

SRM Agency Purchaser

Purpose/Definition: The SRM Agency Purchaser role is responsible for procuring materials and services on behalf of their specific agency based on thresholds defined by procurement policy.

Role Mapping Rules

Positions that receive the SRM Agency Purchaser role cannot receive any of the following roles:

- SRM Requisitioner
- SRM Receiver
- R/3 Receiver
- Invoice Entry Processor
- SRM Procurement Document Approver Role (all roles)
- SRM Purchase Order/Contract Approver Role (all roles)
- Agency Revenue Processor

Please review Management Directive 205.37 Role Assignment, Security, and Internal Control Maintenance for guidance on role mapping conflicts.

Responsibilities

- Receive items to be sourced based on dollar thresholds delegated to the agency
- Analyze and determine if contract is in place or if a solicitation is required
- Create purchase orders from DGS and/or agency contracts
- Create and edit IFBs, RFPs and RFQs in SRM
- Utilize document builder to appropriately build the solicitation
- Review proposals received from suppliers and enter responses if received in paper
- Create bid tabulations in SRM
- Evaluate and make award
- Create and edit award documents including contracts and purchase orders
- Create and analyze strategic and transactional procurement reports in Business Warehouse and in SRM
- Monitor contract expirations and usage
- Create emergency purchase orders and/or sole source RFQ's

Required Knowledge, Skills, and Abilities

- Broad knowledge of Commonwealth procurement policies and methods
- Broad knowledge of bidding, contracting, and purchase orders
- Broad knowledge of the Commonwealths criteria for disadvantaged business requirements
- Knowledge of standards and evaluation methods used to assess the quality and value of a wide variety of supplies and services.
- Knowledge of how information is referenced/carried forward into successive procurement documents without requiring data re-entry.
- Knowledge of vendor qualification, contract updating/management, requisition/shopping cart, and p-card payment.

- Knowledge of how to select appropriate account code to identify purchase orders over \$5k as fixed assets.
- Understanding of how to use order acknowledgement and shipping notification to plan inventory and track vendor delivery performance.
- Ability to create solicitations from approved shopping carts, enter vendor quotations online, and run price comparison function to award bid.
- Ability to change contracts and purchase orders, including conditions.
- Ability to use a periodic invoice plan (e.g. ERS) to make lease payments, including how to adjust payments due to CPI changes.
- Ability to generate and analyze purchasing reports to track contract status, vendor spend, and improve procurement performance.
- Ability to monitor GR/IR account to identify discrepancies between goods receipts and invoices.
- Ability to monitor data output to track workflow.
- Ability to establish and maintain effective working relationships with DGS, vendors, and customers, and coordinate with them online.

Tools

- SAP—R/3 and SRM
- Business Warehouse

Processes & Transactions

- Workload Redistribution
- Bid Creation
- Document Builder
- Bid Opening
- Bid Awards
- Contract/PO Creation
- Creating Stand-Alone PO
- Sourcing Requirement/Create PO
- Editing/Deleting/Printing
- Liquidating PO
- Base Reporting

Training Prerequisites

The following knowledge is required before employees can enroll in SRM training. If an employee who will perform a To-Be role is not knowledgeable in any of the below areas, pre-requisite training is available through the CTC.

- PC and Windows User Fundamentals
- Microsoft Software
 - Microsoft Word (Word Processor)
 - Microsoft Excel (Spreadsheet)
 - Microsoft Outlook (Email)
 - Internet Browser
 - Windows

SRM Agency Purchaser

Course Name	Course	Hours	Del. Media
Fundamentals	SRM Sourcing Fundamentals	1.00	WBT
	SRM Navigation & Overview	0.15	WBT
Core Purchasing	Create & Maintain Purchase Orders	24.50	ILT
	Create & Maintain Solicitations & Contracts		
	Business Warehouse		

25.65 hours total