Welcome to SRM Overview!

This course is designed to provide Commonwealth Procurement Professionals and Requisitioners with an overview of SRM 7.0 to include:

• Operational Procurement
• Purchasing and Sourcing
• Supplier Collaboration
This course is presented on a series of slides. Navigate through the slides by selecting the NEXT and PREVIOUS buttons.

You may exit the course at any time. When you return to the course, you can choose to resume the course at your most recent stopping point or choose to start from the beginning.

To start the course, select the NEXT button.
After successfully completing this course, you will be able to:

- Identify the benefits of SRM 7.0
- Understand the special features of SRM 7.0
- Understand how to navigate in SRM
- Understand terminology associated with SRM
Agenda

• SRM 7.0: Introduction and Overview
  – What is SRM
  – Benefits of SRM
  – Special features of SRM 7.0

• Getting Started in SRM 7.0
  – Navigation
  – Functionality
  – Common Buttons
  – Terminology
SRM 7.0: Introduction and Overview
What is SRM?

• SRM is an abbreviation for Supplier Relationship Management
• SRM is a fast, efficient, and dependable tool for order placement, order approval, goods receipt, and supplier invoice entry
• SRM consists of the following components:
  – Operational Procurement
    • Shopping Carts
    • Purchasing Card (P-Card) Orders
  – Purchasing & Sourcing
    • Solicitations
    • Contracts
    • Purchase Orders
  – Supplier Collaboration
    • Supplier Registration
    • Supplier Bid Response
    • Invoicing
SRM Offers a number of benefits:

- Simplifies the purchasing process and improves accuracy and productivity by minimizing manual administrative tasks
- Supports agency-specific workflows
- Provides a friendly user interface
- Gives access to electronic catalogs, allowing the contract price to be viewed and automatically entered
- Allows electronic submission of orders to select suppliers and electronic submission of invoices by suppliers
- Improves procurement reporting capabilities
Logging In

The SAP SRM Portal Desktop is accessible through www.myworkplace.state.pa.us
Overview of SRM 7.0

Portal Desktop Landscape

Header Area

Top-Level Navigation (Work Centers)

Navigation Area (Control Center)

Content Area
Navigating the User Interface

• Roles
  – Your user role(s) are assigned by position
  – Access to your role(s) are within the Control Center (e.g., left navigation pane)

• Transactions
  – Upon selection of a specific role, the associated activities and transactions display as Worksets in 7.0
Navigating the User Interface

• Worksets
  – Groups of role-specific activities and/or transactions which display when the corresponding role is selected
  – Multiple levels of Worksets are permitted in SRM 7.0

• Document Landscape
  – SRM 7.0 document landscapes have elements contained in both SRM 5.0 and SAP R/3
    ■ Examples will be shown throughout the course
Control Center in SRM 7.0

- When a role is selected, *Worksets* assigned to the user are displayed
  - If applicable, an additional *Workset* is displayed below the initial result as shown in this screen capture
Overview of SRM 7.0

Personal Object Worklist (POWL)

- The POWL is located in the *content area* of the portal desktop
Personal Object Worklist (POWL)

- It is a query-driven worklist containing procurement documents from your work area
  - The Active Queries displayed will vary depending upon the selected Workset
Overview of SRM 7.0

Personal Object Worklist (POWL)

- Results of the selected query are displayed in a table format
- “One-Step” buttons are available at the top of each query
To make additional One-Step options available, choose a document to work with
Personal Object Worklist (POWL)

- You may display additional fields for your query by selecting the SEARCH CRITERIA button
Overview of SRM 7.0

Sample Document Landscape (Shopping Cart)
Overview of SRM 7.0

Sample Document Landscape (PO)

Title and Header Area

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

Tab Pages

Sub Tabs

- Various data is contained throughout each of the tabs and sub-tabs. For example, Notes and Attachments tab would contain text and attachments.
The area that data is entered is known as the Application Area.
Overview of SRM 7.0

Search Feature

- Select the match code icon to open a dialog box to input the search criteria.
Search Feature

- Enter the applicable criteria and select the START SEARCH button
Overview of SRM 7.0

Search Feature

- The Results List displays
- Highlight the desired item and select OK
### Overview of SRM 7.0

#### Search Feature

<table>
<thead>
<tr>
<th>Function</th>
<th>Number</th>
<th>Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>Requester</td>
<td>326419</td>
<td></td>
</tr>
<tr>
<td>Vendor</td>
<td>100012</td>
<td>AS</td>
</tr>
<tr>
<td>Service Agent</td>
<td>326419</td>
<td>Alt</td>
</tr>
<tr>
<td>Goods Recipient</td>
<td>300001</td>
<td>Ext</td>
</tr>
<tr>
<td>Ship-To Address</td>
<td>90</td>
<td>DPI</td>
</tr>
<tr>
<td>Location</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

- The chosen value is transferred into the applicable field
• Tips, Warnings, and Error messages are located at the top of the screen rather than the bottom

• Up to five (5) error messages will display at a time, use the scroll bar on the left to see additional messages
Getting Started in SRM 7.0
Logging On

1. Launch Internet Explorer

2. Type **www.myworkplace.state.pa.us** into the address bar and select the Go button
Logging On

To bookmark the address as a favorite, select the link as shown below.
Getting Started in SRM

Select the SRM tab on the Portal Welcome screen

Ensure that the Navigation pane is expanded
Navigation Tips

- You must use SRM’s navigation buttons
- Using Internet Explorer’s navigation buttons exits SRM and causes loss of data
Each user's home page is customized based upon the roles he or she has been assigned.

The Universal Worklist contains leave slips and procurement items waiting for review and approval.
<table>
<thead>
<tr>
<th>Function</th>
<th>SRM</th>
</tr>
</thead>
<tbody>
<tr>
<td>Navigation</td>
<td>Screens are simple to navigate</td>
</tr>
<tr>
<td></td>
<td>SRM has a user-friendly look and feel</td>
</tr>
<tr>
<td>Supplier per Cart</td>
<td>Separate shopping carts are required for each supplier</td>
</tr>
<tr>
<td>Searching</td>
<td>Search criteria is user-friendly</td>
</tr>
<tr>
<td></td>
<td>Product details are shown</td>
</tr>
<tr>
<td>Creating Purchase Orders (PO)</td>
<td>POs are automatically created for certain materials and suppliers</td>
</tr>
</tbody>
</table>
### Getting Started in SRM

<table>
<thead>
<tr>
<th>Function</th>
<th>SRM</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Account Assignment</strong></td>
<td></td>
</tr>
<tr>
<td></td>
<td>General Ledger (G/L) codes must be entered</td>
</tr>
<tr>
<td></td>
<td>Users have the ability to set default account assignment preferences</td>
</tr>
<tr>
<td></td>
<td>Cost assignments can be distributed based on quantity, percentage or value</td>
</tr>
<tr>
<td></td>
<td>Online account search is available</td>
</tr>
</tbody>
</table>
### Function: Workflow

<table>
<thead>
<tr>
<th>Function</th>
<th>SRM</th>
</tr>
</thead>
<tbody>
<tr>
<td>Workflow</td>
<td>Flexible approval, enables organizations to manage the requisitioning of goods</td>
</tr>
<tr>
<td></td>
<td>Workflows are automatically in compliance with purchasing thresholds</td>
</tr>
</tbody>
</table>
## Getting Started in SRM

<table>
<thead>
<tr>
<th>Function</th>
<th>SRM</th>
</tr>
</thead>
<tbody>
<tr>
<td>Copying</td>
<td>Line item copying is available and easy to use</td>
</tr>
<tr>
<td></td>
<td>User can distribute costs, change shipping address, and edit individual line items</td>
</tr>
<tr>
<td>Receiving</td>
<td>Partial quantities can be returned or canceled</td>
</tr>
</tbody>
</table>
**Getting Started in SRM**

## Common Buttons

<table>
<thead>
<tr>
<th>Command buttons</th>
<th>Action Item buttons appear in line items</th>
</tr>
</thead>
<tbody>
<tr>
<td>Command buttons appear throughout SRM</td>
<td>Action Item buttons appear in line items</td>
</tr>
<tr>
<td>• The buttons contain text that indicates what command will be performed</td>
<td>• The DETAILS button is used to review and/or add related data to a line item in a shopping cart</td>
</tr>
<tr>
<td></td>
<td>• The ADD ITEM button is used to add an item from another shopping cart and/or catalog</td>
</tr>
<tr>
<td></td>
<td>• The COPY/PASTE buttons are used to copy individual line items, completely transferring the item details and pasting to another line item</td>
</tr>
<tr>
<td></td>
<td>• The DUPLICATE button is used to copy all data from one line item to another without pasting</td>
</tr>
<tr>
<td></td>
<td>• The DELETE button is used to remove an item from the shopping cart</td>
</tr>
</tbody>
</table>

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**SMART BUYING**
### Common Buttons (cont’d)

<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>• When icons are grayed-out (inactive), the user is not able to perform that function</td>
</tr>
<tr>
<td></td>
<td>• <strong>Match Code icon</strong> appears when search capability is available</td>
</tr>
<tr>
<td></td>
<td>• Select the Match Code to display applicable criteria</td>
</tr>
<tr>
<td></td>
<td>• Asterisks (*) should be used before and after keywords</td>
</tr>
<tr>
<td></td>
<td>• Capitalization does not affect search returns</td>
</tr>
</tbody>
</table>
Procurement – the act of obtaining or buying goods and services. The process includes preparation and processing of a requirement as well as the receipt and approval of payment.

Receiving – accepting delivery of a product or service

Requisition (shopping cart) – written request or order for goods or services

Requisitioner – individual who creates the requisition (shopping cart)

Workflow – term used to refer to the movement of work from one responsible party to another
Knowledge Check
1. SRM simplifies the purchasing process and improves accuracy and productivity by minimizing manual administrative tasks

a. True  

b. False
2. One supplier can be added to a single cart

a. True  

b. False
3. When icons are grayed-out, are users able to perform that function?

a. Yes
b. No
4. Can you use the Internet Explorer “Back” button/icon to navigate in SRM?

a. Yes ☐

b. No ☐
Select the link below to complete an online survey

https://www.surveymonkey.com/s/QYHGMNY
You will receive credit for completing this course within 24 hours. Please select the “Log Off” button in the lower right corner to close this course.

As a reminder, you will not receive an E-mail Notification for WBT Course completions. To view if you have received credit for completion of the WBT Course(s), log onto LSO from www.myworkplace.state.pa.us, select My Training > Training Activities and go to the Completed Courses section of My Training Activities to search for the course.

Thank you!