



SRM Shoppers


SRM_SHO_300



UK UNIVERSITY OF KENTUCKY

SRM Shoppers

What is SRM?



Supplier Relationship Management (SRM) is an SAP e-procurement product that uses a web-based platform. It is the University's formal procurement system.

- Enables end users to procure goods and services via a "Shopping Cart" environment.
- Generates savings for the University through use of electronic Catalogs.
- Integrates with SAP functionality and processes.
- Functional responsibility for SRM is held with the Materials Management (MM) Team within the Enterprise Applications Group.

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Who Should Receive SRM Shopper Training?



Any persons authorized to perform procurement functions for their department or area are required to complete Shopper training. This includes administrative/other staff or faculty conducting purchases on behalf of their departments or units.

Note: SRM is a phased implementation. It is currently utilized by all departments and areas within the academic campus sector. Phase II of implementation is forthcoming and will include the following areas:

- UK HealthCare
- College of Medicine
- Facilities areas using Plant Maintenance (PM)

The above areas continue to use SAP requisitions. Any person(s) within the above areas should take course MM_REQ_300 SAP Requisitions rather than the SRM Shopper course.

When is SRM used?



Being the formal procurement system for the University, SRM is used for the following purchases:

- Purchases, regardless of amount, for which the vendor does not accept the procurement card
- Any purchase, regardless of amount, that involves written agreements
- Commodities having special conditions or nature (i.e., personal service contracts, leases, licensed goods, etc.)
- Purchase of capital equipment (i.e., > \$2000 cost, or > \$1000 for computers)
- Highest volume suppliers to the University and for which there are electronic catalogs loaded

How SRM Differs from other Purchase Methods



SRM differs from other purchase methods for which departments have delegated authority.

1. Procurement card – Used for purchase of:

- Most small dollar operational goods and services which are *not* available from SRM catalogs
- Other orders with total cost < \$5000
- Equipment with item cost < \$2000, computers < \$1000 (Exception: Purchase of Dell computers is allowable for orders up to \$5000 on procurement card)
- Items involving no special conditions or written agreements

2. Payment Request Document (PRD) – Used for processing payments for select goods and services that are usually of a discretionary nature or for which little or no Purchasing policy applies, e.g., speaker fees, government fees, awards, patient reimbursements, etc.

Accounts Payable holds responsibility for the PRD program.

How Do I Know SRM is the Right Method?



The Purchasing / AP Quick Reference dictates the correct method by commodity type and can be found on the Purchasing website at:

<http://www.uky.edu/Purchasing/docs/quickrefguide.pdf>

	<i>Procurement Card</i> Purchases less than \$5,000 (Preferred Method)	<i>Shopping Cart/ Requisition</i> through Purchasing	<i>Payment Request Document (PRD)</i>
Exhibit Space for Conventions, Conferences, Trade Shows/Meeting space/room	X	X	
Exhibit Fees	X	X	
Express Mail Services (ie. FedEx, UPS, DHL)	X		
Flowers			X
Floor Covering Removal and/or installation		X	
Freight and other shipping costs	X	X	
Furniture	X	X	

IRIS Integrated Resource Information System

SRM Roles

Level	SRM Role	Role Description	Corresponding SRM document type
Department	Shopper	Responsible for creating a "Shopping Cart" to purchase goods and/or services from a particular supplier	Shopping Cart
Department / College / Unit	Approver	Approves Shopping Carts for their department or area	--
Purchasing	Buyer	Responsible for university-wide contracting processes for various commodities	Purchase Order
Department	Confirmer	Confirms physical receipt of goods in satisfactory condition	Goods Confirmation
Accounts Payable	--	Posts invoices against purchase orders	Invoice Receipt

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IRIS Integrated Resource Information System

Role Combinations

In order to maintain checks and balances there is a limit on the number and structure of roles any one person may hold. The following matrix shows all permissible combinations for various procurement roles within myUK.



SAP (R3/MM) SRM PRD	SIMILAR ROLES					
	REQUISITIONER	APPROVER	RECEIVER			
	SHOPPER	APPROVER	GOODS CONFIRMER			
	CREATOR	APPROVER				
				PRD CREATOR	SAP REQUISITIONER	SRM SHOPPER
				SAP /SRM /PRD APPROVER	SAP RECEIVER	SRM GOODS CONFIRMER
OPTION 1	✓	✓	✓	✗	✓	✓
OPTION 2	✗	✗	✗	✓	✓	✓
OPTION 3	✗	✓	✓	✓	✗	✗

The same person is not required to hold all roles within any one option. The combinations reflect the maximum roles within each option any one person may hold.

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Training Requirements for SRM Departmental Roles

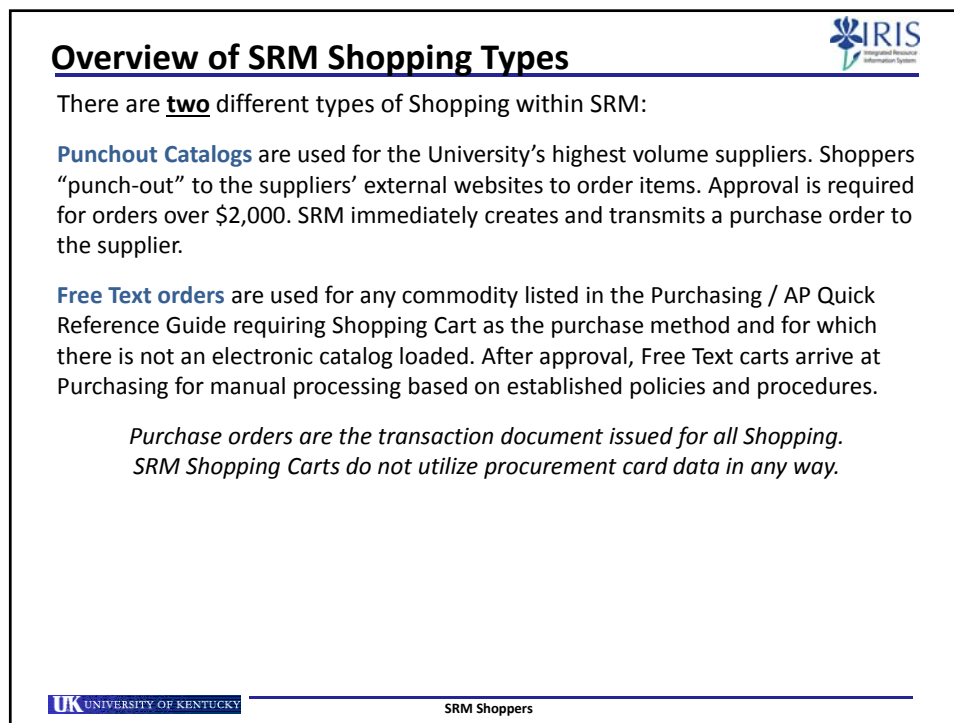
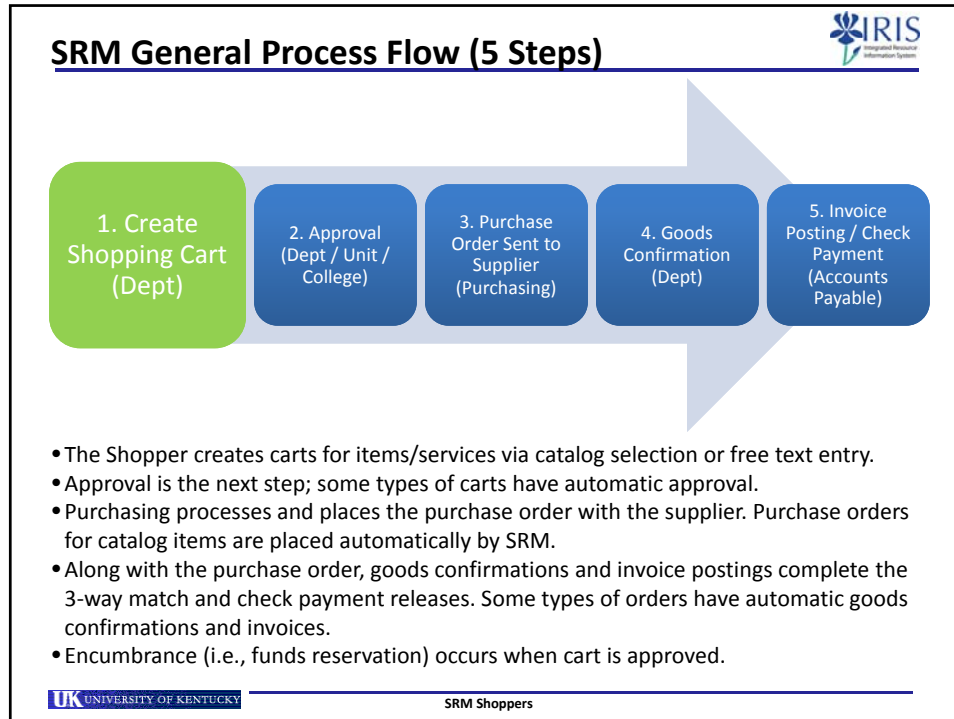
Role	Training Requirements
Shopper	Shoppers are required to take and pass the SRM_SHO_300 SRM Shoppers course via the <i>myUK</i> Training module.
Approver	Approvers are required to take and pass the MM_APP_300 Combined Approvers course via the <i>myUK</i> Training module.
Goods Confirmer	Goods Confirmer are required to take and pass the SRM_CON_300 SRM Goods Confirmations course via the <i>myUK</i> Training module.

SRM Terminology

Term	Definition
Shopping Cart	The tool utilized by Shoppers to purchase goods and/or services
Attributes	End user default components which flow into every Shopping Cart
POWL (Dashboard)	Personalized Object Work List, serves as the Shopper's home or starting point and contains queries, document history, etc.
Punchout Catalog	Electronic catalogs located on external suppliers' websites
Free Text	Used when items are not available from electronic catalogs; entered via freehand from a supplier quote
Workflow	Process by which documents route to users' Inboxes within SRM





Personal Settings

Personal Settings Overview

Personal Settings relate to the user's *employee* data and are established via Site Navigation.

- Default information populates into this area based on data from Human Resources org structure.
- Personal Settings must be confirmed and setup for all roles during the first visit to SRM to ensure a successful Shopping experience.

Login to myUK

1. Click Link Blue from the UK Home Page

2. Click myUK from the Link Blue site

3. Login to myUK using your AD and password

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Shopper Tab and Site Navigation

4. Select the Shopper tab

5. Click Settings

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Personal Settings – Position Tab

6. Click Edit to begin changes

7. Form of address is required

8. Email address is the only data on the Position tab to be edited

Employee ID: Streetman

Buttons: Edit, Close, Read Only, Check

Form of Address: Ms.

First Name: Reagan

Position: Contracting Officer II

Department Address:

- Street/ House Number: 322 Peterson Serv
- Postal Code/ City: 40506 Lexington
- Country: US

Department Address Details:

- Building: 0005
- Floor/ Room Number: 322
- Inhouse Mail:
- Communication Type: E-Mail
- Phone Number/ Extension: 859-257-3967
- Fax Number / Extension: 859-257-1951
- E-Mail: reagan.streetman@uky.edu

Attributes for Position Contracting Officer II

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Personal Settings – Position Tab

Organizational and Functional Assignments populate automatically and relate to the employee's position

Department Address within the Position tab is organizational data only and will always be the 322 Peterson Building address.

Note: None of the above items are edited within Personal Settings. If any of your organizational or functional assignment's data appears to be incorrect or you have changed departments, please notify srmhelp@uky.edu.

Employee ID 22868 Name

Buttons: Save, Close, Read Only

Form of Address: Ms.

First Name: Reagan

Position: Contracting Officer II

Department Address:

- Street/ House Number: 322 Peterson Serv
- Postal Code/ City: 40506 Lexington
- Country: US

Department Address Details:

- Building: 0005
- Floor/ Room Number: 322
- Inhouse Mail:
- Communication Type: E-Mail
- Phone Number/ Extension: 859-257-3967
- Fax Number / Extension: 859-257-1951
- E-Mail: reagan.streetman@uky.edu

Attributes for Position Contracting Officer II

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Personal Settings – User Account Tab



Edit Document:

Employee ID 22868 Name Ms. Reagan Streetman

9. Click User Account Tab

Personal Data

Form of Address: Academic Title:

First Name: * Last Name: * Streetman

Position **User Account**

Standard Settings

User ID: * RSTRE2

E-Mail: reagan.streetman@uky.edu

Time Zone: EST Eastern Time (New York)

Language: English

10. Edit date format if desired

Date Format: MM/DD/YYYY

Decimal Notation: 1,234,567.89

My Procurement Substitutes

Name of Substitute	Start Substitution On	End Substitution On

Set Building Delivery Address



The Building Delivery Address must also be set prior to using SRM. This designates the building to which purchased items will be delivered.

Attributes for Position Contracting Officer II

Attribute: Cost Center

Account assignment category* Cost Center

11. Select Building Delivery Address from Attributes drop down menu

Delivery address*

Product Category*

Request type

WBS Element

The default building delivery address for all first-time Shoppers is 322 Peterson Service Building. It must be changed to your building address.

Attributes for Position Contracting Officer II

Attribute: Delivery address* Add Line Remove Display Default

Standard	Deactivate	Value Description	Value
*	<input type="checkbox"/>	322 Peterson Service Building / Lexington / 40506	000001071

Note: If the building delivery address is not changed, any Shopping Cart orders you place will be delivered to the Peterson Building address.

12. Click the Possible Entries icon to search and choose your building delivery address

Finalize Building Delivery Address



13. Locate your building address based on postal speed-sort code. Highlight and click OK.

Value	Label
309898	0023 / Police (Safety and Security) / 305 Eucli...
309899	0024 / Lafferty Hall / 150 Patterson Dr / Lexingt...
309900	0025 / White Hall Classroom Bldg / 140 Patter...
309901	0026 / Student Center Addition / 180 Avenue of...
309902	0026T / New Storage-South Farm / 4321 Emm...
309903	0027 / Patterson Office Tower / 120 Patterson ...
309904	0028 / Barker Hall / 406 Administration Dr / Lex...
309905	0029 / Alumni Gym / 102 Avenue of Champions...
309906	0030 / Student Center / 404 Administration Dr / Le...
309907	0031 / Frazee Hall / 406 Administration Dr / Le...

Attribute	Standard	Deactivate	Value Description	Value
Delivery address*	<input checked="" type="radio"/>	<input type="checkbox"/>	0027 / Patterson Office Tower / 120 Patterson Dr / Lexington / 40506-0027	309903

14. Click the Standard radio button

Save and Exit Personal Settings



15. Click Save when all settings are completed

Employee ID 22868

Personal Data

Form of Address: * Ms. Academic Title:

First Name: * Reagan Last Name: * Streetman

Position **User Account**

Organizational Assignment

Department: 3P009 31002256; MM-Buyer-009

Position: P0123M5 50118993; Contracting Officer II

Functional Assignment

Department Head Of:

Purchasing Group: 3P009 31002256; MM-Buyer-009

Department Address

Street/ House Number: 322 Peterson Serv

Postal Code/ City: 40506 Lexington

Country: US

Department Address Details

Building: 0005

Floor/ Room Number: 322

Inhouse Mail:

Communication Type: E-Mail


Phone Number/ Extension: 859-257-3967

Fax Number / Extension: 859-257-1951

E-Mail: * reagan.streetman@uky.edu

Attributes for Position Contracting Officer II

Attribute:





Introduction to the POWL

SRM roles are tab-based with the Personalized Object Work List driving the user's work tasks.

Personalized Object Work List

- a.k.a., the POWL or “dashboard”
- Serves as home base for each SRM user
- Contains Active Queries, Quick Criteria Maintenance, and document history with active links.

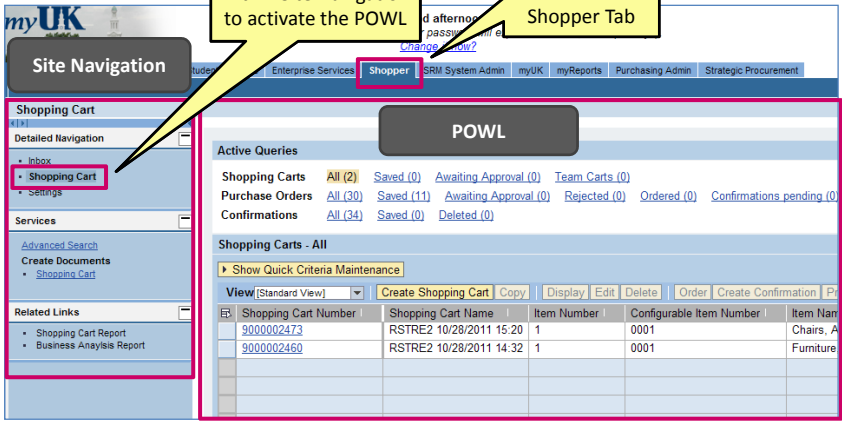

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Navigating to Personalized Object Work List


Click Shopping Cart within Site Navigation to activate the POWL

Note: You are still on the Shopper Tab




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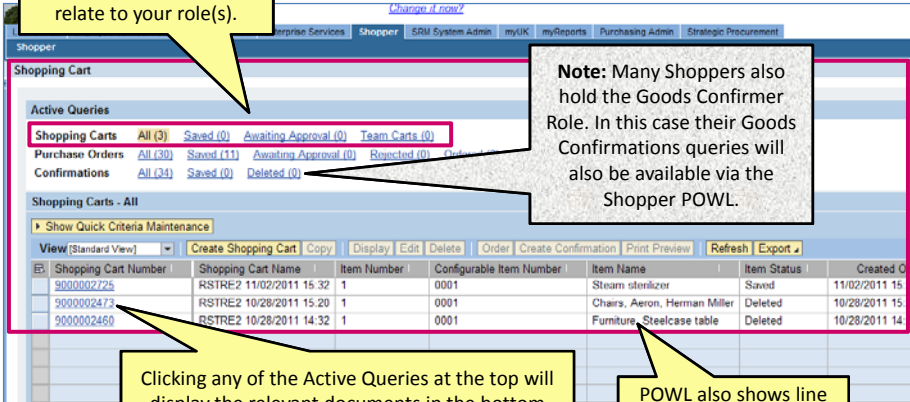
Personalized Object Work List Overview



The POWL is driven by pre-configured queries that display Shopping Carts and other documents that relate to your role(s).


Note: Shopping Carts are identified as a 10-digit number prefixed with 90.

Note: Many Shoppers also hold the Goods Confirmer Role. In this case their Goods Confirmations queries will also be available via the Shopper POWL.




Clicking any of the Active Queries at the top will display the relevant documents in the bottom section. Clicking the number will display the Shopping Cart in new window or tab.

POWL also shows line item contents of each cart, date created, status, etc.


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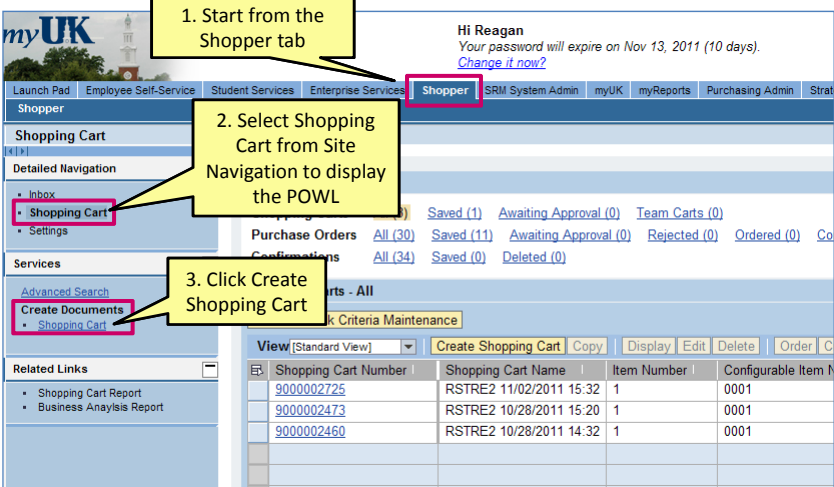
Shopping Cart Overview




1. Start from the Shopper tab

2. Select Shopping Cart from Site Navigation to display the POWL

3. Click Create Shopping Cart




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Shopping Cart Layout (three sections)

General Data (a.k.a. Header) Section (top)

Item Overview Section (middle)

Item Details Section (bottom)

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Shopping Cart Layout – General Data (top)

Shopping Cart number automatically generates

Action Buttons

Naming convention populates automatically with your User ID and date/time stamp

Internal / Approval Note can be added (Does not print on purchase order.)

Note to Supplier prints on the purchase order

Note: “Header” notes apply to an entire Shopping Cart. Notes specific to individual line items are entered in the Item Details section.

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Shopping Cart Layout – Item Overview (middle)



Action Buttons specific to Item Overview section

Ordered line items are reflected in the Items Overview Section

Line Number	Item Type	Description	Product Category	Product Category Description	Quantity	Unit	Net Price / Limit	Currency	Delivery Date
0001	Material	OMX RECYCLED LASER BEAM	44000000	Office EquipSupp&Acc	12	RM	9.14	USD	11/09/2011
*	Undefined Item Type		99999999	ENTER PRODUCT CATEGO	1.000		0.00	USD	11/09/2011
*	Undefined Item Type		99999999	ENTER PRODUCT CATEGO	1.000		0.00	USD	11/09/2011
*	Undefined Item Type		99999999	ENTER PRODUCT CATEGO	1.000		0.00	USD	11/09/2011
*	Undefined Item Type		99999999	ENTER PRODUCT CATEGO	1.000		0.00	USD	11/09/2011
*	Undefined Item Type		99999999	ENTER PRODUCT CATEGO	1.000		0.00	USD	11/09/2011
*	Undefined Item Type		99999999	ENTER PRODUCT CATEGO	1.000		0.00	USD	11/09/2011
*	Undefined Item Type		99999999	ENTER PRODUCT CATEGO	1.000		0.00	USD	11/09/2011
*	Undefined Item Type		99999999	ENTER PRODUCT CATEGO	1.000		0.00	USD	11/09/2011

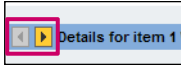
Section information includes line item description, quantity, UOM, price, and delivery date

Shopping Cart Layout – Item Details (bottom)



Item Details Section includes information specific to each line item. Click the arrows to move between multiple line items.

Information in this section includes Account Assignment, Notes and Attachments, Source of Supply, etc.



Details for item 1 OMX RECYCLED LASER BEAM						
Item Data	Account Assignment	Notes and Attachments	Delivery Address/Performance Location	Sources of Supply / Service Agents	Approval Process Overview	
You can see who bears the costs and, if necessary, you can distribute the cost to several cost centres						
Cost Distribution						
Number	Accounting Line Number	Percentage	Account Assignment Category	Assign Number	Account Assignment Description	General Ledger Account
0001		100.00	Cost Center	1012013930	PURCHASNG	540334
Details for Item 0001 - Cost Center						
Percentage: *	<input type="text" value="100.00"/>		Fund:	<input type="text" value="0011002000"/>		
Account Assignment Category:	Cost Center		Unfunded Accounting Line:	<input type="checkbox"/>		

Shopping Cart Initial Settings



Initial Shopping Cart Settings must be set prior to completion of your first Shopping Cart. Because these settings relate to carts themselves, they are set within your initial Shopping Cart, not Personal Settings.

- Not configuring Shopping Cart settings may result in errors or incorrect processing of carts.



Shopping Cart Initial Settings



Create Shopping Cart

Number 9000002775 Document Name RSTRE2 11/03/2011 13:05 Status In Process Created On

Order Show My Tasks Close Save Check

General Data

Buy on Behalf Of Reagan Streetman

Name of Shopping Cart RSTRE2 11/03/2011 13:05

Default Settings: Set Values

Approval Process: Display / Edit Agents

Document Changes: Display

PO Type: USPO

Period of Performance:

Item Overview


Details Add Item Copy Paste Duplicate Delete

Line Number	Item Type	Product ID	Description	Product Category	Product Category Description	Quantity	Unit	
*	Undefined Item Type			*****	ENTER PRODUCT CATEGO	1,000		
*	Undefined Item Type			*****	ENTER PRODUCT CATEGO	1,000		
*	Undefined Item Type			*****	ENTER PRODUCT CATEGO	1,000	0.00	USD
*	Undefined Item Type			*****	ENTER PRODUCT CATEGO	1,000	0.00	USD
*	Undefined Item Type			*****	ENTER PRODUCT CATEGO	1,000	0.00	USD
*	Undefined Item Type			*****	ENTER PRODUCT CATEGO	1,000	0.00	USD
*	Undefined Item Type			*****	ENTER PRODUCT CATEGO	1,000	0.00	USD
*	Undefined Item Type			*****	ENTER PRODUCT CATEGO	1,000	0.00	USD

File Settings

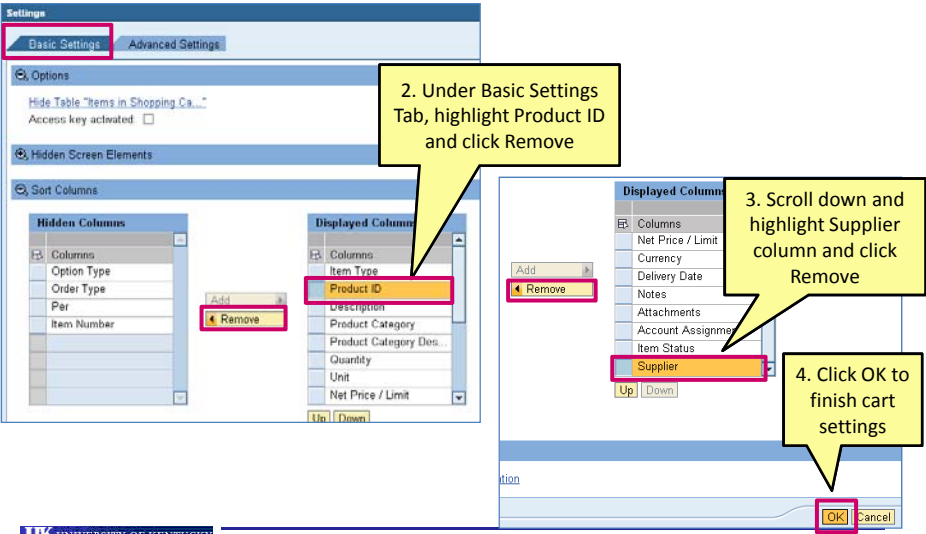
The Shopping Cart Settings button is located to the far right of the Item Overview (middle) section. You may need to scroll to the right to locate it.

1. Click Settings on far right side of screen of Item Overview section



Shopping Cart Initial Settings – Remove from View


The Product ID and Supplier columns should be removed from view prior to creation of your first Shopping Cart. This only needs done once.




1. Under Basic Settings Tab, highlight Product ID and click Remove


2. Scroll down and highlight Supplier column and click Remove

3. Click OK to finish cart settings

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Create Punchout Catalog Shopping Cart



Punchout catalogs are used for the University's highest volume suppliers and are located on external websites. Pricing is pre-negotiated by Purchasing.

SRM automatically processes and transmits a purchase order to the supplier for punchout catalog orders.

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Create Punchout Catalog Order – Set Delivery Room/Floor

The room address for delivery of goods must be confirmed/refined at the Shopping Cart level. This must be done for every Shopping Cart.

1. Click Set Values within Default Settings

2. If needed click the right arrow to expose all tabs

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Create Punchout Catalog Order – Set Delivery Room/Floor


Delivery address information flows in from Personal Settings and reflects your *building address* only. The Shopper must add the specific floor and room number, contact person, etc. This must be completed on each cart and will populate to all line items in the cart.

3. Complete contact person, floor, room, etc.

4. Click OK

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Punchout Catalog Order – Create



Punchout catalog items are ordered through the Add Item dropdown button. As new catalogs are added to the system, they will appear in the Add Item menu.

Number 9000002882
Document Name RSTRE2 11/04/2011 12:59
Status In Process
Created On 11/04/2011 12:59

Order
Show My Tasks
Close
Save
Check

General Data

Buy on Behalf Of: Reagan Streetman Approval Note:

Name of Shopping Cart: RSTRE2 11/04/2011 12:59

Default Settings: [Set Values](#)

Approval Process: [Display / Edit](#)

Document Changes: [Display](#)

PO Type: NBPO

Period of Performance:


Item Overview

With Free Description Limit Item

Old Shopping Carts and Templates


OfficeMax Catalog

Description	Product Category	Product Category Description	Quantity	Unit	Net Price
Undefined Item Type	99999999	ENTER PRODUCT Catego	1.000		
Undefined Item Type	99999999	ENTER PRODUCT Catego	1.000		
Undefined Item Type	99999999	ENTER PRODUCT Catego	1.000		
Undefined Item Type	99999999	ENTER PRODUCT Catego	1.000		
Undefined Item Type	99999999	ENTER PRODUCT Catego	1.000		
Undefined Item Type	99999999	ENTER PRODUCT Catego	1.000		
Undefined Item Type	99999999	ENTER PRODUCT Catego	1.000		
Undefined Item Type	99999999	ENTER PRODUCT Catego	1.000		


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5. Click Add Item and select catalog choice. Shopper will leave SRM and enter supplier's website.

Punchout Catalog Order – Add Items from Site



Shopping Cart
Number of Items
Subtotal


View Cart
Check
Search by Keyword or Product #
Search

OfficeMax

Paper & Paper Products > Copy and Multi-line Paper > Laser

Items 1-20 of 20

Product Code	UOM	Your Price
P10M44008	BLU	59.14
OfficeMax - 30% Recycled Laser Paper - 8-1/2" x 11" White 50 24 lb OUX RECYCLED LASER BEAM		
QTY: 12	Add to Cart	
All-In-One Printing Paper by HP		
P1HPT1122	BLU	87.23
HP - All-in-One Printing Paper - 8-1/2" x 11" White uS 97/Euro 111 22 lb HP All-in-One		


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6. Once at the punchout site, browse for needed items

To leave without ordering, click Cancel/Exit

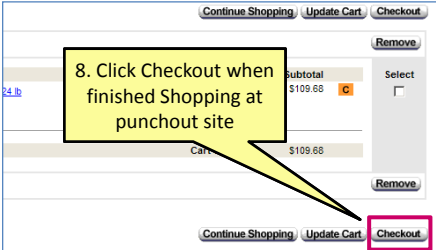
7. Enter quantities of items and click Add to Cart. Continue to add other items or proceed to Checkout.

Note: Punchout catalogs are customized for SRM use only. They do not retain information on Shopper's personal orders or settings.

Punchout Catalog Order – Add Items from Site

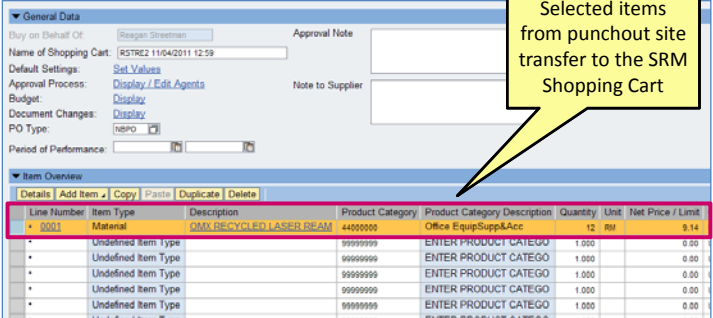


8. Click Checkout when finished Shopping at punchout site




Note: Each punchout supplier's catalog has a different appearance, but all operate similarly based on standard checkout-cart ordering.

Note: All product info transfers to SRM including quantity, price, UOM, and supplier name




Selected items from punchout site transfer to the SRM Shopping Cart

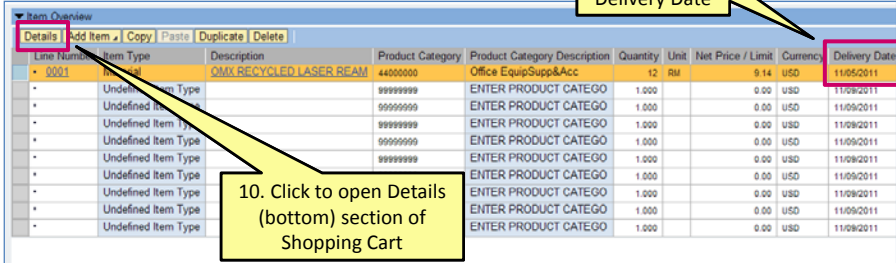


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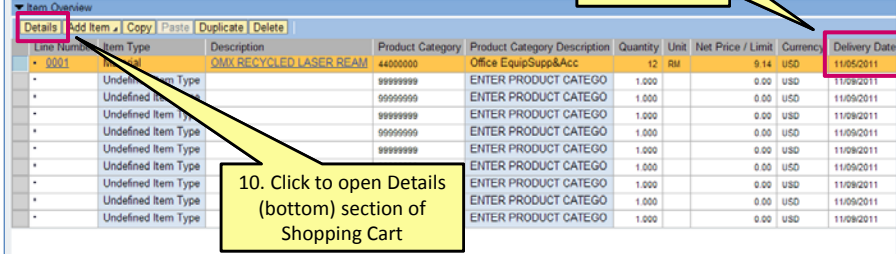
Punchout Catalog Order – Details Section




9. Enter required Delivery Date




10. Click to open Details (bottom) section of Shopping Cart





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Punchout Catalog Order – Details Section

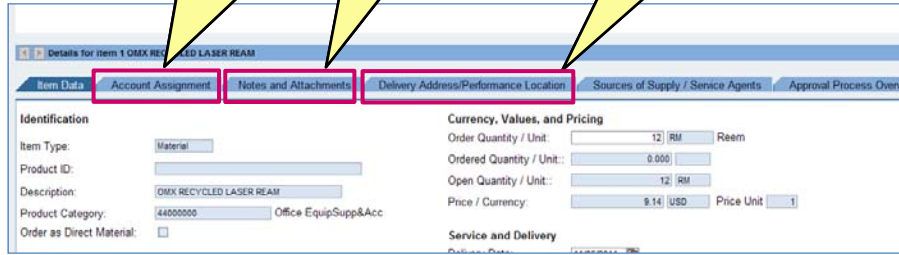



Note: The lower section of the Shopping Cart is termed “Item Details”. It holds additional information relating to the purchase such as Account Assignment, Notes and Attachments, etc. and is edited on a *line item* basis, i.e., each line item can be assigned different accounting, etc. if desired.

Cost Object information (funding source) can be found on the Account Assignment tab

Notes and file attachments can be added by line item


Delivery Address information was already set at header level under Default Settings/Set Values. Thus, nothing needs entered or modified for this in Details section.





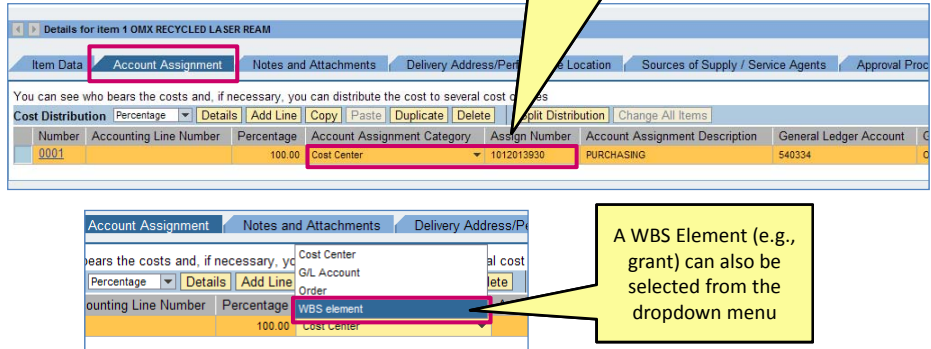
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Punchout Catalog Order – Account Assignment




The primary components of Account Assignment are Cost Center (or WBS Element) and General Ledger (GL) Account. Both must be completed on each cart line item.

11. Account Assignment Category and related entries can populate automatically if they were established within your Personal Settings (See Appendix). They can be entered or modified on a cart basis as needed.




A WBS Element (e.g., grant) can also be selected from the dropdown menu



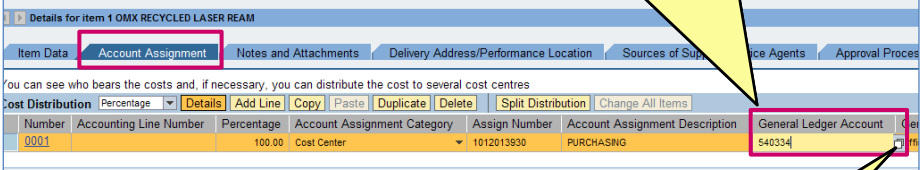
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Punchout Catalog Order – GL Account




Note: You are still on the Account Assignment tab

12. A suggested GL will populate automatically on many carts or can be entered/overwritten as needed. The Shopper should check the GL to ensure it is correct based on the nature of the particular purchase.




TIP: The General Ledger (GL) Account is an accounting component that relates to the description of the goods or services purchased.

If needed, click on the right side of the GL box to access a Possible Entries icon and search function

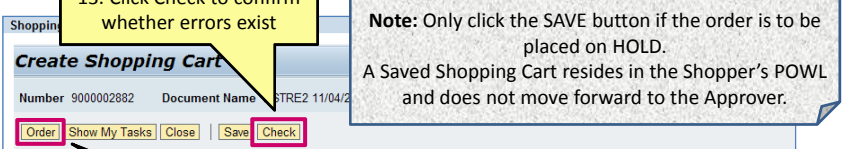

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Punchout Catalog Shopping Cart – Complete Order



13. Click Check to confirm whether errors exist


Note: Only click the SAVE button if the order is to be placed on HOLD. A Saved Shopping Cart resides in the Shopper's POWL and does not move forward to the Approver.




14. Click Order to place order

15. Click Close button to close window. Do not click the X in upper right window corner to close.

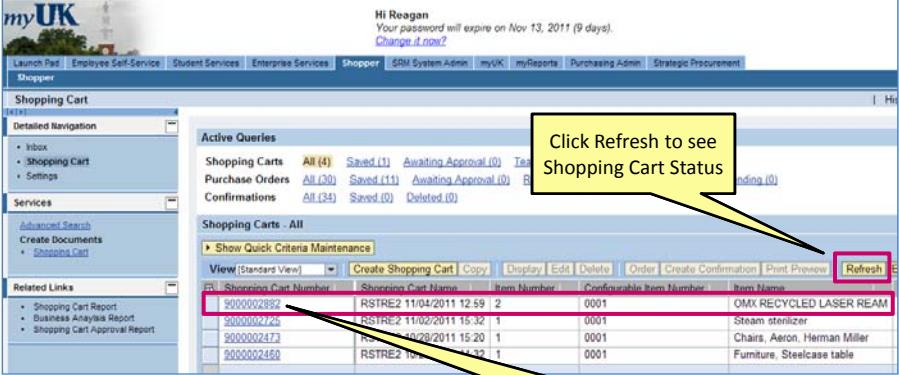
Show My Tasks | Edit | **Close** | Refresh | Copy


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Punchout Catalog Shopping Cart-Status from POWL


The Punchout Catalog Shopping Cart next moves to the Approver if order total is \$2000 or greater. Once approved, a purchase order automatically transmits to the supplier for order placement.




Click Refresh to see Shopping Cart Status

Shopping Cart Number	Shopping Cart Name	Item Number	Configurable Item Number	Item Name
9000002382	RSTRE2 11/04/2011 12 59	2	0001	OMX RECYCLED LASER REAM
9000002725	RSTRE2 11/02/2011 15 32	1	0001	Steam sterilizer
9000002473	RSTRE2 10/28/2011 15 20	1	0001	Chairs, Aeron, Herman Miller
9000002450	RSTRE2 10/28/2011 14 32	1	0001	Furniture, Steelcase table

Shopping Carts are listed in your POWL and can be accessed by clicking on the cart number


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Special Notes on Punchout Catalog Shopping Carts

Special features are added to SRM for punchout catalog orders:

- Orders totaling \$2000 or less from punchout catalog suppliers do not require approval. SRM automatically transmits a purchase order once a cart is created and ordered.
- Goods Confirmations are not required for punchout catalog orders.
- Upon shipment and invoicing of goods, the Shopper and their employment supervisor will receive an email confirmation of the order.

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Create Free Text Shopping Cart



“Free Text” Shopping Carts are applicable for any commodity in the Purchasing / AP Quick Reference Guide requiring Shopping Cart as the purchase method and for which there is not an electronic catalog loaded.


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Free Text Shopping Cart – Overview

The first step in creating a Free Text Shopping Cart is obtaining a quote from a supplier. As the name “Free Text” implies, the Shopper enters the line items directly into the cart via freehand rather than selecting from electronic catalogs. The supplier quote should be electronically attached to the cart.

All Free Text Shopping Carts require approval regardless of dollar amount. They route to Purchasing after approval and are processed on a case-by-case basis based on established policies and procedures.

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Free Text Shopping Cart - Create

1. Begin on the Shopper Tab

2. From the POWL click Create Shopping Cart to begin

POWL

Shopping Carts All (2) Saved (1) Awaiting Approval (0) Team Carts (0)
 Purchase Orders All (30) Saved (11) Awaiting Approval (0) Rejected (0) Ordered (0) Confirmations pending (0)
 Confirmations All (34) Saved (0) Deleted (0)

Shopping Carts - All

Show Quick Criteria Maintenance

View [Standard View] Create Shopping Cart Copy Display Edit Delete Order Create Confirmation

Shopping Cart Number	Shopping Cart Name	Item Number	Configurable Item Number	Item
9000002882	RSTRE2 11/04/2011 12:59	2	0001	OM
9000002725	RSTRE2 11/02/2011 15:32	1	0001	Ste

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Create Free Text Order – Set Delivery Address Room/Floor

The room address for delivery of goods must be confirmed/refined at the Shopping Cart level. This must be done for every cart created.

3. Click Set Values within Default Settings

If needed, click the right arrow to expose all tabs

Create Shopping Cart

Number 9000002775 Document Name Created On 11/03/2011 13:05:48 Created By Ms

Order Show My Tasks Close Save Cancel

General Data

Buy on Behalf Of: Reagan Streetman
 Name of Shopping Cart: RSTRE2 11/03/2011 13:05
 Default Settings: **Set Values**
 Approval Process: Display / Edit Agents
 Document Changes: Display
 PO Type: NSPO
 Period of Performance:

Item Overview

Line Number	Item Type	Product ID	Description
*	Undefined Item Type		
*	Undefined Item Type		
*	Undefined Item Type		
*	Undefined Item Type		
*	Undefined Item Type		
*	Undefined Item Type		
*	Undefined Item Type		

Change Default Settings

Your data will be transferred to all new items. Items already in the shopping cart will be unchanged.

Item Basic Data Account Assignment Internal Note

Buy on Behalf of: Reagan Streetman
 Goods Recipient: Reagan Streetman
 Product Category: 99999999 ENTER PRODUCT Catego
 Purchase Group: MM-Buyer-021
 Company Code: University of Kentucky
 Location / Plant: University of Kentucky University of Kentucky
 Storage Location:

OK Cancel

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Create Free Text Order – Set Delivery Address Room/Floor

Default delivery address flows in from Personal Settings and reflects your building address only. The Shopper must add the specific floor and room number, contact person, etc. This must be completed on each cart and will populate to all line items in the cart.

4. Complete contact person, floor, room, etc.

5. Click OK

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Free Text Shopping Cart – Options to Enter Data

6. Free Text line items are added via the Add Item drop down menu

With Free Description	Description	Product Category	Product Category Description	Quantity	Unit	Net Price / Limit
Limit Item	type	99999999	ENTER PRODUCT CATEGO	1.000		0.00
Old Shopping Carts and Templates	type	99999999	ENTER PRODUCT CATEGO	1.000		0.00
OfficeMax Catalog	type	99999999	ENTER PRODUCT CATEGO	1.000		0.00
-	Undefined Item Type	99999999	ENTER PRODUCT CATEGO	1.000		0.00
-	Undefined Item Type	99999999	ENTER PRODUCT CATEGO	1.000		0.00

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Free Text Shopping Cart – Add Text Line

7. Enter General Description of the line item

8. Enter Quantity and Unit of Measure

9. Enter unit price

10. Enter Delivery Required date

Optional: Can enter an internal note if needed (will not print on the PO)

TIP: Free text information is usually mirrored directly from the supplier quote.

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Free Text Shopping Cart – Adding Product Category

11. Click the Possible Entries icon to perform a search

12. Perform a wildcard search (* on each end of keyword) for the category. You can also perform a wide-open search using no search criteria.

13. Click Start Search

Note: The Product Category reflects the type of good or service being purchased and serves two functions – it routes the cart to the appropriate Purchasing buyer. It also automatically populates the suggested GL entry for many (but not all) types of goods/services.

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Free Text Shopping Cart – Adding Product Category

14. Locate and highlight the correct category from the search results

Product Category populates into field

Note: Product categories notated with "PRD" cannot be assigned to a Shopping Cart.

15. Click Add to Item Overview to complete Free Text Entry

16. Click OK

Description	Category ID	Logical System
Furniture, Furnishin	56000000	R3PCLNT300

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Free Text Shopping Cart – Navigating to Details

Data populates directly into the Shopping Cart line item

17. Click Details to review and confirm Account Assignment, Delivery, etc.

Line Number	Item Type	Description	Product Category	Product Category Description	Quantity	Unit	Net Price / Limit	Currency
000	Material	Mayline Four Post Shelving, six tier	56000000	Furniture, Furnishin	2	EA	306.00	USD
	Assigned Item Type		99999999	ENTER_PRODUCT_CATEG	1.000		0.00	USD
	Assigned Item Type		00000000	ENTER_PRODUCT_CATEG	1.000		0.00	USD

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Free Text Shopping Cart – Account Assignment



18. Default Cost Center or WBS Element will flow in from Personal Settings (if previously entered in Attributes - See Appendix). Enter or search for new assignment if overwriting default values.

19. A suggested GL populates automatically for many Free Text orders based on the Product Category. Overwrite if necessary.

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

Number	Accounting Line Number	Percentage	Account Assignment Category	Assign Number	Account Assignment Description	General Ledger Account	Gene
0001		100.00	Cost Center	1012013930	PURCHASING	540300	Furnit

Free Text Shopping Cart – Add Notes/Attachments



20. Add Item text (prints on the PO) or Internal Note (does not print on the PO) from the Notes and Attachments tab

▼ Notes

Category	Description
Delivery text	-Empty-
Item Text	65" high x 42" wide x 15" deep, closed L-ends: Item del...
Internal Note	-Empty-
Supplier text	-Empty-


▼ Attachments

Add Attachment

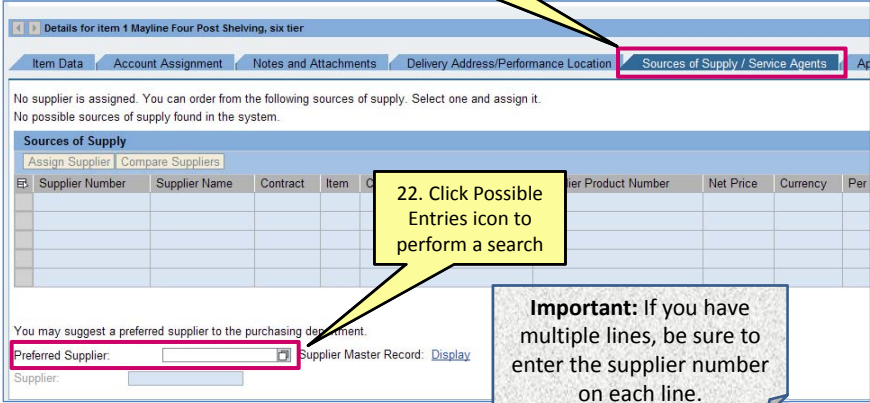
Category	Description
The table does not contain any data	

21. Attach electronic scan of the quote or other relevant document(s). (Steps to attach a document can be found in the Supplementary Tasks section.)

Free Text Shopping Cart - Add Source of Supply




The Preferred Supplier is assigned to Free Text Shopping Carts through the Sources of Supply tab




22. Click Possible Entries icon to perform a search

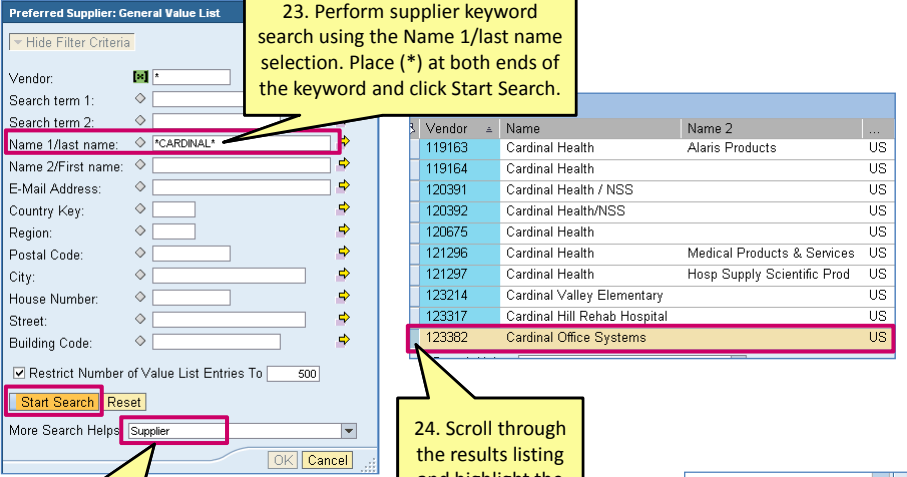
Important: If you have multiple lines, be sure to enter the supplier number on each line.


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Free Text Shopping Cart – Supplier Search



23. Perform supplier keyword search using the Name 1/last name selection. Place (*) at both ends of the keyword and click Start Search.




24. Scroll through the results listing and highlight the correct supplier

25. Click OK

This selection should always be set to Supplier

Vendor	Name	Name 2	...
119163	Cardinal Health	Alaris Products	US
119164	Cardinal Health		US
120391	Cardinal Health / NSS		US
120392	Cardinal Health/NSS		US
120675	Cardinal Health		US
121296	Cardinal Health	Medical Products & Services	US
121297	Cardinal Health	Hosp Supply Scientific Prod	US
123214	Cardinal Valley Elementary		US
123317	Cardinal Hill Rehab Hospital		US
123382	Cardinal Office Systems		US


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Free Text Shopping Cart – Finalize Supplier Selection



Details for item 1 Mayline Four Post Shelving, six tier

Item Data Account Assignment Notes and Attachments Delivery Address/Performance Location **Sources of Supply / Service Agents** Approval

No supplier is assigned. You can order from the following sources of supply. Select one and assign it.
No possible sources of supply found in the system.

Name	Contract	Item	Contract Item Description	Supplier Product Number	Net Price	Currency	Per	Unit	In

You may suggest a preferred supplier to the purchasing department.

Preferred Supplier: Cardinal Office Systems Supplier Master Record [Display](#)

Supplier:

26. The Preferred Supplier number populates into the Shopping Cart

Remember: Be sure to repeat the Preferred Supplier number on each line item. The supplier number can be entered via free hand for each additional line.

Free Text Shopping Cart – Check and Order



Number 9000002989 Document Name RSTRE2 11/07/2011 16:00 Status

General Description

Buy on Behalf Of Reagan Streetman Approval Note

Name of Shopping Cart RSTRE2 11/07/2011 16:00

27. Click Check for errors

28. Click Order to place order


29. Click Close button to close window. Do not click the X in upper right window corner to close.

Number 9000002989 Document Name RSTRE2 11/07/2011 16:00

Shopping cart "RSTRE2 11/07/2011 16:00" with number 9000002989

Remember: Only click the SAVE button if the order is to be placed on HOLD. A Saved Shopping Cart resides in the Shopper's POWL and does not move forward to the Approver.

Free Text Shopping Cart - Status from POWL



The Free Text Shopping Cart next moves to the Approver regardless of dollar amount.
Once approved the cart arrives at Purchasing for processing.

Active Queries

Shopping Carts [All \(7\)](#) [Saved \(3\)](#) [Awaiting Approval \(0\)](#) [Team Carts \(0\)](#)

Purchase Orders [All \(1\)](#) [Saved \(1\)](#) [Awaiting Approval \(0\)](#) [Rejected \(0\)](#) [Ordered \(0\)](#) [Confirmations pending \(0\)](#)


Confirmations [All \(52\)](#) [Saved \(0\)](#) [Deleted \(0\)](#)

Shopping Carts - All

Show Quick Criteria Maintenance

View (Standard View) Create Shopping Cart Copy Display Edit Delete Order Create Confirmation Print Preview Refresh Exp

Shopping Cart Number	Shopping Cart Name	Item Number	Configurable Item Number	Item Name
9000003572	RSTRE2 11/16/2011 08:52	1	0001	Printing brochures
9000003494	RSTRE2 11/15/2011 10:22	1	0001	Furniture, Steelcase Dividers
9000002989	RSTRE2 11/07/2011 16:00	1	0001	Mayline Four Post Shelving, six tier
9000002882	RSTRE2 11/04/2011 12:59	2	0001	OMX RECYCLED LASER REAM
9000002725	RSTRE2 11/02/2011 15:32	1	0001	Steam sterilizer
9000002473	RSTRE2 10/28/2011 15:20	1	0001	Chairs, Aeron, Herman Miller
9000002460	RSTRE2 10/28/2011 14:32	1	0001	Furniture, Steelcase table



SRM Shoppers





Editing Shopping Carts & Supplementary Tasks



SRM Shoppers

Edit Shopping Cart Overview



Shopping Carts can be edited up to the point of approval. Shopping Carts cannot be edited after they are approved.

Shopping Carts can be edited by the original Shopper or an Approver.

Highlight the Shopping Cart within the POWL and click "Edit" to make changes as appropriate. Shoppers or Approvers can change, add, or delete line items; change cost assignment information; add attachments, etc.

Contact Purchasing if uncertain as to how changes may affect the Shopping Cart or its correlated purchase order.

Begin Shopping Cart Edit



Active Queries

Shopping Carts All (5) Saved (2) Awaiting Approval (0)

Purchase Orders All (33) Saved (11) Awaiting Approval (0)

Confirmations All (52) Saved (0) Deleted (0)

Shopping Carts - All

Show Quick Criteria Maintenance

View [Standard View] Create Shopping Cart Copy Display Edit Delete Print Preview Refresh Exp

Shopping Cart Number	Shopping Cart Name	Item Number	Configurable	Description
9000002989	RSTRE2 11/07/2011 16:00	1	0001	Four Post Shelving, six tier
9000002882	RSTRE2 11/04/2011 12:59	2	0001	OWK RECYCLED LASER REAM
9000002725	RSTRE2 11/02/2011 15:32	1	0001	Steam sterilizer
9000002473	RSTRE2 10/28/2011 15:20	1	0001	Chairs, Aeron, Herman Miller
9000002460	RSTRE2 10/28/2011 14:32	1	0001	Furniture, Steelcase table

1. From POWL, click Refresh to see an updated view of Shopping Carts and their status.

2. Highlight desired cart and click Edit

3. Depending on the cart's status, you may get a window like this. Click Continue.

Change


This document is currently in approval. If you continue, the document may be re-evaluated and the approval process reset.

Continue Cancel

TIP: If you have trouble moving a cart into Edit mode, click Show My Tasks button at the top to unlock the document.

Show My Tasks Close

Edit Shopping Cart



Item Overview

Line Number	Item Type	Description	Product Category	Product Category Description	Quantity	Unit	Net Price / Limit	Currency	Delivery Date	Note
0001	Material	Steam sterilizer	99999999	ENTER PRODUCT Catego	1	EA	500.00	USD	11/07/2011	
	Undefined Item Type		99999999	ENTER PRODUCT Catego	1.000		0.00	USD	11/19/2011	
	Undefined Item Type		99999999	ENTER PRODUCT Catego	1.000		0.00	USD	11/19/2011	
	Undefined Item Type		99999999	ENTER PRODUCT Catego	1.000		0.00	USD	11/19/2011	
	Undefined Item Type		99999999	ENTER P					11/19/2011	
	Undefined Item Type		99999999	ENTER P					11/19/2011	
	Undefined Item Type		99999999	ENTER P					11/19/2011	
	Undefined Item Type		99999999	ENTER P					11/19/2011	
	Undefined Item Type		99999999	ENTER P					11/19/2011	
	Undefined Item Type		99999999	ENTER P					11/19/2011	

Remember to click Details to open the Line Item Details section

4. Shopping Cart will open in edit mode (white screen). Make changes to description, quantity, price, Account Assignment, delivery address, etc. as needed.

Details for item 1 Steam sterilizer

Item Data | Account Assignment | Notes and Attachments | Delivery Address/Performance Location | Sources of Supply / Service Agents | Approval Pro

Identification

Item Type: Material

Product ID:

Description: * Steam sterilizer

Product Category: 99999999 ENTER PRODUCT Catego

Order as Direct Material:

Subcontracting:

Company Code: UK00 University of Kentucky

Supplier Product Number:

Currency, Values, and Pricing

Order Quantity / Unit: 1 EA Each

Ordered Quantity / Unit: 0.000

Open Quantity / Unit: 1 EA


Price / Currency: 500.00 USD Price Unit 1

Service and Delivery


Delivery Date: 11/07/2011

Location / Plant: 3 University of Kentucky

Storage Location:


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Complete Shopping Cart Edit and (Re-) Order



Details for item 1 Steam sterilizer

Item Data | Account Assignment | Notes and Attachments | Delivery Address/Performance Location | Sources of S

Identification

Item Type: Material

Product ID:

Description: * Steam sterilizer

Product Category: 99999999 ENTER PRODUCT Catego

Order as Direct Material:

Subcontracting:

Company Code: University of Kentucky

Supplier Product Number:

Organization

Purchasing Group: MM-Buyer-021 Members

Currency, Values, and Pricing

Order Quantity / Unit:

Ordered Quantity / Unit:

Open Quantity / Unit:

Price / Currency:

Service and Delivery

Delivery Date: 11/07/2011

Location / Plant: 3

Storage Location:


Incoterm Key/Location:


Goods Recipient: 22868

5. Click Check for errors

6. Click Order to complete

Order | Show My Tasks | Close | Read Only | Save | Check | Delete


SRM Shoppers




Minimum Browser Requirements


Since SRM operates within SAP, the follow specific browser versions are required to ensure proper operation:

- Firefox >= 2.0
- Microsoft Internet Explorer = 5.5 thru 8
- Opera >= 7.0
- Safari >= 3.0

For more information or if you have problems that may relate to browser requirements visit: <http://www.uky.edu/ukit/eag/desktop-information>.

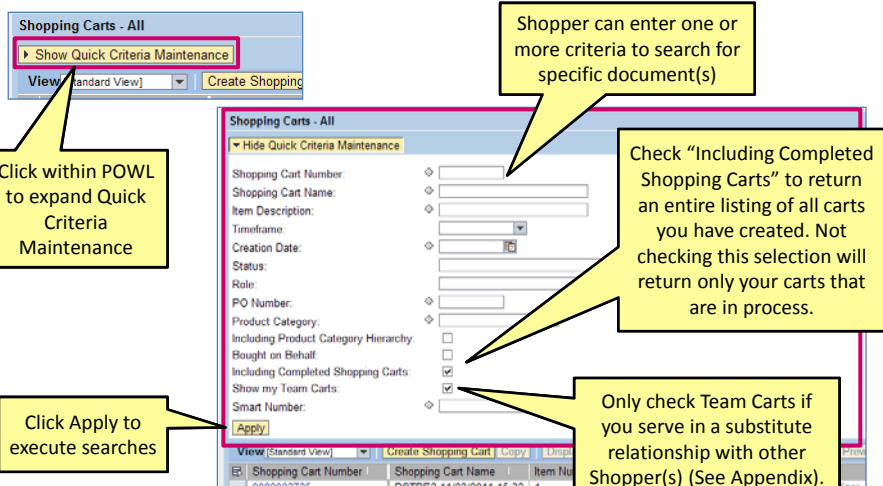
For additional assistance contact Enterprise Applications Group (EAG) email: irismain@email.uky.edu.



SRM Shoppers




POWL – Quick Criteria Maintenance

Quick Criteria Maintenance is an extension of the highlighted query in the upper section of the POWL. Opening it will display additional search criteria allowing the Shopper to perform customized document searches. It can be hidden when not in use.




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Quick Criteria Maintenance – Search Examples



Shopping Carts - All

▼ Hide Quick Criteria Maintenance

Shopping Cart Number:

Shopping Cart Name:

Item Description:

Timeframe:

Creation Date:

Status:

Role:

PO Number:

Product Category:

Including Product Category Hierarchy:

Bought on Behalf:

Including Completed Shopping Carts:

Show my Team Carts:

Smart Number:

View (Standard View) | Create Shopping Cart

Shopping Cart Number	Shopping Cart Name	Item Number	Configurable Item Number	Item Name	Item Status
900002460	RSTRE2 10/28/2				

Search Example 1 –
Enter specific cart by number and click Apply. Shopping Cart displays in lower section. Click into number to display contents.

Shopping Carts - Saved

▼ Hide Quick Criteria Maintenance

Shopping Cart Number:

Shopping Cart Name:

Item Description:

Timeframe:

Creation Date:

Status:

Role:

PO Number:

Product Category:

Including Product Category Hierarchy:

Logical System (Product):

Bought on Behalf:

Including Completed Shopping Carts:

Show my Team Carts:


Smart Number:

View (Standard View) | Create Shopping Cart | Copy | Display | Edit | Delete | Order | Create Confirmation | Print Preview | Refresh

Shopping Cart Number	Shopping Cart Name	Item Number	Configurable Item Number	Item Name	Item Status
900002726	RSTRE2 11/02/2011 15:32	1	0001	Steam sterilizer	Saved


Search Example 2 – Enter status of Saved and click Apply. Saved Shopping Cart(s) only will display in lower section.

Tip: If a query returns erroneous results, open Quick Criteria Maintenance and confirm whether invalid criteria may be entered.



SRM Shoppers

Manage and Maximize POWL



Shoppers can personalize how their POWL handles and displays documents for improved visual feel and navigation.

Active Queries

Shopping Carts [All \(17\)](#) [Saved \(0\)](#) [Awaiting Approval \(1\)](#) [Team Carts \(1\)](#)

Purchase Orders [All \(5\)](#) [Saved \(0\)](#) [Awaiting Approval \(0\)](#) [Rejected \(0\)](#) [Ordered \(0\)](#) [Confirmations](#)

Confirmations [All \(0\)](#) [Saved \(0\)](#) [Deleted \(0\)](#)

Shopping Carts - All

▼ Hide Quick Criteria Maintenance

Shopping Cart Number:

Shopping Cart Name:

Item Description:

Timeframe:

Creation Date:

Status:

PO Number:

Product Category:

Including Completed Shopping Carts:

Show my Team Carts:

View (SRM View) | Create Shopping Cart | Copy | Display | Edit | Delete | Order | Create Confirmation | Print Preview | Refresh | Export


Shopping Cart Number	Item Number	Item Name	Created On	Quantity	Unit	Item Status
900010594	1	STENO BOOK GREGG WHT RECY	03/19/2012 12:14:05	1	DZ	Follow-on Doc
900010594	2	LEGAL PAD CAN 5X8 12PK	03/19/2012 12:14:06	1	DZ	Follow-on Doc
900010594	3	FILE JACKETS POLY 100K ASST	03/19/2012 12:14:06	1	DZ	Follow-on Doc

Queries can be customized for specific document searches

Search terms within Quick Criteria Maintenance can be added or removed.


Number of columns and visible rows can be configured for better workspace layout

A Quick Reference Card for Managing and Maximizing the POWL is available from the Purchasing SRM website at: <http://www.uky.edu/Purchasing/srmquickrefcards.htm>

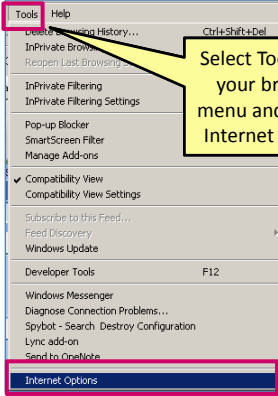


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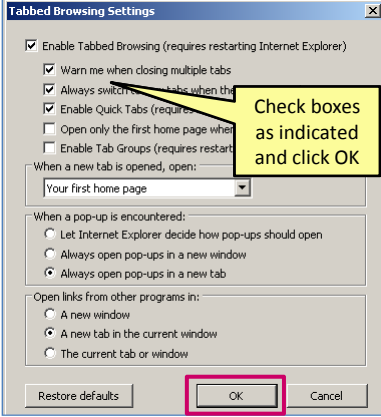
Using Tabs Instead of Open Windows



SRM tasks open in new browser windows by default. If desired you can configure your browser to instead open new tabs within a single browser window.




Select Tools from your browser menu and choose Internet options




Check boxes as indicated and click OK

Note: Graphics shown are from IE 8.0 – Your browser menu may offer different options.


SRM Shoppers

Working with “Reverse” Shopping Carts




Some types of orders perform better in “reverse” format. Reverse orders are entered as one line item with a lump sum dollar amount for the entire order, regardless whether the quote has multiple lines. Reverse format is usually used for complex orders such as furniture or printing. It may also be used for orders that span a length of time and require monthly payments, e.g., equipment rental.

Reverse Shopping Carts are entered as one line for the entire order. Enter the total dollar amount in the quantity column, LOT as the unit of measure, and 1.00 in the Net Price box.


Duplicate Delete		Product Category	Product Category Description	Quantity	Unit	Net Price / Limit
Description		56000000	Furniture, Furnishin	5,682.110	LOT	1.00
Furniture for 1st floor lobby		99999999	ENTER PRODUCT Catego	1.000		0.00

Contact the responsible buyer in Purchasing if you are unsure whether a specific Shopping Cart you plan to enter might work best in a reverse format.


SRM Shoppers

Obtaining Hard Copy of Shopping Cart

If needed for records or auditing, a hard copy of the Shopping Cart can be obtained via the Print Preview button within the POWL.



Highlight cart and click Print Preview

Shopping Cart Number	Shopping Cart Name	Item Number	Configurable Item Number	Item Name	Item
9000003494	RSTRE2 11/15/2011 10:22	1	0001	Furniture, Steelcase Dividers	Aw
9000002989	RSTRE2 11/07/2011 16:00	1	0001	Mayline Four Post Shelving, six tier	Sav
9000002882	RSTRE2 11/04/2011 12:59	2			ER REAM
9000002725	RSTRE2 11/02/2011 15:32	1			Sav
9000002473	RSTRE2 10/28/2011 15:20	1			Miller
9000002460	RSTRE2 10/28/2011 14:32	1			ble


Save or print .pdf hard copy as desired (document includes cost assignment info)

Delivery point:
UK
University of Kentucky
322 Patterson Dr
LEXINGTON KY 40506-0027
USA

Delivery date: 11/28/2011


Item	Product no.	Description	Submission deadline/contract RFx response	Supplier product number	Net value
1		Furniture, Steelcase Dividers			
	500	LOT	1.00 USD1 LOT	500.00 USD	500.00 USD
				Total value:	500.00 USD
				Tax Amount:	0.00 USD
				Total value (gross):	500.00 USD

For item 1
Account assignment:
Percent: 100.00
Assigned to: Cost Center 1012013930
GL account: 540300
Business area: 0101
Location: University of Kentucky
Campus: South Lexington
LEKINGTON KY 40506
USA

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Split Account Assignment

Account Assignment for any line item can be distributed across multiple Cost Centers or WBS Elements.



1. Select distribution to be based on percentage, quantity, or value
2. Click Split Distribution to create multiple lines
3. Enter multiple Cost Centers or WBS Elements with their associated GL's and the percentage (or quantity, or value) you would like assigned to each.

Number	Account	Percentage	Account Assignment Category	Assign Number	Account Assignment Description	Gen
101		50	Cost Center	1012013930		5403
102		30	Cost Center	1012578060		5403
103		20	Cost Center	1012578460		5403
104		0.00	Cost Center			5403
105		0.00	Cost Center			5403
106		0.00	Cost Center			5403

 **SRM Shoppers**

Adding Notes/ Attachments

Note: Item Text will print on the purchase order to the supplier. Internal Text is not seen by the supplier.

If specific to a given line, Item Text and Internal Notes should be entered for the line to which they apply.

Category	Description
Delivery text	-Empty-
Item Text	-Empty-
Internal Note	-Empty-
Supplier text	-Empty-

Category	Description	File Name	Version
The table does not contain any data			

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Adding Attachments


1. Click Add Attachment

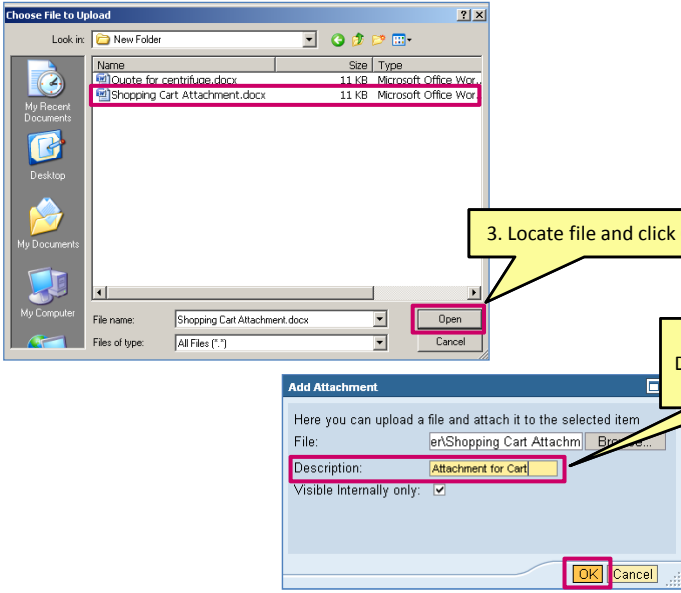
2. Click Browse

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

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Adding Attachments






3. Locate file and click Open

4. Add file Description, and then click OK

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Naming Convention for Attachments



When creating attachments, refrain from inserting special characters, such as @, #, \$, *, \, ', +, etc. into the filename.

Filenames should also not include spaces between words nor underscores. Files should be named with a purely alphanumeric format.

Examples of suitable filenames:

- Medtechquote1001.pdf
- Furniturelayout.doc

Examples of unsuitable filenames:

- API Printing Quote.pdf (filename includes spaces)
- Fisher+incubator \$1000.doc (filename includes special characters)

Only the following file formats are acceptable as Shopping Cart attachments:

- PDF, XLS, XLSX, DOC, DOCX, TXT, TIF, BMP, GIF, HTML

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Approvers and Approval Status

After a Shopping Cart is created and refreshed, Approver information can be viewed on the Approval Process Overview tab in the Details section.

Sequence	Process Step	Level Status	Status	Processor	Received On	Processed On	Forwarded By	Agent Determination
001	SRM Shopping Cart Approval (1)	Completed (Level was Processed)	Approved	Martha Steyn	10/27/2011 10:54:15	10/27/2011 11:15:37		Level 1 Approver
002	SRM Shopping Cart Approval (1)	Completed (Level was Processed)	Approved	Martha Steyn	10/27/2011 11:15:39	10/27/2011 11:17:48		Level 2 Approver

Information reflects full history including Approver(s) and dates/times of approval(s)

Note: If cart has not been approved, the tab will reflect the Approvers' mailboxes in which it resides.

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Related Documents Tab

The Related Documents tab shows other documents that are part of the purchase transaction, some with drill-down functionality (PO, Goods Confirmation, etc.).

Document	Name	Document Number	Backend Document Number	Status	Date	Quantity	Unit	Val
Shopping Cart	lead of sawdust	9000001136/1		Follow-on Document Created	11/09/2011	1	EA	
Purchase Order	Local PO1 RTTR2 11/09/2011 10:24	7500000948/1	7500000948/1	Ordered	11/09/2011	1	EA	
	Total					1	EA	

Shows related documents including PO number. Clicking into the PO number will display the purchase order.

Shows status of each document related to the Shopping Cart.

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Determine Shopping Cart Status via POWL



The status of each Shopping Cart can be found in the POWL (remember to click Refresh for latest information). Status options can include Awaiting Approval, Saved, Approved, Rejected, In Purchaser's Worklist, etc.

Active Queries

Shopping Carts All (6) Saved (2) Awaiting Approval (0) Team Carts (0)

Purchase Orders All (33) Saved (11) Awaiting Approval (0) Rejected (0) Ordered (0) Confirmation

Confirmations All (52) Saved (0) Deleted (0)

Shopping Carts - All

Show Quick Criteria Maintenance

View [Standard View] Create Shopping Cart Copy Display Edit Delete Order Create Confirmation Print Preview Refresh Export

Shopping Cart Number	Shopping Cart Name	Item Number	Configurable Item Number	Item Name	Item Status
9000003494	RSTRE2 11/15/2011 10:22	1	0001	Furniture, Steelcase Dividers	Awaiting Approval
9000002989	RSTRE2 11/07/2011 16:00	1	0001	Mayline Four Post Shelving, six tier	Saved
9000002882	RSTRE2 11/04/2011 12:59	2	0001	OMX RECYCLED LASER REAM	Saved
9000002725	RSTRE2 11/02/2011 15:32	1	0001	Steam sterilizer	Saved
9000002473	RSTRE2 10/28/2011 15:20	1	0001	Chairs, Aeron, Herman Miller	Deleted
9000002460	RSTRE2 10/28/2011 14:32	1	0001	Furniture, Steelcase table	Deleted

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Click Refresh Button for latest information

Column shows status of Shopping Carts

How Determine Assigned Purchasing Buyer



The Purchasing Buyer is automatically assigned to every Shopping Cart as soon as it is ordered. Free Text orders move to the responsible buyer after approval.

Details for item 1 custom music arrangement

Item Data Account Assignment Notes and Attachments Delivery Add

Identification

Item Type: Material

Product ID:

Description: custom music arrangement

Product Category: 90150000 Entertainment Servic

Order as Direct Material:

Subcontracting:

Company Code: UK00 University of Kentucky

Supplier Product Number:

Manufacturer Part Number:

Organization

Purchasing Group: MM-Buyer-025 Craig Locke Show Members

UK UNIVERSITY OF KENTUCKY SRM Shoppers

The assigned buyer can be found in the Details section on the Item Data tab

Remove Remaining Encumbrance on Shopping Cart

Shopping Carts that are Rejected by Purchasing or for which the PO was canceled *may* carry an associated encumbrance. This encumbrance must be released in order to reconcile accounting ledgers.

Active Queries

Shopping Carts All (5) Saved (2) Awaiting Approval (0) Team Carts (0)

Purchase Orders All (33) Saved (11) Awaiting Approval (0) Rejected (0) Ordered (0)


Deleted (0)

1. Highlight Shopping Cart or specific cart line within POWL

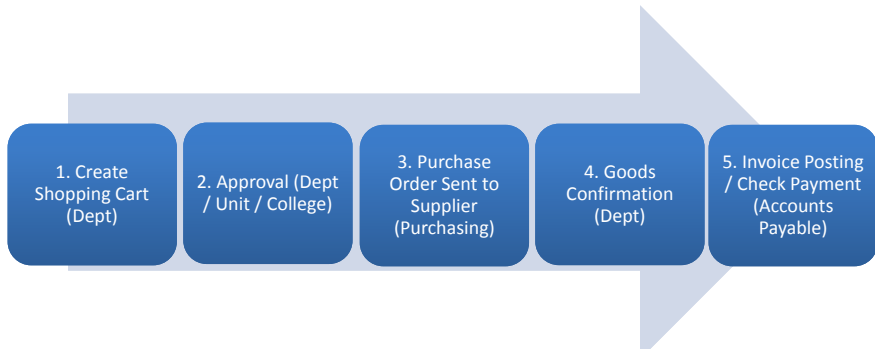
2. Click Delete to remove encumbrance

Sho	Cart Number	Shopping Cart Name	Item Number	Configurable Item Number	Item Name
9000002389		RSTRE2 11/07/2011 16:00	1	0001	Mayline Four Post Shelving, six tier
9000002382		RSTRE2 11/04/2011 12:59	2	0001	OMX RECYCLED LASER REAM
9000002725		RSTRE2 11/02/2011 15:32	1	0001	Steam sterilizer
9000002473		RSTRE2 10/28/2011 15:20	1	0001	Chairs, Aeron, Herman Miller
9000002460		RSTRE2 10/28/2011 14:32	1	0001	Furniture, Steelcase table

Shoppers can identify whether encumbrances exist against their Shopping Carts using SAP Transaction Code GR55 or BI/BW reports. This task is only applicable if an invalid encumbrance is showing within SAP reports.

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SRM Shoppers

Diagnosing Process Problems




1. Create Shopping Cart (Dept)
2. Approval (Dept / Unit / College)
3. Purchase Order Sent to Supplier (Purchasing)
4. Goods Confirmation (Dept)
5. Invoice Posting / Check Payment (Accounts Payable)


As an SRM order evolves through the process, the Shopper's POWL will reflect the status in which it currently resides (e.g., Approved, in Purchaser's worklist, etc.).

Problems can be frequently diagnosed based on the order status in the process.

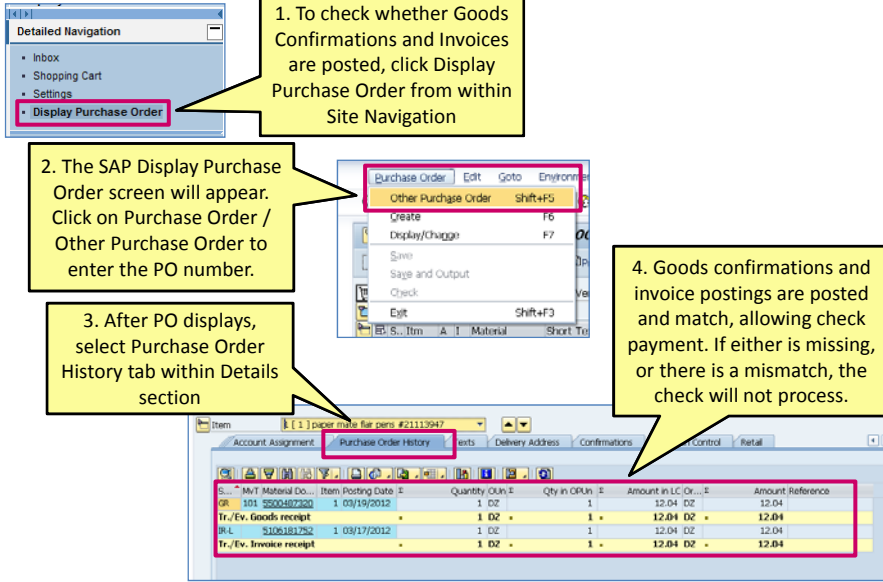
Example: With the purchase order being in place, completion of the Goods Confirmation and the Invoice Posting complete a "3-way match" allowing the check payment to release. Common problems relate to one or more of these tasks not being completed.

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SRM Shoppers

Diagnosing Process Problems




1. To check whether Goods Confirmations and Invoices are posted, click Display Purchase Order from within Site Navigation
2. The SAP Display Purchase Order screen will appear. Click on Purchase Order / Other Purchase Order to enter the PO number.
3. After PO displays, select Purchase Order History tab within Details section
4. Goods confirmations and invoice postings are posted and match, allowing check payment. If either is missing, or there is a mismatch, the check will not process.



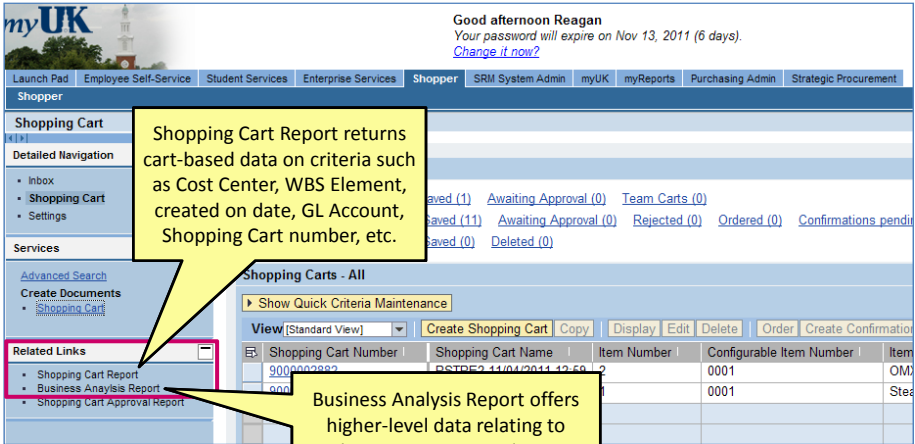
Item	Material	Posting Date	Quantity	UoM	Qty in C/Pln	Amount in LC	Cr.	De.	Amount Reference
GR	101 5500487320	1 03/19/2012	1	DZ	1	12.04	DZ		12.04
Tr./Ev.	Goods receipt					12.04	DZ		12.04
BR-L	5106181792	1 03/17/2012	1	DZ	1	12.04	DZ		12.04
Tr./Ev.	Invoice receipt					12.04	DZ		12.04

SRM Shoppers

Reports



Reports are available within the Related Links area below Site Navigation.




Shopping Cart Report returns cart-based data on criteria such as Cost Center, WBS Element, created on date, GL Account, Shopping Cart number, etc.

Business Analysis Report offers higher-level data relating to business areas, catalogs, purchase orders, suppliers, etc.

SRM Shoppers

Inbox Overview

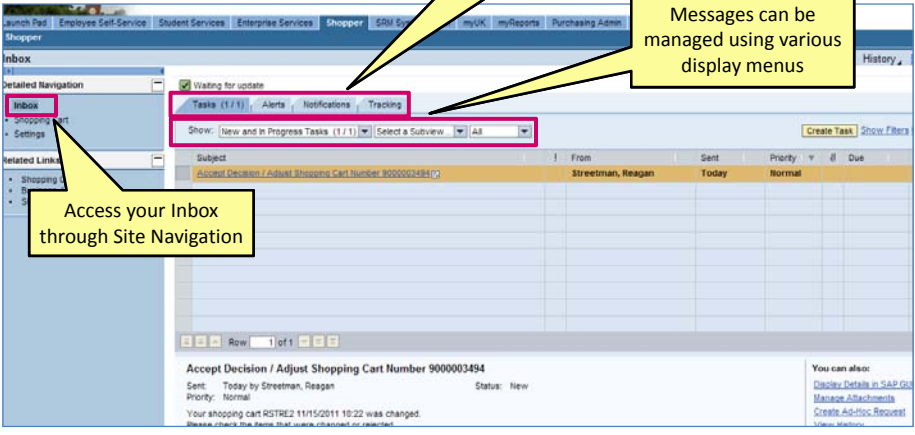


Note: All SRM users have Inboxes. Document-related messages and other communications move throughout Workflow to users' Inboxes.



Different types of communications can be found among various tabs

Messages can be managed using various display menus


Access your Inbox through Site Navigation



The screenshot shows the SRM Shoppers interface. At the top, there is a navigation bar with tabs for 'Tasks (1/1)', 'Alerts', 'Notifications', and 'Tracking'. Below this, there is a 'Show:' dropdown menu set to 'New and in Progress Tasks (1/1)'. A table below displays a message with the subject 'Accept Decision / Adjust Shopping Cart Number 9000003494', sent by 'Streetman, Reagan' on 'Today' with a 'Normal' priority. A 'Create Task' button and 'Show Filters' link are also visible.

Inbox – Filter Settings

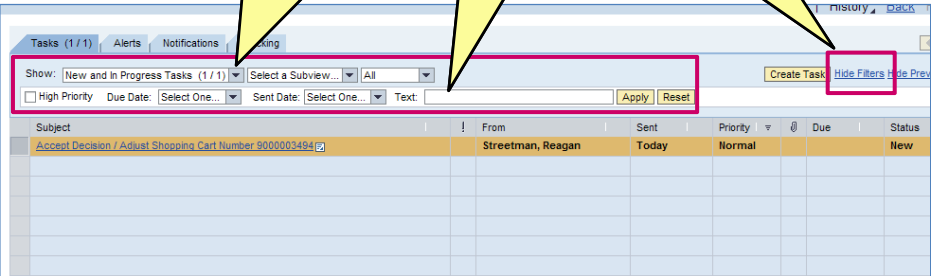


Filters can be used to better manage messages or find specific documents.



Select from various search criteria to locate or manage specific messages

Can also search messages based on specific text


Link shows or hides Filters as desired



The screenshot shows the 'Filter Settings' section of the SRM Shoppers interface. It features a 'Show:' dropdown menu set to 'New and in Progress Tasks (1/1)'. Below this, there are search criteria: 'High Priority', 'Due Date: Select One...', 'Sent Date: Select One...', and a 'Text:' input field. There are 'Apply' and 'Reset' buttons. A 'Hide Filters' link is also visible. The table below shows the same message as in the previous screenshot.

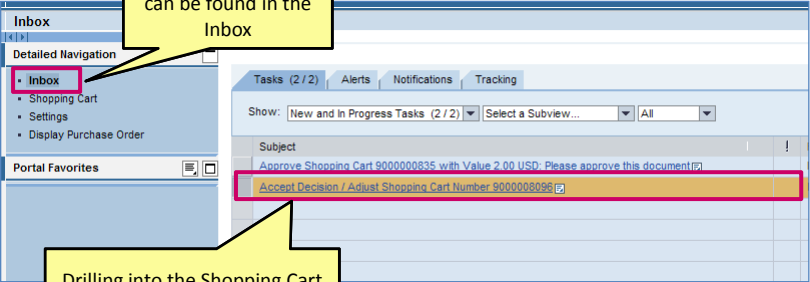



Handling Rejected Shopping Carts




A Shopping Cart rejected by an Approver returns to the Shopper's Inbox for disposition.

Rejected documents can be found in the Inbox




Drilling into the Shopping Cart shows the cart was rejected

Approval Note: Rejecting cart due to incorrect GL used. Please correct GL Account and resubmit. (CLOCKE 04/04/2012 10:27:54 EST)


SRM Shoppers

Handling Rejected Shopping Carts



The Shopper must choose one of three options in managing the rejected cart.

1. Click **Edit** to make changes and re-order. Modified Shopping Cart returns to the Approver, or –
2. Click **Accept** to accept the rejection. Shopping Cart may be copied to another cart in the future, or –
3. Click **Delete** to remove Shopping Cart from workflow and terminate.

If edit is selected, make needed changes and click Proceed to finish and return the cart to the Approver's Inbox.

Accept Changes of Shopping Cart: 9000008096


Number	Document Name	Status
9000008096	CLOCKE 04/04/2012 10:23	A

▼ General Data

Buy on Behalf Of: Craig Locke	Approval Note	Reject Please (CLC
Name of Shopping Cart: CLOCKE 04/04/2012 10:23		
Default Settings: Set Values		
Approval Process: Display / Edit Agents	Note to Supplier	
Budget: Display		

Accept Changes of Shopping Cart: 9000008096

Number	Document Name	Status
9000008096	CLOCKE 04/04/2012 10:23	Status


SRM Shoppers

Closing Open Windows or Tabs

Users should always click the Close button to exit an open window or tab.

Always click Close button to exit an open window or tab

Note: Don't click X to exit an open window or tab

Line Number	Item Type	Description	Product Category	Quantity	Unit	Net Price / Limit	Curr
0001	Material	Furniture_Steelcase Dividers	56000000	500	LOT	1.00	USD

SRM Shoppers

Fix Query Lock

If a window or tab is closed using the X in the upper right hand corner, it is possible to be locked out of the system.

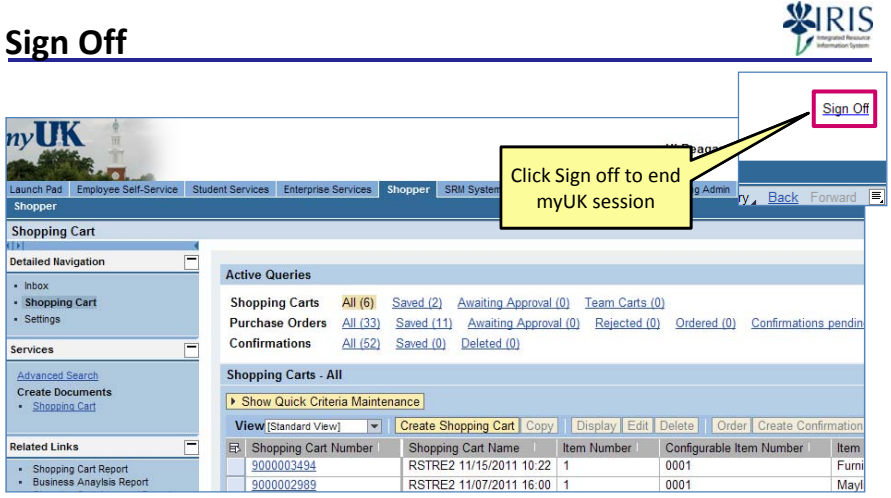
You may receive this message in your POWL if locked out of the system

1. To correct, scroll to bottom of screen and click Fix Query Lock

2. Click any Active Query from the top of your POWL to continue working

SRM Shoppers

Sign Off



myUK

IRIS Integrated Resource Information System

Launch Pad Employee Self-Service Student Services Enterprise Services Shopper SRM System

Click Sign off to end myUK session

Sign Off

Shopper

Shopping Cart

Detailed Navigation

- Inbox
- Shopping Cart
- Settings

Services

Advanced Search

Create Documents

- Shopping Cart

Related Links

- Shopping Cart Report
- Business Analysis Report

Active Queries

Shopping Carts All (6) Saved (2) Awaiting Approval (0) Team Carts (0)

Purchase Orders All (33) Saved (11) Awaiting Approval (0) Rejected (0) Ordered (0) Confirmations pending

Confirmations All (52) Saved (0) Deleted (0)

Shopping Carts - All


Show Quick Criteria Maintenance

View (Standard View) Create Shopping Cart Copy Display Edit Delete Order Create Confirmation

Shopping Cart Number	Shopping Cart Name	Item Number	Configurable Item Number	Item
9000003494	RSTRE2 11/15/2011 10:22	1	0001	Furni
9000002989	RSTRE2 11/07/2011 16:00	1	0001	Mavl

Remember: Be sure to click the "Sign Off" link when exiting SRM to close all applications.

UK UNIVERSITY OF KENTUCKY SRM Shoppers



IRIS Integrated Resource Information System

Appendix - Substitute Shoppers and Attributes

UK UNIVERSITY OF KENTUCKY SRM Shoppers

Designate Substitute Shoppers



Optional: **Substitute Shoppers** are persons allowed to set-up, view, and respond on behalf of another Shopper.

- Only Shoppers may designate, in their Personal Settings tab, their own Substitute Shoppers.
- Substitute Shoppers must have the Shopper role before they can be designated.
- Unless a Substitute Shopper is designated, no one will be able to create or view the Shopper's Shopping Carts.

Designate Substitute Shoppers



Edit Document:

Employee ID 22868 Name Ms. Reagan Streetman

[Save](#) [Close](#) [Read Only](#) [Check](#)

▼ Personal Data

Form of Address: * Ms. Academic Title:

First Name: * Reagan Last Name: * Streetman

Position **User Account**

Standard Settings

User ID: * RSTRE2

E-Mail: reagan.streetman@uky.edu

Time Zone: EST

Language: English

Date Format: MM/DD/YYYY

Decimal Notation: 1,234,567.89

My Procurement Substitutes

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

Name of Substitute	Start Substitution On	End Substitution On

Persons I Represent As Substitute

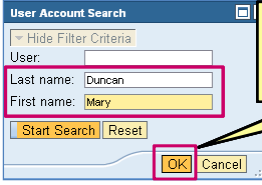
[Settings](#)

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

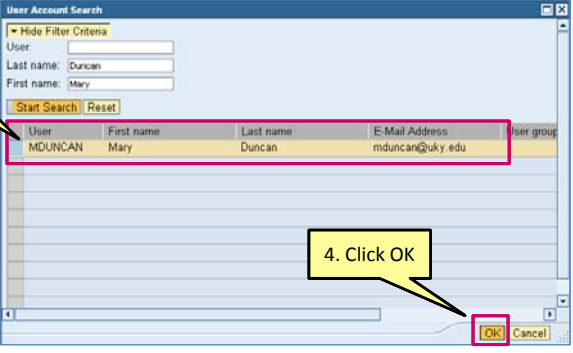
Note: You are on the User Account tab within Personal Settings

1. Click the Possible Entries icon to locate and add a Substitute Shopper

Designate Substitute Shoppers



2. To conduct a search enter last and first name of Substitute Shopper, and then click OK

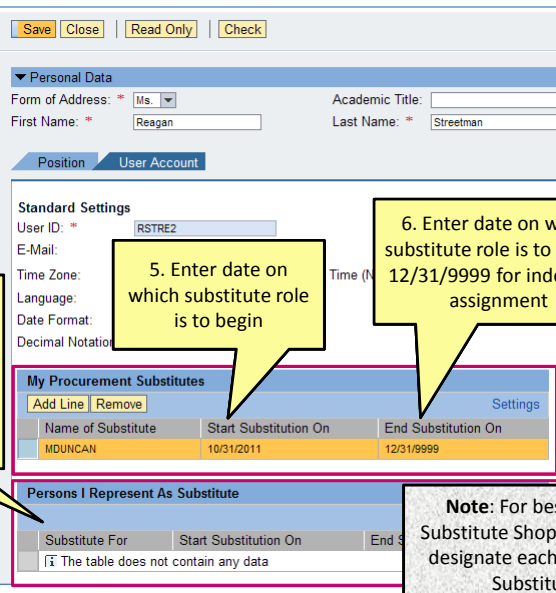


3. Highlight correct selection from search results

4. Click OK

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Designate Substitute Shoppers



5. Enter date on which substitute role is to begin

6. Enter date on which substitute role is to end or 12/31/9999 for indefinite assignment

Note: If you are designated as a Substitute by another Shopper, that information will appear in the bottom section.

Note: For best results Substitute Shoppers should designate each other as a Substitute.

UK UNIVERSITY OF KENTUCKY SRM Shoppers

Managing Substitute Shopping



Designating your Substitute Shoppers within Personal Settings sets permissions for you to participate in “Team Shopping”.

With Team Shopping, two or more shoppers can have access to each other’s carts. A Substitute Shopper can view, edit, or delete a Shopping Cart created by a team member.

For more information a Quick Reference Card entitled “Substitute Shoppers and Manage Team Carts” is available from the Purchasing SRM website at:

<http://www.uky.edu/Purchasing/srmquickrefcards.htm>

Attributes Overview



Attributes are default components which populate into every Shopping Cart to facilitate a more efficient Shopping experience.

The following attributes can be set as defaults:

- Account Assignment Category
- Cost Center
- WBS Element

Setting attributes within Personal Settings is optional. Not setting attributes will require manual entry of components for every Shopping Cart.

Attribute – Account Assignment Category



The Account Assignment Category determines which type of account assignment will default into each Shopping Cart.

Edit Document:

Employee ID: 22858

Save Close Read

Personal Data

Form of Address: (U) Academic Title: Academic Title

First Name: First Name Last Name: Streetman

Position User Account

Organizational Assignment

Department: 3P009 31002256; MMA-Buyer-009 Department Address Details

Position: P012345 50118993; Contracting Officer II Building: Building

Functional Assignment

Department Head Of: Department Head Of

Purchasing Group: 3P009 31002 Purchasing Group: 31002

Department Address

Street/ House Number: 322 Peterson Seriv Street/ House Number: 3227

Postal Code/ City: 40508 Lexington Postal Code/ City: 40508

Country: US E-Mail: reagan.streetman@uky.edu

Attributes for Position Contracting Officer II

Attributes

Account assignment category*

Cost Center

Delivery address*

Product Category*

Request

Request type

WBS Element

Attribute – Account Assignment Category



Note: This task only selects the "type" of account assignment to default into each Shopping Cart. The actual Cost Center or WBS Element numbers are entered on the following screens.

Attributes for Position Contracting Officer II

Attribute: Account assignment category* Add Line Remove

Standard	Deactivate	Value Description
<input checked="" type="radio"/>	<input type="checkbox"/>	Cost Center
<input type="radio"/>	<input type="checkbox"/>	G/L Account
<input type="radio"/>	<input type="checkbox"/>	Order
<input type="radio"/>	<input type="checkbox"/>	WBS element

3. Determine which type of Cost Assignment Category you most frequently use and click the Standard radio button. Cost Center will be the most common selection for most Shoppers.

Important: Be sure not to check Deactivate for any selections.

Attribute – Cost Center

1. Select Cost Center from the drop down menu to assign a default Cost Center number

2. Select Logical System (there is only one selection)

3. Click Add Line

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Attribute – Cost Center


4. Enter the Cost Center number that you will use for most purchases

If needed a search feature is available through the Possible Entries icon

5. Click the Standard radio button

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Attribute – WBS Element



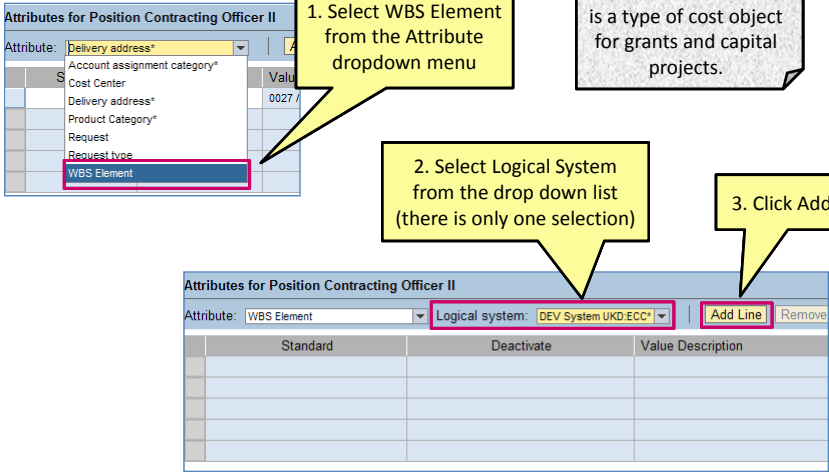
If you frequently purchase goods or services charged to a WBS Element, you can also set a default WBS Element to flow into your Shopping Carts.

1. Select WBS Element from the Attribute dropdown menu

Note: A WBS Element is a type of cost object for grants and capital projects.


2. Select Logical System from the drop down list (there is only one selection)

3. Click Add Line



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Attribute – WBS Element



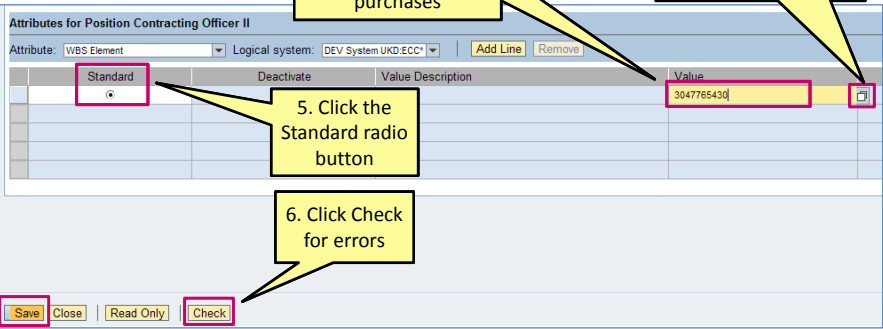
4. Enter the WBS Element number that you will use for most purchases

If needed a search feature is available through the Possible Entries icon

5. Click the Standard radio button

6. Click Check for errors

7. Click Save when finished editing all Attributes



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SRM Help Web Sites



- SRM Resource Page on Purchasing web site:
<http://www.uky.edu/Purchasing/srm.htm>
- myHelp – MM & Purchasing Help web site:
<http://myHelp.uky.edu/rwd/HTML/MM.html>

Both sites contain Quick Reference Cards, updated and printable course manuals, Reference Manual, etc.

- SRM Assistance Email: SRMHelp@uky.edu

Printing Course Manual (Optional)



If desired, a printable (Adobe PDF) version of this course manual is available for your convenience.

To access and print the manual:

1. Click on the printer (the manual will open in a separate browser window)
2. Print the course manual
3. Close the separate browser window
4. Return to this course window
5. Click on the green Continue button below



To proceed without printing, click on the green Continue button below.

Check for Understanding



In order to receive full credit for the SRM Shoppers course, you must now successfully complete the Check for Understanding – a quiz covering the main concepts presented in this course.



Course Completion



To complete this WBT, click on the yellow Log off button in the lower corner of this window.



Note: This window will close, and you should be returned to the main, myTraining page for this WBT. The main page will refresh (usually within 30 seconds, depending on network traffic), and you should receive a green, system message confirming your participation.

Your participation in this course has been completed.

You may then safely navigate away from the main page.