

Create a Describe Requirement (Free Text) Shopping Cart

Use this procedure to create a **Describe Requirement (Free Text) Shopping Cart**. A *Describe Requirement Shopping Cart* is created when the material or service needed **may or may not exist** on a statewide contract but is unavailable through a Catalog in the Supplier Relationship Management (SRM) system.

Requisitioners **must** verify if the purchasing request received contains all the pertinent information needed to create the cart. The information includes, but is not limited to, the following:

- **Requestor** (agency/bureau/program area)
- **Purchase Type** (materials or services)
- **Justification** (why it is needed)
- **Quantity Total** (unit of measurement or hours)
- **Total Cost** (purchase grand total)
- **Requested Delivery Date** (when materials or services are needed by)
- **Delivery Information** (physical address location)

Most importantly, verify the following:

- A **quote** has been **obtained** from the Supplier.
- The **method of payment** that will be used (**P-Card** or **Account/Funding** information)
- The material or service is **not available** in any **one** of the following resources:
 - State Surplus Property Program
 - Agency or DGS Warehouse
 - Unique Source Contract
 - Statewide Contract or Catalog

Disclaimer: All screenshots used in this procedure are for example purposes only.

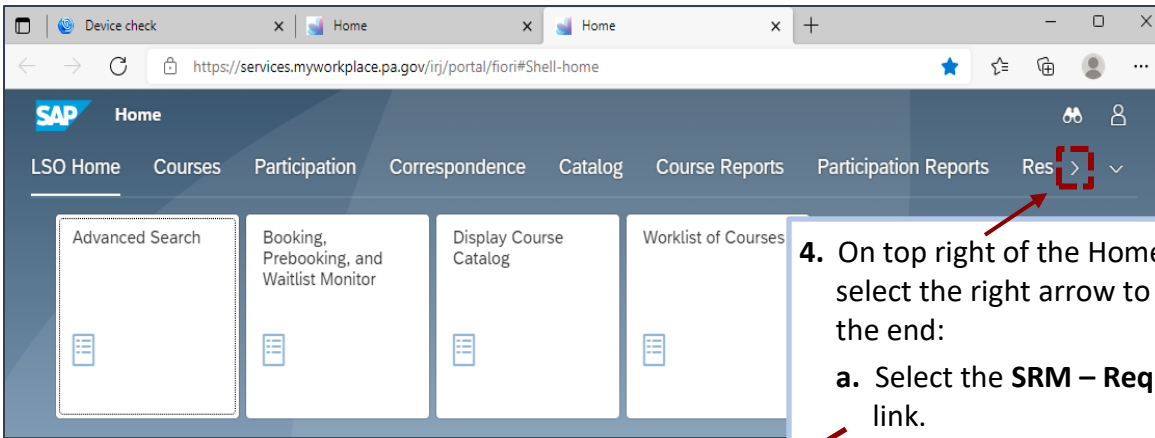
To Access SRM:

1. Select the **Microsoft Window** and scroll down to select **Microsoft Edge**.

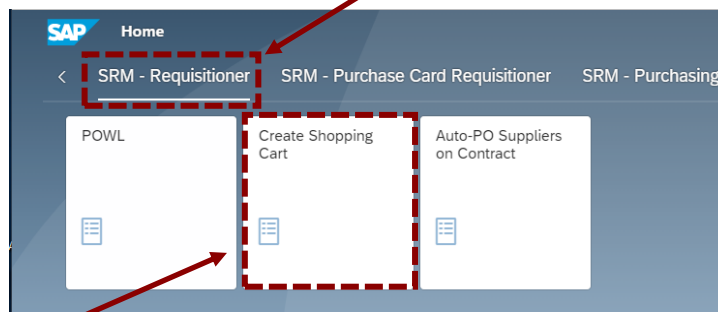
a. In the web address field, type <https://www.myworkplace.pa.gov> and select the **enter** button.

2. On the SAP Home screen, select the **SRM** link.

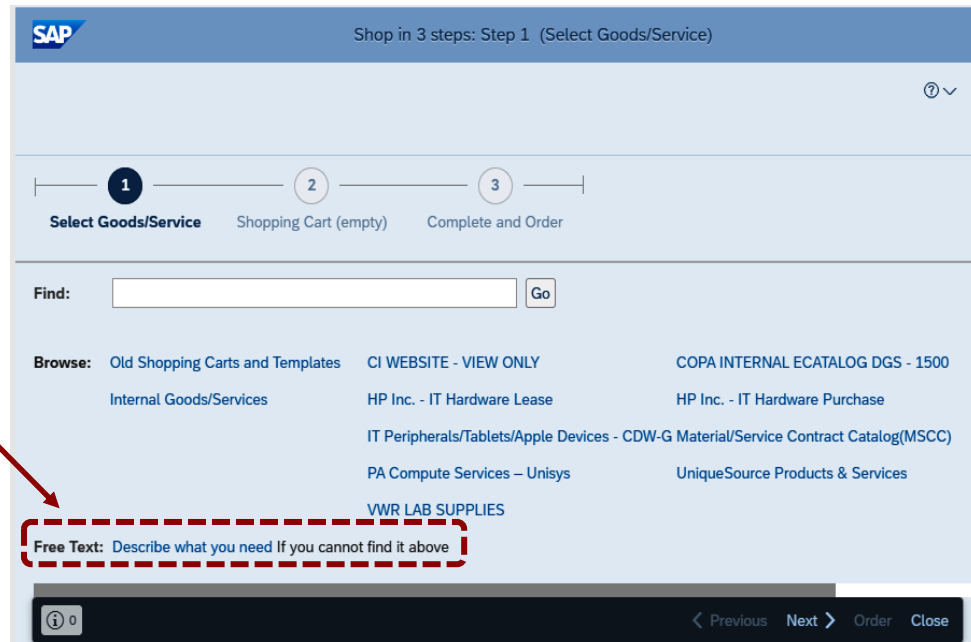
3. Select the **SRM**



4. On top right of the Home screen, select the right arrow to scroll to the end:
a. Select the **SRM – Requisitioner** link.




5. Select the **Create Shopping Cart** tile.



The **Shop in 3 Steps Wizard** will screen displays.

6. From 'Step 1 Select Goods/Service' screen, select the **Free Text: Describe what you need** link.

 **Do not change the Product Type!** The SRM system **will** recognize if you are ordering a **material or service** based on the **Product Category Code** that is entered.

For example, in SRM system any **product category number** that begins with:

- **1 through 6 is a material**
- **7 through 9 is a service**

The Describe Requirement input screen displays:

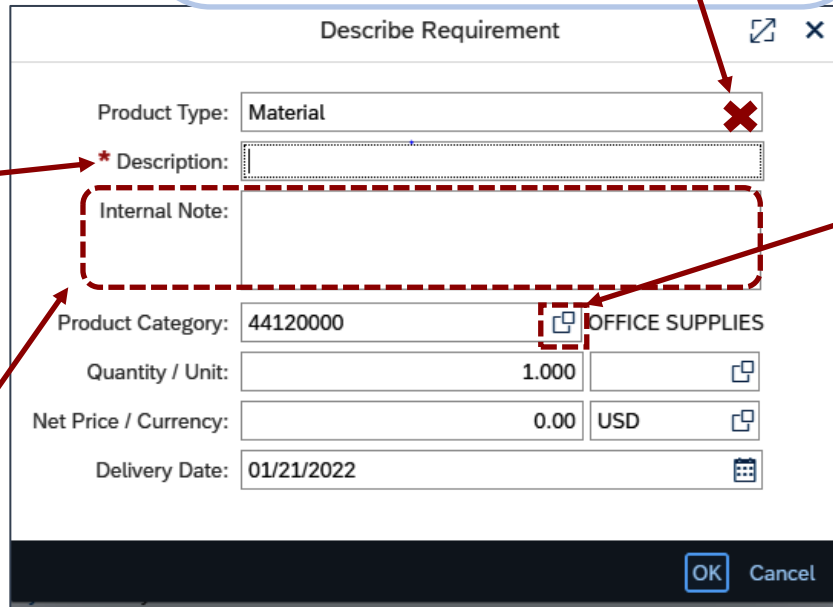
7. Complete the following fields:

a. **Type** in the **description** of the material or service needed (*e.g., Sign Language Interpreter*).

b. **Type** in the **Justification** for the purchase in the **Internal Note** field,

For Example:

- Who is it for?
- Why is it needed?
- What ramifications is suffered if not purchased.



Describe Requirement

Product Type: Material

* Description:

Internal Note:


Product Category: 44120000 OFFICE SUPPLIES

Quantity / Unit: 1.000


Net Price / Currency: 0.00 USD

Delivery Date: 01/21/2022


OK Cancel


 **NOTE:** The default **product category number** **must** be changed.


8. Enter the **Product Category** number if **known** or select the **match code icon** to search. (*See NOTE below for Search Instructions*)


 **NOTE:** The correct Product Category code **must be added** for all line items. Requisitioners can visit the **UNSPSC (United Nations Standard Product and Services Code)** website at: www.unspsc.org to search for the correct code. ****Once you obtain the **Product Category ID number**, return to shopping cart to enter the **Product ID number** in the **Product Category** field of the shopping cart input screen. ****

Also, requisitioners can use the **search** feature in the **Product Category** field to find the correct code.

Product Category: 44120000  OFFICE SUPPLIES

Quantity / Unit: 1.000 

Net Price / Currency: 0.00 USD 

Delivery Date: 01/21/2022 

8. To search for a Product Category number,
- a. Select the **match code** icon.


Search Product Category

Personal Value List

Display As: Flat List



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

Product Category ID:

Description: Interpreter* 

Logical System:

Restrict Number of Value List Entries 500

OK Cancel

- b. In the **Description** field, **type** a description (*e.g., Interpreter*).
- c. Increase the **number of value list entries** to get wider search.
- d. Select the **START SEARCH** button.


Search Product Category

Personal Value List

Display As: Flat List



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

Product Category ID:

Description: Interpreter* 

Logical System:

Restrict Number of Value List Entries 500

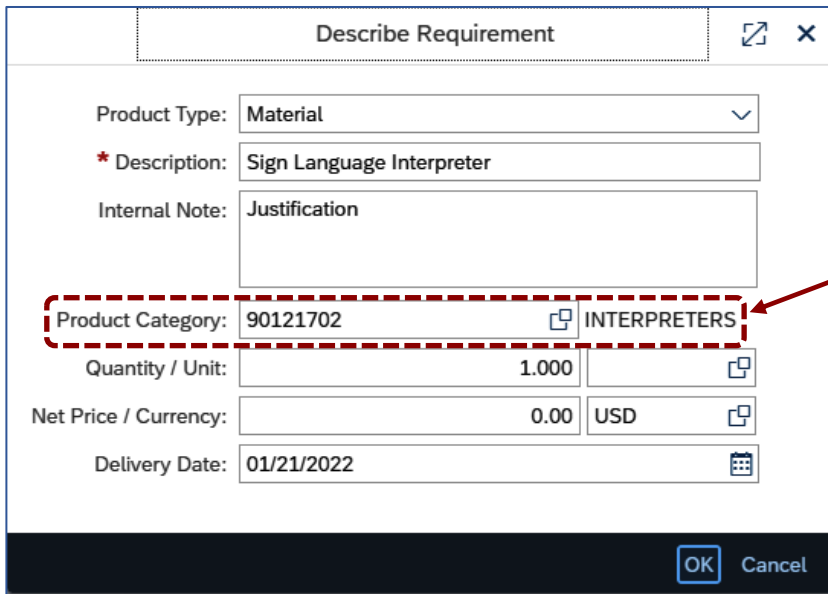
Search Result

	Description	Category ID	Logical System
<input checked="" type="radio"/>	INTERPRETERS	90121702	PC1CLNT110
<input type="radio"/>			
<input type="radio"/>			
<input type="radio"/>			
<input type="radio"/>			
<input type="radio"/>			
<input type="radio"/>			
<input type="radio"/>			
<input type="radio"/>			

OK Cancel

The **searched** results display:

- e. Select the **radio** icon next to the Description.
- f. Select the **OK** button.

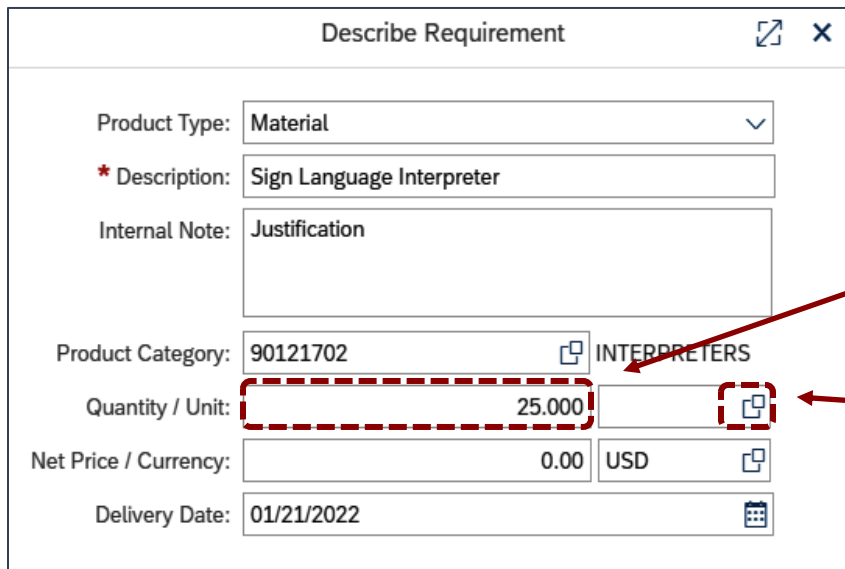


The 'Describe Requirement' dialog box contains the following fields:

- Product Type: Material
- * Description: Sign Language Interpreter
- Internal Note: Justification
- Product Category: 90121702 INTERPRETERS
- Quantity / Unit: 1.000
- Net Price / Currency: 0.00 USD
- Delivery Date: 01/21/2022

Buttons: OK, Cancel

g. The **Product Category** number and description populates in **Product Category** field.



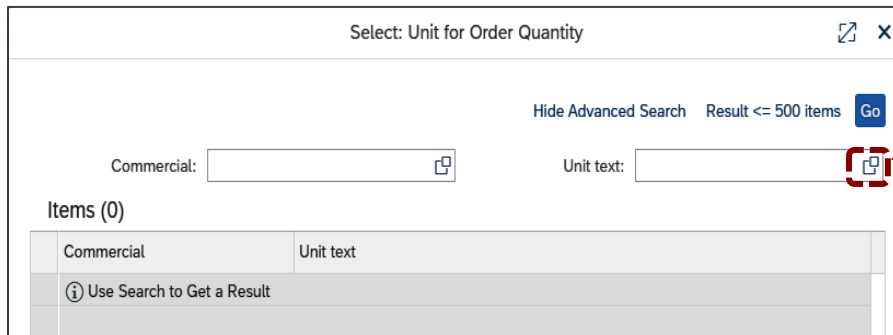
The 'Describe Requirement' dialog box is shown with the following changes:

- Quantity / Unit: 25.000

The match code icon next to the 'Quantity / Unit' field is highlighted with a red dashed box.

9. Enter the **Quantity / Unit of measure** (e.g., 25 / each, hour, etc.).

a. To search for the **unit of measure**, select the **match code** icon to use the **Advanced Search** feature.



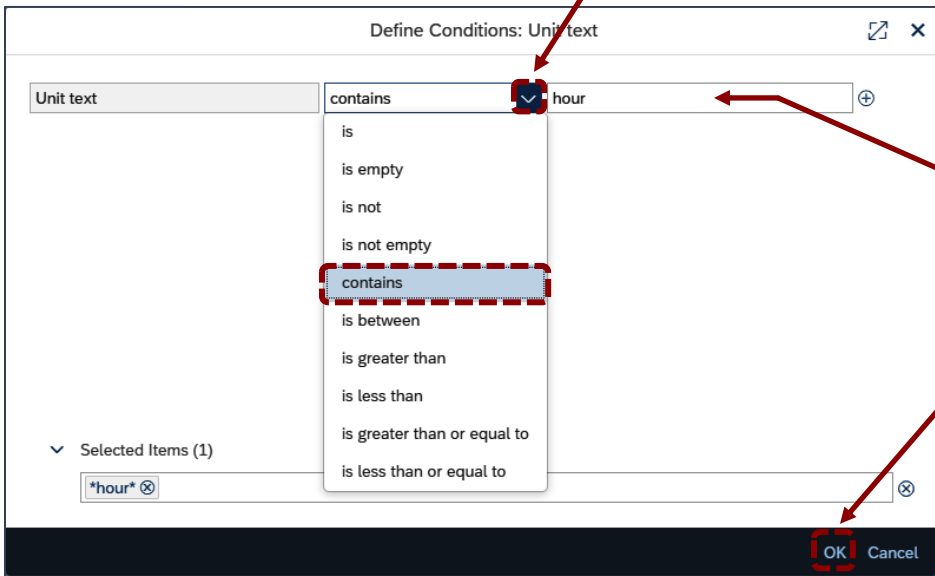
The 'Select: Unit for Order Quantity' dialog box contains the following elements:

- Commercial: []
- Unit text: []
- Buttons: Hide Advanced Search, Result <= 500 items, Go
- Items (0)
- Table with columns: Commercial, Unit text
- Message: Use Search to Get a Result

The match code icon next to the 'Unit text' field is highlighted with a red dashed box.

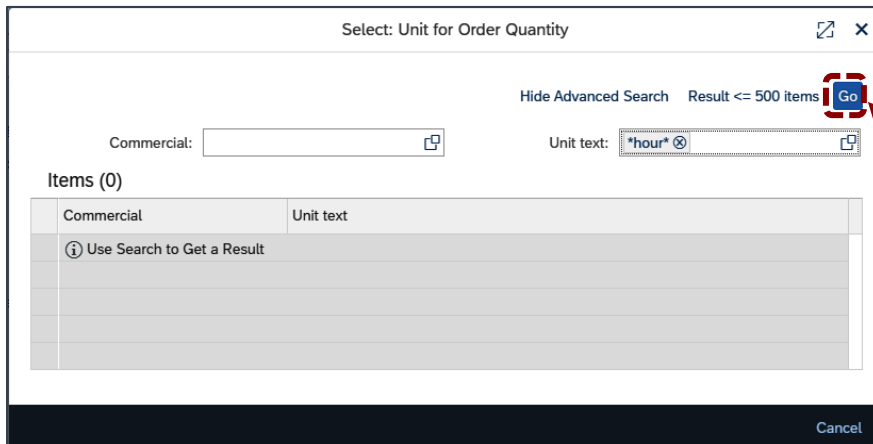
b. Select the **match code** icon next to the **Unit Text** field.

- c. Next, select the downward arrow to choose any one of the condition options you want to search by (e.g., contains).



- d. Type the unit of measure you want to search for (e.g., hour).

- e. Select the OK button.

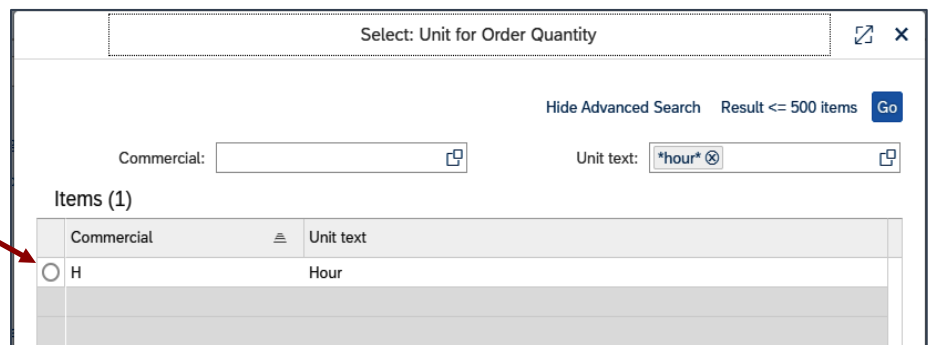


Notice, how the searched unit of measure text (*hour*) populates in the **Unit Text** field with an asterisk * before and after.

- f. Select the GO button.

The searched results display:

- g. Select the radio icon next to the unit of measure abbreviation.



Describe Requirement

Product Type: Material

* Description: Sign Language Interpreter

Internal Note: Justification

Product Category: 90121702 INTERPRETERS

Quantity / Unit: 25.000 H

Net Price / Currency: 0.00 USD

Delivery Date: 02/01/2022

h. The **unit of measure** abbreviation (*e.g., H for Hour*) populates in the unit of measure field.

Describe Requirement

Product Type: Material

* Description:

Internal Note:

Product Category: 44120000 OFFICE SUPPLIES

Quantity / Unit: 1.000

Net Price / Currency: 0.00 USD

Delivery Date: 01/21/2022

OK Cancel

10. Enter the **Net Price / Currency:** (*e.g., 70.00 / USD for US dollars*).

11. Enter the **delivery date** or select the **delivery date** using the **Calendar** icon.

12. Select the **OK** button.

13. The item(s) will transfer from the **Describe Requirement input screen** into **Step 2** of the **Shopping Cart Wizard**:

a. Verify and address any error/warning messages.

The shopping cart shows line-item details transfer in from the **Describe Requirement input screen** based on the product category entered.

NOTE: Error and Warning messages displays on the bottom left side of the Shopping Cart screen. Errors that display with a red exclamation sign will not allow you to proceed until corrections are made. Warnings that display with a yellow exclamation yield sign will allow you to proceed but must be reviewed for corrections.

Line Number	Item Type	Item Process type	Product ID	Description	Product Category	Product Category Description	Quantity	Unit	Net Price / Limit
1	Material			Sign Language Interpreter	90121702	INTERPRETERS	25.000	H	70.00

The shopping cart displays the **total number and line-item number** that contains the **Error or Warning messages**.

Requisitioners **must** review the **Error or Warning messages** and correct according to the messages for each line item (e.g., see line 1).

Line 1: No G/L account was entered; enter a GL... - this means that line item 1 of the cart does not contain a General Ledger (G/L) number. A **General Ledger (G/L)** is a financial account code used to identify material or service ordered, e.g., Sign Language Interpreter, **G/L # is 6343117**.

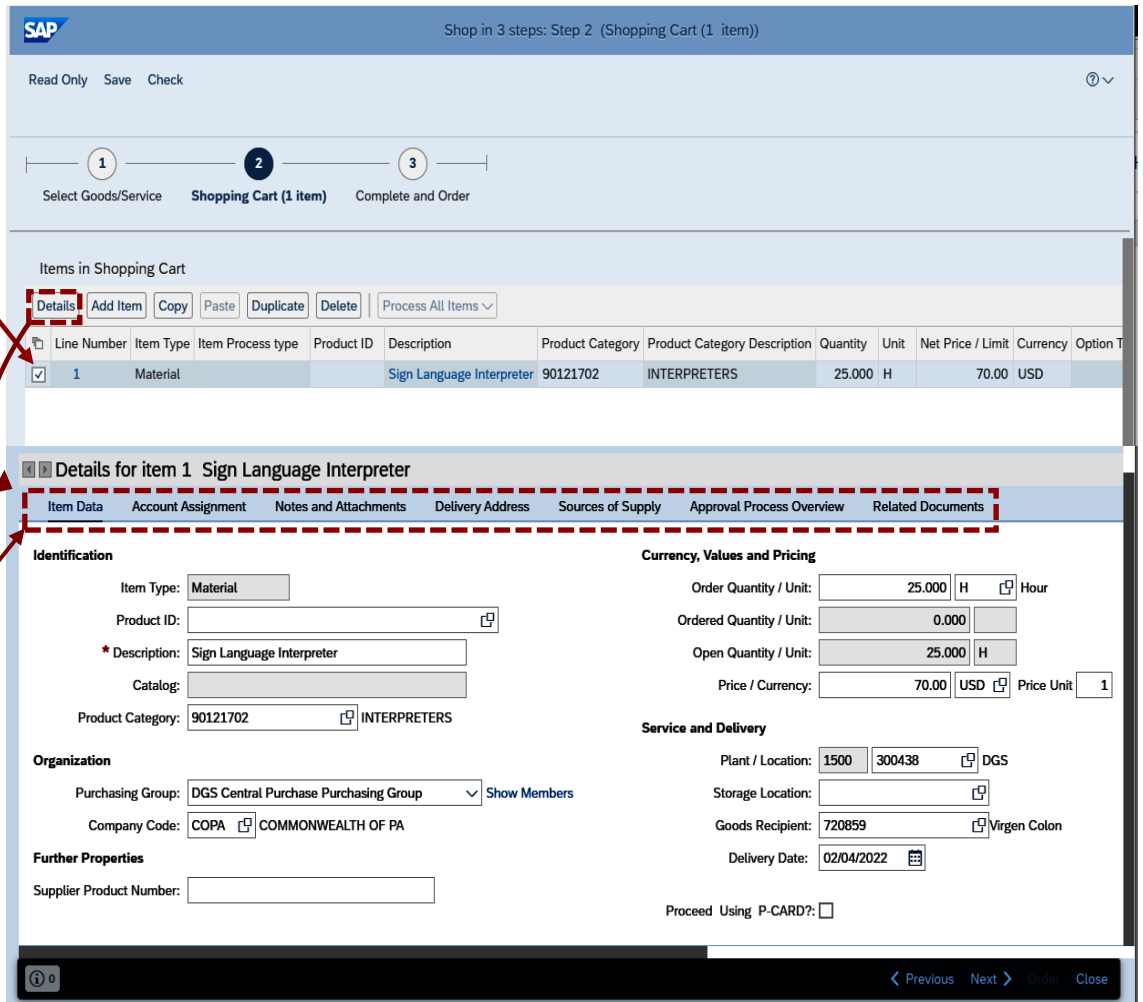
IMPORTANT: Requisitioners are **required** to verify that the **material or service transferred** from the Describe Requirement input screen is correct (*e.g., material or description, product category code, quantity, unit of measure, price, and delivery date*).

Accessing and completing line-item details:

14. Place a **checkmark** in the box next to the line-item number and select the **Details** button to view details.

15. Or select the **Line-Item Number**.

- a. Details for the line-item displays in the bottom portion of the screen. There are **6 sub-tabs** displayed.
- b. Requisitioners **must** select **each sub-tab** to verify that the line-item details are accurate.
- c. Complete only fields shaded in white (*e.g., delivery date, account assignment, notes, and attachments, etc.*).



16. Requisitioner must **verify** and/or **complete** the below key areas of the **Item Data** tab.

a. Identification (verify):

- ✓ Description
- ✓ Product Category

b. Organization (verify):

- ✓ Purchasing Group

NOTE: Do not change or complete the Product ID, PGroup, Co. Code, Supplier Product # and Storage Location fields.

c. Currency, Values and Pricing:

- ✓ Verify or correct the **Order Quantity / Unit**.

d. Service and Delivery:

- ✓ Verify **Plant/ Location** is accurate.

e. Select the Calendar icon to choose a **Delivery Date**.

Accessing and completing the Account Assignment tab:

The *Account Assignment* consists of the Agency's Account Coding that will be used as the form of payment. It identifies the financial resource the funds are coming from (e.g., *Cost Center, Grant Internal Order*) to pay for the procurement. Requisitioners can obtain the **Account Assignment** information from their Agencies Financial Office.

17. Select the **Account Assignment** tab to enter the payment details. (**The account assignment must be entered for all line-items**).

Requisitioners can split the Account Assignment (**Cost Distribution**) by the following:

- Percentage
- Quantity
- Value



There are **action buttons** within the **Account Assignment** tab to simplify entry for each line item.

Details for item 1 Sign Language Interpreter

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

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

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

Number	Accounting Line Number	Percentage	Account Assignment Category	Assign Number
0001		100.00	Cost Center	

- **Details** – will display the detailed information of the account assignment.
- **Add Line** – creates a new line to enter additional account codes.
- **Copy** – will add data to your SRM Clipboard (i.e., if you frequently use the same account assignment such as the Cost Center and Fund not the general ledger)
- **Paste** – is used to auto-populate the same data from the clipboard into other selected line items.
- **Duplicate** – creates a second line item identical to the first or previous line item.
- **Delete** – is used to delete a line item.
- **Split Distribution** – adds lines to split the type of account coding to use.
- **Change All Items** – applies the account assignment to all line items once the first has been set. **(NOTE: This button acts like copy/paste and can be used if the Account Assignment information is identical for all line items).**



Split Distribution – is used to distribute across multiple account codes (e.g., State/Federal). The Split Distribution button gives the option to select the **Type of Account Assignment Category**.

Type	Description
Mixed Account Single Line	No cost distribution between Cost Centers, Funds or General Ledgers (G/Ls), but there is a need for additional cost elements (Order or WBS element)
Asset	Fixed assets (materials) over \$25,000
Cost Center	State Funds
Mixed Account Multi Line	Cost distribution by quantity or percentage using multiple Cost Centers, Funds & G/Ls
Order	Non-Grant Internal Orders that are used to collect and monitor the actual costs of specific operations and tasks performed. Same as a Grant Internal Order, only it's for the agency use.
WBS Element	Work Breakdown Structure -Model of the work to be performed during a project. A WBS combines WBS elements into a hierarchical organization.
Grant Internal Order	Internal Orders tied to Federal or State Grants

Completing the Account Assignment tab:

After selecting the **Cost Distribution**:

18. Complete the applicable coding information depending on the **Account Assignment Category** (e.g., *Cost Center, Fund, General Ledger Account, and Budget Period*) and select the return key on the keyboard.

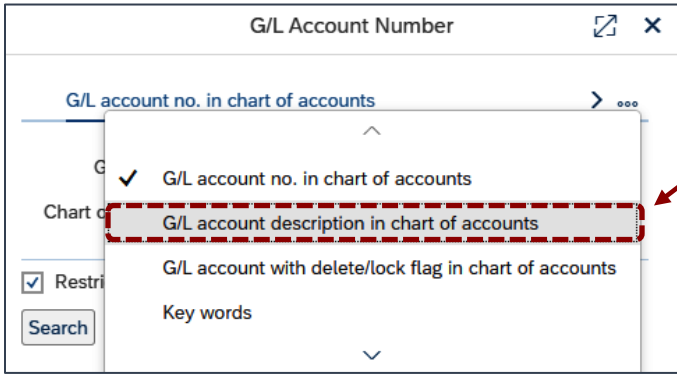
The **General Ledger Account** is an account code that identifies the material or product category (e.g., Sign Language Interpreter).



NOTE: Requisitioners will need to search for the correct **General Ledger (G/L)** account code.

The **G/L Account Number** search screen opens.

b. Select the **ellipses (...)** to open the navigation menu.



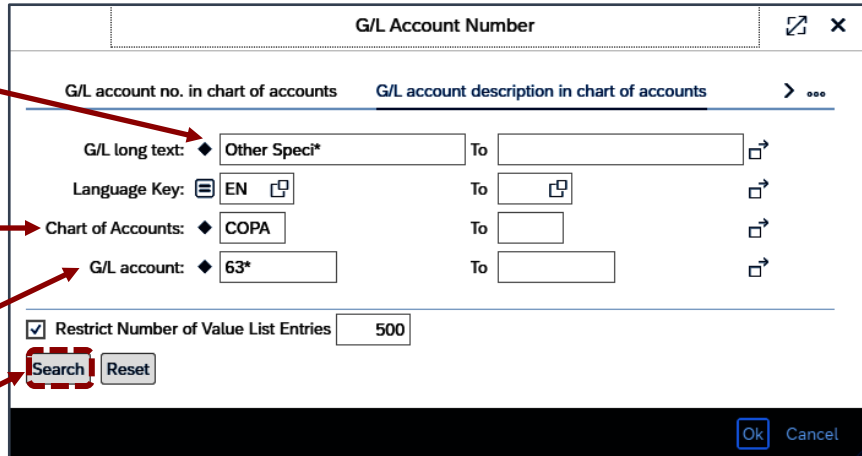
c. Select **G/L account description in chart of accounts** link to search for material or service.

d. Type in the description of **material or service** followed by an asterisk* (e.g., **Other Speci* for Special Services**).

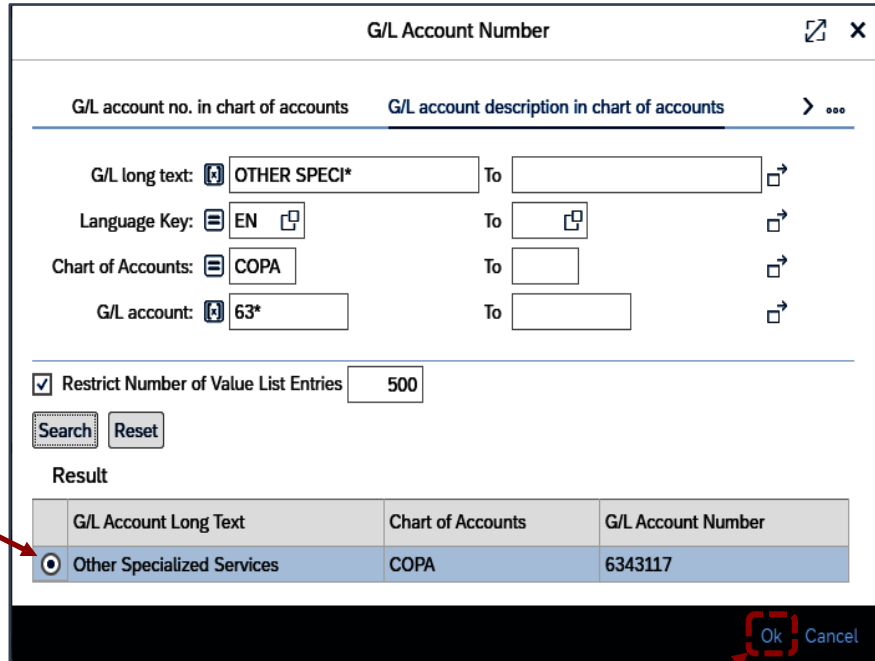
e. Enter **COPA** in **Chart of Accounts** field.

f. Enter **63*** for **Operational General Ledger**.

g. Select the **SEARCH** button.



h. Select the **radio icon** next to the searched results.



i. Select the **OK**.

Details for item 1 Sign Language Interpreter

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

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

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

Number	Accounting Line Number	Percentage	Account Assignment Category	Assign Number
0001		100.00	Cost Center	

Details for Item 0001 : Cost Center

Basic Data

Fund: 1007400700

* Percentage: 100.00

Budget Period: 2020

Account Assignment Category: Cost Center

Commitment Item:

* Cost Center: 1577101000

Fund Center:


Functional Area:

Controlling Area: COPA

General Ledger Account: 6343117 Other Specialized Services

Business Area:

j. The G/L Account number and description populates in G/L Account field.



Completing the Notes and Attachments tab:

19. Select the **Vendor Text**

link to add a detail description of the material or service, mfg. number and any **additional text** (e.g., special delivery instructions, contact information, etc.).

a. Select **OK**.

20. Select the **Internal Note**

link to add a Justification for the material or service including any note to the approver.

a. Select **OK**.

21. Select the **ADD ATTACHMENT** button to browse and add a document (e.g., Supplier Quote).

Do not use special characters and there is a **40-character limit** when naming the attachment.

22. Select **OK** button.

Do not use the **VERSIONING** button to edit attachment documents. This functionality is **not used** by commonwealth users. To edit documents, select the **Delete** button to delete the attachment. Make any revisions to the document outside of SRM. Once the revisions are made, upload the new version in the **Notes and Attachments**.

Category	Description	File Name	Version	Processor	Visible Internally only
Standard Attachment	Quote	LKHQ965..pdf	1		<input checked="" type="checkbox"/>

• If applicable, use the **EDIT DESCRIPTION** to revise the title of the attachment.

Accessing the Delivery Address tab:

23. Select the **Delivery Address** tab to verify the correct location for delivery is listed and/or accurate.

The screenshot displays the SAP Shopping Cart interface. At the top, it shows 'Shop in 3 steps: Step 2 (Shopping Cart (1 item))'. Below this is a progress bar with three steps: 1. Select Goods/Service, 2. Shopping Cart (1 item), and 3. Complete and Order. The second step is active. A table below shows the cart item: Line Number 1, Item Type Material, Item Process type, Product ID, Description 'Sign Language Interpreter', Product Category 90121702, Product Category Description INTERPRETERS, Quantity 25.000, Unit H, Net Price / Limit 70.00 USD, Option Type 1, Order Type 1, and Delivery Date 02/04/2022. Below the table, the 'Details for item 1 Sign Language Interpreter' section is shown. The 'Delivery Address' tab is selected and highlighted with a red dashed box. A red arrow points from the 'Delivery Address' tab to the 'Name' field, which contains 'EXEC BRANCH' and has a small match code icon. A text box 'a. Select the match code in the name field to search and add an address if needed.' is positioned next to the match code icon. Other address fields include C/O: BOP FOR PL, Fax Number/Extension: 717-783-6241, Street / House Number: Forum Place 555 Walnut Street - ..., District, Country: US USA, Additional Name: Executive Branch, Phone Number / Extension: 717-787-4719, E-Mail, Floor / Room, Postal Code / City: 17101 Harrisburg, Postal Code / P.O.Box, and Region: PA Pennsylvania.

Line Number	Item Type	Item Process type	Product ID	Description	Product Category	Product Category Description	Quantity	Unit	Net Price / Limit	Currency	Option Type	Per	Order Type	Delivery Date	Not
1	Material			Sign Language Interpreter	90121702	INTERPRETERS	25.000	H	70.00	USD		1	1	02/04/2022	1

Details for item 1 Sign Language Interpreter

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

Reset

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

Name: EXEC BRANCH

C/O: BOP FOR PL

Fax Number/Extension: 717-783-6241

Street / House Number: Forum Place 555 Walnut Street - ...

District:

Country: US USA

Additional Name: Executive Branch

Phone Number / Extension: 717-787-4719

E-Mail:

Floor / Room:

Postal Code / City: 17101 Harrisburg

Postal Code / P.O.Box:

Region: PA Pennsylvania

a. Select the match code in the name field to search and add an address if needed.

Accessing the Source of Supply tab:

The **Source of Supply** is the supplier providing the material or service. The **Source of Supply** tab automatically displays the supplier's name and contract number based on the product category selected. Make sure the **correct product category** has been selected to **avoid** the **wrong supplier** being populated as the source.

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

Read Only Save Check

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

24. Requisitioners are required to verify if the Source of Supply (e.g., supplier) defaults from the contract. If not, the Source of Supply must be added.

Items in Shopping Cart

Details Add Item Copy Paste Duplicate Delete Process All Items

Line Number	Item Type	Item Process type	Product ID	Description	Product Category	Product Category Description	Quantity	Unit	Net Price / Limit	Currency	Option Type	Per	Order Type	Delivery Date	Notes	Total Value	Attachments	Account Assignment	Item Status	Supplier
1	Material		Sign Language Interpreter	90121702	INTERPRETERS		25.000	H	70.00	USD		1		02/04/2022	1	1,750.00	1	Cost Center (1577101000)	Saved	None

Total Value 1,750.00 USD
Tax amount 0.00 USD
Total Val. (Gross) 1,750.00 USD

Filter Settings

Details for item 1 Sign Language Interpreter

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

No supplier has been assigned; select and assign one of the following sources of supply

No possible sources of supply found in the system

Sources of Supply

Assign Supplier Compare Suppliers

Supplier Number	Supplier Name	Contract	Item	Contract Item Description
<input type="checkbox"/>				
<input type="checkbox"/>				
<input type="checkbox"/>				
<input type="checkbox"/>				
<input type="checkbox"/>				

You may suggest a preferred supplier to the purchasing department

Preferred Supplier: 184808 SIGN LANGUAGE SPECIALISTS

25. To add a supplier, select the Source of Supply tab:

a. Select the Match code to search for the supplier to add (see end user procedure for [Using the Filter Option to Add Source of Supply](#)).

Filter

Priority Rank	Priority Description	Interlinkage

Previous Next Order Close

NOTE: The **Preferred Supplier** field **must only be completed** when the following applies:

- The materials or services **are on contract**, but the **Source of Supply** did not populate the correct supplier and contract to assign as the source.
- The supplier providing the materials or services **is not** on contract.

When using the **Preferred Supplier** option, requisitioners **must add** an **internal note** referencing the contract and line-item number(s) and advise the *Source of Supply* will not populate.

Accessing the Approval Process Overview tab:

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

Read Only Save Check

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

Details for item 1 Sign Language Interpreter

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

Current Status: Initial
 Current Process Step:
 Currently Processed By:

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

Header Approval Status

Add Approver Remove Approver

Sequence	Process Step	Status	Processor
001	SRM Shopping Cart Completion	Open (No Decision Made)	Chasity Beward;Denise Sowers;Michael Weges
002	SRM Shopping Cart Completion	Open (No Decision Made)	Tammy Noel;Kristina Landvater;Walter Strausbaugh;Michael Kirby

26. The Approval Process Overview tab displays the approvers names established within workflow process of the agency. Requisitioners can view level of approvers and the approval status.

Requisitioners also have the option to **add Ad Hoc Approvers** in the approval workflow process for their shopping carts.

- An **Ad Hoc Approver** is an additional approver that can be added within a cart by a requisitioner anytime the agency approvals **do not** meet the requirements of a specific shopping cart.
- Users added as an **Ad Hoc Approver** **must** have a **SRM Approver** role.
- **Ad Hoc Approvers** **cannot** be added to a Special Category cart (*e.g., IT, Training, Audio/Video*) after the cart reaches the final Agency Approver.

For assistance with adding Ad Hoc Approvers, see EUP for [Ad Hoc Process on Rejected Shopping](#)



NOTE: A shopping cart will transmit to an **Agency Purchasing Agent** to process into a **PO** if **ANY ONE** of the following criteria is met:

- The Shopping cart was created via “**Describe Requirement (Free Text)**”.
- The Carts value is **greater than \$10,000**.
- The Cart contains items **not** from an **approved catalog supplier**.

Prior to ordering the shopping cart, requisitioners **must** first **name the shopping cart** according to guidelines in the [Document Naming Convention and Records Management Procedure](#).

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

Save Check

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

Name of shopping cart: **28.** In the **Name of Shopping Cart** field,

Number: 12535724

Team Shopping Cart: Make available to my purchasing substitutes

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

Note to Approver:

29. Select the **ORDER** button to order the cart.

27. Select the **Step 3- Complete and Order** link of shopping cart.

28. In the **Name of Shopping Cart** field,

- a. Enter the name using the **first four numbers of the product category, (e.g., 9012 for 90121702 Sign Language Interpreter).**
- b. Followed by a **space dash space and a noun** that describes the purchase.
- c. For example:
9012 Sign Language Interpreter

NOTE: Requisitioners can select the **SAVE** button at top of the screen to save and retrieve the cart another time via the **POWL (Personal Object Worklist)**. *The POWL is a tool in SRM to search procurement documents (e.g., shopping carts).*

29. Select the **ORDER** button to order the cart.

Order Close

NOTE: Selection of the **Close** button at bottom of the Cart without **saving** or **ordering** will cause the requisitioner to lose the shopping cart.

The screenshot shows the SAP Shopping Cart interface. At the top, the SAP logo is on the left and "Shop in 3 steps" is on the right. Below this is a section titled "Items in Shopping Cart" containing a table with the following data:

Line Number	Item Type	Item Process type	Product ID	Description	Product Category	Product Category Description	Quantity	Unit
1	Material			Sign Language Interpreter	90121702	INTERPRETERS	10.000	H

Below the table, there is a section titled "What do you want to do next?" with the text "You can now print this shopping cart or continue shopping" and two links: "Print Preview" and "Shop Again".

A red dashed box highlights a notification area at the bottom of the screen. It contains a notification bubble with a checkmark and the text "Shopping cart '9012 Sign Language Interpreter' ...". Below this, a message bar displays the text "Shopping cart '9012 Sign Language Interpreter' with number 12535725 ordered successfully". A red arrow points from a text box to this message bar.

30. Once the cart is ordered:
a. A message displays showing the Shopping Cart Number has been ordered successfully at bottom of the cart.

The End.