



Requisitioning and Receiving Goods and Services with the SRM Shopping Cart Knowledge Transfer Session

Welcome to Class!

- Introductions
- Ground Rules



Ground Rules

🌀 Important Ground Rules

- Sign the attendance sheet
- Feel free to ask questions
- Turn off your cell phones and pagers
- No email or internet usage during class except at breaks
- Have a good time!
- Complete course evaluation at the end of training

Course Agenda

- Lesson 1: Create A Shopping Cart
- Lesson 2: Shopping Cart Workflow / Approvals
- Lesson 3: NIGP Search/ State Contract Punch Out
- Lesson 4: Cost Assignment Options
- Lesson 5: Goods Confirmation
- Review and Summary

Course Learning Objectives

- Upon completion of this course, you should be able to:
 - Describe the goods and services requisitioning processes in the Supplier Relationship (SRM) system.
 - Define key terms and concepts.
 - Create a shopping cart for goods/services using SRM.
 - Modify shopping carts that have been put on hold.
 - Approve or cancel shopping carts that have been work-flowed to you.
 - Check status of an existing shopping cart.

Course Learning Objectives cont.

- Upon completion of this course, you should be able to:
 - Create a shopping cart using several different methods.
 - Know the difference between State Term Contract Search and State Term Contract “Punch-Out”
 - Understand “workflow”
 - Use split funding in a shopping cart.
 - Create a “Goods Confirmation” against an existing Purchase Order.

Key Terms and Concepts

- SRM / Supplier Relationship Management
- ECC / Enterprise Central Component
- Punch Out Catalog
- Shopping Cart (SC)
- Approval
- Purchase Order
- Invoice
- Source of Supply
- Product Category
- Carry Out Sourcing



Benefits of SRM Shopping Cart

- ④ Integrated system
- ④ Data entered into SRM result in real-time queries and reports in ECC
- ④ Documents can be placed on hold
- ④ Easy retrieval of information
- ④ Reduced processing time
- ④ Single, integrated environment for information management
- ④ Better reporting and delivery capabilities

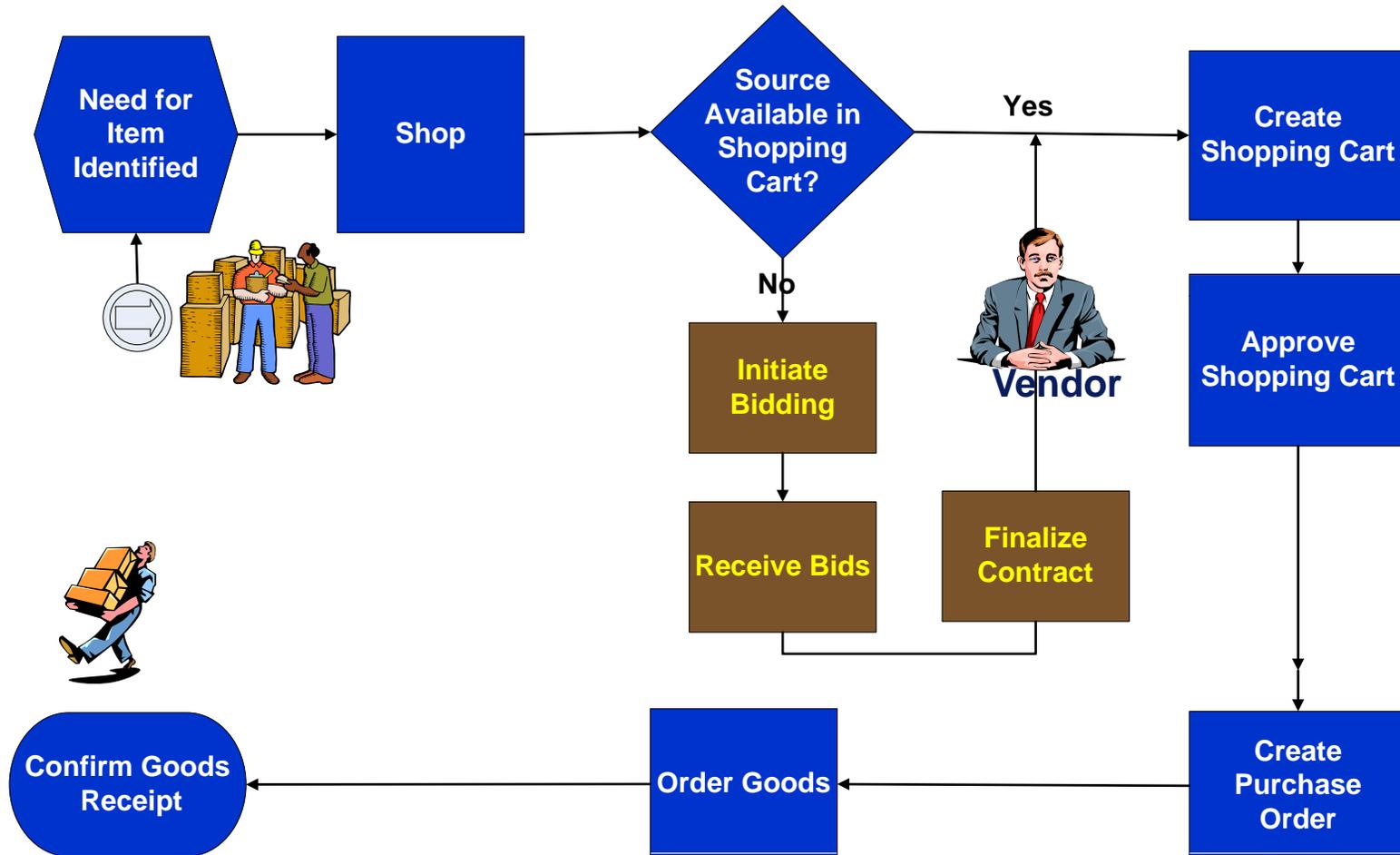


Lesson 1: Create a Shopping Cart

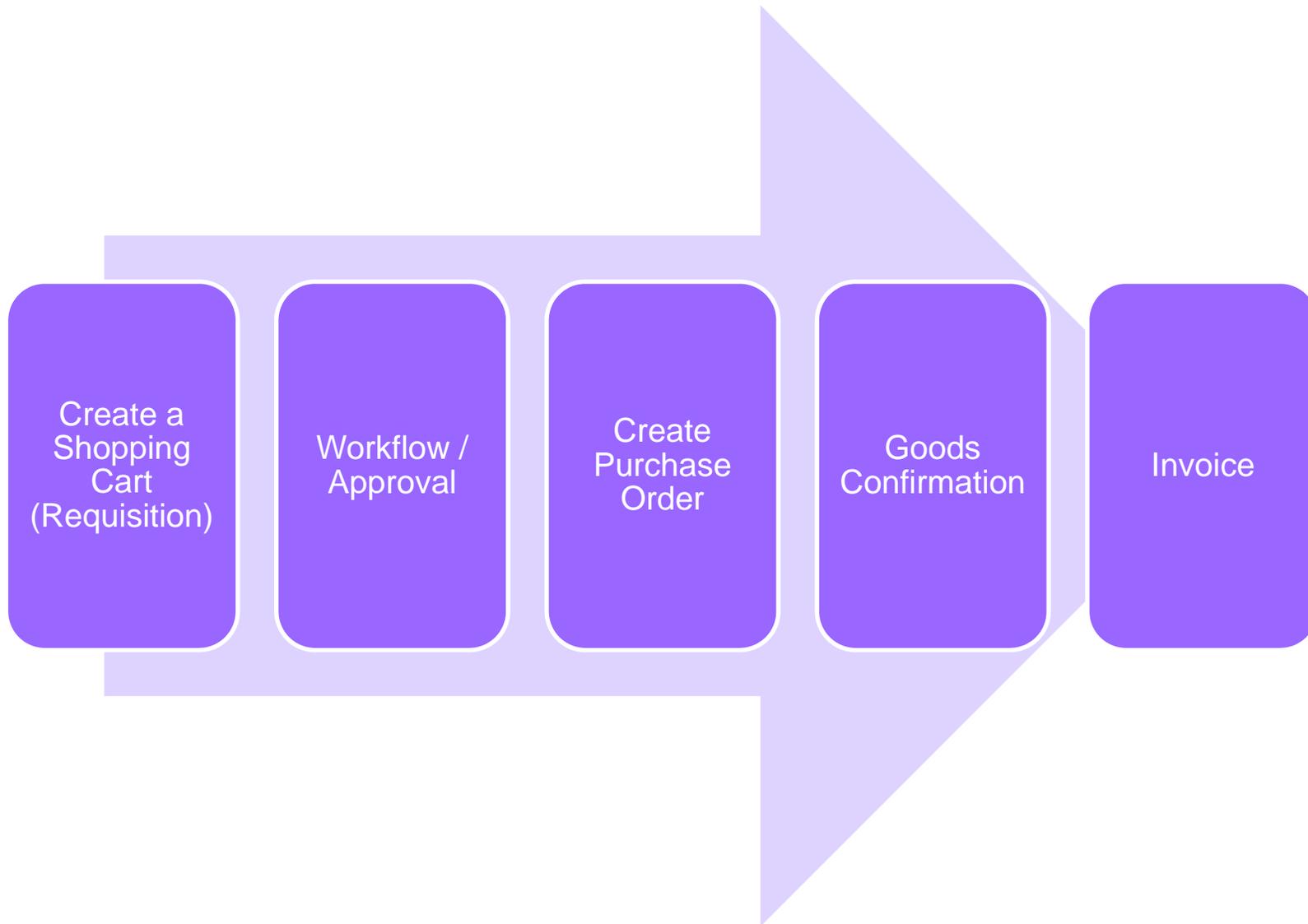
Lesson 1 Learning Objectives

- Upon completion of this Lesson, you should be able to:
 - Describe the procurement process in SRM.
 - Enter required data into a shopping cart.
 - Understand funds availability check in the shopping cart.
 - Understand the importance of selecting the correct NIGP code/product category.

Procurement Process in SCEIS



Procurement Process in SCEIS



Selecting Goods/Services for Procurement

In SRM, there are several ways to select products/services that need to be procured:

- Old Purchase Orders/ Templates
- Punch Out Catalogs
- NIGP/Contract Search
- “Describe Requirement” Function

Creating a Shopping Cart

There are three simple steps that are required to create a shopping cart:

Shop in 3 Steps



In this step, you can search for goods/services and add them to your shopping cart. In step 2, you can display your shopping cart and check it. In step 3, you can order your shopping cart.

Step 1: Select Goods/Service

You can add items to the shopping cart using the following methods:

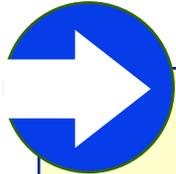
Search in Individual Catalogs:

- | | |
|---|---|
|  Old Purchase Orders and Templates |  Internal Goods/Services |
|  Hewlett Packard |  Howard Technology Solutions |
|  LENOVO Punch Out Catalog |  NIGP/Contract Search |
|  Office Max |  SHI Punch Out Catalog |
|  Troxell | |

Name of Area Step 1: Select Goods/Service

Not found what you were looking for? Use the following order form:

- [Describe Requirement](#)



- ◆ Check the Status of a Shopping Cart
 - ◆ Demonstration – Trainer: Check status
 - ◆ Exercise: uPerform Business Process Procedure
 - ◆ WWW.SCEIS.SC.Gov
 - ◆ Training
 - ◆ SCEIS uPerform
 1. Materials Management (MM)
 2. Procurement
 3. Shopping Cart
 4. Create a Shopping Cart

Learning Activity

- If the vendor is unknown, the shopping cart can be redirected to the Finance Department. (True or False)
- The source of supply is a vendor. (True or False)
- The Product Category is the same as the NIGP Code. (True or False)

Lesson 1 Summary

- You should now be able to:
 - Enter required data into a shopping cart.
 - Create a shopping cart in SRM.
 - Describe the procurement process.



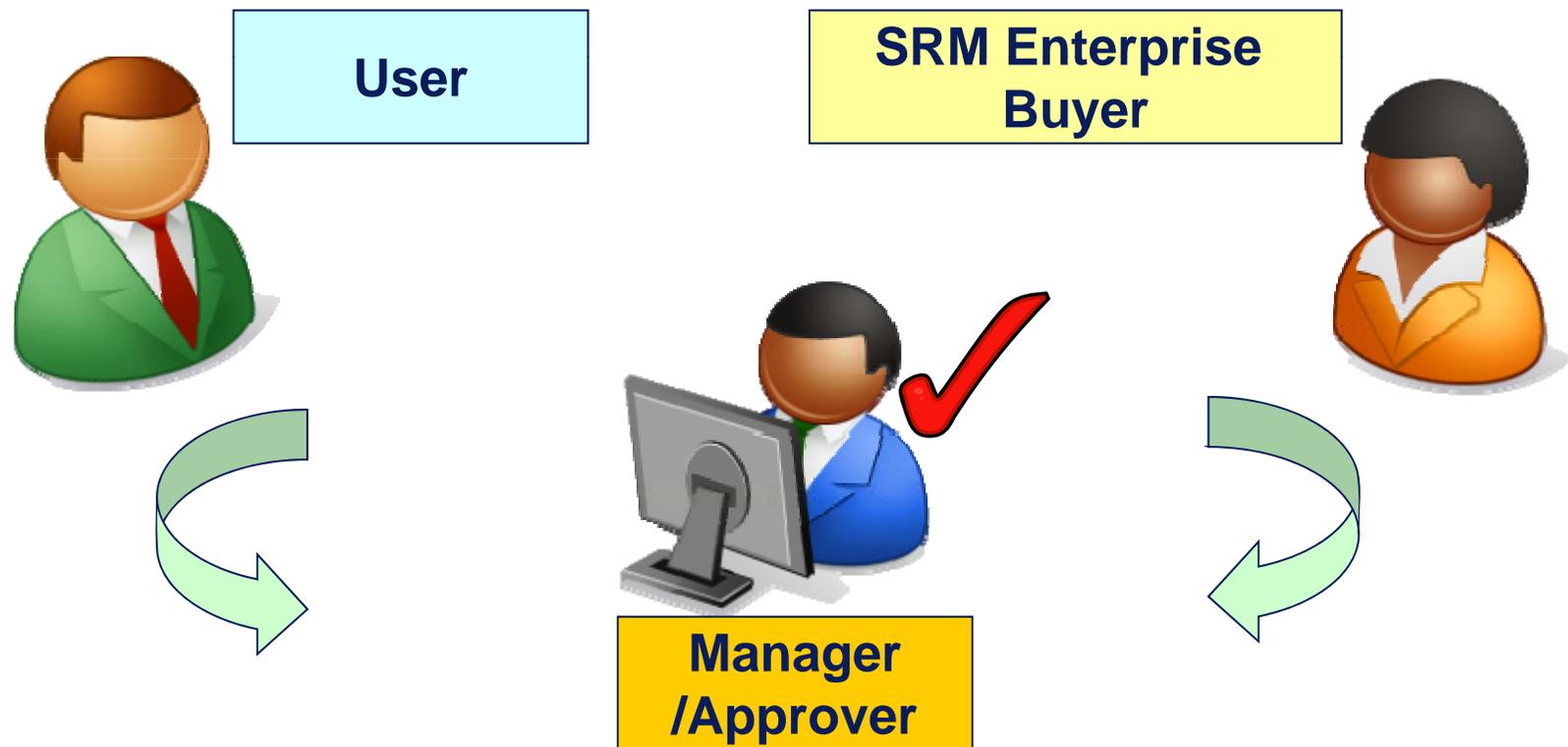
Lesson 2: Shopping Cart Workflow / Approval

Lesson 2 Learning Objectives

- Upon completion of this lesson, you should be able to describe:
 - The process of checking the status of the shopping cart as a user.
 - The process of checking the status of the shopping cart as an approver/manager.
 - Approval rights as a user.
 - Discuss the conditions during which shopping cart approval is required.

Participants of the SRM Shopping Process

The User, SRM Enterprise Buyer and the Manager/ Approver participate in the SRM shopping process.



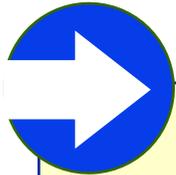
Shopping Cart Workflow/Approval

Workflow/Approval occurs for the shopping cart based on several conditions:

- The dollar amount of the shopping cart is greater than the amount you are approved to buy.
- Financial accounting data or Asset is unknown.
- Agency requires grants administrator to approve/review shopping carts with grants



Demonstration and Exercise



- ◆ Check the Status of a Shopping Cart
 - ◆ Demonstration – Trainer: Check status
 - ◆ Exercise: uPerform Business Process Procedure
 - ◆ WWW.SCEIS.SC.Gov
 - ◆ Training
 - ◆ SCEIS uPerform
 1. Materials Management (MM)
 2. Procurement
 3. Shopping Cart
 4. SRM Shopping Cart (Approval)

Lesson 2 Summary

- You should now be able to:
 - Access shopping carts that have been placed on hold.
 - Understand that shopping carts placed on hold can be modified.
 - Release the cart for approval.

Learning Activity

- ④ As a manager you can change items in the shopping cart. (True or False)
- ④ As a user, while making changes in the shopping cart you can make changes to the status on behalf of other users. (True or False)



Lesson 3: NIGP Search/State Contract Punch Out

Lesson 3 Learning Objectives

- ④ Upon completion of this lesson, you should be able to:
 - Search for a commodity/service using the State Term Contract Search or NIGP Search
 - Create a shopping cart using a Punch Out catalog developed by a state term contract vendor.



- ◆ Shopping Cart Template
 - ◆ Demonstration – Trainer: STC/NIGP Search
 - ◆ Exercise: uPerform Business Process Procedure
 - ◆ WWW.SCEIS.SC.Gov
 - ◆ Training
 - ◆ SCEIS uPerform
 1. Materials Management (MM)
 2. Procurement
 3. Shopping Cart
 4. SRM Shopping Cart (State Contract Search)
 5. SRM Shopping Cart (NIGP Search)



Lesson 4: Cost Assignment Options

Lesson 4 Learning Objectives

- Upon completion of this lesson, you should be able to:
 - Split a cost assignment by:
 - Percentage
 - Quantity
 - Value
 - Understand and explain the options for entering cost assignment:
 - CC = Cost Center
 - U = Unknown
 - AS = Asset
 - UA = Asset Unknown



- ◆ Cost Assignment Options
 - ◆ Demonstration – Cost Center Split
 - ◆ Exercise: uPerform Business Process Procedure
 - ◆ WWW.SCEIS.SC.GOV
 - ◆ Training
 - ◆ SCEIS uPerform
 1. Materials Management (MM)
 2. Procurement
 3. Shopping Cart
 4. SRM Shopping Cart (Cost Center Split)

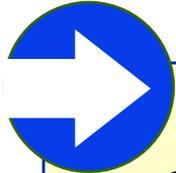


Lesson 6: Goods Confirmation

Lesson 5 Learning Objectives

- Upon completion of this lesson, you should be able to discuss:
 - Create a “Goods Confirmation” against an existing Purchase Order.
 - Create a “Return Delivery” against a previously created goods confirmation.
 - Display confirmation details and preview document number that is posted in back-end system.

Demonstration and Exercise



- ◆ Goods Confirmation
 - ◆ Demonstration: Goods Confirmation in SRM
 - ◆ Exercise: uPerform Business Process Procedure
 - ◆ WWW.SCEIS.SC.GOV
 - ◆ Training
 - ◆ SCEIS uPerform
 1. Materials Management (MM)
 2. Procurement
 3. Shopping Cart
 4. SRM Shopping Cart (Confirm Goods)

Course Summary

- You should be able to:
 - Describe the goods and services requisitioning processes in the Supplier Relationship (SRM) system.
 - Define key terms and concepts.
 - Create a shopping for goods/services using SRM.
 - Modify shopping carts that have been put on hold.
 - Approve or cancel shopping carts that have been work-flowed to you.
 - Check status of an existing shopping cart.
 - Find and use a previously created shopping cart as a template.

Course Summary cont.

- You should be able to:
 - Create a shopping cart using state contract Punch Out Catalog.
 - Use split funding in a shopping cart.
 - Create a shopping cart for an “asset”.
 - Create a “Goods Confirmation” against an existing Purchase Order.

MM Knowledge Transfer Breakout Session

At DSS Training Center, Midlands Shopping Center, unless otherwise noted.

- **Managing and Submitting Bids, Small Purchases**
 - June 10, 2009 at 9:00 a.m. – 11:30 a.m.
 - June 10, 2009 at 2:00 p.m. – 4:30 p.m. (repeat)

- **Managing and Submitting Bids, Complex Purchases**
 - June 17 2009 at 9:00 a.m. – 4:30 p.m.
 - June 18, 2009 at 9:00 a.m. – 4:30 p.m. (repeat)

- **Purchasing**
 - June 24 2009 at 9:00 a.m. – 3:00 p.m.
 - June 25, 2009 at 9:00 a.m. – 3:00 p.m. (repeat)

Next Steps cont.

- **Inventory Management – Material Planner**
 - June 10, 2009 at 9:00 a.m. – 11:00 a.m., *SCEIS office, Room 201*

- **Inventory Management – Goods Receiver/Issuer**
 - June 17, 2009 at 9:00 a.m. – 11:00 a.m., *SCEIS office, Room 201*

- **Inventory Management – Physical Inventory**
 - June 24, 2009 at 9:00 a.m. – 11:00 a.m., *SCEIS office, Room 201*

Next Steps

🌀 Additional Support and Reference Materials

- You can access additional support and print step-by-step procedures on the SCEIS uPerform website.

Go to the **SCEIS** website at <http://www.sceis.sc.gov> and click “**SCEIS uPerform**”

Any Questions?

