Attachments    Approval    Tracking

**General Header Data**

Smart Number:	Local Purchase Order(1 90044)	Note to Supplier:	
<input type="checkbox"/> Smart Number is External		Internal Note:	
Purchase Order Number:	4300004137		
PO Name:			
Supplier:	100042 JACK WILLIAMS THE COMPANY INC123456789		
Requester:	317923 Cynthia Anderson		
Recipient:	317923 Cynthia Anderson		
Location:	300022 General Services		
Ship-To Address:	304836 EXEC BRANCH		
Purchasing Organization:	CDPA Purchasing Organization		
Purchasing Group:	DGS Central Purchasing Group <a href="#">Show Members</a>		
Total Value (Net):	10,923.75 USD		

- After reviewing the necessary data, approve or reject the PO
- To approve the PO, select the APPROVE button

# Approving POs



*Display Purchase Order (Approval Mode)*

Approve **Reject** Save | Print Preview | Close Related Links ▾

Purchase Order Number 4300004137 Purchase Order Type Standard PO

- Select the REJECT button if there are errors in the PO



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# Knowledge Checks

# Knowledge Check

1. Select the statement that best addresses the following:

When approving Solicitations, Contracts, and POs, it is necessary to view the Notes and Attachments sub-tab.

- a. This statement is false, the Notes and Attachments sub-tab is used to communicate information between a document's creator and his or her manager.
- b. This statement is false, the Notes and Attachments sub-tab is not used during the approval process.
- c. This statement is true, the Notes and Attachments sub-tab contains documents that must be reviewed during the approval process.
- d. This statement is true, although not always used during the approval process, the Notes and Attachments sub-tab might contain important contact information.

# Knowledge Check

2. Select the statement that best completes this sentence:

When rejecting a procurement document,

- a. It is strongly suggested that you document the reason for the rejection in the Approval Note field on the Approval tab.
- b. It is strongly suggested that you send an email to the creator of the document stating the reason for the rejection.
- c. Because SRM automatically routes documents, it is not necessary to document the reason a procurement document is rejected.

# Knowledge Check

3. Because SRM automatically records your reason for rejecting a procurement document, you do not need to record the reason yourself.
  - a. This statement is false – although SRM automatically records your reason for rejecting the document, you need to email the reason to the creator of the document.
  - b. This statement is false – SRM does not automatically record your reason for rejecting the document. You need to record the reason in the Approval Note field.
  - c. This statement is true.

# Knowledge Check

4. Because SRM automatically evaluates the data within the document, selecting the CHECK button is the easiest and quickest way to approve a document.
  - a. This statement is false – although SRM automatically evaluates all the data in the document, all approvers must review the data.
  - b. This statement is false – although you can use the CHECK button to ensure the accuracy of the data, you need to select the APPROVE button to approve the document.
  - c. This statement is false – SRM does not automatically evaluate all the data in the document. Selecting the CHECK button will not ensure the accuracy of the data and you need to select the APPROVE button to approve the document.
  - d. This statement is true.

# Survey

Select the link below to complete an online survey.

<https://www.surveymonkey.com/s/V8NNNKX>



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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.



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**SAP**

**S**upplier  
**R**elationship  
**M**anagement

**SRM Sourcing**  
**Procurement**  
**Document**  
**Approver**

**Thank you!**