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DEPARTMENT OF GENERAL SERVICES



Supplier
Relationship
Management

SRM 7.0

**Creating & Maintaining
Purchase Orders**



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Welcome!



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Introductions



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Course Objectives

Course Objectives

- After successfully completing this course, you will be able to:
 - Understand the special features of SRM 7.0
 - Perform the necessary functions to create a Purchase Order (PO)
 - Create and edit legal documents in Document Builder (DB)
 - Print a PO
 - Make necessary edits to a PO
 - Access a PO to delete individual line items or delete an entire order
 - Redistribute work to other sourcing professionals
 - Source a requirement and create a PO
 - Liquidate the balance of a PO when a partial Goods Receipt was done
 - Business Partner Update

Agenda

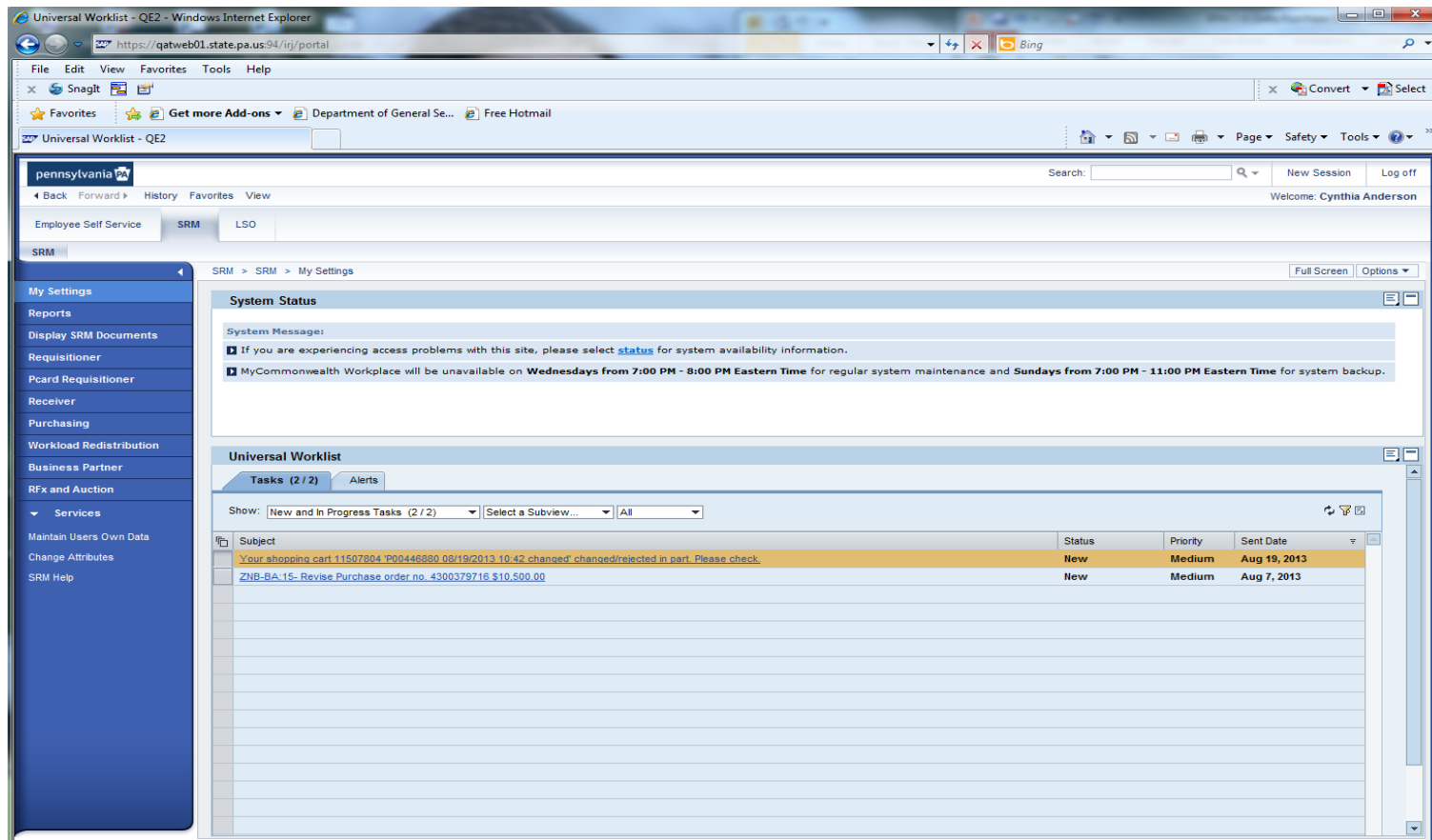
- SRM 7.0: Introduction and Overview
- Create a Stand-alone PO
- Create a DB Document
- Create a PO w/Reference to a Contract
- Print a fully executed PO
- Edit and Delete a PO
- Workload Redistribution
- Source a Requirement and Generate a PO
- Source an Inventory Requirement and Generate a PO
- Liquidate Commitments/Complete Shopping Cart
- Business Partner Update

SRM 7.0: Introduction and Overview

Overview of SRM 7.0

Logging In

The SAP/SRM Portal Desktop is accessible through www.myworkplace.state.pa.us

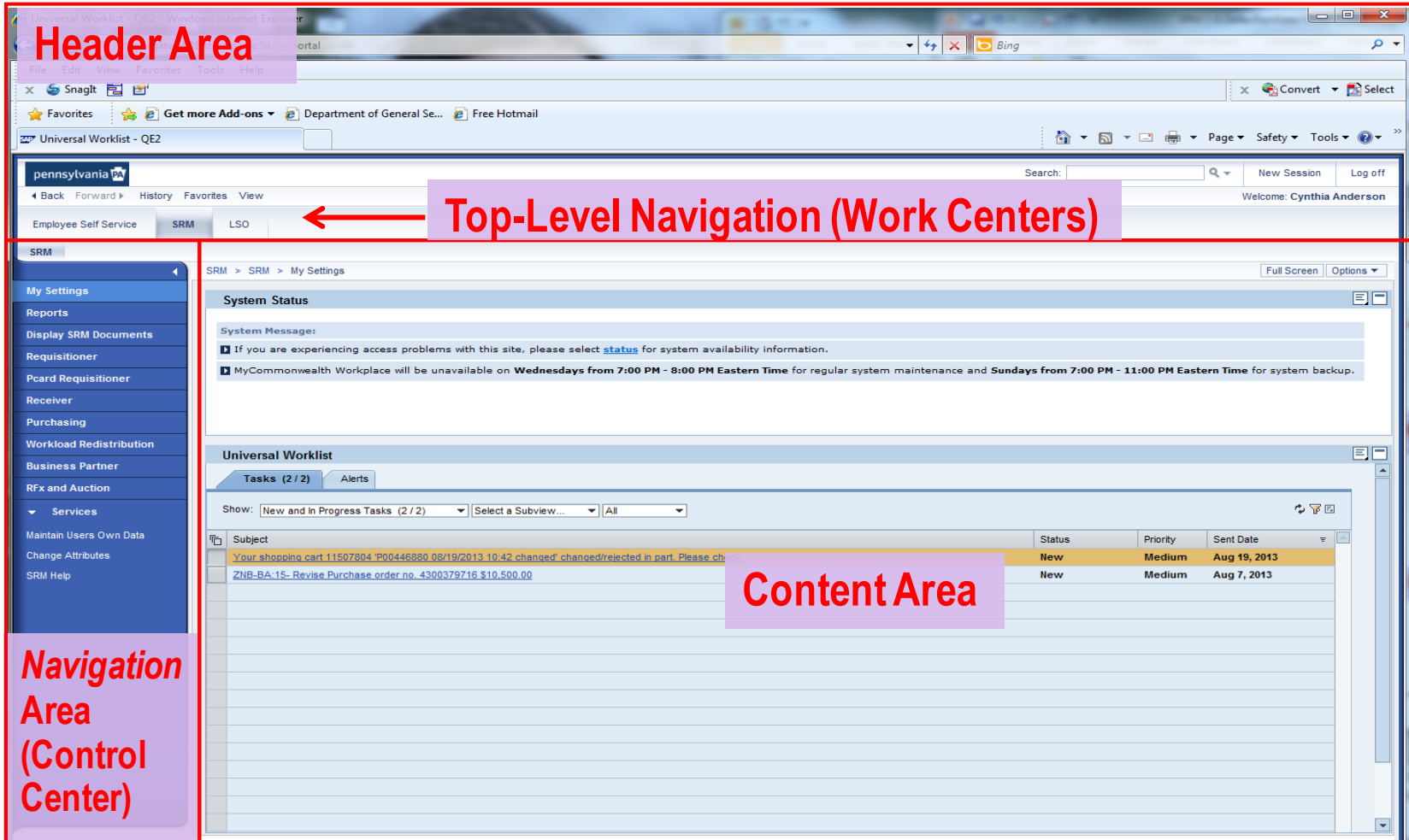


The screenshot shows the SAP/SRM Portal Desktop interface. The browser address bar displays <https://gatweb01.state.pa.us:94/ij/portal>. The page title is "Universal Worklist - QE2". The interface includes a navigation menu on the left with options like "My Settings", "Reports", "Display SRM Documents", "Requisitioner", "Pcard Requisitioner", "Receiver", "Purchasing", "Workload Redistribution", "Business Partner", "RFx and Auction", "Services", "Maintain Users Own Data", "Change Attributes", and "SRM Help". The main content area shows the "SRM" section with "My Settings" selected. Under "System Status", there is a "System Message" section with two messages: "If you are experiencing access problems with this site, please select [status](#) for system availability information." and "MyCommonwealth Workplace will be unavailable on **Wednesdays from 7:00 PM - 8:00 PM Eastern Time** for regular system maintenance and **Sundays from 7:00 PM - 11:00 PM Eastern Time** for system backup." Below this is the "Universal Worklist" section, which displays a table of tasks. The table has columns for "Subject", "Status", "Priority", and "Sent Date".

Subject	Status	Priority	Sent Date
Your shopping cart 11507804 'P00446880 08/19/2013 10:42 changed' changed/rejected in part. Please check.	New	Medium	Aug 19, 2013
ZNB-BA 15- Revise Purchase order no. 4300379716 \$10,500.00	New	Medium	Aug 7, 2013

Overview of SRM 7.0

Portal Desktop Landscape



Header Area

Top-Level Navigation (Work Centers)

Navigation Area (Control Center)

Content Area

System Status

Universal Worklist

Subject	Status	Priority	Sent Date
Your shopping cart 11507804 'P00446880_08/19/2013_10:42_changed' changed/rejected in part. Please ch...	New	Medium	Aug 19, 2013
ZNB-BA-15- Revise Purchase order no. 4300379716 \$10,500.00	New	Medium	Aug 7, 2013

Overview of SRM 7.0

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

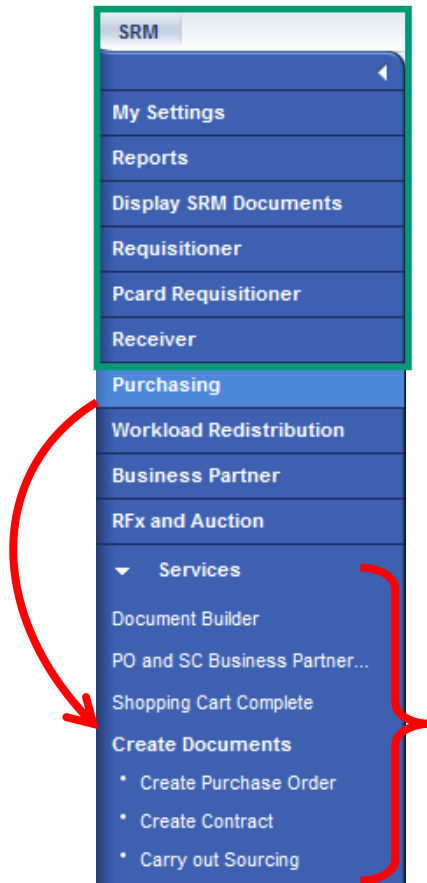
Overview of SRM 7.0

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

Overview of SRM 7.0

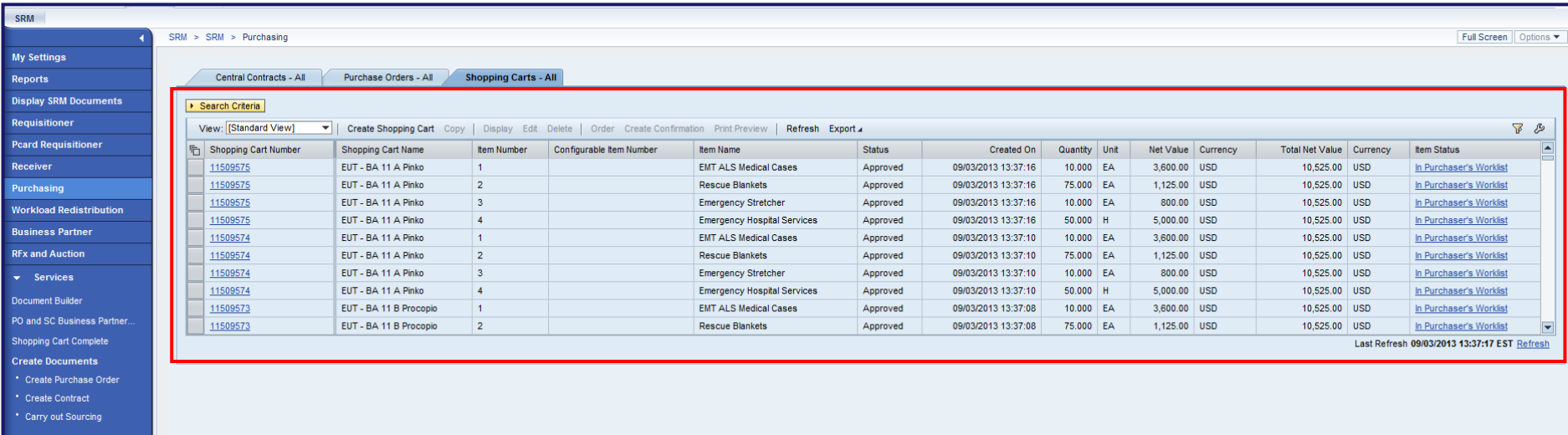
Control Center in SRM 7.0



- Your user role is assigned to your position
- Access to your role is within the Control Center
- 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)



SRM > SRM > Purchasing

Central Contracts - All | Purchase Orders - All | **Shopping Carts - All**

Search Criteria

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

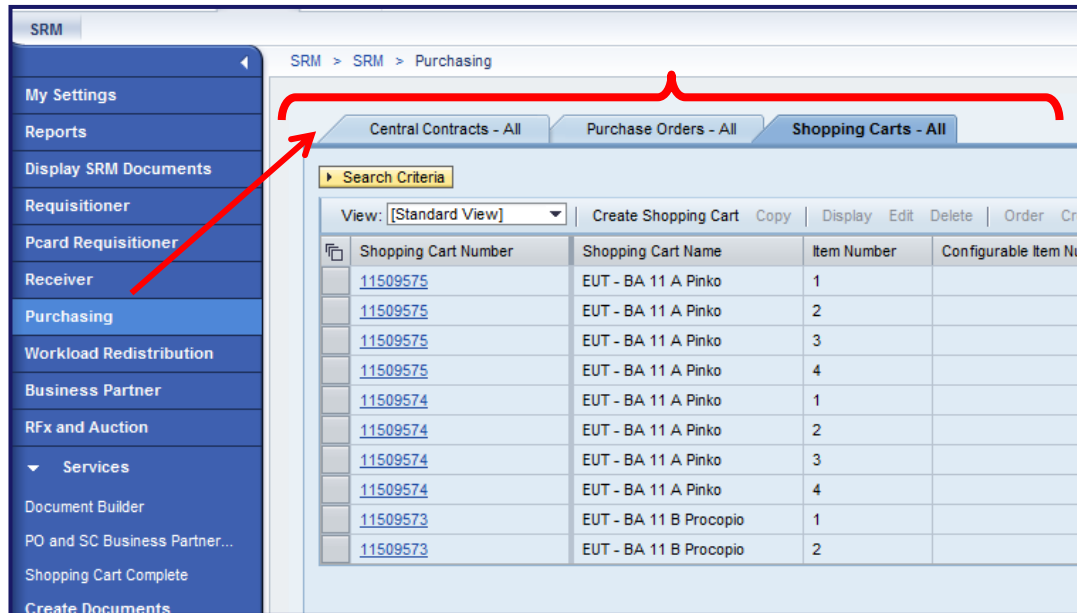
Shopping Cart Number	Shopping Cart Name	Item Number	Configurable Item Number	Item Name	Status	Created On	Quantity	Unit	Net Value	Currency	Total Net Value	Currency	Item Status
11509575	EUT - BA 11 A Pinko	1		EMT ALS Medical Cases	Approved	09/03/2013 13:37:16	10.000	EA	3,600.00	USD	10,525.00	USD	In Purchaser's Worklist
11509575	EUT - BA 11 A Pinko	2		Rescue Blankets	Approved	09/03/2013 13:37:16	75.000	EA	1,125.00	USD	10,525.00	USD	In Purchaser's Worklist
11509575	EUT - BA 11 A Pinko	3		Emergency Stretcher	Approved	09/03/2013 13:37:16	10.000	EA	800.00	USD	10,525.00	USD	In Purchaser's Worklist
11509575	EUT - BA 11 A Pinko	4		Emergency Hospital Services	Approved	09/03/2013 13:37:16	50.000	H	5,000.00	USD	10,525.00	USD	In Purchaser's Worklist
11509574	EUT - BA 11 A Pinko	1		EMT ALS Medical Cases	Approved	09/03/2013 13:37:10	10.000	EA	3,600.00	USD	10,525.00	USD	In Purchaser's Worklist
11509574	EUT - BA 11 A Pinko	2		Rescue Blankets	Approved	09/03/2013 13:37:10	75.000	EA	1,125.00	USD	10,525.00	USD	In Purchaser's Worklist
11509574	EUT - BA 11 A Pinko	3		Emergency Stretcher	Approved	09/03/2013 13:37:10	10.000	EA	800.00	USD	10,525.00	USD	In Purchaser's Worklist
11509574	EUT - BA 11 A Pinko	4		Emergency Hospital Services	Approved	09/03/2013 13:37:10	50.000	H	5,000.00	USD	10,525.00	USD	In Purchaser's Worklist
11509573	EUT - BA 11 B Procopio	1		EMT ALS Medical Cases	Approved	09/03/2013 13:37:08	10.000	EA	3,600.00	USD	10,525.00	USD	In Purchaser's Worklist
11509573	EUT - BA 11 B Procopio	2		Rescue Blankets	Approved	09/03/2013 13:37:08	75.000	EA	1,125.00	USD	10,525.00	USD	In Purchaser's Worklist

Last Refresh 09/03/2013 13:37:17 EST [Refresh](#)

- The POWL is located in the content area of the portal desktop

Overview of SRM 7.0

Personal Object Worklist (POWL)

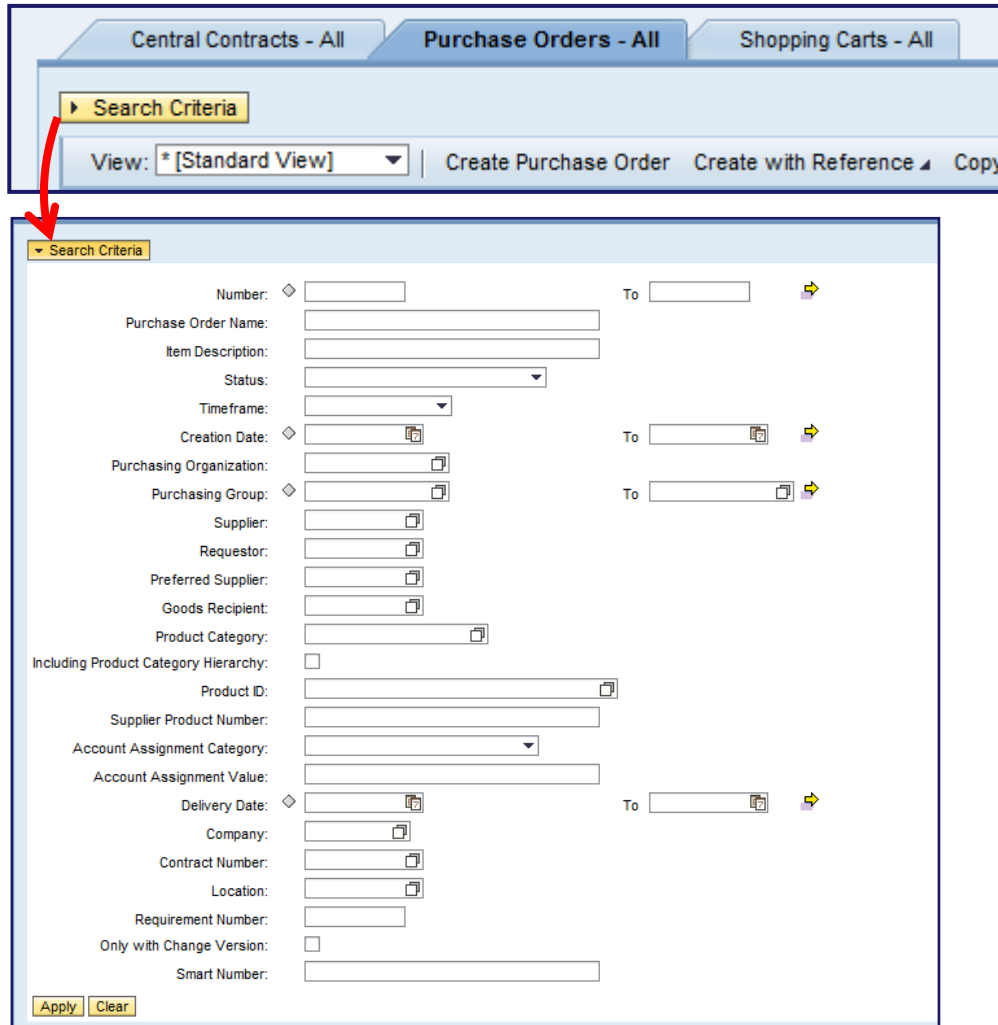


Shopping Cart Number	Shopping Cart Name	Item Number	Configurable Item Nu
11509575	EUT - BA 11 A Pinko	1	
11509575	EUT - BA 11 A Pinko	2	
11509575	EUT - BA 11 A Pinko	3	
11509575	EUT - BA 11 A Pinko	4	
11509574	EUT - BA 11 A Pinko	1	
11509574	EUT - BA 11 A Pinko	2	
11509574	EUT - BA 11 A Pinko	3	
11509574	EUT - BA 11 A Pinko	4	
11509573	EUT - BA 11 B Procopio	1	
11509573	EUT - BA 11 B Procopio	2	

- 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)



Central Contracts - All | Purchase Orders - All | Shopping Carts - All

Search Criteria

View: * [Standard View] | Create Purchase Order | Create with Reference | Copy

Search Criteria

Number: To

Purchase Order Name:

Item Description:

Status:

Timeframe:

Creation Date: To

Purchasing Organization:

Purchasing Group: To

Supplier:

Requestor:

Preferred Supplier:

Goods Recipient:

Product Category:

Including Product Category Hierarchy:

Product ID:

Supplier Product Number:

Account Assignment Category:

Account Assignment Value:

Delivery Date: To

Company:

Contract Number:

Location:

Requirement Number:

Only with Change Version:

Smart Number:

Apply Clear

- Display query fields by selecting the SEARCH CRITERIA button

Overview of SRM 7.0

Personal Object Worklist (POWL)

Central Contracts - All Purchase Orders - All Shopping Carts - All

Search Criteria

View: * [Standard View] Create Purchase Order Create with Reference Copy Display Edit Delete Purchase Order Response Notify Recipient Print Preview Refresh Export

Purchase Order Number	Purchase Order Name	Item Number	Item Name	Status	Supplier Name	Total Value	Currency
4300003624	FT CRP Testing for SP 10/21/2010 11:55	1	Testing CRP and FT for Support Packs	Ordered	ABC CONSTRUCTION	100,000.00	USD
4300003624	FT CRP Testing for SP 10/21/2010 11:55	2	Another line for more testing	Ordered	ABC CONSTRUCTION	100,000.00	USD
4300003592	RM Snapshot Test workfl 09/28/2010 08:34	1	original line item	Ordered	CAROLE GRASS	100,000.00	USD
4300002227	Test for Bob 12/03/2008 10:02	1	Testing for Bob	Ordered	SECCO	100,000.00	USD
4300001740	P00514646 02/11/2008 16:53	1	Tina Testing ZPOC transaction type	Ordered	BILLS TRACTORS	100,000.00	USD
4300001570	P00089160 01/03/2008 07:52	1	test	Awaiting Approval	ASAP SOFTWARE EXPRESS	100,000.00	USD
4300000944	test portal supplier	1	test portal supplier	Awaiting Approval	INTERNATIONAL PAPER CO	100,000.00	USD
4300000169	P00089160 04/03/2007 18:05	1	driver	Saved	CAROLE GRASS	100,000.00	USD
4300000167	P00097952 04/03/2007 15:50	1	Tables	Saved	ASAP SOFTWARE EXPRESS	100,000.00	USD
4100001081	Document Builder Test	1	Test for Sharon	Saved	CAROLE GRASS	100,000.00	USD

Last Refresh 07/15/2013 11:14:07 EST [Refresh](#)

- 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

Overview of SRM 7.0

Sample Document Landscape (PO)

Create Purchase Order

Order Save Print Preview Check Close Related Links

Enter at least one item or one line

Purchase Order Number: 4300004108 Purchase Order Type: Standard PO Status: In Process Document Date: 05/28/2013 Total Value (Gross): 0.00 USD Smart Number

Overview Header Items Notes and Attachments Approval Tracking

General Header Data

Smart Number:
 Smart Number is External

Purchase Order Number: 4300004108
 PO Name: 5610 Seating

Supplier: 552 PENNSYLVANIA INDUSTRIES FOR THE
 Requester: 317923 Cynthia Anderson
 Recipient: 317923
 Location: 300022
 Ship-To Address: 354836

Note to Supplier:
 Internal Note:

Purchasing Organization: COPA Purchasing Organization
 Purchasing Group: DGS Central Purchasing Group Show Members

Total Value (Net): 0.00 USD

Item Overview

Details Add Item Copy Paste Duplicate Delete Undelete Propose Sources of Supply Add Condition Remove Condition Exercise Option Process All Items Filter Settings

Line Number	Deleted	Item Type	Item Number	Product ID	Description	Product Category	Quantity	Unit	Gross Price	Currency	Per	Net Price	Option Type	Order Type	Condition	Option Status	Delivery Date	Account Assignment Type	Account Assignment Number	
*		Material	0		managerial seating	56101500	1.000	EA	467.95	USD	1	0.00								
*		Material	0				0.000		0.00	USD	0	0.00								
*		Material	0				0.000		0.00	USD	0	0.00								
*		Material	0				0.000		0.00	USD	0	0.00								
*		Material	0				0.000		0.00	USD	0	0.00								
*		Material	0				0.000		0.00	USD	0	0.00								
*		Material	0				0.000		0.00	USD	0	0.00								
*		Material	0				0.000		0.00	USD	0	0.00								
*		Material	0				0.000		0.00	USD	0	0.00								
																		Total Value (Net)	0.00	USD
																		Total Tax	0.00	USD
																		Total Value (Gross)	0.00	USD

This is an example of a document landscape. Displayed is the initial tab (Overview) upon creation or entry of a PO.

Overview of SRM 7.0

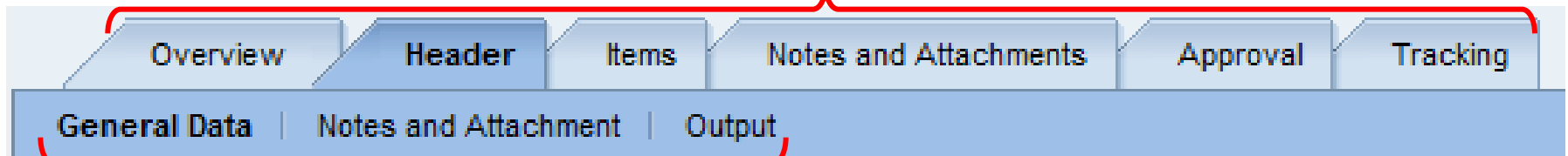
Sample Document Landscape (PO)

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.

Overview of SRM 7.0

Sample Document Landscape (PO)

Create Purchase Order

Order Save Print Preview Check Close Related Links

Enter at least one item or one line

Purchase Order Number: 4300004108 Purchase Order Type: Standard PO Status: In Process Document Date: 05/26/2013 Total Value (Gross): 0.00 USD Smart Number

Overview Header Items Notes and Attachments Approval Tracking

General Header Data

Smart Number:

Smart Number is External

Purchase Order Number: 4300004108

PO Name: 5810 Seating

Supplier: * 152 PENNSYLVANIA INDUSTRIES FOR THE

Requester: * 317923 Cynthia Anderson

Recipient: 317923

Location: 300022

Ship-To Address: 354836

Purchasing Organization: * COPA Purchasing Organization

Purchasing Group: * DGS Central Purchasing Group Show Members

Total Value (Net): 0.00 USD

Note to Supplier:

Internal Note:

Item Overview

Details Add Item Copy Paste Duplicate Delete Undelete Propose Sources of Supply Add Condition Remove Condition Exercise Option Filter Settings

Line Number	Deleted	Item Type	Item Number	Product ID	Description	Product Category	Quantity	Unit	Gross Price	Currency	Per	Net Price	Option Type	Order Type	Condition	Option Status	Delivery Date	Account Assignment Type	Account Assignment Number	
*		Material	0		managerial seating	58101500	1.000	EA	487.95	USD	1	0.00								
*		Material	0				0.000		0.00	USD	0	0.00								
*		Material	0				0.000		0.00	USD	0	0.00								
*		Material	0				0.000		0.00	USD	0	0.00								
*		Material	0				0.000		0.00	USD	0	0.00								
*		Material	0				0.000		0.00	USD	0	0.00								
*		Material	0				0.000		0.00	USD	0	0.00								
*		Material	0				0.000		0.00	USD	0	0.00								
*		Material	0				0.000		0.00	USD	0	0.00								
*		Material	0				0.000		0.00	USD	0	0.00								
																		Total Value (Net)	0.00	USD
																		Total Tax	0.00	USD
																		Total Value (Gross)	0.00	USD

The area where data is entered is known as the Application Area.

Application Area

Overview of SRM 7.0

Search Feature

▼ Partner

Details Add Send E-Mail Call Clear

Function	Number	N
▪ Requester		
▼ Vendor	161302	
▪ Service Agent		
▪ Goods Recipient	703389	
▪ Ship-To Address	1	
▪ Location	301375	

Search: Requester

Search Criteria Hide Search Criteria

Business Partner	is		+ -
Name 1/last name	is	ANDERSON	+ -
Name 2/First name	is	CYNTHIA	+ -
Search term 1	is		+ -

Maximum Number of Results:

Search Clear Entries Reset to Default


Results List: 1 results found for Requester

Last name	First name	Org. Unit Name	BusinessPartner
Anderson	Cynthia	GSPR7140	703389

- Select the match code icon to open a dialog box to input the search criteria
- Use the dropdowns in the search criteria to filter by applicable criteria
- Select the SEARCH button to display results

Overview of SRM 7.0

Search Feature

▼ Partner		
Details Add ▲ Send E-Mail Call Clear		
Function	Number	Na
▪ Requester	703389	
▼ Vendor	161302	GO
▪ Service Agent		
▪ Goods Recipient	703389	
▪ Ship-To Address	1	EX
▪ Location	301375	DG

- The chosen value is transferred into the applicable field

Overview of SRM 7.0

Create Purchase Order

Order Save Print Preview Check Close Related Links ?

! PO's without reference to a contract <=10K not allowed
! Line 1: No G/L account was entered; enter a G/L account
! Line 1: Error in account assignment for item 1
! Line 1: Enter a value in the mandatory field Cost Center in account assignment

Purchase Order Number 4300385744 Purchase Order Type DGS Created PO Status In Process Document Date 11/22/2013 Total Value (Gross) 822.76 USD Smart Number
Supplier [GOODYEAR TIRE & RUBBER COMPANY INC](#)

- Tips, Warnings, and Error messages are located at the top of the screen



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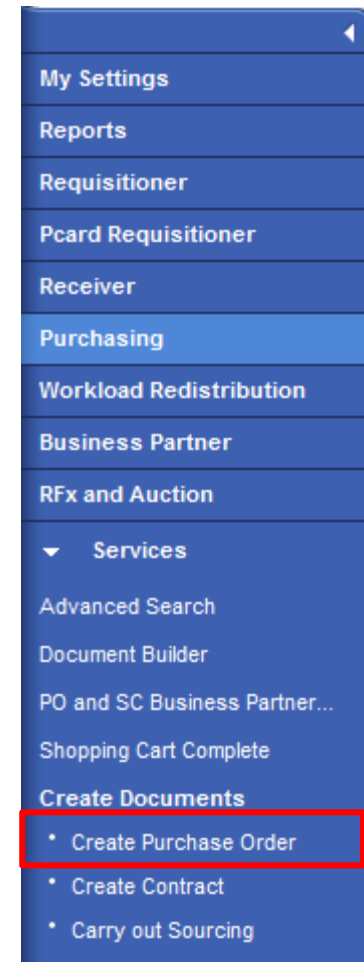
Stand-Alone Purchase Orders

Creating Purchase Orders

- Select **Purchasing**

Left navigation pane – Create Documents

- Select **Create Purchase Order**



Creating Purchase Orders

- Select the Purchase Order Type by selecting the *gray* block
- Select the CONTINUE button

Select Purchase Order Type

Select the type of purchase order that you want to create.

<input type="checkbox"/>	Purchase Order Type	Purchase Order Type Description
<input type="checkbox"/>	ZDGS	DGS Created PO
<input type="checkbox"/>	ZEP	Emergency PO
<input type="checkbox"/>	ZEPI	EmergencyPO Ind Agcy
<input type="checkbox"/>	ZEPO	Emergency PO OA OIT
<input type="checkbox"/>	ZNB	Standard PO
<input type="checkbox"/>	ZNBI	Std PO Ind Agency
<input type="checkbox"/>	ZSBI	SoleSrc Supply IndA
<input type="checkbox"/>	ZSDI	SoleSrc Serv IndAgcy
<input type="checkbox"/>	ZSRM	Local Purchase Order
<input type="checkbox"/>	ZSSB	Sole Source Supply
<input type="checkbox"/>	ZSSD	Sole Source Service

Creating Purchase Orders

Create Purchase Order will open in the Overview tab.

Create Purchase Order

Order Save Print Preview Check Close Related Links

Purchase Order Number: 4300384982 Purchase Order Type: Standard PO Status: In Process Document Date: 10/17/2013 Total Value (Gross): 20,869.00 USD Smart Number Supplier: GOODYEAR TIRE & RUBBER COMPANY INC

Overview Header Items Notes and Attachments Approval Tracking

General Header Data

Smart Number: P00446880 10/17/2013 09:23
 Smart Number is External

Purchase Order Number: 4300384982
 PO Name: 2517 Tires

Supplier: * 161302 [GOODYEAR TIRE & RUBBER COMPANY INC](#)

Requester: * 703389 [Cynthia Anderson](#)

Recipient: * 703389 [Cynthia Anderson](#)

Location: 301375 [DGS Bureau of Procurement](#)

Ship-To Address: 1 [EXEC BRANCH](#)

Purchasing Organization: * COPA Purchasing Organization

Purchasing Group: * DGS Central Purchase Purchasing Group [Show Members](#)

Total Value (Net): 20,869.00

Note to Supplier: [Text Area]

Internal Note: [Text Area]

Item Overview

Details Add Item Copy Paste Duplicate Delete Undelete Propose Sources of Supply Add Condition Remove Condition Process All Items Filter Set

Line Number	Deleted	Item Type	Item Number	Product ID	Description	Product Category	Quantity	Unit	Gross Price	Currency	Per	Net Price	Option Type	Order Type	Condition	Option Status	Delivery Date	Account Assignment Type	Account Assignment Number
* 1		Material	1		245/60R18 Radial Tires	25172504	100.000	EA	208.69	USD	1	208.69					10/29/2013	Cost Center	1577101000
*		Material	0				0.000		0.00	USD	0	0.00							
*		Material	0				0.000		0.00	USD	0	0.00							
*		Material	0				0.000		0.00	USD	0	0.00							
*		Material	0				0.000		0.00	USD	0	0.00							
*		Material	0				0.000		0.00	USD	0	0.00							
*		Material	0				0.000		0.00	USD	0	0.00							
*		Material	0				0.000		0.00	USD	0	0.00							
*		Material	0				0.000		0.00	USD	0	0.00							
*		Material	0				0.000		0.00	USD	0	0.00							
																		Total Value (Net)	20,869.00
																		Total Tax	0.00
																		Total Value (Gross)	20,869.00

Creating Purchase Orders

Overview tab

The screenshot shows the 'Overview' tab of a purchase order system. The 'General Header Data' section is highlighted with a red box. The fields and their values are as follows:

Field	Value
Smart Number	P00446880 10/17/2013 09:23
Smart Number is External	<input type="checkbox"/>
Purchase Order Number	4300384982
PO Name	2517 Tires
Supplier *	161302 GOODYEAR TIRE & RUBBER COMPANY INC
Requester *	703389 Cynthia Anderson
Recipient *	703389 Cynthia Anderson
Location	301375 DGS Bureau of Procurement
Ship-To Address	1 EXEC BRANCH
Purchasing Organization *	COPA Purchasing Organization
Purchasing Group *	DGS Central Purchase Purchasing Group Show Members
Total Value (Net)	20,869.00

Additional fields on the right side of the form include 'Note to Supplier' and 'Internal Note', both of which are empty text boxes.

- In the General Header data, select the PO Name field and name the PO
- Complete all required fields such as: Supplier, Requester, Recipient, Location, and Ship-To Address
- If the Supplier Number is not known, a search can be performed
 - Select the Supplier Name to view the details

Creating Purchase Orders

Naming Your Document

- There is a 40-character limit on the document's name
 - Characters include letters, punctuation, and spaces
- The name must include:
 - 4-digit UNSPSC code (ref: www.unspsc.org)
 - Space or Dash
 - Noun that describes the item or Contract Title (no abbreviations)
- Example:
 - 2517 Radial Tires

Creating Purchase Orders

Overview tab

Item Overview																				
Details		Add Item	Copy	Paste	Duplicate	Delete	Undelete	Propose Sources of Supply	Add Condition	Remove Condition	Process All Items	Filter Settings								
Item Number	Deleted	Item Type	Item Number	Product ID	Description	Product Category	Quantity	Unit	Gross Price	Currency	Per	Net Price	Option Type	Order Type	Condition	Option Status	Delivery Date	Account Assignment Type	Account Assignment Number	
1		Material	1		245/60R18 Radial Tires	25172504	100.000	EA	208.69	USD	1	208.69					10/29/2013	Cost Center	1577101000	
*		Material	0				0.000		0.00	USD	0	0.00								
*		Material	0				0.000		0.00	USD	0	0.00								
*		Material	0				0.000		0.00	USD	0	0.00								
*		Material	0				0.000		0.00	USD	0	0.00								
*		Material	0				0.000		0.00	USD	0	0.00								
*		Material	0				0.000		0.00	USD	0	0.00								
*		Material	0				0.000		0.00	USD	0	0.00								
*		Material	0				0.000		0.00	USD	0	0.00								
																		Total Value (Net)	20,869.00	USD
																		Total Tax	0.00	USD
																		Total Value (Gross)	20,869.00	USD

- In the Item Overview, continue data entry in the applicable fields
 - Enter as much of the information listed on the Item Overview as possible
- Access line item details by selecting the Item Number or the DETAILS button

Creating Purchase Orders

Items tab

General Data | Prices and Conditions | Account Assignment | Notes and Attachments | Approval Preview | Related Documents | Extended PO History | Payment

▼ Basic

Identification

Item Number: 1
 Item Type: Material
 Product ID:
 Description: 245/60R18 Radial Tires
 Product Category: 25172504 AUTOMOBILE/LIGHT TRU
 Catalog:
 Contract / Item: 0

Further Properties

Supplier Product Number:

Currency, Values and Pricing

Quantity / Unit: 100.000 EA (0 EA is equivalent to: 0)
 Gross Price / Per: 208.69 USD 1 EA
 Net Value: 20,869.00 USD
 Net Price: 208.69 USD
 Tax Code / Amount: 10:A/P Sales Tax, exempt 0.00 USD

Service and Delivery

Delivery Date: 10/29/2013
 Underdelivery/Overdelivery Tolerance: 0.00 % / 0.00 %
 Storage Location:

Status and Statistics

Item Deleted: No
 Closeout Status:
 Cancelled:

▼ Partner

Details Add Send E-Mail Call Clear

Function	Number	Name
Requester	703389	Cynthia Anderson
Goods Recipient	703389	Cynthia Anderson
Ship-To Address	1	EXEC BRANCH
Location	301375	DGS Bureau of Procurement

- In the General Data sub-tab, data should default from the Item Overview
- Verify the information and add any additional information that is applicable
- Verify the information defaulted in the Partner section is correct

Creating Purchase Orders

Items tab

Overview Header **Items** Notes and Attachments Approval Tracking

Details Add Item Copy Paste Duplicate Delete Undelete Propose Sources of Supply Add Condition Remove Condition Exercise Option Process All Items

Line Number	Deleted	Item Type	Item Number	Product ID	Description	Product Category	Quantity	Unit	Gross Price	Currency	Per	Net Price	Option Type	Order Type	Condition	Option Status	Delivery Date
1		Material	1		245/60R18 Radial Tires	25172504	100.000	EA	208.69	USD	1	208.69					10/29/2013
		Material	0				0.000		0.00	USD	0	0.00					
		Material	0				0.000		0.00	USD	0	0.00					
		Material	0				0.000		0.00	USD	0	0.00					
		Material	0				0.000		0.00	USD	0	0.00					
		Material	0				0.000		0.00	USD	0	0.00					
		Material	0				0.000		0.00	USD	0	0.00					
		Material	0				0.000		0.00	USD	0	0.00					
		Material	0				0.000		0.00	USD	0	0.00					
		Material	0				0.000		0.00	USD	0	0.00					

Details for Item 1 245/60R18 Radial Tires

General Data **Prices and Conditions** Account Assignment Notes and Attachments Approval Preview Related Documents Extended PO History Payment

Prices and Conditions

Add Condition Remove Condition Details Aggregated Release Value Filter Settings

Price / Condition	Amount	Amount Value	Per	Price Unit	Value	Document Currency	Contract	Aggregated Release Value
Price (Manual)	208.69	USD	1	EA	20,869.00	USD		
Gross	208.69	USD	1	EA	20,869.00	USD		
Discount Amount	0.00	USD	1	EA	0.00	USD		
Net	208.69	USD	1	EA	20,869.00	USD		

- In the Prices and Conditions sub-tab, data should default from the Item Overview

Creating Purchase Orders

Items tab

Details for Item 1 Dental Equipment

General Data | Prices and Conditions | Account Assignment | Notes and Attachments

▼ Basic

Cost Distribution

Number	A	Percentage	Account Assignment Category
0001		100.00	Cost Center

Percentage (dropdown menu):

- Percentage
- By Quantity
- By Value

Account Assignment Category (dropdown menu):

- Mixed Account - Single Line
- Asset
- Cost Center
- Mixed Account - Multi Line
- Order
- WBS element
- Grant Internal Order

Buttons: Details, Add Line, Copy, Paste, Duplicate, Delete, Split D

- The Account Assignment Category should default from the Item Overview
 - Cost Distribution can be by Percentage, Quantity, or Value
 - System allows for copying, pasting, and adding of additional line(s) of account assignments

Creating Purchase Orders

Items tab

Details for Item 0001 : Cost Center

Basic Data

* Percentage: 100.00

Account Assignment Category: Cost Center

* Cost Center: 1577140000 Strat Suprt & Aud Div

Fund Center: 1577140000 DGS Procurement

Functional Area: 1310 Facil, Prop & Comm Mgt

Controlling Area: COPA

General Ledger Account: 6362130 Medical Supplies

Business Area: 15

Fund: 1007400700 DGS Procurement

Budget Period: 2014

Commitment Item: 6362100 MedicalSupplies

Unfunded Accounting Line:

- Enter your Account Assignment
 - i.e. Cost Center, Fund, General Ledger, Budget Period
- All other fields will default based on the information entered

Creating Purchase Orders

Items tab

General Data | Prices and Conditions | Account Assignment | **Notes and Attachments** | Approval Preview | Related Documents | Extended PO History | Payment

▼ Notes Filter Settings

Clear

Category	Description
Item Text	Most commonly used tire sizes and types are net priced a...
Internal Note	-Empty-
Vendor Remark	-Empty-
Material PO Text	Raised White Letters
Shipping Instructions	Deliver Monday thru Friday, except State Holidays, betwe...

▼ Attachments Filter Settings

Add Attachment | Edit Description | Versioning ▾ | Delete

Category	Description	File Name	Version	Processor	Visible Internally only	Checked Out	Type	Size (KB)	Changed by	Changed on
Standard Attachment	Sales quote for Tire PO	Sales quote for Tire PO.docx	1		<input checked="" type="checkbox"/>	<input type="checkbox"/>	docx	33	P00446880	10/17/2013

- Select the Notes and Attachments sub-tab to enter text and attach documents

Creating Purchase Orders

Items tab

Details for Item 1 245/60R18 Radial Tires

General Data | Prices and Conditions | Account Assignment | Notes and Attachments | **Approval Preview** | Related Documents | Extended PO History | Payment

Current Status:
 Current Process Step:
 Currently Processed By:
 Approval Process Data: [Download as XML](#)

Item

Approval Status Details for Selected Item

Sequence	Process Step	Level Status	Status	Processor	Received On	Processed On	Forwarded By	Agent Determination	Settings
001	SRM Purchase Order Approval	Valid (Can be Started)	Open (No Decision Made)	Corey Mccue, Debra Chernicoff, Joseph Mavanja, Walter Neugebauer, Rita Shaffer, Debra				Agents for PO approval step	

- Select the Approval Preview sub-tab to review the release strategy

Creating Purchase Orders

Items tab – Related Documents

Details for Item 1 245/60R18 Radial Tires

General Data | Prices and Conditions | Account Assignment | Notes and Attachments | Approval Preview | **Related Documents** | Extended PO History | Payment

▼ Document Control

Purchase Order Response Invoice Expected
 Shipping Notification Confirmation-Based Invoice Verification
 Goods Receipt / Confirmation of Performance of Service Evaluated Receipt Settlement

▼ Statistics

Goods Receipt / Confirmation of Performance of Service **Invoice**
 Confirmed Quantity: EA Invoiced Quantity: EA
 Confirmed Value: USD Invoiced Value: USD

No Further Confirmation Yes No
 No Further Invoice Yes No

▼ History

View: Filter Settings

Document	Name	Document Number	Back-End Document Number	Status	Date	Quantity	Unit	Value	Currency
Purchase Order	245/60R18 Radial Tires	4300384982/1		In Process	10/17/2013	100.000	EA	20,869.00	USD
	Total					100.000	EA	20,869.00	USD

- The Related Documents sub-tab houses the statistical information used when liquidating commitments
 - i.e.: No further confirmations; No further invoices

Creating Purchase Orders

Items tab

Details for Item 1 245/60R18 Radial Tires

General Data | Prices and Conditions | Account Assignment | Notes and Attachments | Approval Preview | Related Documents | **Extended PO History** | Payment

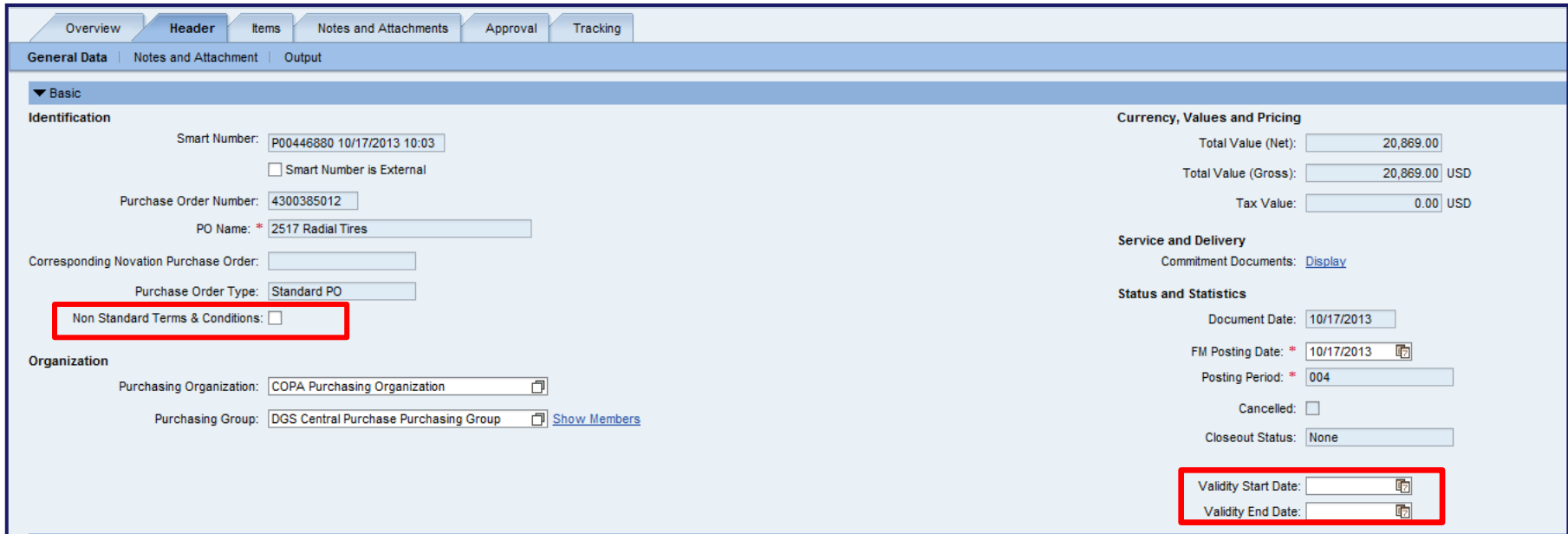
Send To Records Management Expand All Close All

Item/Header > Description	ObjectID in Back-End	Document Date	Quantity	Base Unit	Value in FM area	Currency in FM area	Value	Currency	Accounting Document	Clearing Document	Invoice Reference	Partial/Residual	Complete
▼ Item 1 / 245/60R18 Radial Tires													<input type="checkbox"/>
▼ Total Value in Purchase Order			100.000	EA			20869.00	USD					<input type="checkbox"/>
▪ Value in Purchase Order	4300384982 / 0000000		100.000	EA			20869.00	USD					<input type="checkbox"/>

- Select the Extended PO History sub-tab to view the Goods Receipt and Invoice information for the PO

Creating Purchase Orders

Header tab – General Data sub-tab



Overview | **Header** | Items | Notes and Attachments | Approval | Tracking

General Data | Notes and Attachment | Output

▼ Basic

Identification

Smart Number: P00446880 10/17/2013 10:03
 Smart Number is External

Purchase Order Number: 4300385012
 PO Name: * 2517 Radial Tires

Corresponding Novation Purchase Order:

Purchase Order Type: Standard PO

Non Standard Terms & Conditions:

Organization

Purchasing Organization: COPA Purchasing Organization

Purchasing Group: DGS Central Purchase Purchasing Group [Show Members](#)

Currency, Values and Pricing

Total Value (Net): 20,869.00
 Total Value (Gross): 20,869.00 USD
 Tax Value: 0.00 USD

Service and Delivery

Commitment Documents: [Display](#)

Status and Statistics

Document Date: 10/17/2013
 FM Posting Date: * 10/17/2013

Posting Period: * 004

Cancelled:

Closeout Status: None

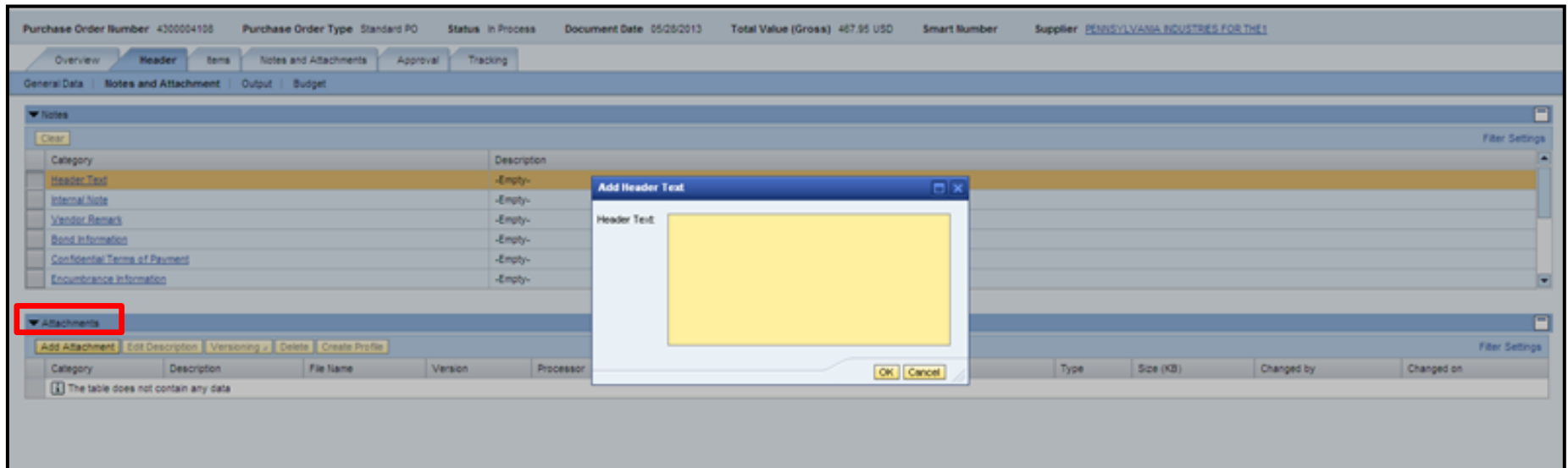
Validity Start Date:

Validity End Date:

- Complete any applicable fields
- Note: Check the “Non Standard Terms & Conditions” checkbox when non-standard terms & conditions are used
- Validity Start – Validity End Dates are now available

Creating Purchase Orders

Header tab – Notes and Attachment sub-tab



Purchase Order Number: 430004108 Purchase Order Type: Standard PO Status: In Process Document Date: 05/29/2013 Total Value (Gross): 467.95 USD Smart Number: Supplier: PENNSYLVANIA INDUSTRIES FOR THE

Overview Header Items Notes and Attachments Approval Tracking

General Data Notes and Attachment Output Budget

Notes

Clear Filter Settings

Category	Description
Header Text	-Empty-
Internal Note	-Empty-
Vendor Remark	-Empty-
Bond Information	-Empty-
Confidential Terms of Payment	-Empty-
Encumbrance Information	-Empty-

Attachments

Add Attachment Edit Description Versioning Delete Create Profile Filter Settings

Category	Description	File Name	Version	Processor	Type	Size (KB)	Changed by	Changed on
The table does not contain any data								

Add Header Text

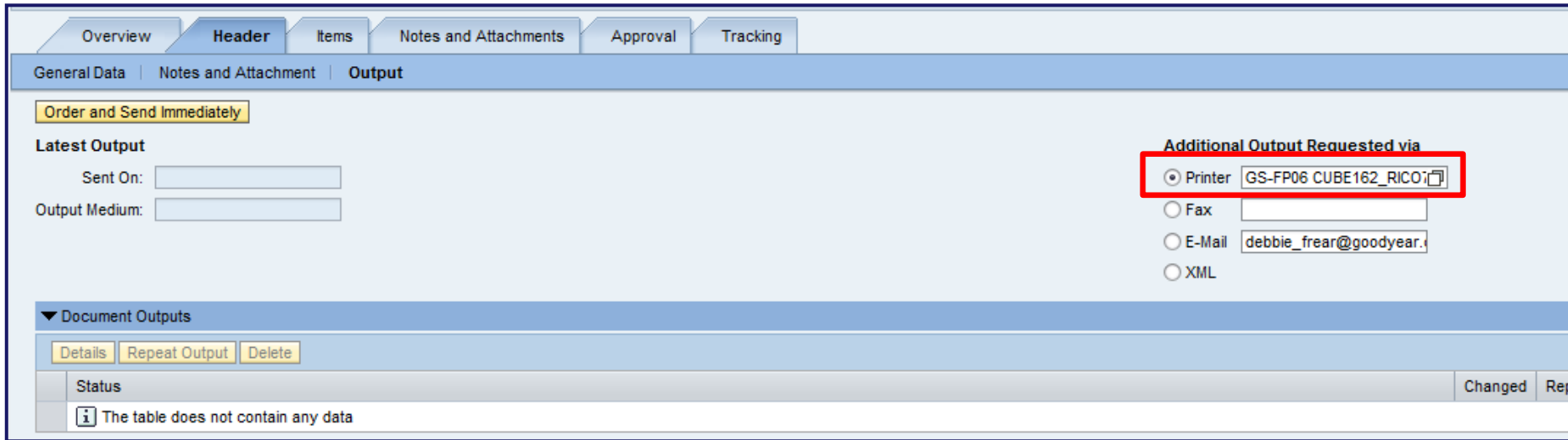
Header Text

OK Cancel

- Enter applicable text in the fields by selecting the appropriate text field link
- Add attachments by selecting the ADD ATTACHMENT button in the Attachments section

Creating Purchase Orders

Header tab – Output sub-tab



Overview | **Header** | Items | Notes and Attachments | Approval | Tracking

General Data | Notes and Attachment | **Output**

Order and Send Immediately

Latest Output

Sent On:

Output Medium:

Additional Output Requested via

Printer

Fax

E-Mail

XML

▼ Document Outputs

Details | Repeat Output | Delete


Status	Changed	Rep
The table does not contain any data		

- Only XML and Auto-POs are output automatically
- Purchasers must manually trigger the output of all other PO documents

Creating Purchase Orders

Header tab – Output sub-tab

Additional Output Requested via

- Printer 
- Fax
- E-Mail
- XML

- Use the Header tab – Output sub-tab to print
- Select the match code icon to search for the printer

Creating Purchase Orders

Search: Spool: Output device

Search Criteria Personal Value List Hide Search Criteria ?

Output Device is GS*

Short name is

Location is

Device type is

Search Clear Entries Reset to Default

Results List: 62 results found for Spool: Output device

Output Device	Short name	Location/status
GS-1650PRINTSHOP_RIC2550	GS64	1650 Bobali Drive
GS-17TH GS_HPLJ2300PPS	GS01	Harrisburg, 110 S. 17th St.
GS-17TH PRINTSHOP_IMG5520	GS44	Harrisburg, 110 S. 17th St., PrintShop
GS-22ND RMG-5_RICOHAMP6001	GS59	"Harrisburg, 22nd & Forster Sts., Room G-5"
GS-22ND RMG1_HPLJ5SI	GS06	Harrisburg, 22nd & Forster Sts., Room G1
GS-22ND RMG10_HPLJ4050	GS03	Harrisburg, 22nd & Forster Sts., Room G10
GS-22ND RMG36_HPLJ8150_CHECK	GSQ1	Harrisburg, 22nd & Forster Sts., Room G36
GS-22ND RMG45_HPLJ5N	GS08	Harrisburg, 22nd & Forster Sts., Room G45
GS-22ND RMG48_HPLJ5N	GS40	Harrisburg, 22nd & Forster Sts., Room G48

- Enter the two-digit agency identifier followed by an asterisk (*)
- Select the SEARCH button
- Once the printer is located, select on the printer name to transfer the information back to the Output tab

Creating Purchase Orders

Header tab – Output sub-tab

Overview | Header | Items | Notes and Attachments | Approval | Tracking

General Data | Notes and Attachment | Output

Order and Send Immediately

Latest Output

Sent On:

Output Medium:

Additional Output Requested via

Printer

Fax

E-Mail

XML

▼ Document Outputs

Details | Repeat Output | Delete

Status	Changed	Rep
i The table does not contain any data		

- If approvals are needed, the document cannot be output until all approvals are completed

Creating Purchase Orders

Notes and Attachments tab

Overview Header Items **Notes and Attachments** Approval Tracking

▼ Notes Filter Settings

[Add](#) [Clear](#)

Assigned To	Category	Text Preview
Item01*245/60R18"	Item Text	Most commonly used tire sizes and types are net priced a...
Item01*245/60R18"	Material PO Text	Raised White Letters
Item01*245/60R18"	Shipping Instructions	Deliver Monday thru Friday, except State Holidays, betwe...

▼ Attachments Filter Settings

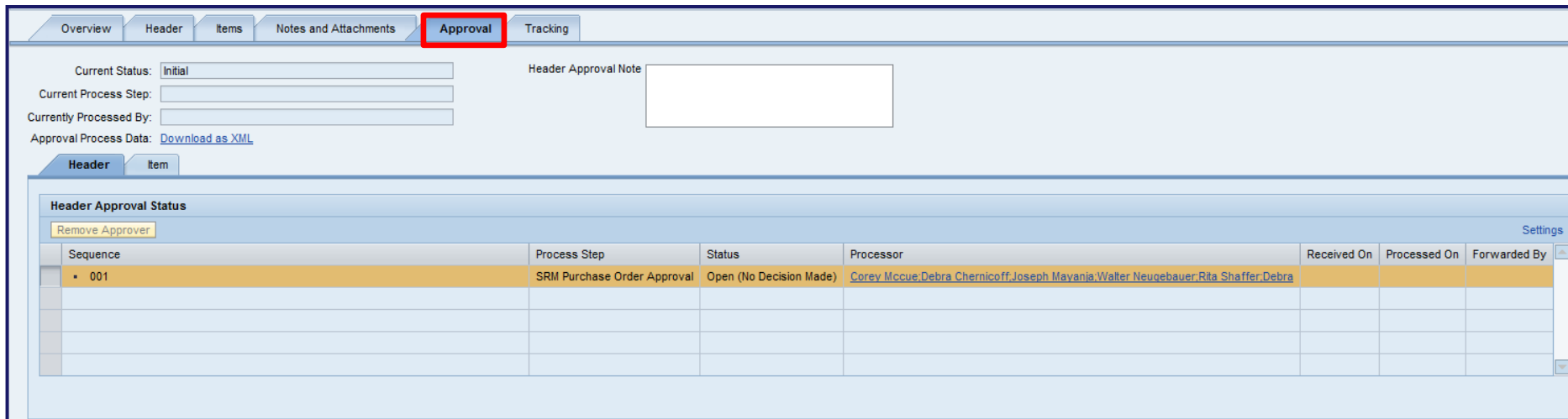
[Add Attachment](#) [Edit Description](#) [Versioning](#) [Delete](#) [Create Qualification Profile](#)

Assigned To	Category	Description	File Name	Version	Processor	Visible Internally only	Checked Out	Type	Size (KB)	Changed by	Changed on
Item01*245/60R18"	Standard Attachment	Sales quote for Tire PO	Sales quote for Tire PO.docx	1		<input checked="" type="checkbox"/>	<input type="checkbox"/>	docx	33	P00446880	10/17/2013

- Edit text fields or add additional attachments

Creating Purchase Orders

Approval tab



Overview Header Items Notes and Attachments **Approval** Tracking

Current Status: Header Approval Note:

Current Process Step:

Currently Processed By:

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

Header Approval Status

[Remove Approver](#) Settings

Sequence	Process Step	Status	Processor	Received On	Processed On	Forwarded By
001	SRM Purchase Order Approval	Open (No Decision Made)	Corey Mccue ; Debra Chernicoff ; Joseph Mayanja ; Walter Neugebauer ; Rita Shaffer ; Debra			

- The Approval tab is functional in SRM 7.0
- Approvers will add comments in the Header Approval Note if a document is rejected
- Select the hyperlink names in the Processor column to see a list of the approvers for each level

Creating Purchase Orders

Tracking tab

Overview Header Items Notes and Attachments Approval **Tracking**

▼ History Filter Settings

View: United States Dollar

Document	Name	Document Number	Back-End Document Number	Status	Date	Value	Currency
Shopping Cart	EUT - BA 15 C Anderson	11508186		Approved	08/29/2013	10,525.00	USD
Purchase Order	4217 Medical Supplies	4300383507	4300383507	Ordered	09/23/2013	5,950.00	USD
Confirmation			2013/5004553182		09/23/2013	10,150.00	USD
Cancellation			2013/5004553253		09/30/2013	5,800.00	USD

▼ Status

System Status
Created > Complete > Document Completed > Ordered

▼ Version Overview Filter Settings

[Detail](#) [Compare](#)

Version	Document/Version Type	Created On	Changed On	Document Name
4	Active Document	09/23/2013 13:42:10	09/30/2013 15:50:17	4217 Medical Supplies
2	Historical Document	09/23/2013 14:50:43	09/23/2013 14:50:42	4217 Medical Supplies
1	Historical Document	09/23/2013 14:39:17	09/23/2013 14:39:17	4217 Medical Supplies

▼ Change Documents Filter Settings

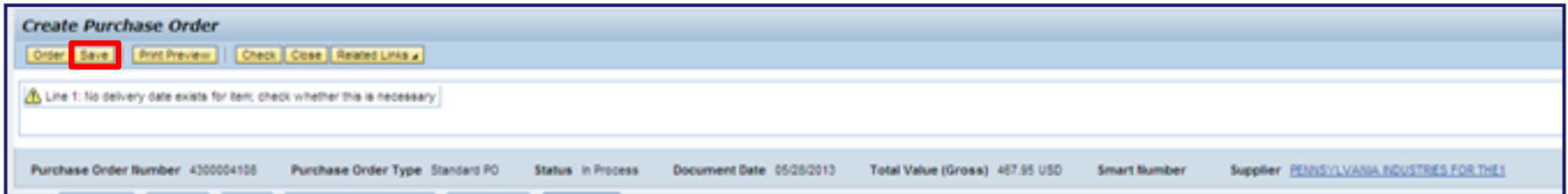
Changed Since
 Changed From/To [Search](#)

[Expand All](#) [Collapse All](#) [Hide Query](#) [Filter](#) [Settings](#)

Header/Item Attribute	Old Value	New Value	Changed By	Changed On	Changed At	Version
▶ Header						
▶ Item Number 1 - EMT ALS Medical Cases						
▶ Item Number 2 - Rescue Blankets						
▶ Item Number 3 - Emergency Stretcher						
▶ Item Number 4 - Emergency Hospital Services						

- Contains version information, history (follow-on documents), change documents, and status information

Creating Purchase Orders



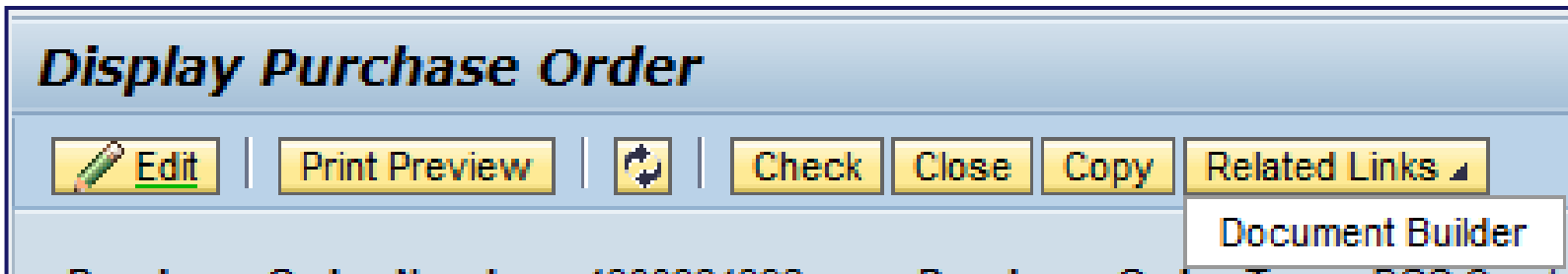
Create Purchase Order

Order Save Print Preview Check Close Related Links ▾

⚠ Line 1: No delivery date exists for item, check whether this is necessary

Purchase Order Number: 4300004100 Purchase Order Type: Standard PO Status: In Process Document Date: 05/09/2013 Total Value (Gross): 487.95 USD Smart Number Supplier: PENNSYLVANIA INDUSTRIES FOR THE...

- Select the SAVE button to put the Purchase Order into a Saved status



Display Purchase Order

Edit | Print Preview | Refresh | Check Close Copy Related Links ▾

Document Builder

- Select the RELATED LINKS button
 - Select the Document Builder link from the dropdown menu

Creating Purchase Orders

When would I use Document Builder (DB) for POs?

- For Stand-Alone PO's that do not reference an RFx or Contract
 - Those POs that reference an RFx or Contract will already have Terms & Conditions (T&Cs) created via DB, therefore, no need to use DB again
 - Example of orders that would not use an RFx or Contract would be items that are exempt from the bidding process such as: periodicals, maps, etc.
(Procurement Handbook - Part 1, Chapter 1, Section C, Not Applicable)
- By using DB agencies will reduce the approval processing time since documents prepared in DB are pre-approved
 - The forms and clauses for preparing Contracts and POs listed on the DGS website are not pre-approved forms and their use will require an agency to obtain review and approval for form and legality by the Office of General Counsel (OGC), as applicable, and the Office of Attorney General (AG)

Creating Purchase Orders

What is Document Builder (DB)?

- DB is a software product that interfaces with SRM to create legal documents from Solicitations, PO, and Contracts
- DB is used with paper or electronically submitted responses for the creation of Commonwealth procurement documents
- The created SRM document is pulled into DB and, based on the document type and other inputs, the user answers a series of questions that builds a legal document
- DB automatically creates the type of legal document from which DB was launched: RFP, PO, etc.

Creating Purchase Orders

Creating a Legal Document

- The questions that are answered in DB serve to build the legal document with T&Cs
- Certain terms and conditions can be edited or removed; this is done under special circumstances and will be reviewed
- A user can add terms and conditions as necessary for special terms
 - Text may be cut and pasted into DB, but it must be in HTML format
- SRM automatically routes documents with non-standard T&Cs to identified approvers
 - The Purchaser must check the Non-Standard T&Cs checkbox in order to have the document workflow to the proper approvers

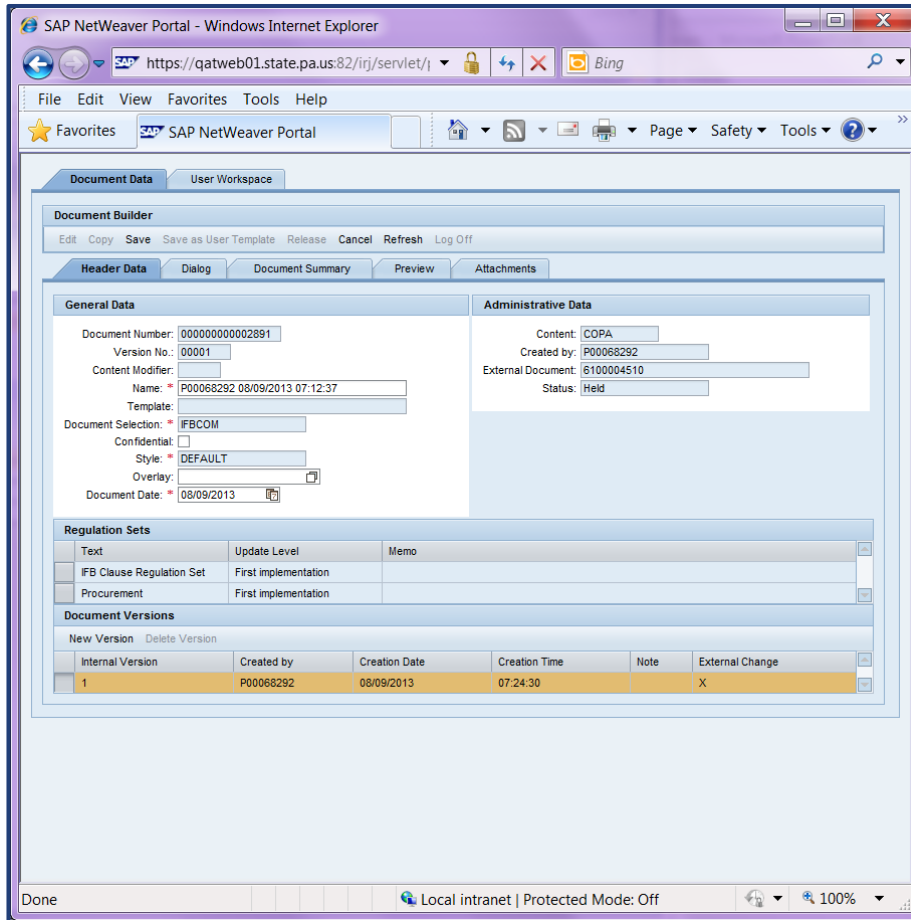
Creating Purchase Orders

Document Builder (DB)

- It is a single “click” process to open DB from the solicitation
- Every question must be answered in DB
 - Do not select “Finish by Default”

Creating Purchase Orders

Document Builder (DB)



The screenshot shows the SAP NetWeaver Portal Document Builder interface. The browser address bar indicates the URL: https://qatweb01.state.pa.us:82/irj/servlet/. The interface includes a menu bar (File, Edit, View, Favorites, Tools, Help) and a toolbar with various icons. The main content area is divided into several sections:

- Document Builder**: Contains menu options like Edit, Copy, Save, Save as User Template, Release, Cancel, Refresh, and Log Off.
- Header Data**: The active tab, containing:
 - General Data**: Document Number (00000000002891), Version No. (00001), Content Modifier, Name (P00068292 08/09/2013 07:12:37), Template, Document Selection (IFBCOM), Confidential, Style (DEFAULT), Overlay, and Document Date (08/09/2013).
 - Administrative Data**: Content (COPA), Created by (P00068292), External Document (B100004510), and Status (Held).
- Regulation Sets**: A table with columns for Text, Update Level, and Memo.

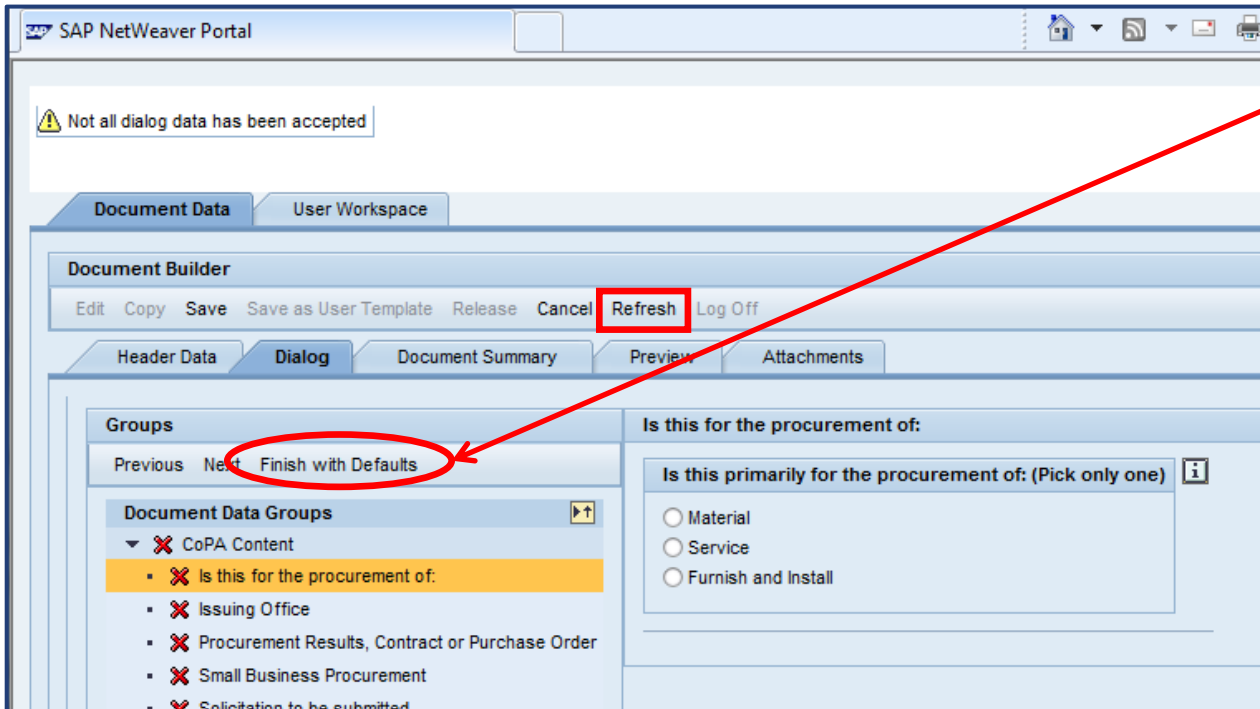
Text	Update Level	Memo
IFB Clause Regulation Set	First implementation	
Procurement	First implementation	
- Document Versions**: A table with columns for Internal Version, Created by, Creation Date, Creation Time, Note, and External Change.

Internal Version	Created by	Creation Date	Creation Time	Note	External Change
1	P00068292	08/09/2013	07:24:30		X

- DB opens in a new window, on the Header Data tab
 - Verify the information defaulted from SRM
 - Make any necessary additions or edits to required fields

Creating Purchase Orders

Document Builder

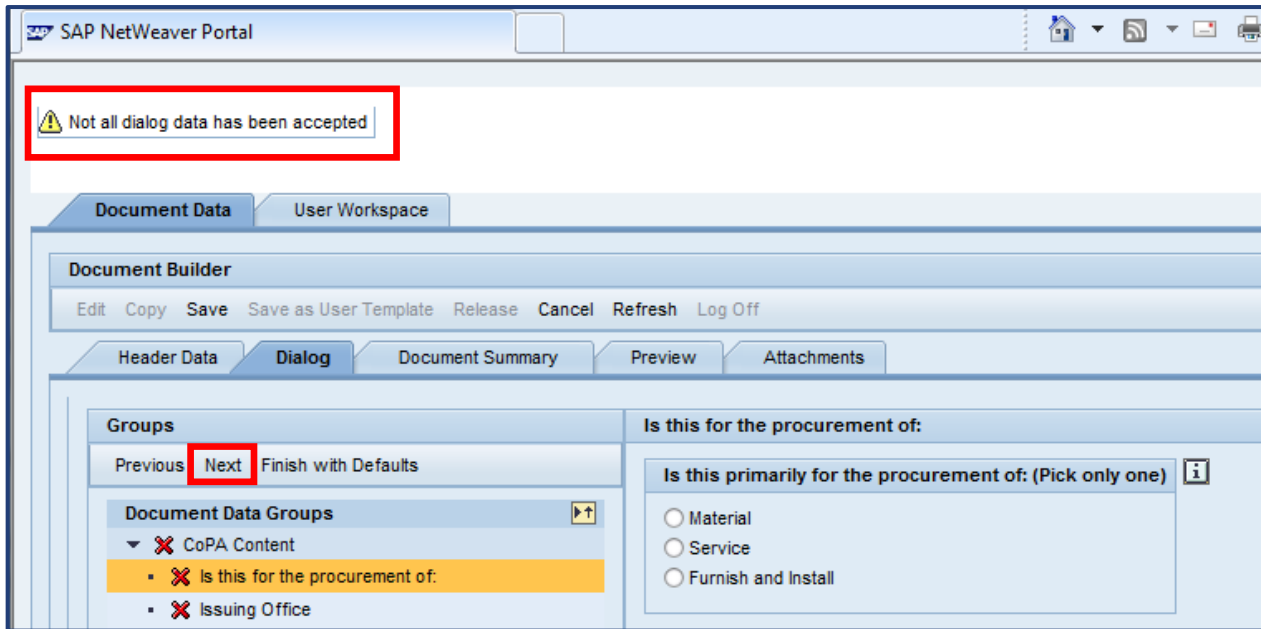


Caution: Never use FINISH WITH DEFAULTS; each question should always be responded to individually.

- On the Dialog tab, view each question and, when applicable, respond with an answer
 - Select the REFRESH button after reviewing and/or responding to the question

Creating Purchase Orders

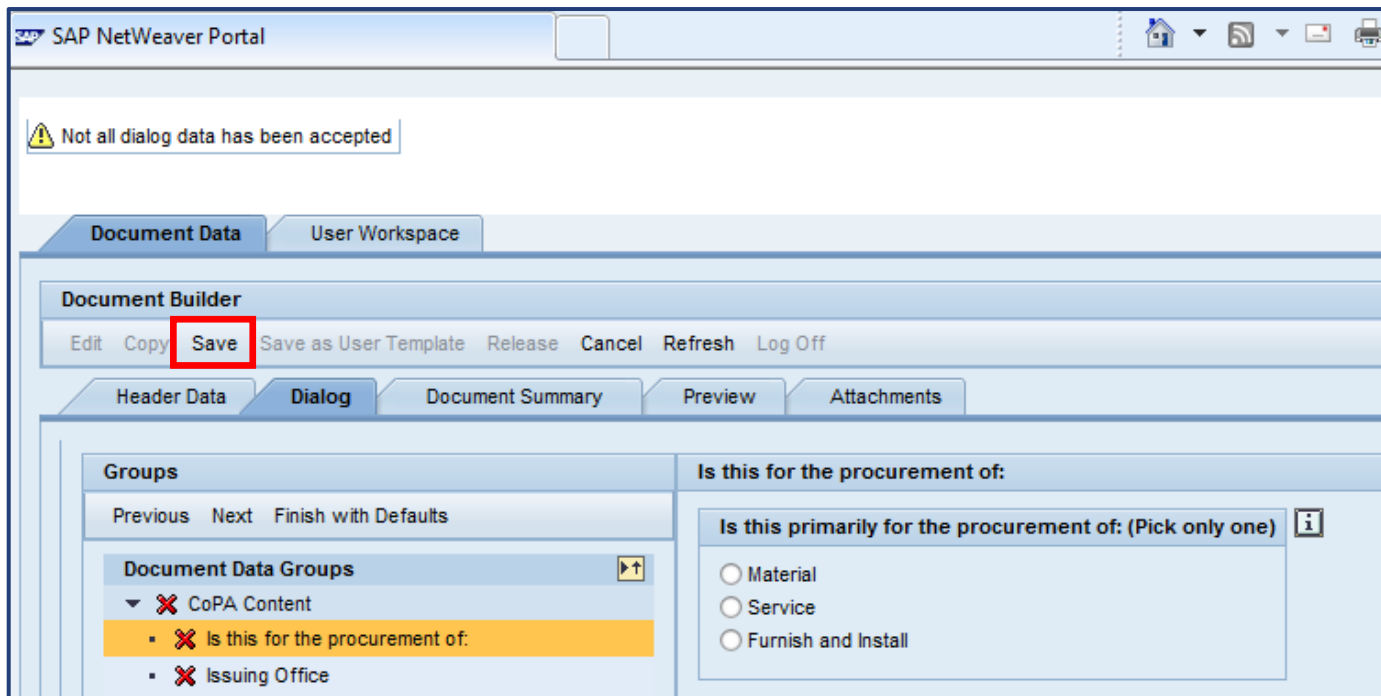
Document Builder



- The default warning message “*Not all dialog data has been accepted*” displays in the upper left corner until all questions have been viewed
- Select the NEXT button to proceed to the next question

Creating Purchase Orders

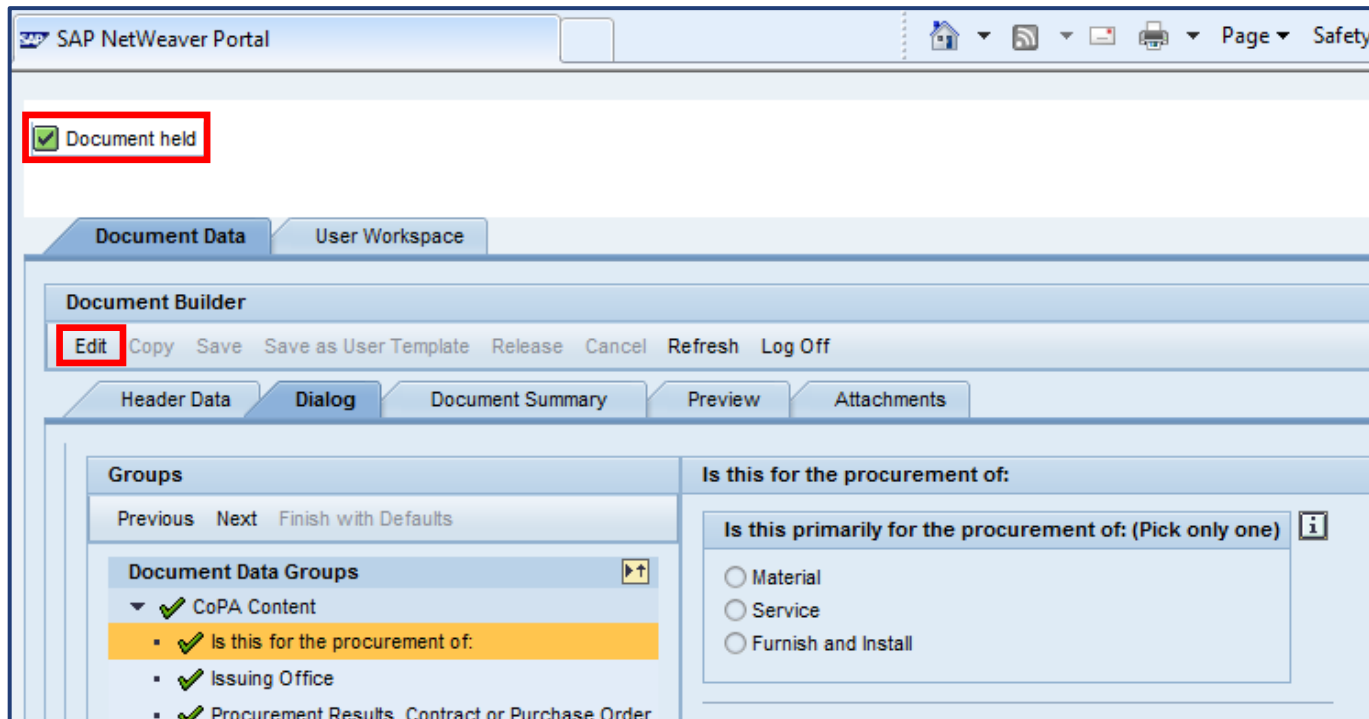
Document Builder



- Select the SAVE button at any time to hold and protect your work

Creating Purchase Orders

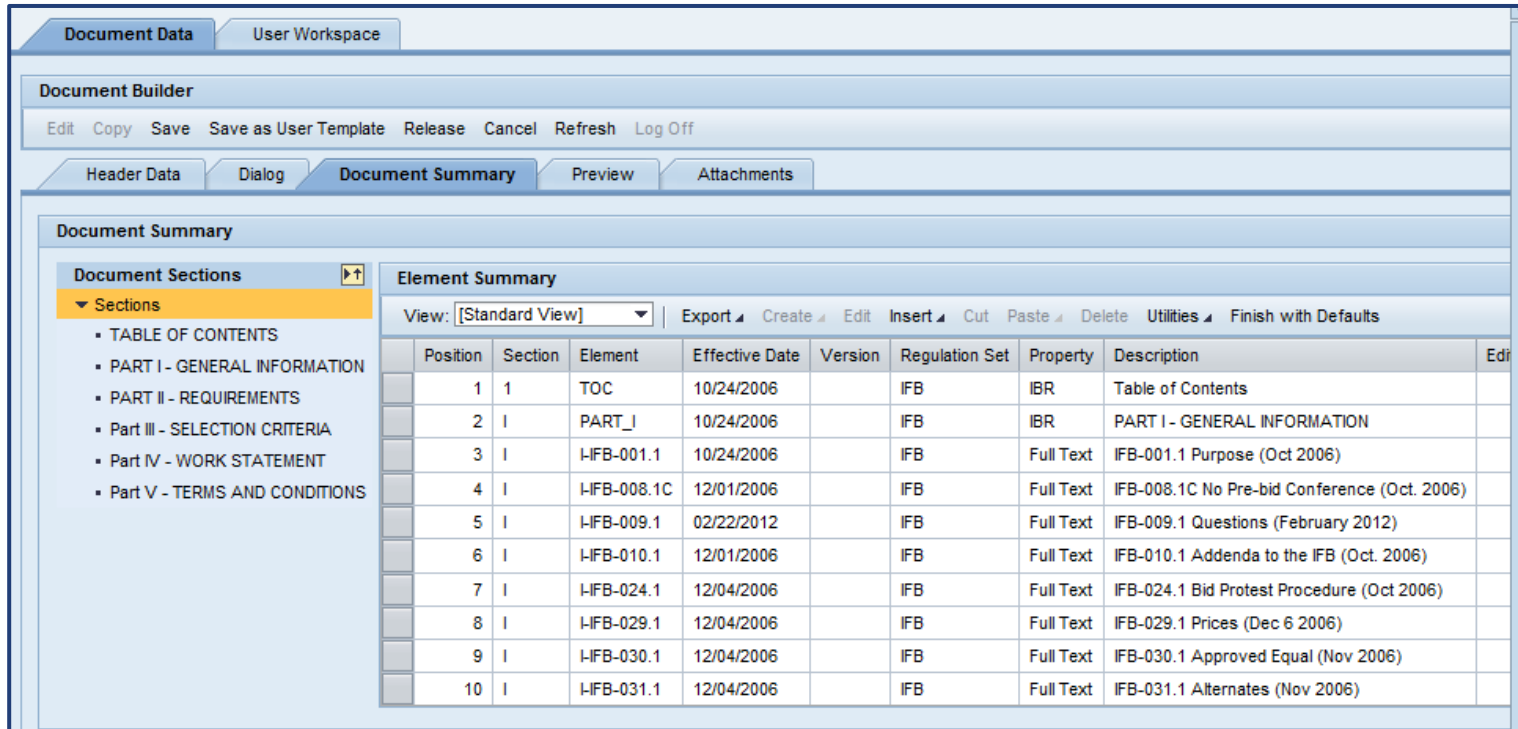
Document Builder



- The message “*Document held*” displays after saving
- Select the EDIT button to continue viewing/responding to questions

Creating Purchase Orders

Document Builder



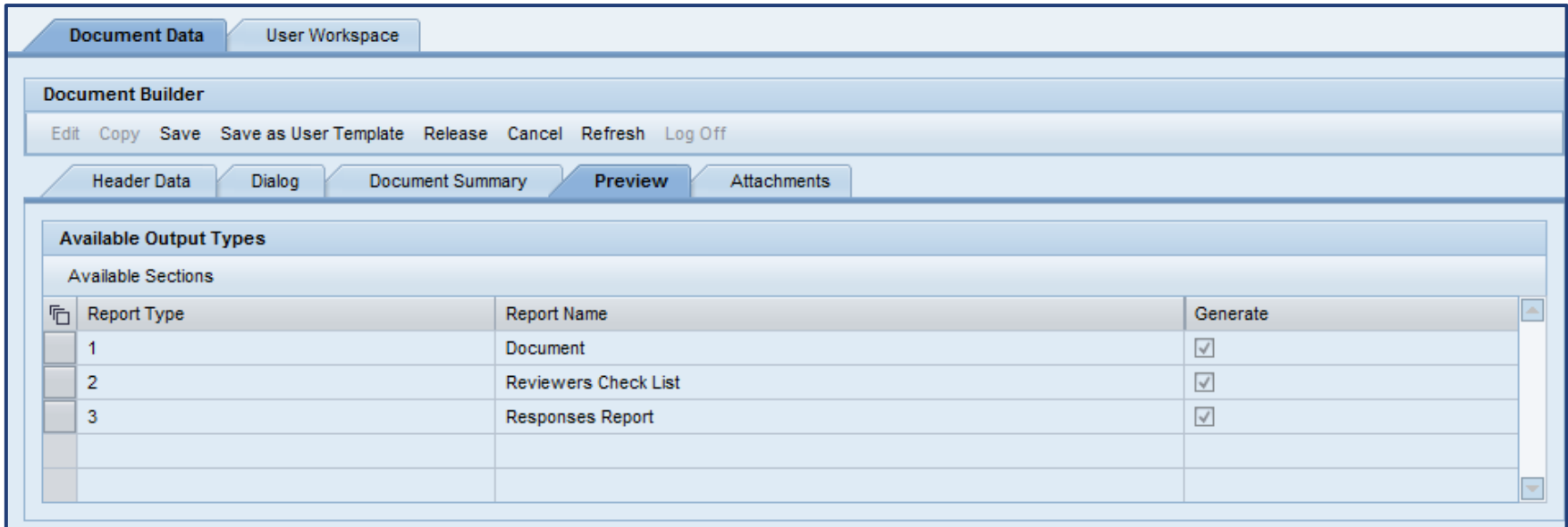
The screenshot shows the Document Builder interface with the Document Summary tab selected. The interface includes a menu bar with options like Edit, Copy, Save, and Release. Below the menu bar are tabs for Header Data, Dialog, Document Summary, Preview, and Attachments. The Document Summary tab displays a 'Document Sections' tree on the left and an 'Element Summary' table on the right. The table lists 10 elements with columns for Position, Section, Element, Effective Date, Version, Regulation Set, Property, and Description.

Position	Section	Element	Effective Date	Version	Regulation Set	Property	Description
1	1	TOC	10/24/2006		IFB	IBR	Table of Contents
2	I	PART_I	10/24/2006		IFB	IBR	PART I - GENERAL INFORMATION
3	I	HIFB-001.1	10/24/2006		IFB	Full Text	IFB-001.1 Purpose (Oct 2006)
4	I	HIFB-008.1C	12/01/2006		IFB	Full Text	IFB-008.1C No Pre-bid Conference (Oct. 2006)
5	I	HIFB-009.1	02/22/2012		IFB	Full Text	IFB-009.1 Questions (February 2012)
6	I	HIFB-010.1	12/01/2006		IFB	Full Text	IFB-010.1 Addenda to the IFB (Oct. 2006)
7	I	HIFB-024.1	12/04/2006		IFB	Full Text	IFB-024.1 Bid Protest Procedure (Oct 2006)
8	I	HIFB-029.1	12/04/2006		IFB	Full Text	IFB-029.1 Prices (Dec 6 2006)
9	I	HIFB-030.1	12/04/2006		IFB	Full Text	IFB-030.1 Approved Equal (Nov 2006)
10	I	HIFB-031.1	12/04/2006		IFB	Full Text	IFB-031.1 Alternates (Nov 2006)

- The Document Summary tab contains a table which lists the clauses contained in the document; the inclusion or exclusion of clauses is based on your responses

Creating Purchase Orders

Document Builder



The screenshot shows the Document Builder interface. At the top, there are tabs for 'Document Data' and 'User Workspace'. Below this is a 'Document Builder' header with a menu bar containing 'Edit', 'Copy', 'Save', 'Save as User Template', 'Release', 'Cancel', 'Refresh', and 'Log Off'. The main area has tabs for 'Header Data', 'Dialog', 'Document Summary', 'Preview' (which is selected), and 'Attachments'. Under the 'Preview' tab, there is a section titled 'Available Output Types' containing a table of 'Available Sections'.

Report Type	Report Name	Generate
1	Document	<input checked="" type="checkbox"/>
2	Reviewers Check List	<input checked="" type="checkbox"/>
3	Responses Report	<input checked="" type="checkbox"/>

- The Preview tab contains three documents (reports) which are automatically generated as the questions on the Dialog tab are completed

Creating Purchase Orders

Document (Terms & Conditions)

Table of Contents

PART I - GENERAL INFORMATION.....	2
I.1 IFB-001.1 Purpose (Oct 2006)	2
I.2 IFB-008.1C No Pre-bid Conference (Oct. 2006)	2
I.3 IFB-009.1 Questions (February 2012).....	2
I.4 IFB-010.1 Addenda to the IFB (Oct. 2006).....	2
I.5 IFB-024.1 Bid Protest Procedure (Oct 2006).....	2
I.6 IFB-029.1 Prices (Dec 6 2006).....	4
I.7 IFB-031.1 Alternates (Oct 2013).....	4
I.8 IFB-032.1 New Equipment (Nov 2006).....	4
I.9 I-IFB-033.1 Modification or Withdrawal of Bid (Nov 2006).....	4
I.10 I-IFB-034.1 Rejection of Bids (Nov 2006)	5

- The complete T&Cs for the solicitation document, in Adobe PDF format. This will need to have the title changed once it is in the procurement document.

Creating Purchase Orders

Reviewer's Report

Reviewer's Checklist for P00446880 01/02/2014 11:38:09 on 2014.01.02 (version 1)

Number	Prescription	Source	Section	Name	Title	Changes	Fillins
0001			1	TOC			
0002			I	PART_I	PART I - GENERAL INFORMATION		
0003			I	I-IFB-001.1	IFB-001.1 Purpose (Oct 2006)		PROJECT_TITLE = AGENCY_NAME =
0004			I	I-IFB-008.1C	IFB-008.1C No Pre-bid Conference (Oct. 2006)		
0005			I	I-IFB-009.1	IFB-009.1 Questions (February 2012)		
0006			I	I-IFB-010.1	IFB-010.1 Addenda to the IFB (Oct. 2006)		IFB_AGENCY_WEBSITE =
0007			I	I-IFB-024.1	IFB-024.1 Bid Protest Procedure (Oct 2006)		
0008			I	I-IFB-029.1	IFB-029.1 Prices (Dec 6 2006)		
0009			I	I-IFB-031.1	IFB-031.1 Alternates (Oct 2013)		
0010			I	I-IFB-032.1	IFB-032.1 New Equipment (Nov 2006)		

- Identifies, per clause, all fill-in responses, as well as any edits that were made to the document language

Creating Purchase Orders

Responses Report

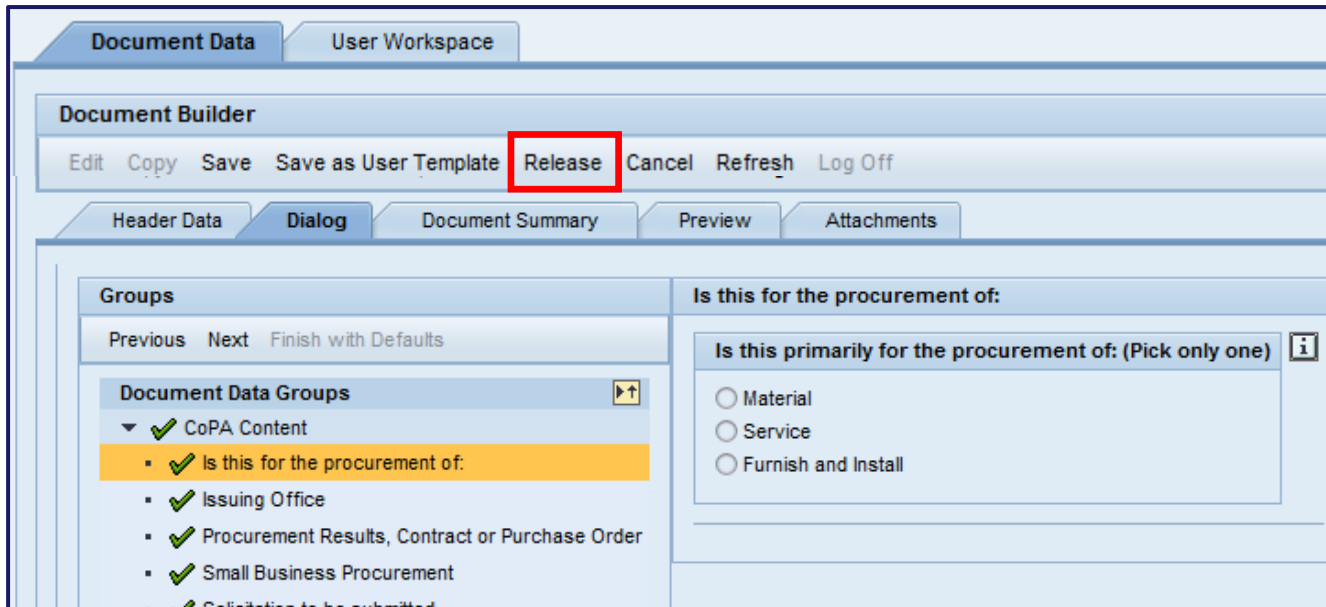
Responses Report for P00446880 01/02/2014 11:38:09 on 2014.01.02 (version 1)

Question	Response
Is this primarily for the procurement of: (Pick only one)	
Apparel	
Passenger Vehicles (Automobiles)	
Commercial Vehicles	
PennDOT	
Additional charge per vehicle	0.00
Printing	
Road Materials	
Paper or Paper Products	
Steel Products	
Prior Notification	
On Pallets	
IT	
Laundering Services	
None of the above	

- Identifies, per field, the responses (or lack of) which were entered for each question

Creating Purchase Orders

Document Builder

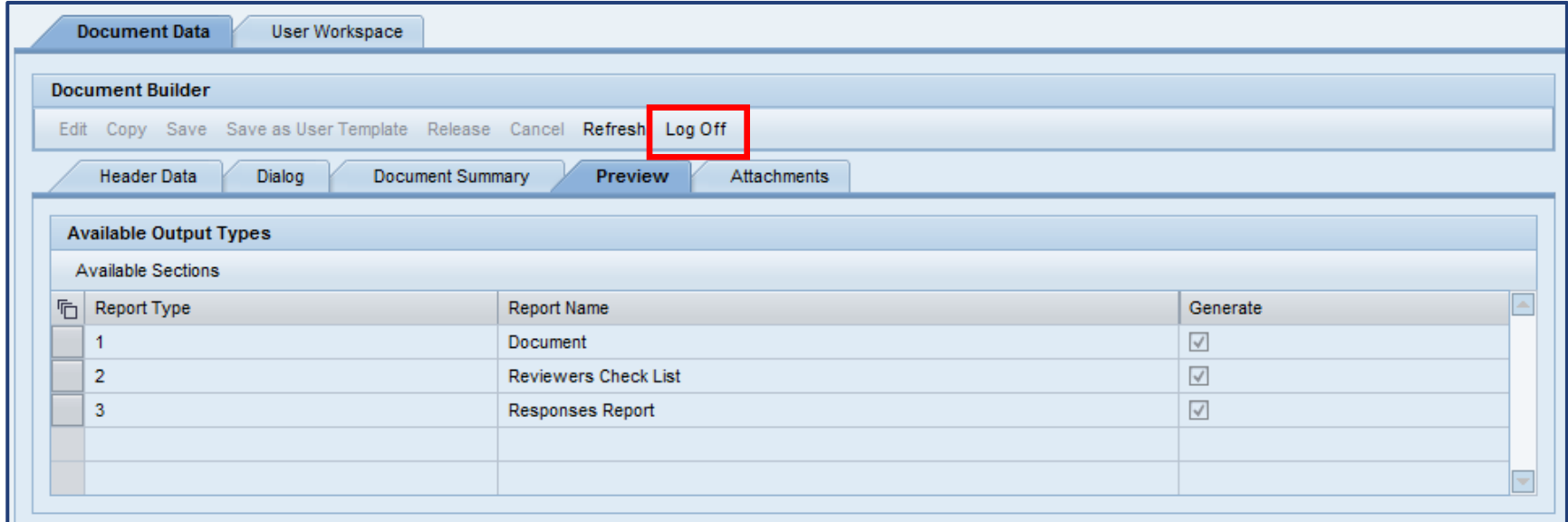


The screenshot shows the 'Document Builder' interface. At the top, there are tabs for 'Document Data' and 'User Workspace'. Below these is a menu bar with options: 'Edit', 'Copy', 'Save', 'Save as User Template', 'Release' (highlighted with a red box), 'Cancel', 'Refresh', and 'Log Off'. Below the menu bar are tabs for 'Header Data', 'Dialog' (selected), 'Document Summary', 'Preview', and 'Attachments'. The main area is divided into two sections. On the left, under 'Groups', there is a tree view with 'Document Data Groups' expanded, showing a list of groups with checkmarks: 'CoPA Content', 'Is this for the procurement of.' (highlighted in yellow), 'Issuing Office', 'Procurement Results, Contract or Purchase Order', 'Small Business Procurement', and 'Solicitation to be submitted'. On the right, under 'Is this for the procurement of:', there is a question: 'Is this primarily for the procurement of: (Pick only one)' with an information icon. Below this are three radio button options: 'Material', 'Service', and 'Furnish and Install'.

- The RELEASE button becomes available after all questions have been answered

Creating Purchase Orders

Document Builder (DB)



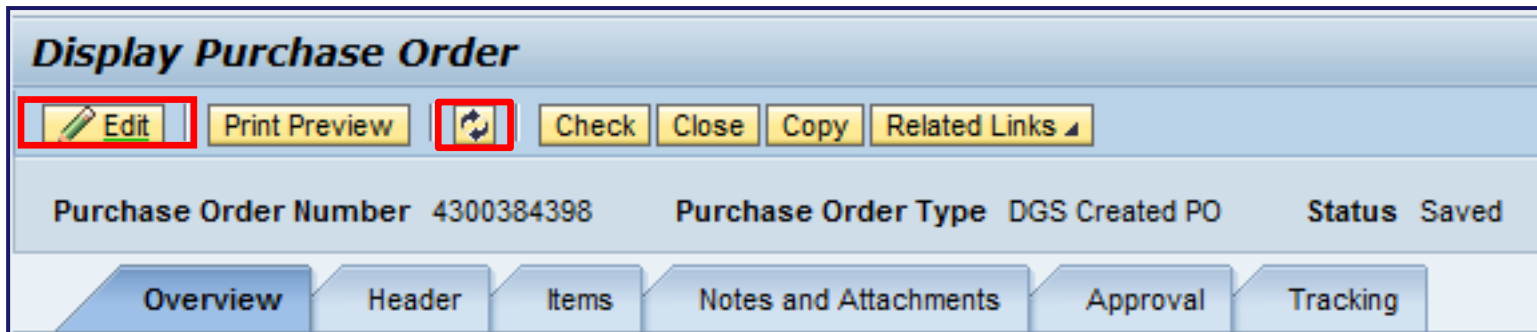
The screenshot shows the Document Builder (DB) interface. The 'Log Off' button in the menu bar is highlighted with a red box. The 'Preview' tab is selected, showing a table of available sections.

Report Type	Report Name	Generate
1	Document	<input checked="" type="checkbox"/>
2	Reviewers Check List	<input checked="" type="checkbox"/>
3	Responses Report	<input checked="" type="checkbox"/>

- When the legal documents have been migrated into SRM, the RELEASE button is no longer available
- Select the LOG OFF button to exit DB

Creating Purchase Orders

Document Builder (DB)



Display Purchase Order

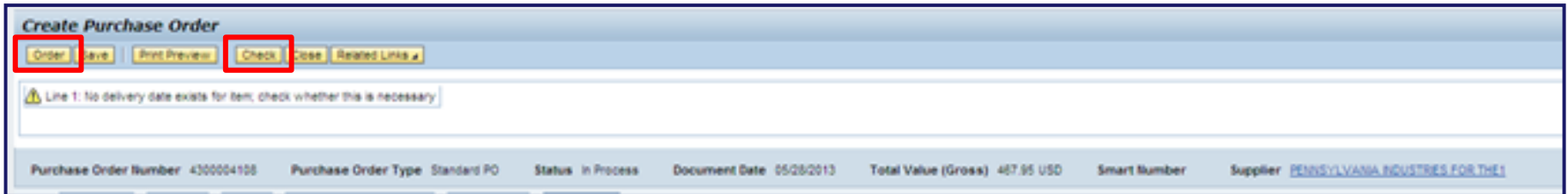
Edit Print Preview Refresh Check Close Copy Related Links ▾

Purchase Order Number 4300384398 Purchase Order Type DGS Created PO Status Saved

Overview Header Items Notes and Attachments Approval Tracking

- Select the EDIT button in SRM
- Select the REFRESH button
 - The documents are attached to the Notes and Attachments sub-tab on the Header tab
 - Locate the attachment titled “Document” and change it to “Terms and Conditions”

Creating Purchase Orders



Create Purchase Order

[Order](#) [Save](#) [Print Preview](#) [Check](#) [Close](#) [Related Links](#)

Line 1: No delivery date exists for item, check whether this is necessary

Purchase Order Number: 4300004108 Purchase Order Type: Standard PO Status: In Process Document Date: 05/08/2013 Total Value (Gross): 487.95 USD Smart Number: Supplier: PENNSYLVANIA INDUSTRIES FOR THE...

- After all data entry in the PO has been completed, select the CHECK button to review and resolve any errors
- Select the ORDER button to submit the PO for approval and ordering

Purchase Orders Referencing a Contract w/o a Requirement

Referencing a Contract w/o a Requirement

Select Purchase Order Type

Continue

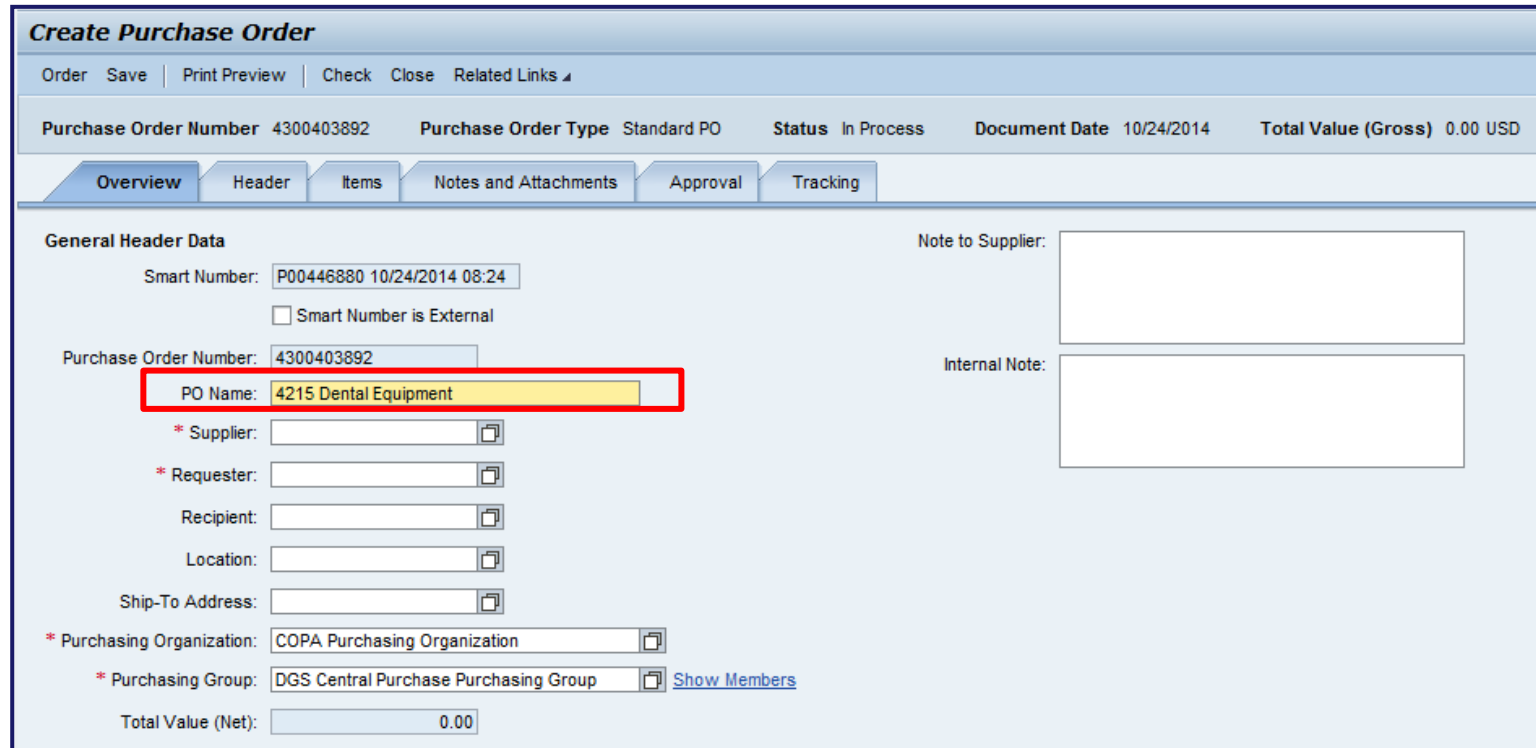
Select the type of purchase order that you want to create.

	Purchase Order Type	Purchase Order Type Description
<input type="checkbox"/>	ZDGS	DGS Created PO
<input type="checkbox"/>	ZEP	Emergency PO
<input type="checkbox"/>	ZEPI	EmergencyPO Ind Agcy
<input type="checkbox"/>	ZEPO	Emergency PO OA OIT
<input type="checkbox"/>	ZNB	Standard PO
<input type="checkbox"/>	ZNBI	Std PO Ind Agency
<input type="checkbox"/>	ZSBI	SoleSrc Supply IndA
<input type="checkbox"/>	ZSDI	SoleSrc Serv IndAgcy
<input type="checkbox"/>	ZSRM	Local Purchase Order
<input type="checkbox"/>	ZSSB	Sole Source Supply
<input type="checkbox"/>	ZSSD	Sole Source Service

- Create the PO in the usual manner by choosing the transaction type and selecting the CONTINUE button

Referencing a Contract w/o a Requirement

Overview tab



Create Purchase Order

Order Save | Print Preview | Check Close Related Links ▾

Purchase Order Number 4300403892 Purchase Order Type Standard PO Status In Process Document Date 10/24/2014 Total Value (Gross) 0.00 USD

Overview Header Items Notes and Attachments Approval Tracking

General Header Data

Smart Number: P00446880 10/24/2014 08:24
 Smart Number is External

Purchase Order Number: 4300403892

PO Name: 4215 Dental Equipment

* Supplier:

* Requester:

Recipient:

Location:

Ship-To Address:

* Purchasing Organization: COPA Purchasing Organization

* Purchasing Group: DGS Central Purchase Purchasing Group [Show Members](#)

Total Value (Net): 0.00

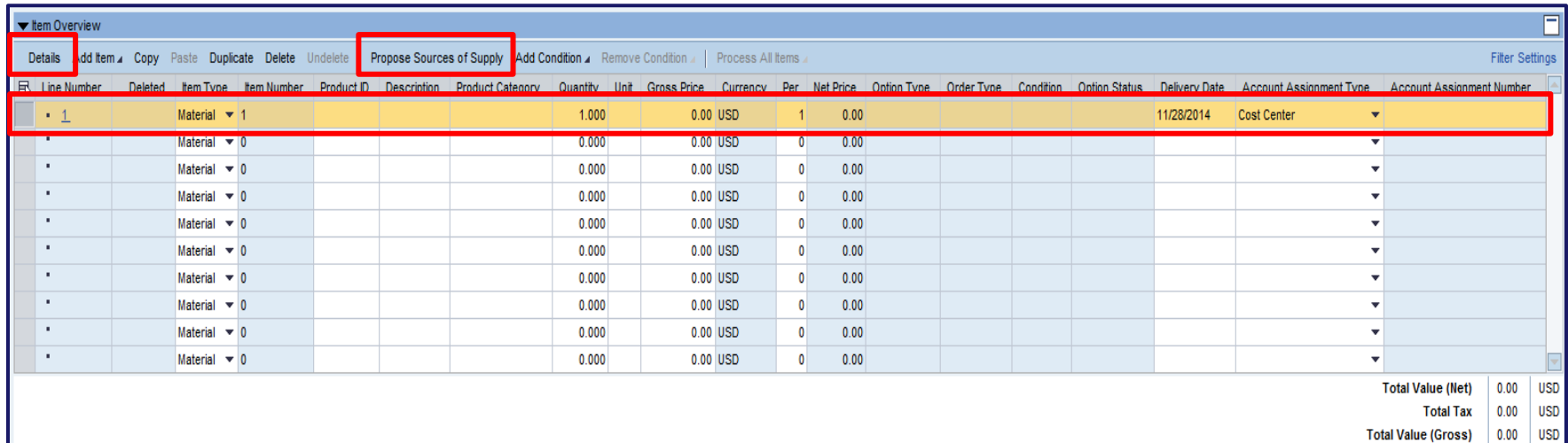
Note to Supplier:

Internal Note:

- In the Overview tab, select the PO Name field and name the PO
 - Do not enter any other information into the General Header Data section at this time

Referencing a Contract w/o a Requirement

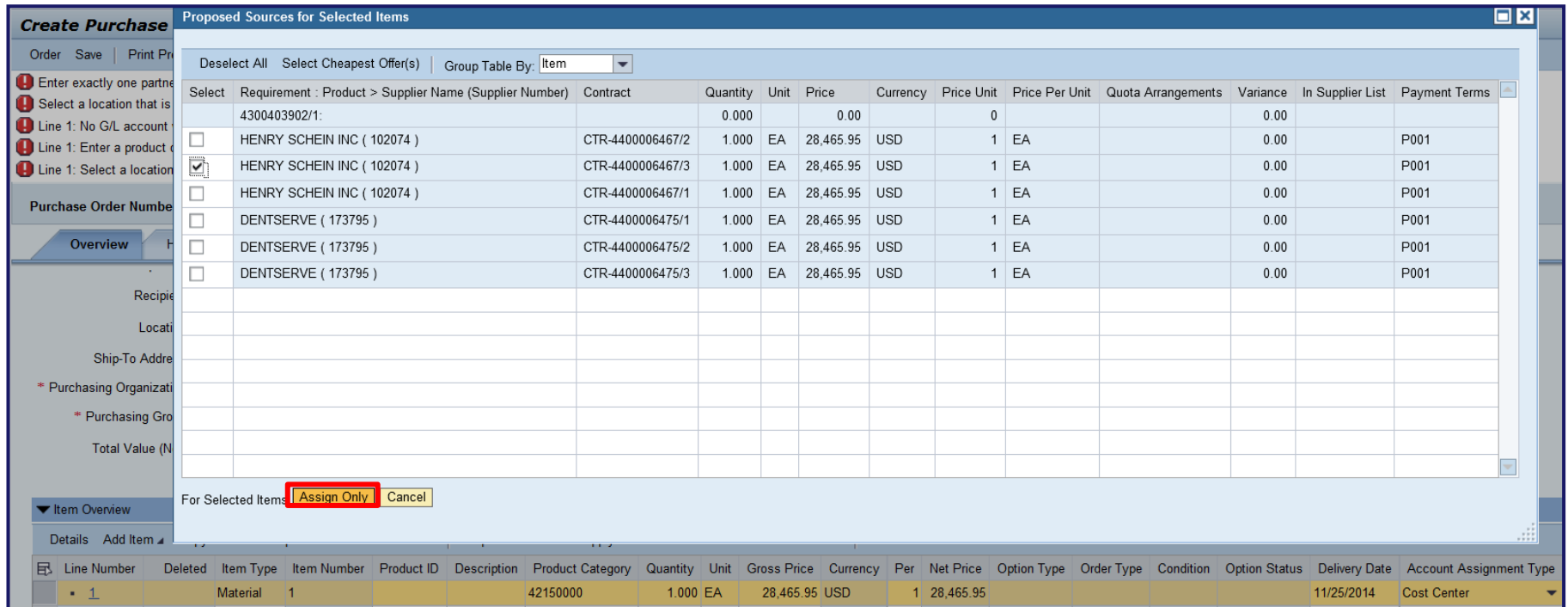
Overview tab



Line Number	Deleted	Item Type	Item Number	Product ID	Description	Product Category	Quantity	Unit	Gross Price	Currency	Per	Net Price	Option Type	Order Type	Condition	Option Status	Delivery Date	Account Assignment Type	Account Assignment Number
1		Material	1				1.000		0.00	USD	1	0.00					11/28/2014	Cost Center	
*		Material	0				0.000		0.00	USD	0	0.00							
*		Material	0				0.000		0.00	USD	0	0.00							
*		Material	0				0.000		0.00	USD	0	0.00							
*		Material	0				0.000		0.00	USD	0	0.00							
*		Material	0				0.000		0.00	USD	0	0.00							
*		Material	0				0.000		0.00	USD	0	0.00							
*		Material	0				0.000		0.00	USD	0	0.00							
*		Material	0				0.000		0.00	USD	0	0.00							
Total Value (Net) 0.00 USD																			
Total Tax 0.00 USD																			
Total Value (Gross) 0.00 USD																			

- Enter the item's basic information into the Item Overview: Quantity, Unit of Measure, and Price/Per (always allow the default "Material" to remain)
 - Select the PROPOSE SOURCE OF SUPPLY button to verify if the item is on Contract, or if the Contract is known, the Contract information can be entered directly on the Basic Data sub-tab in the item details
 - To access the line item details, select the DETAILS button or the Line Number

Referencing a Contract w/o a Requirement



Create Purchase Proposed Sources for Selected Items

Deselect All Select Cheapest Offer(s) Group Table By: Item

Select	Requirement : Product > Supplier Name (Supplier Number)	Contract	Quantity	Unit	Price	Currency	Price Unit	Price Per Unit	Quota Arrangements	Variance	In Supplier List	Payment Terms
<input type="checkbox"/>	4300403902/1:		0.000		0.00			0		0.00		
<input type="checkbox"/>	HENRY SCHEIN INC (102074)	CTR-4400006467/2	1.000	EA	28,465.95	USD	1	EA		0.00		P001
<input checked="" type="checkbox"/>	HENRY SCHEIN INC (102074)	CTR-4400006467/3	1.000	EA	28,465.95	USD	1	EA		0.00		P001
<input type="checkbox"/>	HENRY SCHEIN INC (102074)	CTR-4400006467/1	1.000	EA	28,465.95	USD	1	EA		0.00		P001
<input type="checkbox"/>	DENTSERVE (173795)	CTR-4400006475/1	1.000	EA	28,465.95	USD	1	EA		0.00		P001
<input type="checkbox"/>	DENTSERVE (173795)	CTR-4400006475/2	1.000	EA	28,465.95	USD	1	EA		0.00		P001
<input type="checkbox"/>	DENTSERVE (173795)	CTR-4400006475/3	1.000	EA	28,465.95	USD	1	EA		0.00		P001

For Selected Items **Assign Only** Cancel

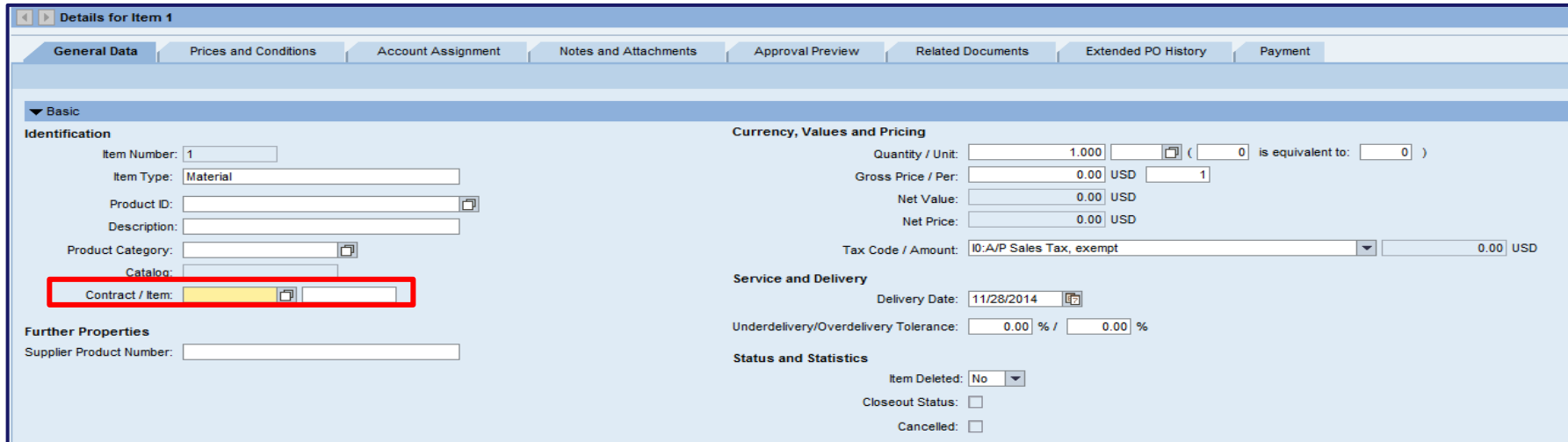
Line Number	Deleted	Item Type	Item Number	Product ID	Description	Product Category	Quantity	Unit	Gross Price	Currency	Per	Net Price	Option Type	Order Type	Condition	Option Status	Delivery Date	Account Assignment Type
1		Material	1	42150000			1.000	EA	28,465.95	USD	1	28,465.95					11/25/2014	Cost Center

- If you select the PROPOSE SOURCE OF SUPPLY button, a dialog box will display showing Contract/Item options to choose from.
- Select the appropriate Contract/Item and select the ASSIGN ONLY button

or

Referencing a Contract w/o a Requirement

Items tab – General Data sub-tab



The screenshot shows the 'Details for Item 1' form with the following fields and values:


- Identification:**
 - Item Number: 1
 - Item Type: Material
 - Product ID: [empty]
 - Description: [empty]
 - Product Category: [empty]
 - Catalog: [empty]
 - Contract / Item:** [highlighted with a red box]
- Further Properties:**
 - Supplier Product Number: [empty]
- Currency, Values and Pricing:**
 - Quantity / Unit: 1.000
 - Gross Price / Per: 0.00 USD
 - Net Value: 0.00 USD
 - Net Price: 0.00 USD
 - Tax Code / Amount: 10:A/P Sales Tax, exempt (0.00 USD)
- Service and Delivery:**
 - Delivery Date: 11/28/2014
 - Underdelivery/Overdelivery Tolerance: 0.00 % / 0.00 %
- Status and Statistics:**
 - Item Deleted: No
 - Closeout Status: [checkbox]
 - Cancelled: [checkbox]









- Enter the Contract number and Line Item number
 - Select the match code to search for the Contract/Item if the information is not known

Referencing a Contract w/o a Requirement

Items tab – General Data sub-tab

Search: Contract / Item

Search Criteria Personal Value List Hide Search Criteria 

Contract	is	4400006467		
Contract Name	is			
Supplier	is	102074		
Terms of Payment	is	P001		

Maximum Number of Results:

Search Clear Entries Reset to Default

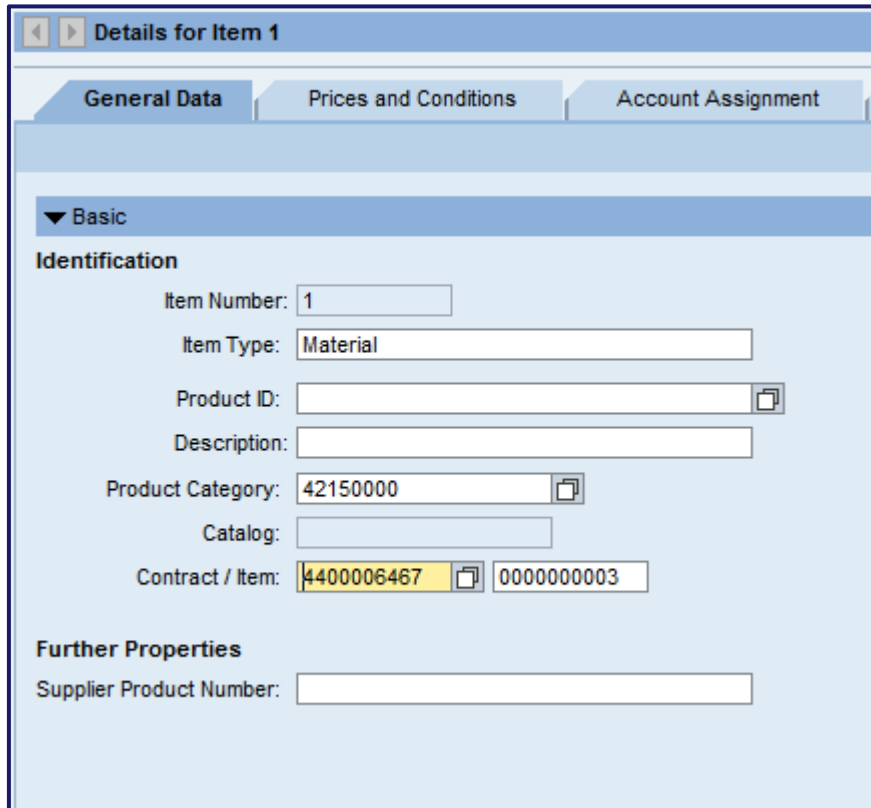
Results List: 3 results found for Contract / Item

Contract	Contract Name	Item Number	Description	Product ID	Product Cat.	Supplier	Name 1/last nm	Pm...
4400006467	4215 Dental Supplies and...	0000000001	Dental Supplies -Core It...		42150000	102074	HENRY SCHEIN INC	P001
4400006467	4215 Dental Supplies and...	0000000002	Dental Supplies - Non-C...		42150000	102074	HENRY SCHEIN INC	P001
4400006467	4215 Dental Supplies and...	0000000003	Dental Equipment		42150000	102074	HENRY SCHEIN INC	P001

- Enter the appropriate search criteria in the field
 - In the example, the contract number is entered
- Select the SEARCH button to display the results
- Select either the gray box or contract number to transfer the data back to the General Data tab

Referencing a Contract w/o a Requirement

Items tab – General Data sub-tab



Details for Item 1

General Data | Prices and Conditions | Account Assignment

▼ Basic

Identification

Item Number: 1

Item Type: Material

Product ID:

Description:

Product Category: 42150000

Catalog:

Contract / Item: 4400006467 0000000003

Further Properties

Supplier Product Number:

- The Contract Number and Line Item Number will display as shown
- Select the CHECK button at the top of the screen to refresh the system and pull all information from the contract forward into the Purchase Order

Referencing a Contract w/o a Requirement

Items tab – General Data sub-tab

Currency, Values and Pricing

Quantity / Unit: (is equivalent to:)

Gross Price / Per: USD

Net Value: USD

Net Price: USD

Tax Code / Amount: USD

Service and Delivery

Delivery Date:

Underdelivery/Overdelivery Tolerance: % / %

Status and Statistics

Item Deleted:

Closeout Status:

Cancelled:

- Enter the Unit, Gross Price, Delivery Date and any other necessary information

Referencing a Contract w/o a Requirement

Items tab – General Data sub-tab

▼ Partner		
Details Add Send E-Mail Call Clear		
Function	Number	Name
▪ Requester		
▪ Goods Recipient		
▪ Ship-To Address	1	EX
▪ Location		

- In the Partner section, enter the Requester by selecting the match code

Referencing a Contract w/o a Requirement

Search: Requester

Search Criteria Hide Search Criteria

Business Partner is

Name 1/last name is ANDERSON

Name 2/First name is CYNTHIA

Search term 1 is

Maximum Number of Results:

Search Clear Entries Reset to Default


Results List: 1 results found for Requester

Last name	First name	Org. Unit Name	BusinessPartner
Anderson	Cynthia	GSPR7140	703389

- In the search criteria, enter the last name and first name
- Select the SEARCH button
- The results will display
- Select the gray box or Last name to transfer the results back to the Partner section

Referencing a Contract w/o a Requirement


Items tab – General Data sub-tab

▼ Partner			
Details Add Send E-Mail Call Clear			
	Function	Number	Na
	▪ Requester	703389	Cy
	▪ Goods Recipient		
	▪ Ship-To Address	1	EX
	▪ Location		

- Enter the Goods Recipient by repeating the same steps performed for the requester

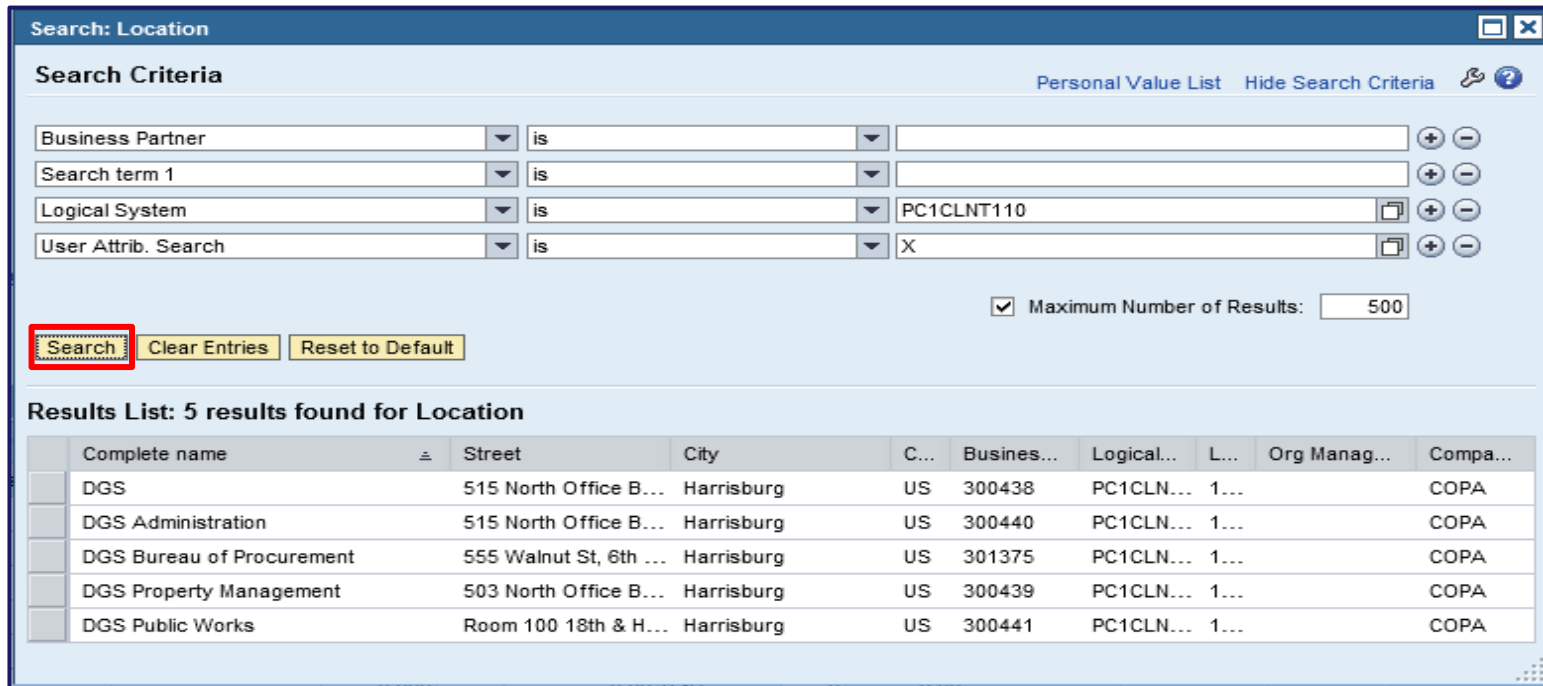
Referencing a Contract w/o a Requirement

Items tab – General Data sub-tab



▼ Partner			
Details Add Send E-Mail Call Clear			
Function	Number		Name
▪ Requester	703389		Cyr
▪ Goods Recipient	703389		
▪ Ship-To Address	1		EXE
▪ Location			

- Enter the Location by selecting the match code

Referencing a Contract w/o a Requirement



Search: Location

Search Criteria Personal Value List Hide Search Criteria  

Business Partner	is		+ -
Search term 1	is		+ -
Logical System	is	PC1CLNT110	+ -
User Attrib. Search	is	X	+ -

Maximum Number of Results:

Search

Results List: 5 results found for Location

	Complete name	Street	City	C...	Busines...	Logical...	L...	Org Manag...	Compa...
	DGS	515 North Office B...	Harrisburg	US	300438	PC1CLN...	1...		COPA
	DGS Administration	515 North Office B...	Harrisburg	US	300440	PC1CLN...	1...		COPA
	DGS Bureau of Procurement	555 Walnut St, 6th ...	Harrisburg	US	301375	PC1CLN...	1...		COPA
	DGS Property Management	503 North Office B...	Harrisburg	US	300439	PC1CLN...	1...		COPA
	DGS Public Works	Room 100 18th & H...	Harrisburg	US	300441	PC1CLN...	1...		COPA

- Do not enter any criteria into the fields, just select the SEARCH button and your options will display
 - Your locations are your plants, which may represent an organization breakdown by deputation, district, etc., and are used to drive workflow
- Select the gray box or complete name to transfer your selection back to the partner section

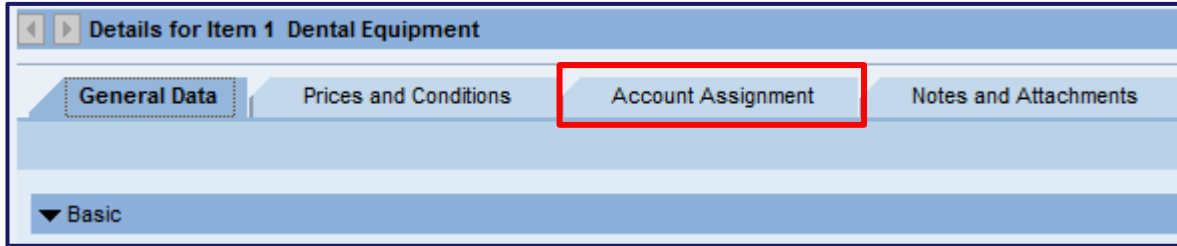
Referencing a Contract w/o a Requirement

Items tab – General Data sub-tab

▼ Partner		
Details Add Send E-Mail Call Clear		
Function	Number	Name
▪ Requester	703389	
▪ Goods Recipient	703389	
▪ Ship-To Address	1	EXEC BRANCH
▪ Location	301375	DGS Bureau of Procurement

- The results will display as shown

Account Assignment

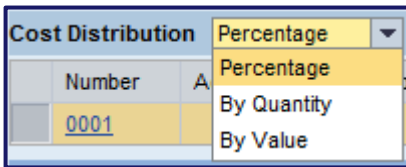


Details for Item 1 Dental Equipment

General Data | Prices and Conditions | **Account Assignment** | Notes and Attachments

▼ Basic

- Select the Account Assignment sub-tab

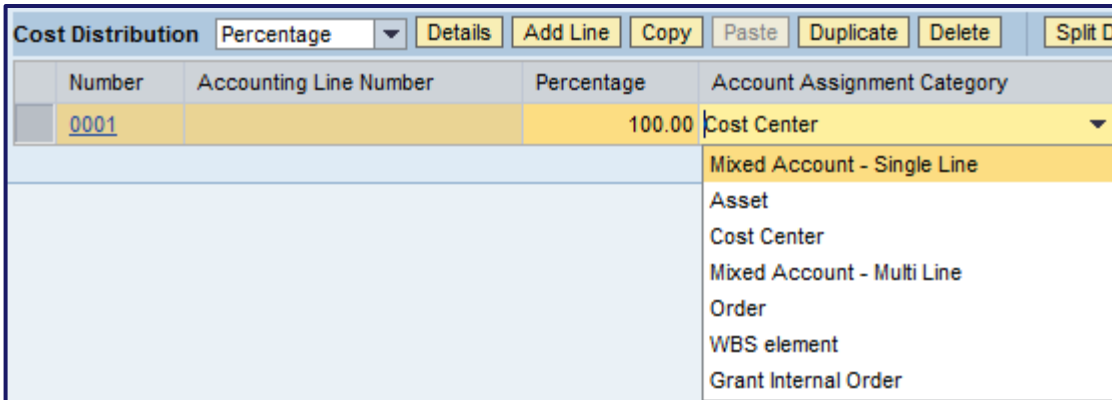


Cost Distribution Percentage

Number	A
0001	

Percentage
By Quantity
By Value

- Select the Cost Distribution – Percentage, Quantity, or Value



Cost Distribution Percentage Details Add Line Copy Paste Duplicate Delete Split Di

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

Mixed Account - Single Line
Asset
Cost Center
Mixed Account - Multi Line
Order
WBS element
Grant Internal Order

- Select the Account Assignment Category

Account Assignment

Number	Accounting Line Number	Percentage	Account Assignment Category	Assign Number
<u>0001</u>		100.00	Cost Center	

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

- Select the DETAILS button or the Number field to enter additional Account Assignment detailed information

Account Assignment

Details for Item 0001 : Cost Center

Basic Data

* Percentage:

Account Assignment Category:

* Cost Center: Strat Suprt & Aud Div

Fund Center: DGS Procurement

Functional Area: Facil, Prop & Comm Mgt

Controlling Area:

General Ledger Account: Medical Supplies

Business Area:

Fund: DGS Procurement

Budget Period:

Commitment Item: MedicalSupplies

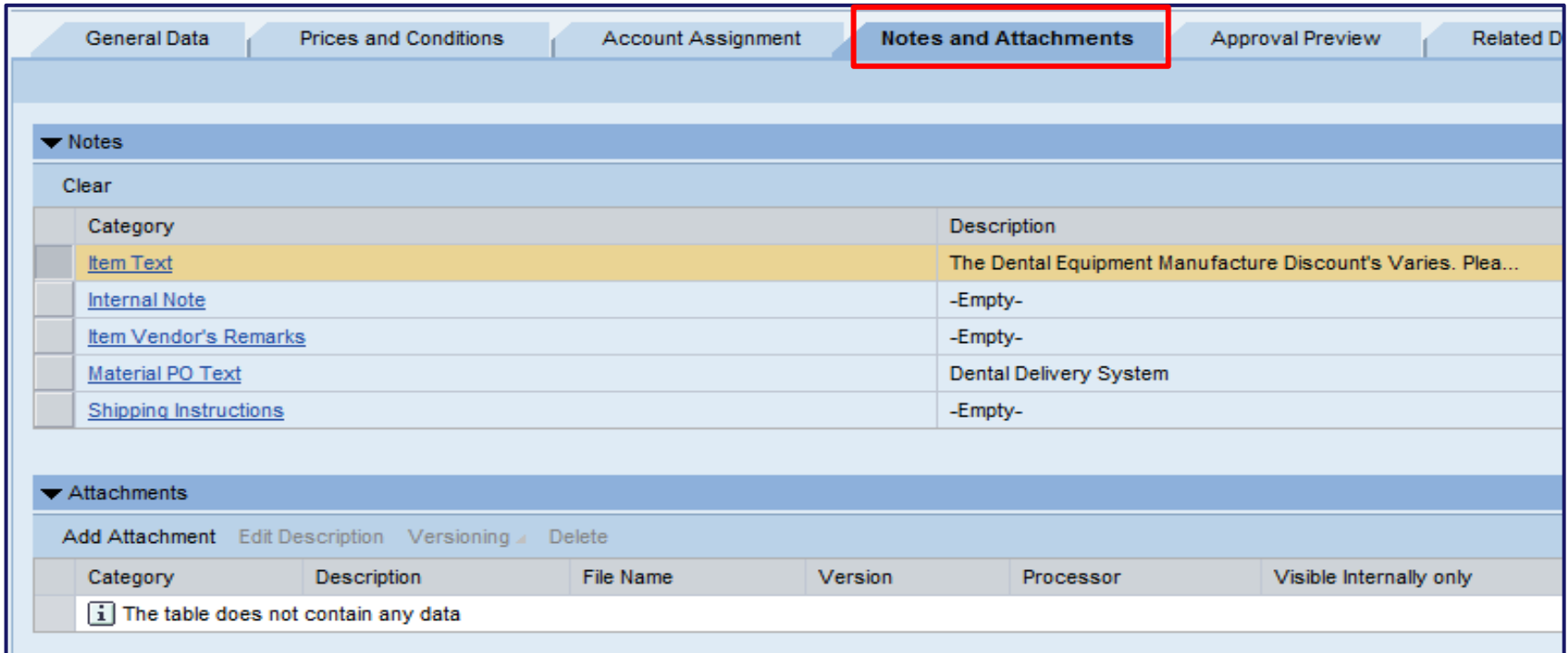
Unfunded Accounting Line:

- Depending on the Account Assignment Category selected, additional information will need to be completed

Creating Purchase Orders

Referencing a Contract w/o a Requirement

Notes and Attachments



General Data | Prices and Conditions | Account Assignment | **Notes and Attachments** | Approval Preview | Related D

▼ Notes

Clear

Category	Description
Item Text	The Dental Equipment Manufacture Discount's Varies. Plea...
Internal Note	-Empty-
Item Vendor's Remarks	-Empty-
Material PO Text	Dental Delivery System
Shipping Instructions	-Empty-

▼ Attachments

Add Attachment | Edit Description | Versioning | Delete

Category	Description	File Name	Version	Processor	Visible Internally only
[i] The table does not contain any data					

- Select the Notes and Attachments sub-tab
- Enter any additional text into the appropriate fields

Referencing a Contract w/o a Requirement

Header Tab – Notes and Attachments sub-tab

Create Purchase Order

Order Save | Print Preview | Check Close Related Links ▾

Purchase Order Number 4300403890 Purchase Order Type Standard PO Status In Process Document Date 10/23/2014 Total

Overview **Header** Items Notes and Attachments Approval Tracking

General Data **Notes and Attachment** Output Document Totals Extended PO History Payment User-Specified Status

▼ Notes

Clear

Category	Description
Header Text	Delivery should be made between the hours of 8:30 am and...
Internal Note	Justification: Dental Delivery System is needed for use...
Header Vendor's Remarks	-Empty-
Bond Information	-Empty-
Confidential Terms of Payment	-Empty-
Encumbrance Information	-Empty-

▼ Attachments

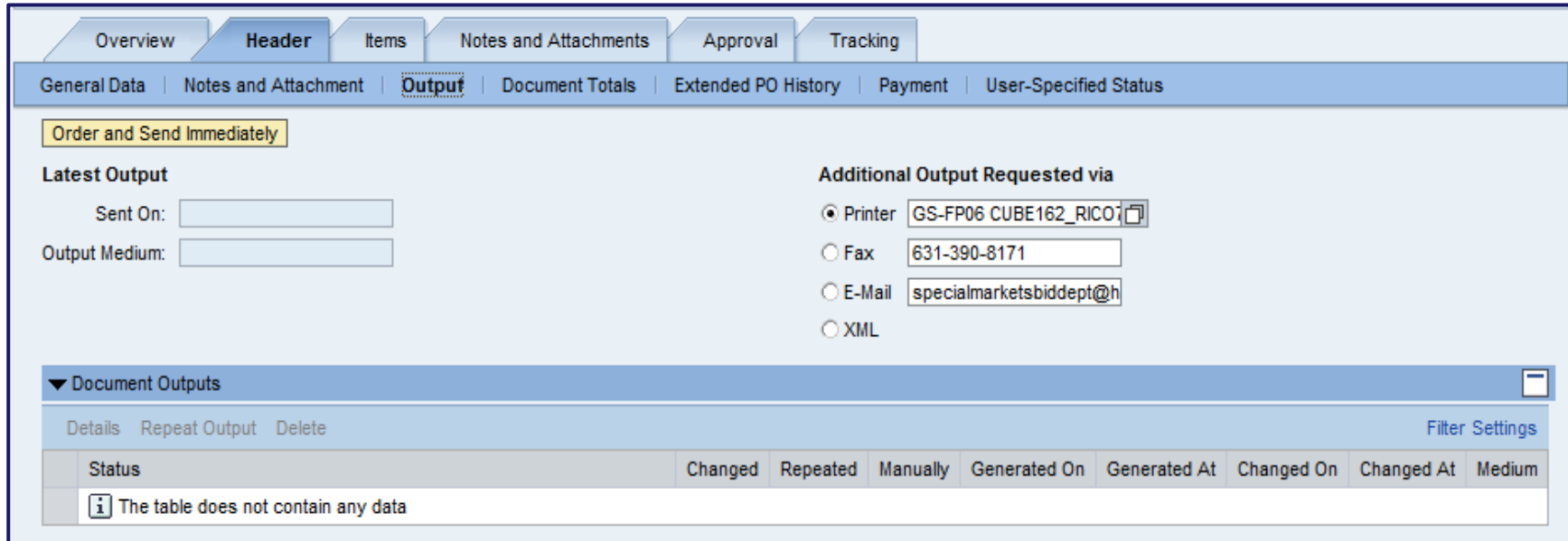
Add Attachment Edit Description Versioning ▾ Delete Create Profile

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

- Select the Head Tab – Notes and Attachments sub-tab
- Enter any information to the supplier into the Header Text
- Enter any internal information such as the justification into the Internal Note
- Add all attachments to the Header – Notes and Attachments section

Referencing a Contract w/o a Requirement

Header Tab – Output sub-tab



Overview | **Header** | Items | Notes and Attachments | Approval | Tracking

General Data | Notes and Attachment | **Output** | Document Totals | Extended PO History | Payment | User-Specified Status

Order and Send Immediately

Latest Output

Sent On:

Output Medium:

Additional Output Requested via

Printer

Fax

E-Mail

XML

▼ Document Outputs

Details Repeat Output Delete [Filter Settings](#)

Status	Changed	Repeated	Manually	Generated On	Generated At	Changed On	Changed At	Medium
<i>i</i> The table does not contain any data								

- Select the Output sub-tab
- Set-up printer, if required

Referencing a Contract w/o a Requirement

Create Purchase Order

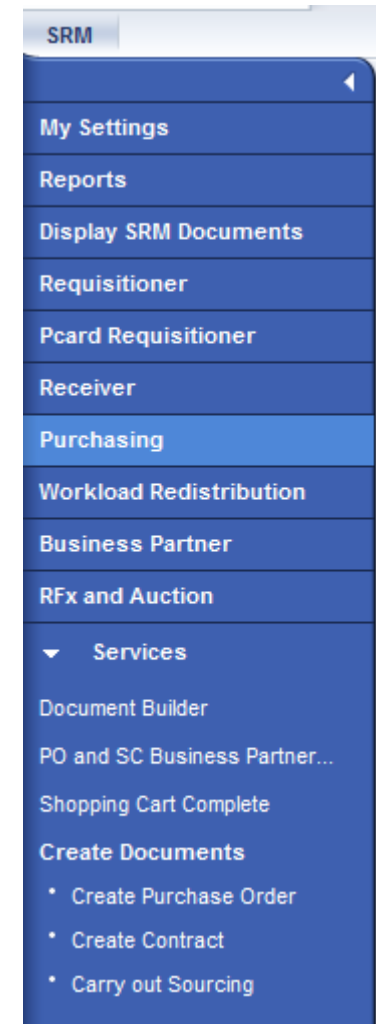
Order Save | Print Preview | Check Close Related Links ▾

- CHECK the PO and address for any errors that may occur
- SAVE or ORDER the PO

Print a Fully Executed Purchase Order

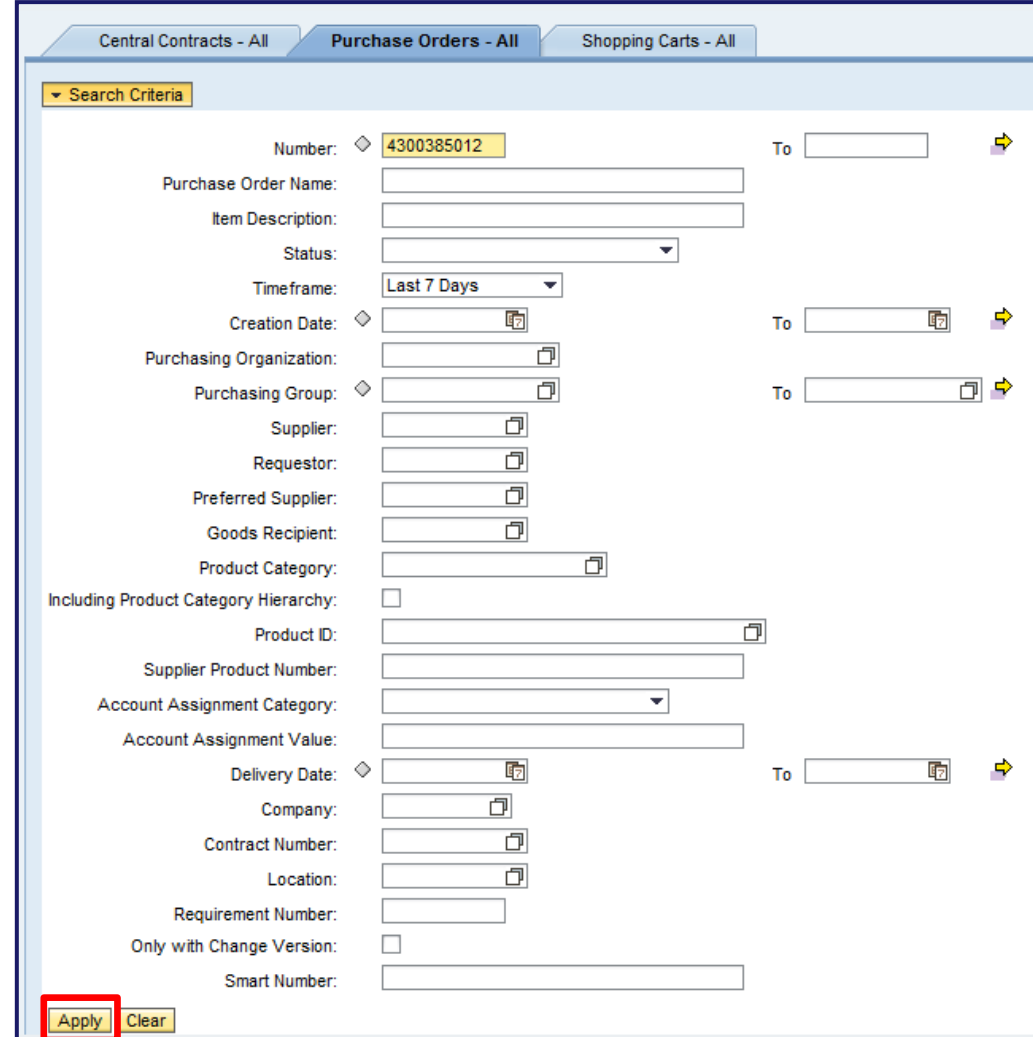
Print a Purchase Order

- Select **Purchasing**, which will open the Personal Object Worklist (POWL)



Print a Purchase Order

- Locate the PO through the proper search method
 - Select the applicable criteria
 - Select the APPLY button



Central Contracts - All **Purchase Orders - All** Shopping Carts - All

▼ Search Criteria

Number: ◇ 4300385012 To →

Purchase Order Name:

Item Description:

Status:

Timeframe: Last 7 Days ▼

Creation Date: ◇ To →

Purchasing Organization:

Purchasing Group: ◇ To →

Supplier:

Requestor:

Preferred Supplier:

Goods Recipient:

Product Category:

Including Product Category Hierarchy:

Product ID:

Supplier Product Number:

Account Assignment Category:

Account Assignment Value:

Delivery Date: ◇ To →

Company:

Contract Number:

Location:

Requirement Number:

Only with Change Version:

Smart Number:

Apply Clear

Print a Purchase Order

- The results will display, select the document number to display the PO

Central Contracts - All | **Purchase Orders - All** | Shopping Carts - All

Search Criteria

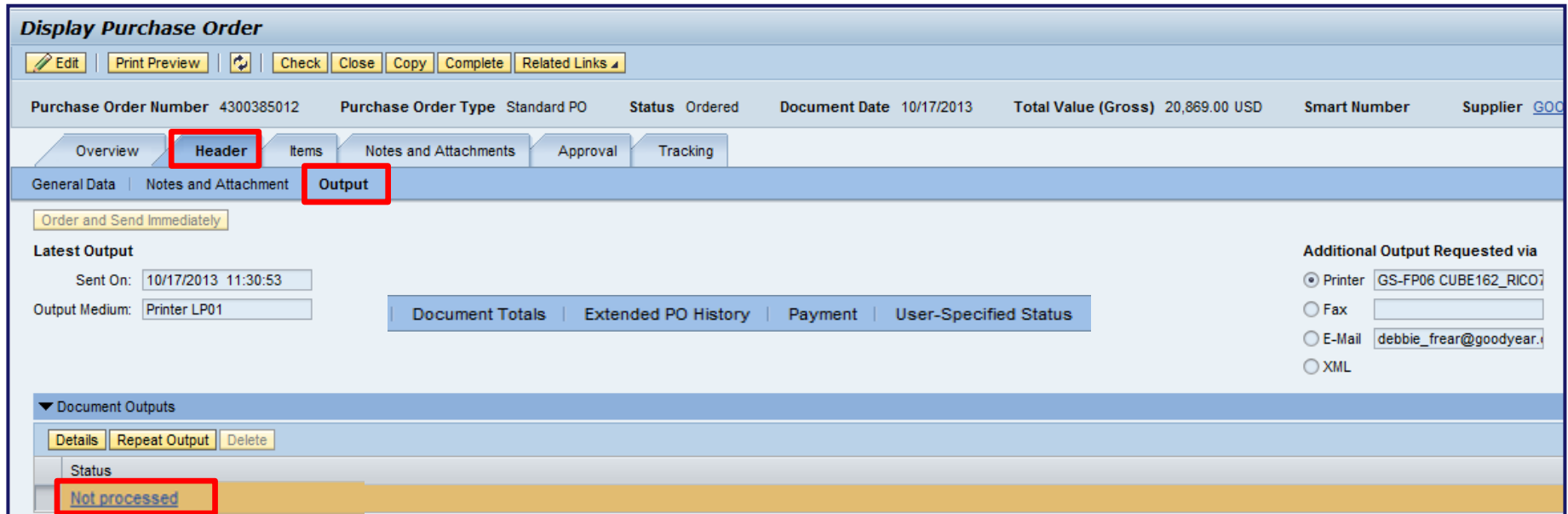
View: [Standard View] | Create Purchase Order | Create with Reference | Copy | Display | Edit | Delete | Purchase Order Response | Notify Recipient | Print Preview | Refresh | Export

Purchase Order Number	Purchase Order Name	Item Number	Item Name	Status	Supplier Name	Total Value	Currency
4300385012	P00446880 10/17/2013 10:03	1	245/60R18	Ordered	GOODYEAR TIRE & RUBBER COMPANY INC	20,869.00	USD

Last Refresh 10/17/2013 15:16:42 EST [Refresh](#)

Print a Purchase Order

- Once the PO is displayed
- Select the Header tab; Output sub-tab
 - Your log will show “Not Processed”



Display Purchase Order

Edit | Print Preview | Check | Close | Copy | Complete | Related Links

Purchase Order Number 4300385012 | Purchase Order Type Standard PO | Status Ordered | Document Date 10/17/2013 | Total Value (Gross) 20,869.00 USD | Smart Number | Supplier [GOO](#)

Overview | **Header** | Items | Notes and Attachments | Approval | Tracking

General Data | Notes and Attachment | **Output**

Order and Send Immediately

Latest Output

Sent On: 10/17/2013 11:30:53

Output Medium: Printer LP01

Document Totals | Extended PO History | Payment | User-Specified Status

Additional Output Requested via

Printer: GS-FP06 CUBE162_RICO

Fax

E-Mail: debbie_freear@goodyear.com

XML

▼ Document Outputs

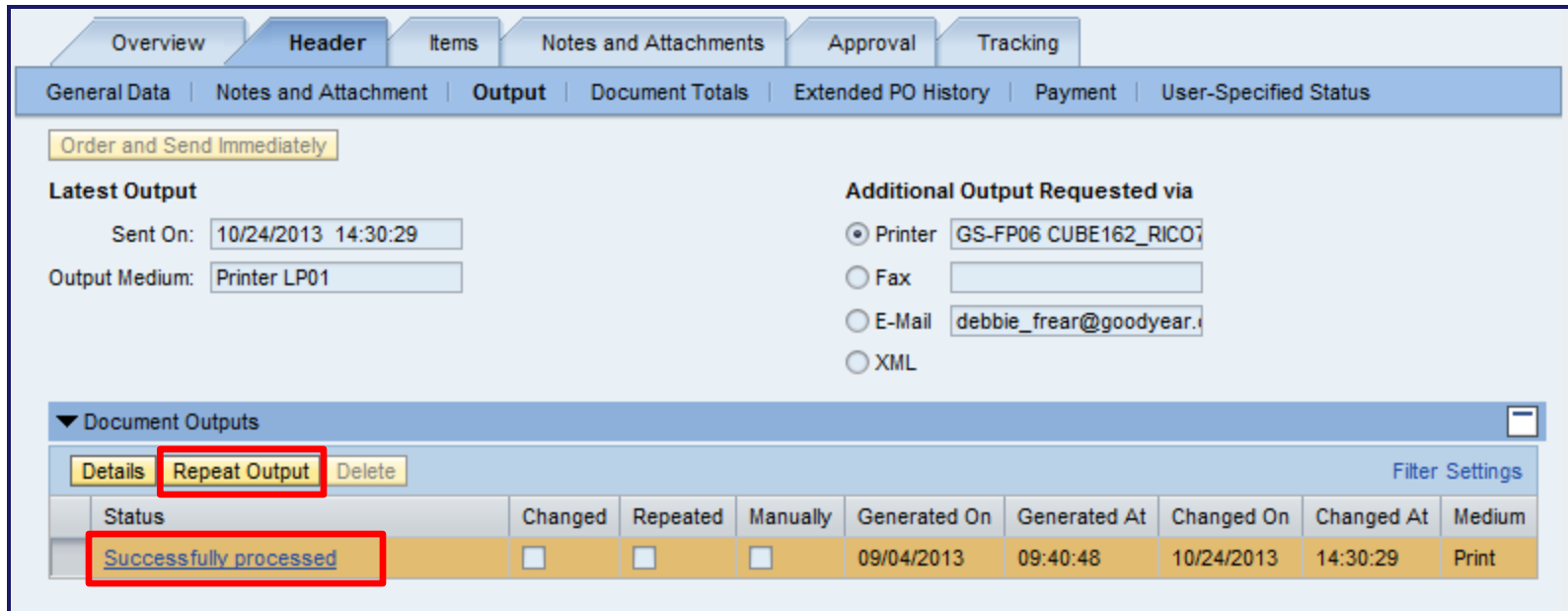
Details | Repeat Output | Delete

Status

Not processed

Print a Purchase Order

- Select the REPEAT OUTPUT button to print your PO
 - Your log will now show “Successfully Processed”



The screenshot shows a web application interface for managing purchase orders. At the top, there are tabs for 'Overview', 'Header', 'Items', 'Notes and Attachments', 'Approval', and 'Tracking'. Below these is a sub-menu with 'General Data', 'Notes and Attachment', 'Output', 'Document Totals', 'Extended PO History', 'Payment', and 'User-Specified Status'. The 'Output' tab is active.

Under the 'Output' tab, there is a yellow button labeled 'Order and Send Immediately'. Below this, the 'Latest Output' section shows 'Sent On: 10/24/2013 14:30:29' and 'Output Medium: Printer LP01'. To the right, the 'Additional Output Requested via' section has radio buttons for 'Printer' (selected), 'Fax', 'E-Mail' (with email address 'debbie_freear@goodyear.t'), and 'XML'.

Below this is a 'Document Outputs' section with a dropdown arrow and a minus sign. It contains three buttons: 'Details', 'Repeat Output' (highlighted with a red box), and 'Delete'. To the right of these buttons is a 'Filter Settings' link.

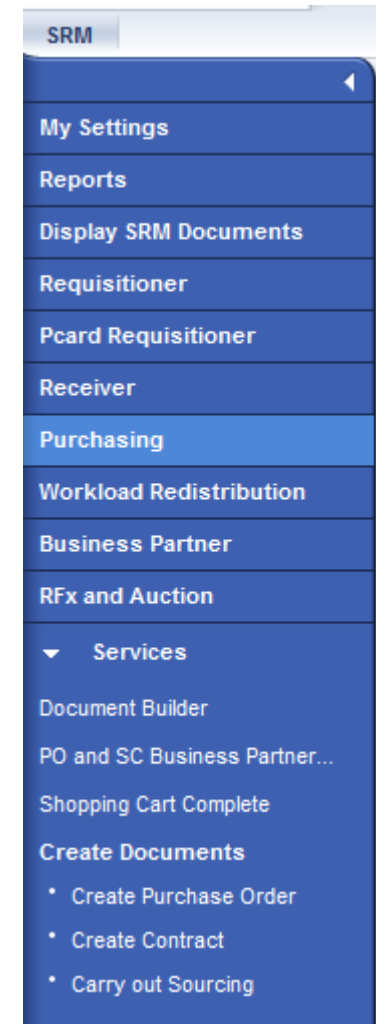
At the bottom is a table with the following columns: Status, Changed, Repeated, Manually, Generated On, Generated At, Changed On, Changed At, and Medium. The first row in the table has the status 'Successfully processed' (highlighted with a red box), and all other columns have empty checkboxes or values.

Status	Changed	Repeated	Manually	Generated On	Generated At	Changed On	Changed At	Medium
Successfully processed	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	09/04/2013	09:40:48	10/24/2013	14:30:29	Print

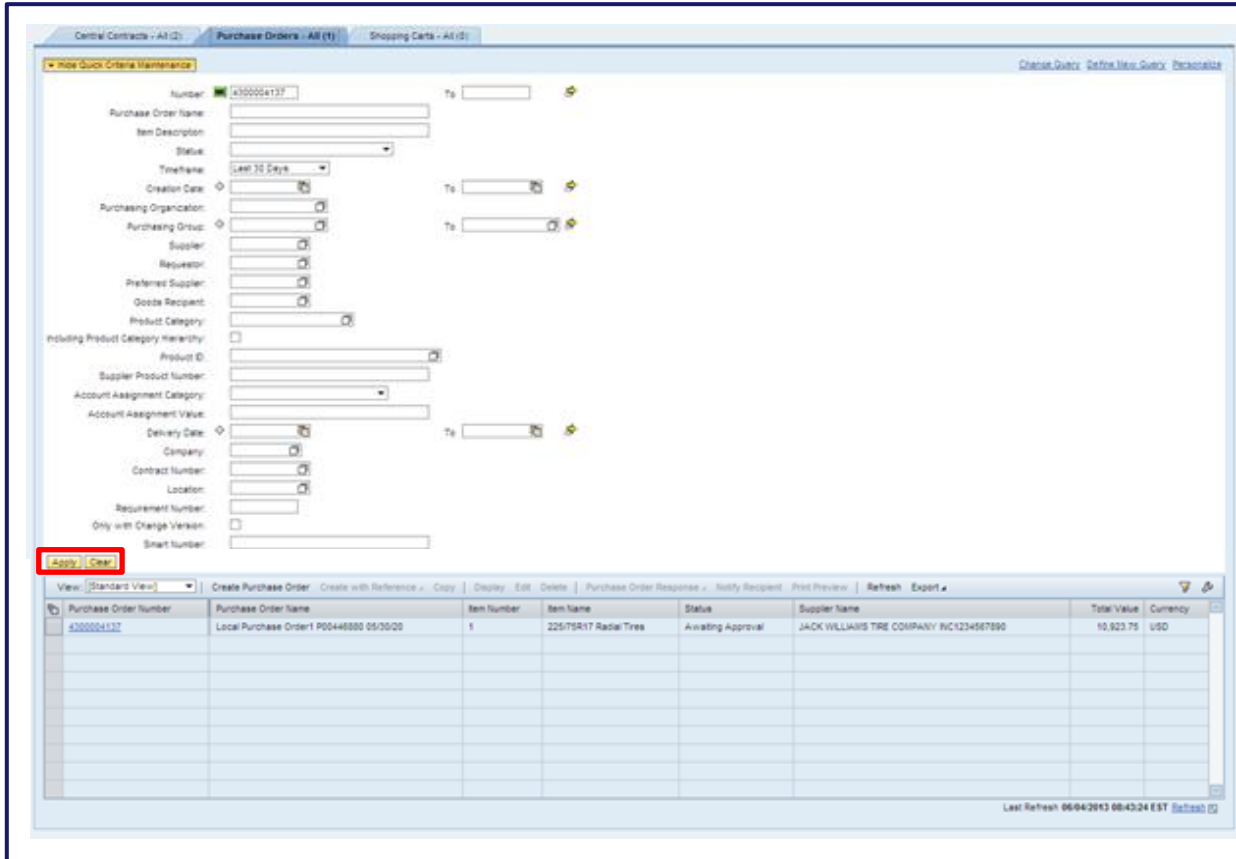
Editing Purchase Orders

Editing a Purchase Order

- Select **Purchasing**, which will open the Personal Object Worklist (POWL)



Editing Purchase Orders



Central Contracts - All (2) | Purchase Orders - All (1) | Shopping Carts - All (0)

more Quick Criteria Maintenance

Number: 4300004137 To: []

Purchase Order Name: []

Item Description: []

Status: []

Timeline: Last 30 Days

Creation Date: [] To: []

Purchasing Organization: []

Purchasing Group: [] To: []

Supplier: []

Requestor: []

Preferred Supplier: []

Goods Recipient: []

Product Category: []

Including Product Category Hierarchy: []

Product ID: []

Supplier Product Number: []

Account Assignment Category: []

Account Assignment Value: []

Delivery Date: [] To: []

Company: []

Contract Number: []

Location: []

Requirement Number: []

Only with Change Version: []

Smart Number: []

Apply Clear

View: [Standard View] | Create Purchase Order | Create with Reference | Copy | Display | Edit | Delete | Purchase Order Response | Notify Recipient | Print Preview | Refresh | Export

Purchase Order Number	Purchase Order Name	Item Number	Item Name	Status	Supplier Name	Total Value	Currency
4300004137	Local Purchase Order# P00448800 05/0020	1	225/75R17 Radial Tires	Awaiting Approval	JACK WILLIAMS TIRE COMPANY INC1234567890	10,923.75	USD

Last Refresh: 06/04/2013 08:43:24 EST Refresh

- Locate the applicable PO through the proper search method
 - Select the applicable criteria
 - Select the APPLY button

Editing Purchase Orders

Purchase Order Number	Purchase Order Name	Item Number	Item Name	Status	Supplier Name	Total Value	Currency
4300005340	Local Purchase Order1 P00446880 04/15/20	1	Nitro Auto Darkening Welding Helmet	Ordered	ARBLL INDUSTRES INC	10,681.73	USD
4300005340	Local Purchase Order1 P00446880 04/15/20	2	MicroMax NS CoolSuit Polypro Back Sz L	Ordered	ARBLL INDUSTRES INC	10,681.73	USD
4300005340	Local Purchase Order1 P00446880 04/15/20	3	MicroMax NS CoolSuit Polypro Back Sz XL	Ordered	ARBLL INDUSTRES INC	10,681.73	USD
4300005340	Local Purchase Order1 P00446880 04/15/20	4	AirWave N95 Disposable Resperator sz ML	Ordered	ARBLL INDUSTRES INC	10,681.73	USD
4300005340	Local Purchase Order1 P00446880 04/15/20	5	DP4 Headgear Clear Visor Shade 5 Flip	Ordered	ARBLL INDUSTRES INC	10,681.73	USD
4300005340	Local Purchase Order1 P00446880 04/15/20	6	SafeBack Premium sz:XL back support	Ordered	ARBLL INDUSTRES INC	10,681.73	USD
4300005340	Local Purchase Order1 P00446880 04/15/20	7	Hycar apron black 34 in. x 48 in.	Ordered	ARBLL INDUSTRES INC	10,681.73	USD
4300005340	Local Purchase Order1 P00446880 04/15/20	8	fire extinguisher 20 lbs 10-A 80-B 80-C	Ordered	ARBLL INDUSTRES INC	10,681.73	USD

- Select the document number to open the document for editing

Editing Purchase Orders

Display Purchase Order

Edit | Print Preview | Check | Close | Copy | Complete | Export | Related Links

Purchase Order Number: 4300005340 Purchase Order Type: Standard PO Status: Ordered Document Date: 04/15/2013 Total Value (Gross): 10,681.73 USD Smart Number

Supplier: [ARILL INDUSTRIES, INC](#)

Overview | Header | Items | Notes and Attachments | Approval | Tracking

General Header Data

Smart Number: Local Purchase Order1 R00442
 Smart Number is External

Purchase Order Number: 4300005340

Supplier: 118249 [ARILL INDUSTRIES, INC](#)

Requester: 326381 [Cynthia Anderson](#)

Recipient: 326381 [Cynthia Anderson](#)

Location: 90 [DPW Warehouse](#)

Ship-To Address: 309991 [EXEC BRANCH](#)

Purchasing Organization: COPA Purchasing Organization

Purchasing Group: DGS Central Purchasing Group [Show Members](#)

Total Value (Net): 10,681.73 USD

Note to Supplier:

Internal Note:

Item Overview

Details | Add Item | Copy | Paste | Duplicate | Cycle | Undo | Propose Sources of Supply | Add Condition | Remove Condition | Exercise Option | Process All Items

Line Number	Deleted	Item Type	Item Number	Product ID	Description	Product Category	Quantity	Unit	Gross Price	Currency	Per	Net Price	Option Type	Order Type	Condition
1		Material	1		Nibro Auto Darkening Working Helmet	46180000	25.000	EA	206.89 USD		1	206.89			
2		Material	2		Micromax NS CoolSuit Polypro Back Sz L	46180000	5.000	CS	85.00 USD		1	85.00			
3		Material	3		Micromax NS CoolSuit Polypro Back Sz XL	46180000	5.000	CS	89.54 USD		1	89.54			
4		Material	4		AirWave N95 Disposable Resperator sz ML	46180000	20.000	BOX	14.90 USD		1	14.90			
5		Material	5		DP4 Headgear Clear Visor Shade 5 Flip	46180000	20.000	EA	55.82 USD		1	55.82			
6		Material	6		SafeBack Premium szXL back support	46180000	20.000	EA	20.81 USD		1	20.81			
7		Material	7		Hycar apron black 34 in. x 48 in.	46180000	21.000	EA	22.58 USD		1	22.58			
8		Material	8		fire extinguisher 20 lbs 10-A 50-B 50-C	46180000	20.000	EA	116.56 USD		1	116.56			

- PO will open in “Display” mode
- Select the EDIT button to begin making edits to the PO

Editing Purchase Orders

- PO changes that trigger a **new approval workflow**:
 - Changing from standard to non-standard terms and conditions
 - Deleting a contract reference
 - Increasing a PO's total value
 - If the increase in value meets the guidelines for a new approval workflow, the PO must be approved by the approvers identified with the new workflow
 - Changing a product category
 - Changing from service to material initiates the material workflow
 - Changing from material to service initiates the service workflow
 - Documents containing both follow the service workflow

**Note: Any edits made prior to the PO being fully approved will start the approval process over*

Editing Purchase Orders

- PO changes that trigger a re-release of the PO and approval by the Comptroller:
 - Changing the Account Assignment category
 - Changing the 1st two digits of the G/L (which changes the account)
 - Changing Fund digits 1 through 5 and/or 8 through 10
 - Example: Fund = 1 2 3 4 5 06 7 8 9
Fund change = 2 2 3 4 5 06 7 8 9
 - Increasing the total value of the PO
 - If the increase in value falls within the current approval workflow, the PO must be approved by the Comptroller

Deleting Purchase Orders

Deleting Purchase Orders

Deleting an SRM PO which was never “Ordered”

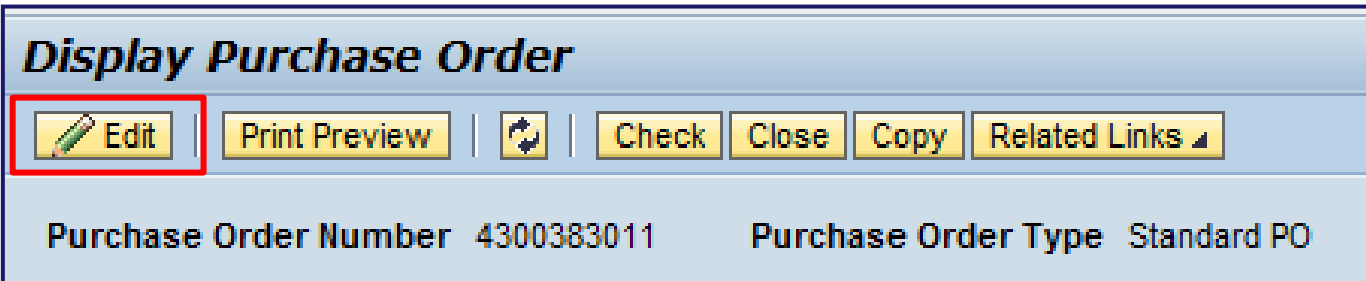
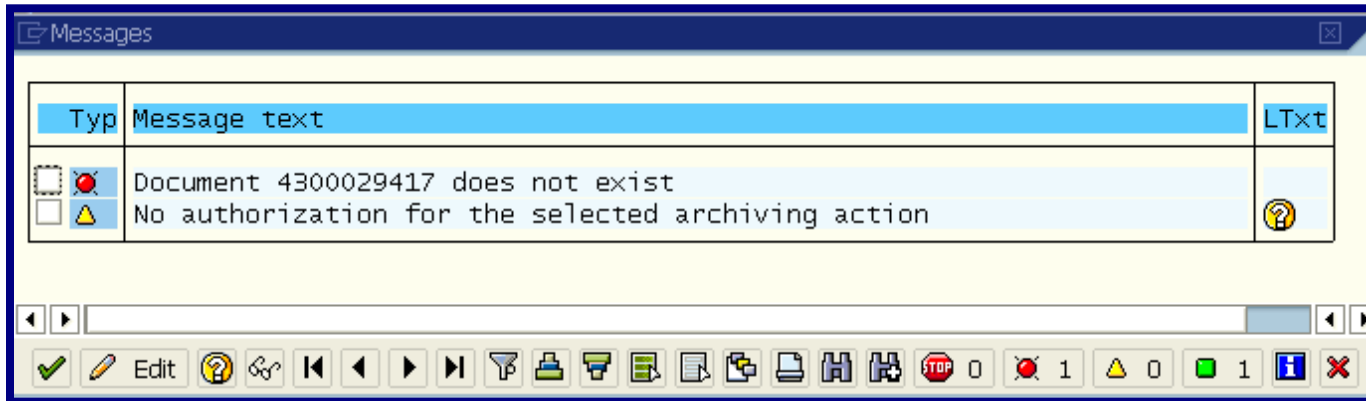
- The PO was created in SRM and “Saved” (i.e., never “Ordered”)
 - PO replication to R/3 did not occur, and deletion at the Header level can be executed in SRM

Purchase Order Number	Purchase Order Name	Item Number	Item Name	Status	Supplier Name	Total Value	Currency
4300005341	1234-1234-1234-1234-2517 TIRES	1	215/75R15 Radial Tires	Saved	BRIDGESTONE/FIRESTONE TIRE	9,385.00	USD
4300005341	1234-1234-1234-1234-2517 TIRES	2	225/70R17 Radial Tires	Saved	BRIDGESTONE/FIRESTONE TIRE	9,385.00	USD
4300005334	1234-{NEW}	1	Managerial Seating	Saved	HAWORTH FURNITURE COMPANY	565.95	USD
4300005330	Eshleman Test PO 4-11-2013	1	Test Cart Eshleman1 4-11-2013	Saved		550.00	USD
4300005329	Eshleman Test Purchase Order 1 4-11-2013	1	sadfsfsdf	Saved		99,999,994.00	USD
4300005325	1234-0024	1	TEST	Saved	ASAP SOFTWARE EXPRESS	30.00	USD
4300005254	P00029729 04/09/2013 14:06	1	DURA PC1604	Saved	SCHAEDLER YESCO DISTRIBUTION INC	113.88	USD
4300005254	P00029729 04/09/2013 14:06	2	DURA PC1604	Saved	SCHAEDLER YESCO DISTRIBUTION INC	113.88	USD
4300005209	P00029729 03/07/2013 11:42	1	test	Saved	EDWIN L HEIM CO	1,000.00	USD
4300005208	P00029729 03/07/2013 11:42	1	test	Saved	EDWIN L HEIM CO	1,000.00	USD

Last Refresh 04/18/2013 08:25:31 EST Refresh

Deleting Purchase Orders

- Verify that the PO does not exist in R/3



- Select the EDIT button to activate the “Edit” mode. Once this is done, the DELETE button will be available at the Header level.

Deleting Purchase Orders

- DELETE the SRM PO at the Header level

Change Purchase Order

Read Only | Order | Save | Print Preview | Check | Close | **Delete** | Related Links ▾

Purchase Order Number 4300383011 Purchase Order Type Standard PO Status Saved

Deleting Purchase Orders

Deleting SRM PO after it was “Ordered”

- The PO was created in SRM and replicated to R/3 when it was “Ordered”
- Deletion of the PO will occur at the Line Item level

Purchase Order Number	Purchase Order Name	Item Number	Item Name	Status	Supplier Name	Total Value	Currency
4300005340	Local Purchase Order1 P00446880 04/15/20	1	Nitro Auto Darkening Welding Helmet	Ordered	ARBILL INDUSTRIES INC	10,681.73	USD
4300005340	Local Purchase Order1 P00446880 04/15/20	2	MicroMax NS CoolSuit Polypro Back Sz L	Ordered	ARBILL INDUSTRIES INC	10,681.73	USD
4300005340	Local Purchase Order1 P00446880 04/15/20	3	MicroMax NS CoolSuit Polypro Back Sz XL	Ordered	ARBILL INDUSTRIES INC	10,681.73	USD
4300005340	Local Purchase Order1 P00446880 04/15/20	4	AirWave N95 Disposable Resperator sz M/L	Ordered	ARBILL INDUSTRIES INC	10,681.73	USD
4300005340	Local Purchase Order1 P00446880 04/15/20	5	DP4 Headgear Clear Visor Shade 5 Flip	Ordered	ARBILL INDUSTRIES INC	10,681.73	USD
4300005340	Local Purchase Order1 P00446880 04/15/20	6	SafeBack Premium szXL back support	Ordered	ARBILL INDUSTRIES INC	10,681.73	USD
4300005340	Local Purchase Order1 P00446880 04/15/20	7	Hycar apron black 34 in. x 48 in.	Ordered	ARBILL INDUSTRIES INC	10,681.73	USD
4300005340	Local Purchase Order1 P00446880 04/15/20	8	fire extinguisher 20 lbs 10-A 80-B 80-C	Ordered	ARBILL INDUSTRIES INC	10,681.73	USD

Last Refresh 04/17/2013 11:26:20 EST [Refresh](#)

Deleting Purchase Orders

- Select the EDIT button to activate the “Edit” mode

Display Purchase Order

Purchase Order Number 4300383011 Purchase Order Type Standard PO

- Select the line item(s) to be deleted and select the DELETE button

Item Overview

Line Number	Deleted	Item Type	Item Number	Product ID	Description	Product Category	Quantity	Unit	Gross Price	Currency	Per	Net Price	Option Type	Order Type	Condition
1		Material	1		Nitro Auto Darkening Welding Helmet	46180000	25.000	EA	206.89	USD	1	206.89			
2		Material	2		MicroMax NS CoolSuit Polypro Back Sz L	46180000	5.000	CS	85.08	USD	1	85.08			
3		Material	3		MicroMax NS CoolSuit Polypro Back Sz XL	46180000	5.000	CS	89.54	USD	1	89.54			
4		Material	4		AirWave N95 Disposable Resperator sz M/L	46180000	20.000	BOX	14.90	USD	1	14.90			
5		Material	5		DP4 Headgear Clear Visor Shade 5 Flip	46180000	20.000	EA	55.82	USD	1	55.82			
6		Material	6		SafeBack Premium szXL back support	46180000	20.000	EA	20.81	USD	1	20.81			
7		Material	7		Hycar apron black 34 in. x 48 in.	46180000	21.000	EA	22.58	USD	1	22.58			
8		Material	8		fire extinguisher 20 lbs 10-A 80-B 80-C	46180000	20.000	EA	116.58	USD	1	116.58			
		Material	0				0.000		0.00	USD	0	0.00			
		Material	0				0.000		0.00	USD	0	0.00			

- Select the ORDER button to save the deletion and replicate the changes to R/3

Change Purchase Order

Purchase Order Number 4300383011 Purchase Order Type Standard PO Status Saved

Deleting Purchase Orders

- The line items deleted in SRM are replicated to R/3 and identified with TRASH CAN icons

ZNB SRM Copy-Standard Pi Vendor 213677 DS WATERS OF AMERICA INC Doc. date 07/18/2007

Header

Item	A	I	Material	Short text	PO quantity	OUnc	Deliv. date	Net price	Curre...	Per	OP...	Matl group	P
1	K		144029	WATER,SPRING,5GAL,PLSTC	200.000	EA	07/26/2007	2.35	USD	1	EA	WATER	P
2	K		144031	COOLER,HOT&COLD WATER,	12.000	MON	07/26/2007	2.00	USD	1	MON	DRINK COOLERP	P

- The committed funds are unencumbered

08/03/2007 16:49:34 Commitments: Line Items by Document Number 1

RefDocNo	Item	FM pstg d.	Value Type Text	Amt type	Pymt bdgt	Fund	Cost	Cmmt item	Funds ctr
4300025587	1	07/18/2007	Purchase orders	Original	470.00	1036107000	3410102000	6361100	3410102000
4300025587	1	07/19/2007	Purchase orders	Change	470.00-	1036107000	3410102000	6361100	3410102000
w	1					1036107000			
***	1								
4300025587	2	07/18/2007	Purchase orders	Original	24.00	1036107000	3410102000	6351500	3410102000
4300025587	2	07/19/2007	Purchase orders	Change	24.00-	1036107000	3410102000	6351500	3410102000
w	2					1036107000	3410102000		
**	2					1036107000			



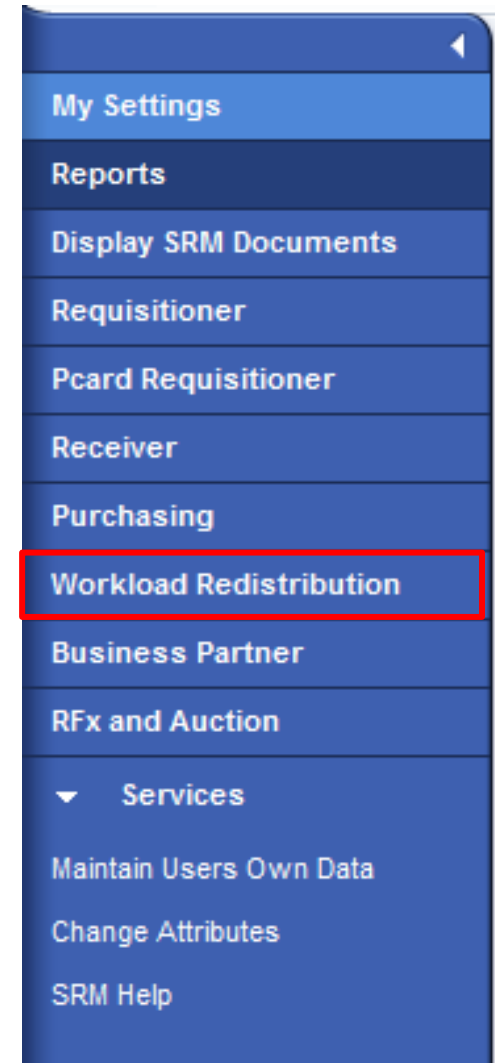
pennsylvania

DEPARTMENT OF GENERAL SERVICES

Workload Redistribution

Assigning Work

- Select **Workload Redistribution**



Assigning Work

If you are authorized to assign work to others:

- Use **Workload Redistribution** to assign requirements to specific groups or sourcing professionals
 - Sends the Requirements to Carry Out Sourcing
- This transaction is also used to reassign responsibility for:
 - RFX (Solicitations), Contracts, and POs
 - Sole Source Material carts to DGS Bureau of Procurement

Assigning Work

- In SRM, a shopping cart might contain more than one type of commodity
 - The line items are listed separately in the Workload Redistribution sourcing area
- Assign individual line items to a Purchaser
 - The Purchaser will later select the individual line items to process

Assigning Work

Finding Potential Assignments



Search for Documents

Document Types

Requirements:

Purchase Orders:

RFxs:

Contracts:

Status: All

Purchasing Organization: COPA Purchasing Organization

Purchasing Group: XC3 - DGS Cynthia K Anderson

Document Number:

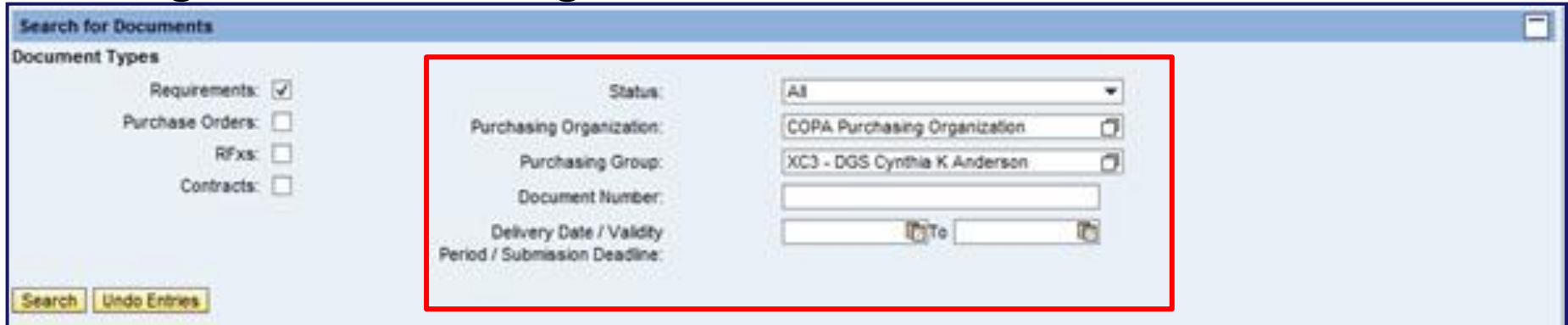
Delivery Date / Validity Period / Submission Deadline:

Search Undo Entries

- Use the checkboxes to identify what type(s) of document to view
 - Requirements, Purchase Orders, RFx (Solicitations), and Contracts are available options

Assigning Work

Finding Potential Assignments



Search for Documents

Document Types

Requirements:

Purchase Orders:

RFxs:

Contracts:

Status: All

Purchasing Organization: COPA Purchasing Organization

Purchasing Group: XC3 - DGS Cynthia K Anderson

Document Number:

Delivery Date / Validity Period / Submission Deadline: To

Search Undo Entries

- Use other criteria from dropdown menus to further refine the type of documents to be viewed
 - The Purchasing Group defaults to the buyer's group, so it must be verified or changed
 - Select "In Process" from the Status dropdown menu
 - After selecting the desired search criteria, select the SEARCH button

Assigning Work

Making the Assignment

Search Result : 1 Documents

Select All | Assign To: | Go | Assign Automatically | Refresh Messages | Filter Settings

Document Number	Document Name	Type	Status	Purchasing Organization	Purchasing Group
0010008237.1	OptiPlex 760 Minitower,OptiPlex 760 Min		Completed	COPA Purchasing Organization	XC3 - DGS Cynthia K Anderson

- The Results List screen displays
- View a document by selecting its Document Number

Assigning Work

Making the Assignment

Search Result : 1 Documents

Assign To: [Filter Settings](#)

<input type="checkbox"/>	Document Number	Document Name	Type	Status	Purchasing Organization	Purchasing Group
<input type="checkbox"/>	0010008237.1	OptiPlex 760 Minitower,OptiPlex 760 Min		Completed	COPA Purchasing Organization	XC3 - DGS Cynthia K Anderson

- Select a document by selecting the *gray* block to the left
- Select all documents by choosing the SELECT ALL button

Assigning Work

Making the Assignment

Search Result : 1 Documents

Select All Assign To: COPA Purchasing Organization YK2-1504-GS Mta Div Go ~~Assign Automatically~~ Refresh Messages Filter Settings

Document Number	Document Name	Type	Status	Purchasing Organization	Purchasing Group
0010000237 / 1	OptPlex 760 Minitower;OptPlex 760 Min		Completed	COPA Purchasing Organization	XC3 - DGS Cynthia K Anderson

- Use the match code to select the Purchasing Organization and Purchasing Group in which the work is to be assigned
- Select the GO button
- Do **not** use the ASSIGN AUTOMATICALLY button

Assigning Work

Making the Assignment

Processing of the documents has been completed

Search for Documents

Document Types

Requirements: Status: All

Purchase Orders: Purchasing Organization: COPA Purchasing Organization

RFxs: Purchasing Group: XC3 - DGS Cynthia K Anderson

Contracts: Document Number:

Delivery Date / Validity Period / Submission Deadline: To

Search **Undo Entries**

Search Result : 1 Documents

Select All | Assign To: COPA Purchasing Organization | YK2-1504-GS Mtls Div | **Go** | **Assign Automatically** | **Refresh Messages** | [Filter Settings](#)

Document Number	Document Name	Type	Status	Purchasing Organization	Purchasing Group
0010008237 / 1	OptiPlex 760 Minitower;OptiPlex 760 Min	Shopping Cart	Completed	COPA Purchasing Organization	XC3 - DGS Cynthia K Anderson

- A message will display stating, “Processing of the documents has been completed”

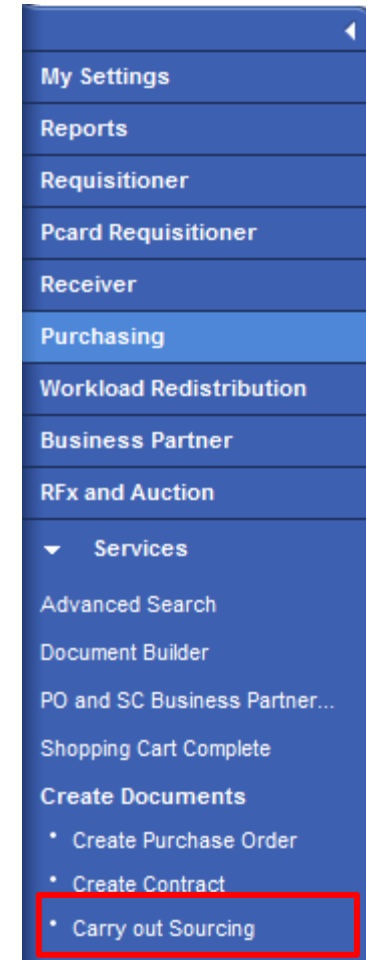
Sourcing a Requirement and Generating a Purchase Order

Sourcing a Requirement – Generate Purchase Order

- Select **Purchasing**

Left navigation pane under – Create Documents

- Select **Carry Out Sourcing**



Sourcing a Requirement – Generate Purchase Order

Assign Sources of Supply: Step 1 (Select Requisition)

Previous Next Close

1 Select Requisition 2 Assign Sources of Supply (No Items) 3 Review Drafts (No Items) 4 Summary Screen (No Documents)

Search Criteria: Requisitions

Number of Requisition: 10014758
 Item Description:
 Product:
 Requirer:
 Purchasing Organization:
 Purchasing Group:
 Priority:
 Delivery Date Range:
 Delivery Date: To

Name of Requisition:
 Product Category:
 Supplier:
 External Requirement:
 Account Assignment Category:
 Account Assignment Number:
 Intended for Grouping:
 Include Locked Items:

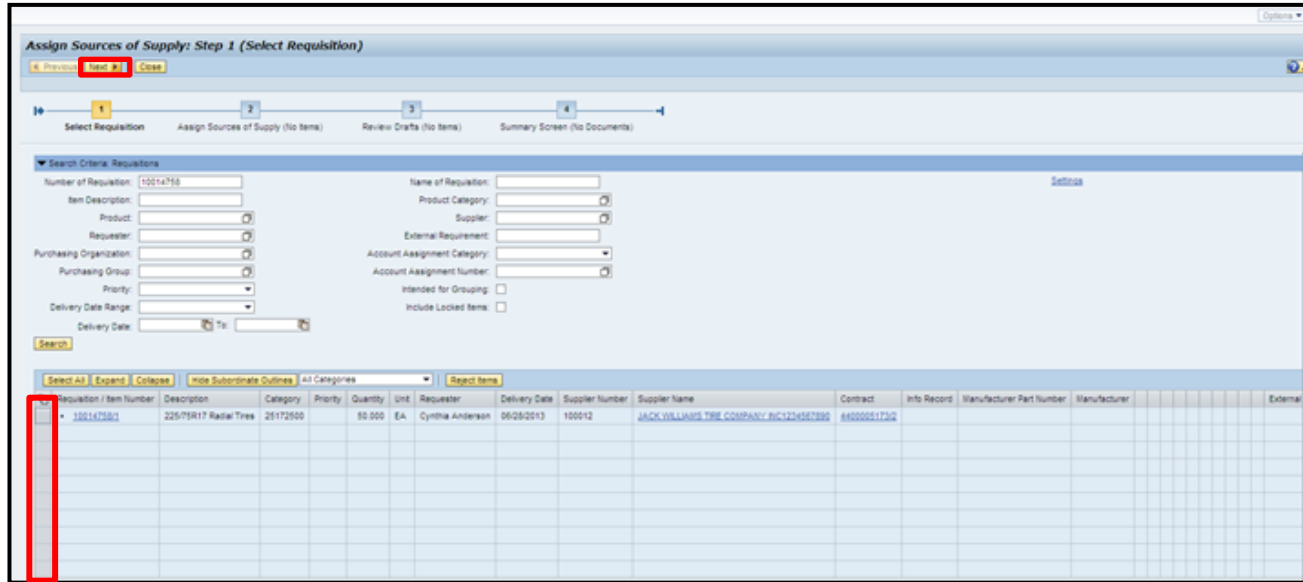
Search

Select All Expand Collapse Hide Subordinate Outlines All Categories Reject Items

Requisition / Item Number	Description	Category	Priority	Quantity	Unit	Requester	Delivery Date	Supplier Number	Supplier Name	Contract	Info Record	Manufacturer Part Number	Manufacturer	External
10014758/1	22579R17 Radial Tires	25172500		50.000	EA	Cynthia Anderson	06/28/2013	100012	JACK WILLIAMS TIRE COMPANY, INC1234567890	660000517302				

- The Carry Out Sourcing screen displays all open assignments
- Search for requirements using various criteria
- Select the SEARCH button

Sourcing a Requirement – Generate Purchase Order



Assign Sources of Supply: Step 1 (Select Requisition)

Previous **Next** Close

1 Select Requisition 2 Assign Sources of Supply (No Items) 3 Review Drafts (No Items) 4 Summary Screen (No Documents)

Search Criteria: Requisitions

Number of Requisition: 10017250
 Item Description: 22575R17 Radial Tires
 Product: 25172500
 Requisition: 10017250
 Purchasing Organization: 22575R17
 Purchasing Group: 25172500
 Priority: EA
 Delivery Date Range: 06/26/2013 To: 06/26/2013

Name of Requisition:
 Product Category:
 Supplier:
 External Requirement:
 Account Assignment Category:
 Account Assignment Number:
 Intended for Grouping:
 Include Locked Items:

Select All Expand Collapse Hide Subordinate Outlines All Categories Reject Items

Requisition / Item Number	Description	Category	Priority	Quantity	Unit	Requester	Delivery Date	Supplier Number	Supplier Name	Contract	Info Record	Manufacturer Part Number	Manufacturer	External
10017250	22575R17 Radial Tires	25172500	EA	50.000		Cynthia Anderson	06/26/2013	100012	JACK WILLIAMS TIRE COMPANY INC/234567890	84500017302				

- Select the items to be sourced. If selecting multiple items, use any of the following options:
 - SELECT ALL button; or
 - Hold down the Shift key, and choose the consecutive rows; or
 - Hold down the Ctrl key, and choose various row(s)
- Select the NEXT button

Sourcing a Requirement – Generate Purchase Order

Assign Sources of Supply: Step 2 (Assign Sources of Supply (1 Items))

◀ Previous Next ▶ Save Close

1 Select Requirement 2 Assign Sources of Supply (1 Items) 3 Review Drafts (No Items) 4 Summary Screen (No Documents)

Select All Expand All Collapse All Change Refresh Propose Sources of Supply Create Draft Replace Item with Catalog Item Undo Replacement Submit to Grouping Remove Assign to My Purchasing Group

Requisition / Item Number	Document Name	Document Number	Draft Type	Item Number	Supplier	Configurable Item Number	Description	Variant	Category Description	Priority	Quantity	Unit	Delivery Date	Supplier Number	Supplier Name
10014758/1							225/75R17 Radial Tires		TIRES & TIRE TUBES		50.000	EA	08/28/2013	100012	JACK WILLIAMS TIRE COMPANY, INC.1234567890

Related Services
[Create New Supplier](#)

- Make sure each line has a supplier
- If multiple items, select the SELECT ALL button
- Select the CREATE DRAFT button to select the type of procurement document you wish to create
- Once you select your document type you will automatically move to the next step in the wizard

Sourcing a Requirement – Generate Purchase Order

Assign Sources of Supply: Step 3 (Review Drafts (1 Items))

Previous Next Process All Drafts Close Process Selected Drafts **Edit Selected Drafts**

1 Select Requisition 2 Assign Sources of Supply (No Items) 3 **Review Drafts (1 Items)** 4 Summary Screen (No Documents)

Created Drafts

Change Selected Draft To Remove

Draft Name	Draft Type	Supplier Number	Supplier	Transaction Type
Local Purchase Order1 P00446880 05/30/20	Purchase Order	100012	JACK WILLIAMS TIRE COMPANY INC1234567890	ZhB - Standard PO

Details of Selected Drafts Local Purchase Order1 P00446880 05/30/20

Remove Expand All Collapse All

Requisition / Item Number	Configurable Item Number	Description	Category	Quantity	Unit	Supplier Number	Supplier Name	Info Record	Net Price	
10014758 / 1		225/75R17 Radial Tires	25172500	50.000	EA				242.75	242.75 USD

- Highlight your Draft; in the Draft Name field, enter the name of your Draft
- Select the Transaction Type and a dropdown menu will display, select your PO type
- Select the EDIT SELECTED DRAFTS button

Note: Do not select the PROCESS ALL DRAFTS or PROCESS SELECTED DRAFTS buttons. This will cause your PO to go directly into the awaiting approval status; or in the situation of an Auto-PO, it will go directly to the supplier.

Sourcing a Requirement – Generate Purchase Order

Change Purchase Order

Order Save Print Preview Check Close Cancel Related Links

Purchase Order Number: 430004145 (Change Version) | Purchase Order Type: Standard PO | Status: In Process | Document Date: 05/30/2013 | Total Value (Gross): 12,137.50 USD | Smart Number | Supplier: JACK WILLIAMS TIRE COMPANY INC1214567890

Overview Header Items Notes and Attachments Approval Tracking

General Header Data

Smart Number: Local Purchase Order (PO44) Smart Number is External

Purchase Order Number: 430004145

PO Name:

Supplier: 160012 JACK WILLIAMS TIRE COMPANY INC1214567890

Requester: 317923 Cynthia Anderson

Recipient: 317923 Cynthia Anderson

Location: 300022 General Services

Ship-To Address: 304538 EXEC BRANCH

Purchasing Organization: COPA Purchasing Organization

Purchasing Group: 005 Central Purchasing Group Show Members

Note to Supplier:

Internal Note:

Total Value (Net): 12,137.50 USD

Item Overview

Details Add Item Copy Paste Duplicate Delete Undo/Redo Propose Sources of Supply Add Condition Remove Condition Exercise Option Process All Items Filter Settings

Line Number	Deleted	Item Type	Item Number	Product ID	Description	Product Category	Quantity	Unit	Gross Price	Currency	Per	Net Price	Option Type	Order Type	Condition	Option Status	Delivery Date	Account Assignment Type	Account Assignment Number
1		Material	1	225-75R17 Radial Tires	25172500		50.000	EA	242.75	USD	1	242.75			10%		06/28/2013	Cost Center	1522110211
*		Material	0				0.000		0.00	USD	0	0.00							
*		Material	0				0.000		0.00	USD	0	0.00							
*		Material	0				0.000		0.00	USD	0	0.00							
*		Material	0				0.000		0.00	USD	0	0.00							
*		Material	0				0.000		0.00	USD	0	0.00							
*		Material	0				0.000		0.00	USD	0	0.00							
*		Material	0				0.000		0.00	USD	0	0.00							
Total Value (Net) 12,137.50 USD Total Tax 0.00 USD Total Value (Gross) 12,137.50 USD																			

- The Change Purchase Order screen displays. If necessary, enter any additional data into the applicable sub-tabs on the Overview, Header, and Items tabs.

Sourcing a Requirement – Generate Purchase Order

Change Purchase Order

Order Save Print Preview Check Close Cancel Related Links

Purchase Order Number: 4300004145 (Change Version) Purchase Order Type: Standard PO Status: In Process Document Date: 05/30/2013 Total Value (Gross): 12,137.50 USD Smart Number Supplier: JACK WILLIAMS TIRE COMPANY/BC124587890

Overview Header Items Notes and Attachments Approval Tracking

General Header Data

Smart Number: Local Purchase Order1 P0044
 Smart Number is External

Purchase Order Number: 4300004145
 PO Name:

Supplier: 100012 JACK WILLIAMS TIRE COMPANY/BC124587890
 Requester: 317923 Cynthia Anderson
 Recipient: 317923 Cynthia Anderson
 Location: 300022 General Services
 Ship-To Address: 00458 ENEC BRANCH
 Purchasing Organization: CORA Purchasing Organization
 Purchasing Group: DGS Central Purchasing Group [Show Members](#)
 Total Value (Net): 12,137.50 USD

Note to Supplier:

Internal Note:

Item Overview

Details Add Item Copy Paste Duplicate Delete Unlink Propose Sources of Supply Add Condition Remove Condition Exercise Option Process All Items Filter Settings

Line Number	Deleted	Item Type	Item Number	Product ID	Description	Product Category	Quantity	Unit	Gross Price	Currency	Per	Net Price	Option Type	Order Type	Condition	Option Status	Delivery Date	Account Assignment Type	Account Assignment Number
1		Material	1	22570R17	Radial Tires	25172500	50.000	EA	242.75	USD	1	242.75			35L		06/20/2013	Cost Center	1522110211
*		Material	0				0.000		0.00	USD	0	0.00							
*		Material	0				0.000		0.00	USD	0	0.00							
*		Material	0				0.000		0.00	USD	0	0.00							
*		Material	0				0.000		0.00	USD	0	0.00							
*		Material	0				0.000		0.00	USD	0	0.00							
*		Material	0				0.000		0.00	USD	0	0.00							
*		Material	0				0.000		0.00	USD	0	0.00							
*		Material	0				0.000		0.00	USD	0	0.00							
Total Value (Net) 12,137.50 USD Total Tax 0.00 USD Total Value (Gross) 12,137.50 USD																			

- When data entry is complete, select the CHECK button to view and resolve any errors. Then select the ORDER button to send the PO through approval workflow.

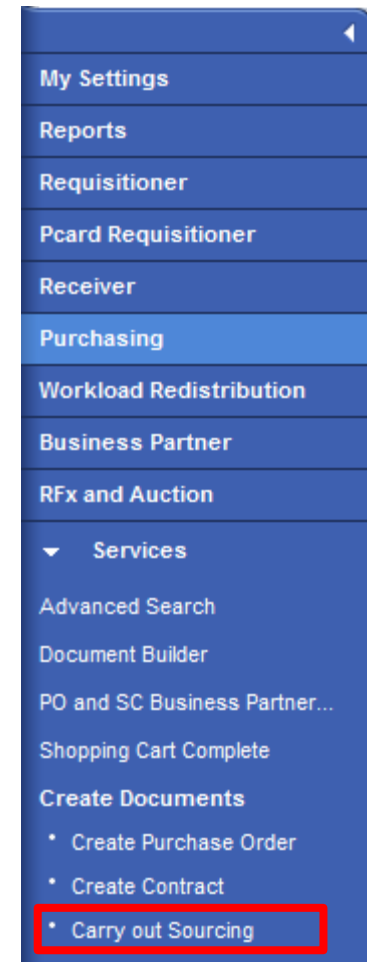
Source an Inventory Requirement and Generate a Purchase Order

Source an Inventory Requirement and Generate a Purchase Order

- Select **Purchasing**

Left navigation pane under – Create Documents

- Select **Carry Out Sourcing**



Source an Inventory Requirement and Generate a Purchase Order

- Select the Shopping Cart number link to display the Shopping Cart

Assign Sources of Supply: Step 1 (Select Requisition)

← Previous Next → Close

1 Select Requisition 2 Assign Sources of Supply (No Items) 3 Review Drafts (No Items) 4 Summary Screen (No Documents)

▼ Search Criteria: Requisitions

Number of Requisition:
Item Description:
Product:
Requester:
Purchasing Organization:
Purchasing Group: Corrections Central Purchasing Group
Priority:
Delivery Date Range:
Delivery Date: To:

Name of Requisition:
Product Category:
Supplier:
External Requirement:
Account Assignment Category:
Account Assignment Number:
Intended for Grouping:
Include Locked Items:

Search

Select All Expand Collapse Hide Subordinate Outlines All Categories Reject Items

Requisition / Item Number	Configurable Item Number	Description	Category	Priority	Quantity	Unit	Requester	Delivery Date	Supplier Number	Supplier Name	Contract	Info Record	Manufacturer Part Number	Manufa
10000022701	0001	Clips, Black, Large	44110000		10.000	PAC	SRMRFCRSV	06/14/2013						
10000022811	0001	Clips, Black, Large	44110000		0.000	PAC	SRMRFCRSV	06/14/2013						
10000022891	0001	test pdp vend	11110000		10.000	EA	SRMRFCRSV	05/20/2013	100012	JACK WILLIAMS TRF COMPANY INC1204567890				
10000022791	0001	test pdp lgth	11110000		40.000	EA	SRMRFCRSV	05/10/2013						
100126541		test pgroup	31191504		10.000	EA	Jeannette Irwin	11/08/2012						
100126581		test pgroup	31191504		10.000	EA	Jeannette Irwin	11/08/2012						
100126311		OptiFlex 7010 MT.L1.1: OptiFlex 7010 MT	43211507		1.000	EA	Teresa SRM-Phase2	11/05/2012	170579	DELL MARKETNG LP1	44000028191		10161448277011	
100122820		PCH PKL SLENTNIGHT 1000PCH/BX 8R/C/S	42000000		2.000	B0X	Herb Test	04/15/2011	164157	MCKESSON MEDICAL SURGICAL MINNESOTA	44000071791		108-PC1000	
100122822		LANCET 260 SFTY PRESS 100S 100EA/BX 15R/C	42000000		2.000	B0X	Herb Test	04/15/2011	164157	MCKESSON MEDICAL SURGICAL MINNESOTA	44000071791		16-218-100	
100122821		CUP MED PL STC 10Z 100S 100PK 50PK/C/S	42000000		1.000	CS	Herb Test	04/15/2011	164157	MCKESSON MEDICAL SURGICAL MINNESOTA	44000071791		16-9505	

Source an Inventory Requirement and Generate a Purchase Order

- Display the Shopping Cart and review for accuracy
- Select the CLOSE button when done

Display Shopping Cart

Print Preview **Close** Refresh

Number: 100000327 Document Name: SRURFCSR 06/11/2013 12:56 Status: Approved Created On: 06/11/2013 12:56:42 Created By: SRURFCSR

General Data

Buy on Behalf of: 329234 SRURFCSR Approval Note

Name of shopping cart: SRURFCSR 06/11/2013 12:56

Header Data: Values

Approval Process: Display / Edit Agents

Budget: Display

Document Changes: Display

Item Overview

Details Add Item Copy Paste Duplicate Delete Process All Items Filter Settings

Line Number	Item Type	Product ID	Description	Product Category	Product Category Description	Quantity	Unit	Net Price / Limit	Currency	Option Type	Per	Order Type	Delivery Date	Notes	Attachments	Item Status	Supplier
0001	Material	100470	Clips, Black, Large	44110000	OFFICE & DESK ACCESS	10.000	PAC	1.00	USD		1		06/14/2013			In Purchaser's Worklist	None

Total Value: 10.00 USD
Tax amount: 0.00 USD
Total Val. (Gross): 10.00 USD

Details for item 1 Clips, Black, Large

Item Data Account Assignment Notes and Attachments Delivery Address/Performance Location Sources of Supply / Service Agents Approval Process Overview Related Documents User-Specified Status Subcontracting

Identification

Item Type: Material
Product ID: 100470
Description: Clips, Black, Large
Product Category: 44110000 OFFICE & DESK ACCESS
Order as Direct Material:

Organization

Purchasing Group: Corrections Central Purchasing Group Show Members
Company Code: COPA COMMONWEALTH OF PA

Further Properties

Currency, Values and Pricing

Order Quantity / Unit: 10.000 PAC Pack
Ordered Quantity / Unit: 0.000
Open Quantity / Unit: 10.000 PAC
Price / Currency: 1.00 USD Price Unit: 1
Goods Receipt:
Invoice Receipt:
Goods Receipt Non-Valuated:
Tax / Amount: 0.00 AP Sales Tax, exempt 0.00 USD
Service Master Record: Display

Service and Delivery

Source an Inventory Requirement and Generate a Purchase Order

- Select the *gray* block next to the Shopping Cart Number
 - If multiple items, select all items
- Select the NEXT button

Assign Sources of Supply: Step 1 (Select Requisition)

◀ Previous **Next ▶** Close

1 Select Requisition 2 Assign Sources of Supply (No Items) 3 Review Drafts (No Items) 4 Summary Screen (No Documents)

Search Criteria: Requisitions

Number of Requisition: Name of Requisition:

Item Description: Product Category:

Product: Supplier:

Requester: External Requirement:

Purchasing Organization: Account Assignment Category:

Purchasing Group: Corrections Central Purchasing Group Account Assignment Number:

Priority: Intended for Grouping:

Delivery Date Range: Include Locked Items:

Delivery Date: To:

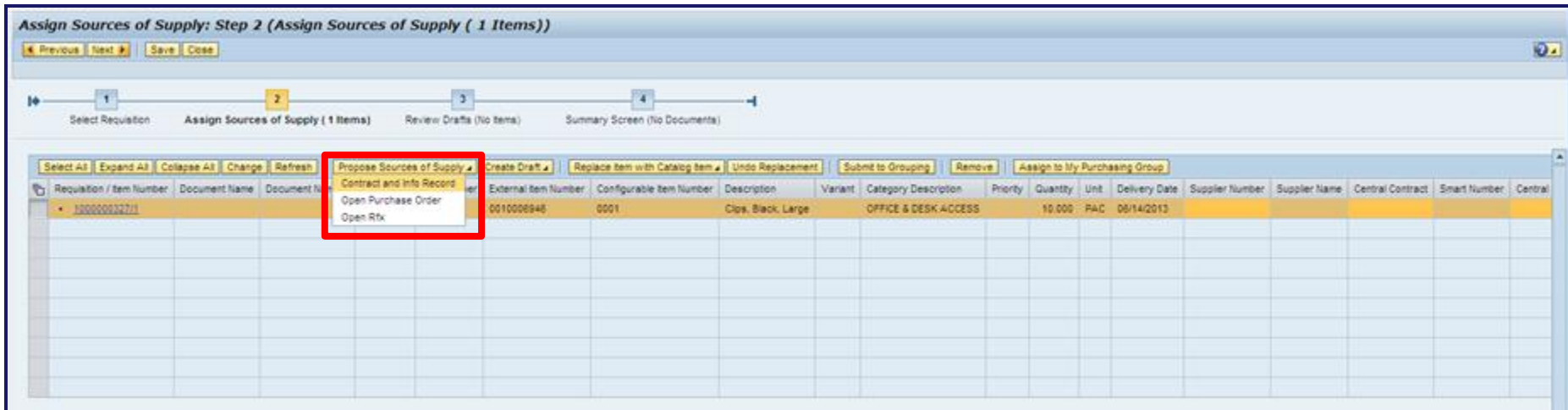
Search

Select All Expand Collapse Hide Subordinate Outlines All Categories Reject Items

Requisition / Item Number	Configurable Item Number	Description	Category	Priority	Quantity	Unit	Requester	Delivery Date	Supplier Number	Supplier Name	Contract	Info Record	Manufacturer Part Number	Manufa
• 1000000327/1	0001	Clips, Black, Large	44110000		10.000	PAC	SRMRFCRSV	06/14/2013						
• 1000000328/1	0001	Clips, Black, Large	44110000		0.000	PAC	SRMRFCRSV	06/14/2013						
• 1000000329/1	0001	test pdp vend	11110000		10.000	EA	SRMRFCRSV	05/20/2013	100012	JACK WILLIAMS TIRE COMPANY INC1234567890				
• 1000000328/1	0001	test pdp lgth	11110000		40.000	EA	SRMRFCRSV	05/10/2013						
• 10012654/1		test pgroup	31191504		10.000	EA	Jeannette Irwin	11/08/2012						
• 10012656/1		test pgroup	31191504		10.000	EA	Jeannette Irwin	11/08/2012						
• 10012631/1		OptPlex 7910.MT.L11. OptPlex 7910.MT	43211507		1.000	EA	Teresa SRM-Phase2	11/05/2012	170579	DELL MARKETING LP1	4400002819/1		1016144827701/1	
• 10012282/2		PCH PKL SILENTONIGHT 1000PCH8X88XCS	42000000		2.000	BOX	Herb Test	04/15/2011	164157	MCKESSON MEDICAL SURGICAL MINNESOTA	4400007179/1		106-PC1000	
• 10012282/2		LANCET 260 SFTY PRESS 100S 100EA8X 158X	42000000		2.000	BOX	Herb Test	04/15/2011	164157	MCKESSON MEDICAL SURGICAL MINNESOTA	4400007179/1		16-216-100	
• 10012282/1		CUP MED PLSTC 10Z 100S 100PK 50PKCS	42000000		1.000	CS	Herb Test	04/15/2011	164157	MCKESSON MEDICAL SURGICAL MINNESOTA	4400007179/1		16-9505	

Source an Inventory Requirement and Generate a Purchase Order

- Select Propose Source of Supply and a dropdown menu will appear, from the dropdown menu, select Contract and Info Record to see if a Contract exists



Assign Sources of Supply: Step 2 (Assign Sources of Supply (1 Items))

← Previous Next → Save Close

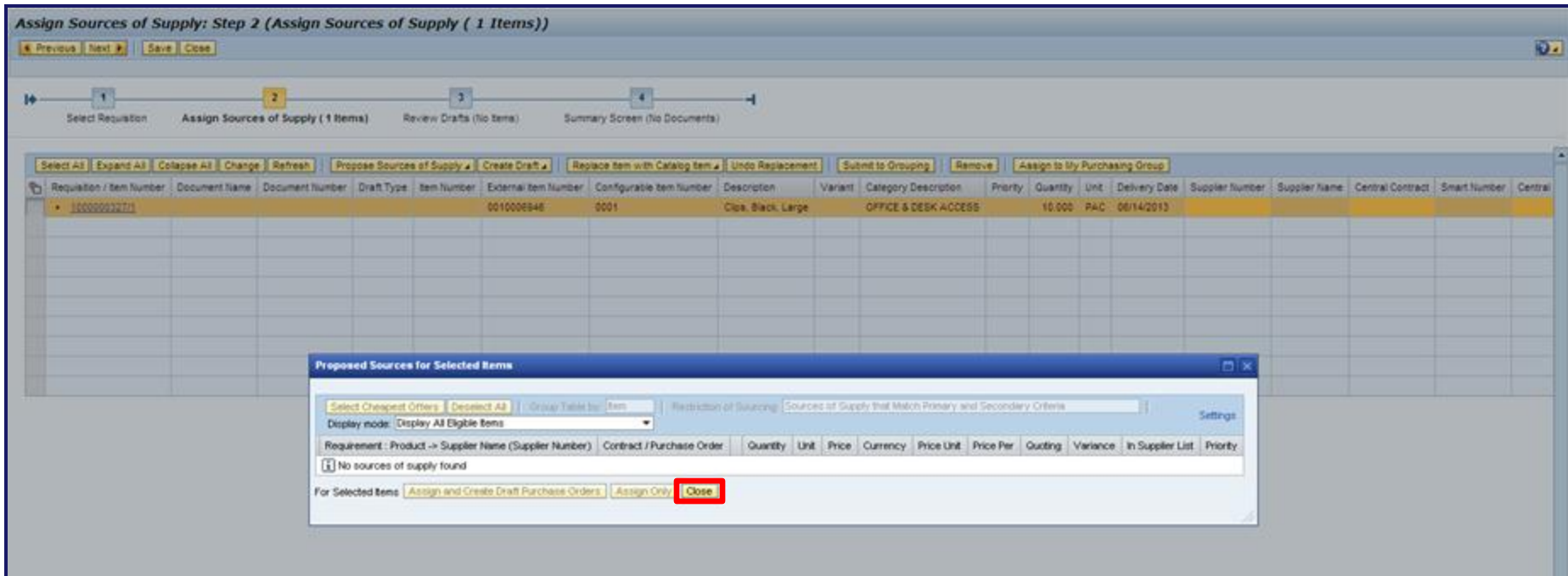
1 Select Requisition 2 Assign Sources of Supply (1 Items) 3 Review Drafts (No Items) 4 Summary Screen (No Documents)

Select All Expand All Collapse All Change Refresh Propose Sources of Supply Create Draft Replace Item with Catalog Item Undo Replacement Submit to Grouping Remove Assign to My Purchasing Group

Requisition / Item Number	Document Name	Document ID	External Item Number	Configurable Item Number	Description	Variant	Category Description	Priority	Quantity	Unit	Delivery Date	Supplier Number	Supplier Name	Central Contract	Smart Number	Central
100000022711			0010000948	0001	Clips, Black, Large		OFFICE & DESK ACCESS	10,000	PAC		09/14/2013					

Source an Inventory Requirement and Generate a Purchase Order

- A dialog box will display with either a list of suppliers/contracts or “No sources of supply found”
- Select the CLOSE button



Assign Sources of Supply: Step 2 (Assign Sources of Supply (1 Items))

Previous Next Save Close

1 Select Requisition 2 Assign Sources of Supply (1 Items) 3 Review Drafts (No Items) 4 Summary Screen (No Documents)

Select All Expand All Collapse All Change Refresh Propose Sources of Supply Create Draft Replace Item with Catalog Item Undo Replacement Submit to Grouping Remove Assign to My Purchasing Group

Requisition / Item Number	Document Name	Document Number	Draft Type	Item Number	External Item Number	Configurable Item Number	Description	Variant	Category Description	Priority	Quantity	Unit	Delivery Date	Supplier Number	Supplier Name	Central Contract	Smart Number	Central
10000002770					0010000948	0001	Clok. Black, Large		OFFICE & DESK ACCESS		10.000	PAC	06/14/2013					

Proposed Sources for Selected Items

Select Cheapest Offers Deconstruct All Group Table by: Item Restriction of Sourcing: Sources of Supply that Match Primary and Secondary Criteria Settings

Display mode: Display All Eligible Items

Requirement: Product -> Supplier Name (Supplier Number) Contract / Purchase Order Quantity Unit Price Currency Price Unit Price Per Outing Variance In Supplier List Priority

No sources of supply found

For Selected Items Assign and Create Draft Purchase Orders Assign Only **Close**

Source an Inventory Requirement and Generate a Purchase Order

- If no sources of supply exist, select the match code in the Supplier Number field to search for a supplier

Assign Sources of Supply: Step 2 (Assign Sources of Supply (1 Items))

Previous Next Save Close

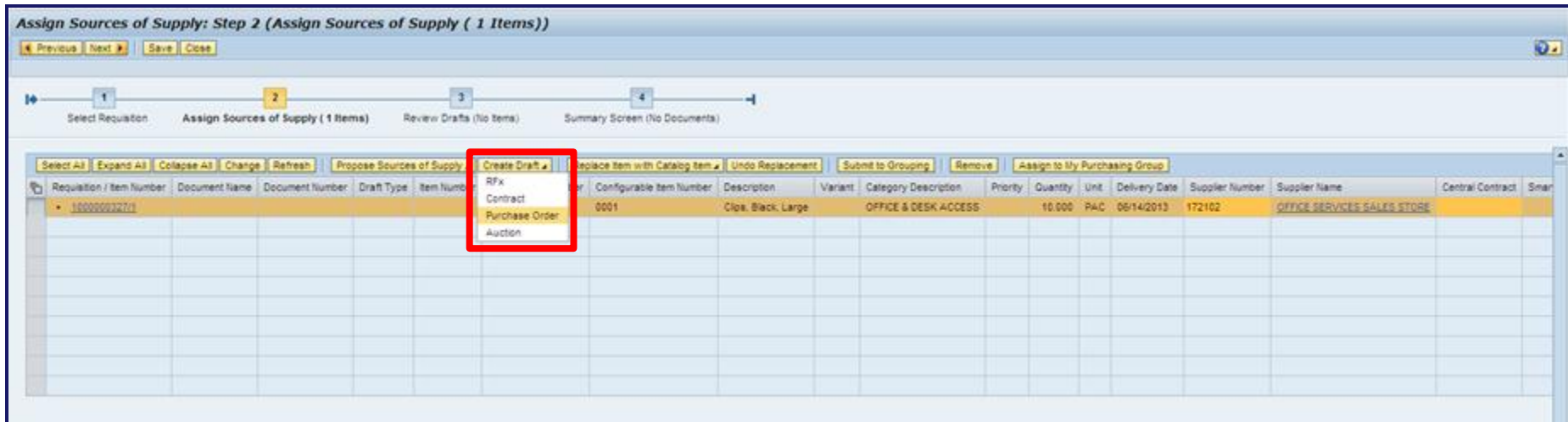
1 Select Requisition 2 Assign Sources of Supply (1 Items) 3 Review Drafts (No Items) 4 Summary Screen (No Documents)

Select All Expand All Collapse All Change Refresh Propose Sources of Supply Create Draft Replace Item with Catalog Item Undo Replacement Submit to Grouping Remove Assign to My Purchasing Group

Requisition / Item Number	Document Name	Document Number	Draft Type	Item Number	External Item Number	Configurable Item Number	Description	Variant	Category Description	Priority	Quantity	Unit	Delivery Date	Supplier Number	Supplier Name	Central Contract	Smart
180000022711					0010000946	0001	Clip, Black, Large		OFFICE & DESK ACCESS		10.000	RAC	09/14/2013	172102	OFFICE SERVICES SALES STORE		

Source an Inventory Requirement and Generate a Purchase Order

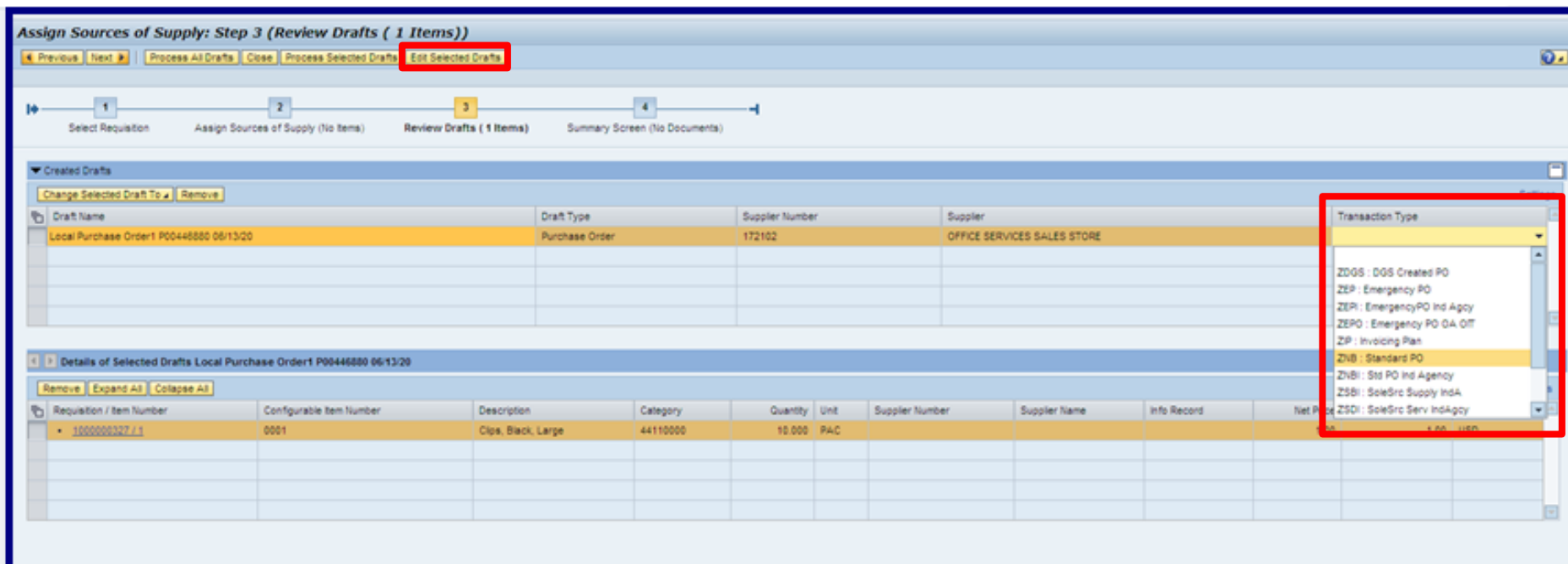
- Select the CREATE DRAFT button, and a dropdown menu will appear, from the dropdown menu select the appropriate document type (i.e. Purchase Order)



Requisition / Item Number	Document Name	Document Number	Draft Type	Item Number	Configurable Item Number	Description	Variant	Category Description	Priority	Quantity	Unit	Delivery Date	Supplier Number	Supplier Name	Central Contract	Smart
100000022701					0001	Cpls. Black Large		OFFICE & DESK ACCESS		10.000	PAC	06/14/2013	172102	OFFICE SERVICES SALES STORE		

Source an Inventory Requirement and Generate a Purchase Order

- Select the Transaction Type and a dropdown menu will appear – select the appropriate PO type from the dropdown menu
- Select the EDIT SELECTED DRAFTS button



Assign Sources of Supply: Step 3 (Review Drafts (1 Items))

Previous Next Process All Drafts Close Process Selected Drafts **Edit Selected Drafts**

1 Select Requisition 2 Assign Sources of Supply (No Items) 3 Review Drafts (1 Items) 4 Summary Screen (No Documents)

Created Drafts

Change Selected Draft To Remove

Draft Name	Draft Type	Supplier Number	Supplier
Local Purchase Order1 P00446880 06/13/20	Purchase Order	172102	OFFICE SERVICES SALES STORE

Transaction Type

- ZDGS : DGS Created PO
- ZEP : Emergency PO
- ZERI : Emergency PO Ind Agcy
- ZEPO : Emergency PO OA OIT
- ZP : Invoicing Plan
- ZNB : Standard PO**
- ZNBI : Std PO Ind Agency
- ZSBI : SoleSrc Supply IndA
- ZSDI : SoleSrc Serv IndAgcy

Details of Selected Drafts Local Purchase Order1 P00446880 06/13/20

Remove Expand All Collapse All

Requisition / Item Number	Configurable Item Number	Description	Category	Quantity	Unit	Supplier Number	Supplier Name	Info Record	Net Price
10000002327 / 1	0001	Clips, Black, Large	44110000	10 000	PAC				

- At this point, the PO will open in the “Edit” mode for further processing



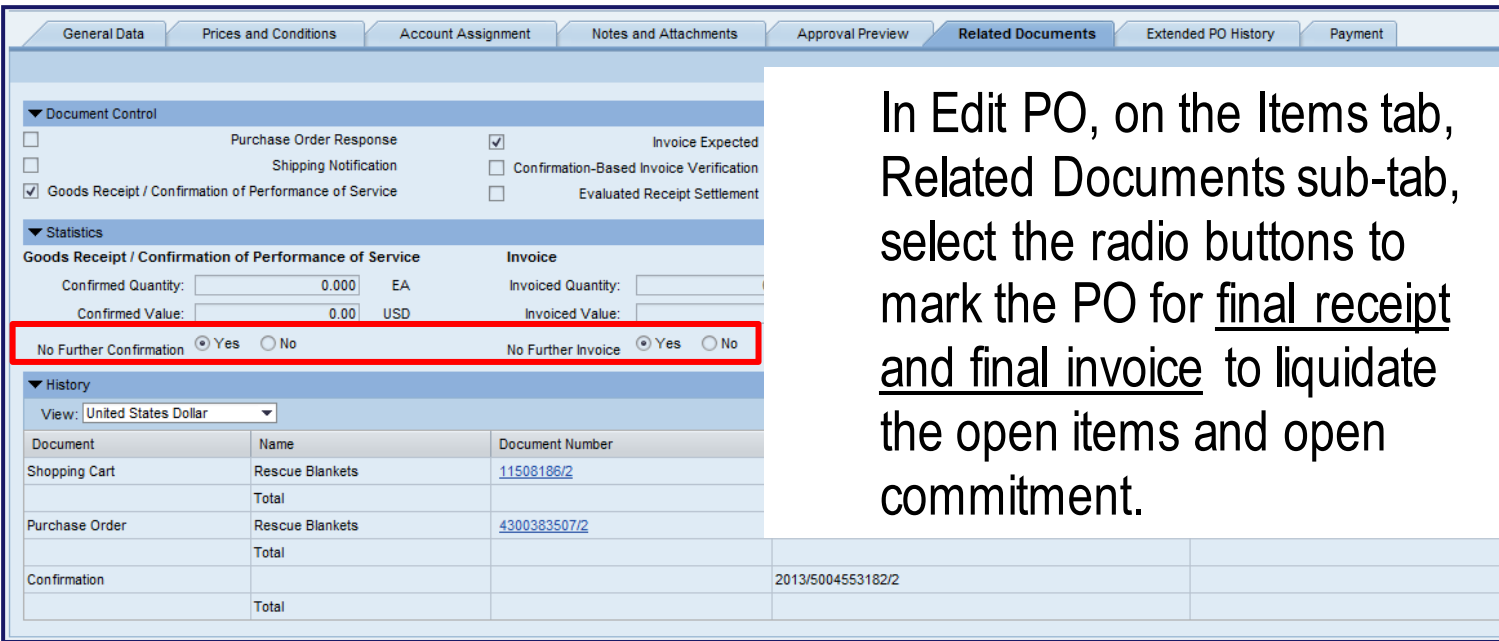
pennsylvania

DEPARTMENT OF GENERAL SERVICES

Liquidating Commitments & Completing Shopping Carts

Liquidating Commitments & Completing Shopping Carts

- A Shopping Cart was created, and a follow-on PO was created for an equal quantity. After the partial receipt, it is decided that there is no longer a requirement of deliveries and/or services from the supplier.



General Data | Prices and Conditions | Account Assignment | Notes and Attachments | Approval Preview | **Related Documents** | Extended PO History | Payment

▼ Document Control

Purchase Order Response Invoice Expected

Shipping Notification Confirmation-Based Invoice Verification

Goods Receipt / Confirmation of Performance of Service Evaluated Receipt Settlement

▼ Statistics

Goods Receipt / Confirmation of Performance of Service Invoice

Confirmed Quantity: 0.000 EA Invoiced Quantity:

Confirmed Value: 0.00 USD Invoiced Value:

No Further Confirmation Yes No No Further Invoice Yes No

▼ History

View: United States Dollar

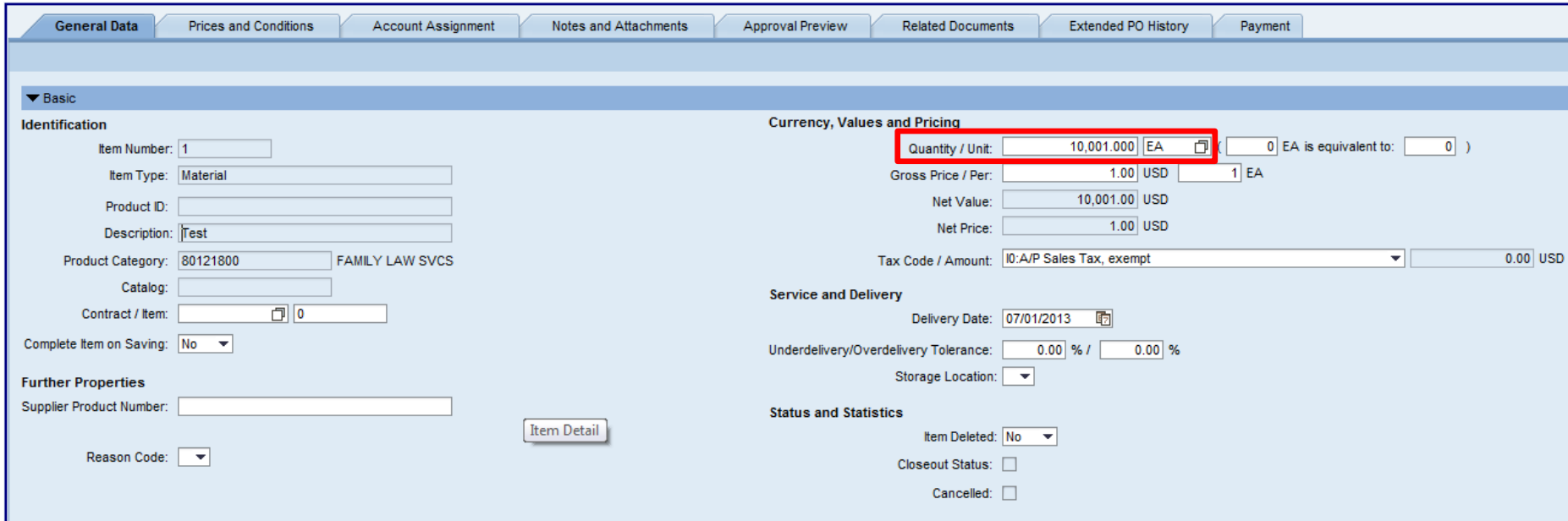
Document	Name	Document Number
Shopping Cart	Rescue Blankets	11508186/2
	Total	
Purchase Order	Rescue Blankets	4300383507/2
	Total	
Confirmation		2013/5004553182/2
	Total	

In Edit PO, on the Items tab, Related Documents sub-tab, select the radio buttons to mark the PO for final receipt and final invoice to liquidate the open items and open commitment.

NOTE: Marking only the GR as final does not liquidate the R3 commitment.

Liquidating Commitments & Completing Shopping Carts

- In the General Data sub-tab, reduce the line item's quantity to what was actually received



General Data | Prices and Conditions | Account Assignment | Notes and Attachments | Approval Preview | Related Documents | Extended PO History | Payment

▼ Basic

Identification

Item Number: 1
Item Type: Material
Product ID:
Description: Test
Product Category: 80121800 FAMILY LAW SVCS
Catalog:
Contract / Item: 0
Complete Item on Saving: No

Further Properties

Supplier Product Number:
Reason Code:

Currency, Values and Pricing

Quantity / Unit: 10,001.000 EA
Gross Price / Per: 1.00 USD 1 EA
Net Value: 10,001.00 USD
Net Price: 1.00 USD
Tax Code / Amount: 10:A/P Sales Tax, exempt 0.00 USD

Service and Delivery

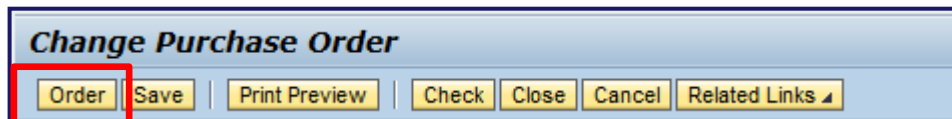
Delivery Date: 07/01/2013
Underdelivery/Overdelivery Tolerance: 0.00 % / 0.00 %
Storage Location:

Status and Statistics

Item Deleted: No
Closeout Status:
Cancelled:

Item Detail

- Select the ORDER button



Change Purchase Order

Order | Save | Print Preview | Check | Close | Cancel | Related Links ▾

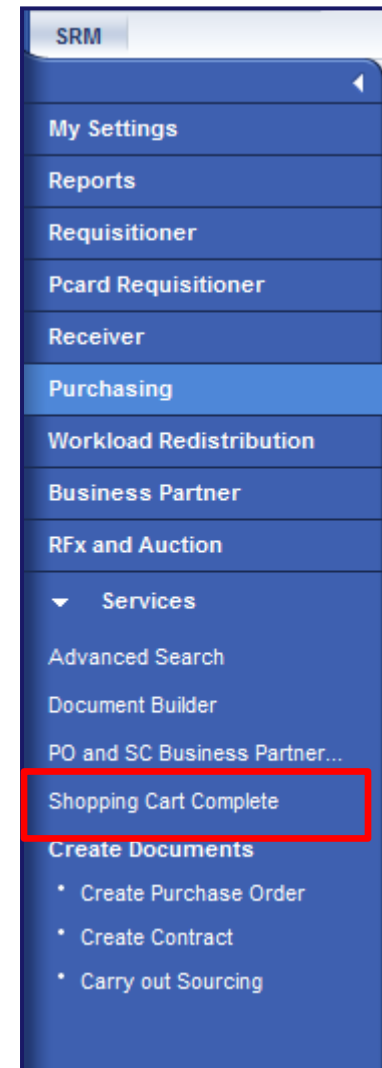
- There are two methods to complete Shopping Carts:
 - Shopping Cart Complete link in the Purchasing *Workset*
 - Carry Out Sourcing using the REJECT ITEMS button
- These methods are illustrated in the following slides

Shopping Cart Complete Link

- Select **Purchasing**

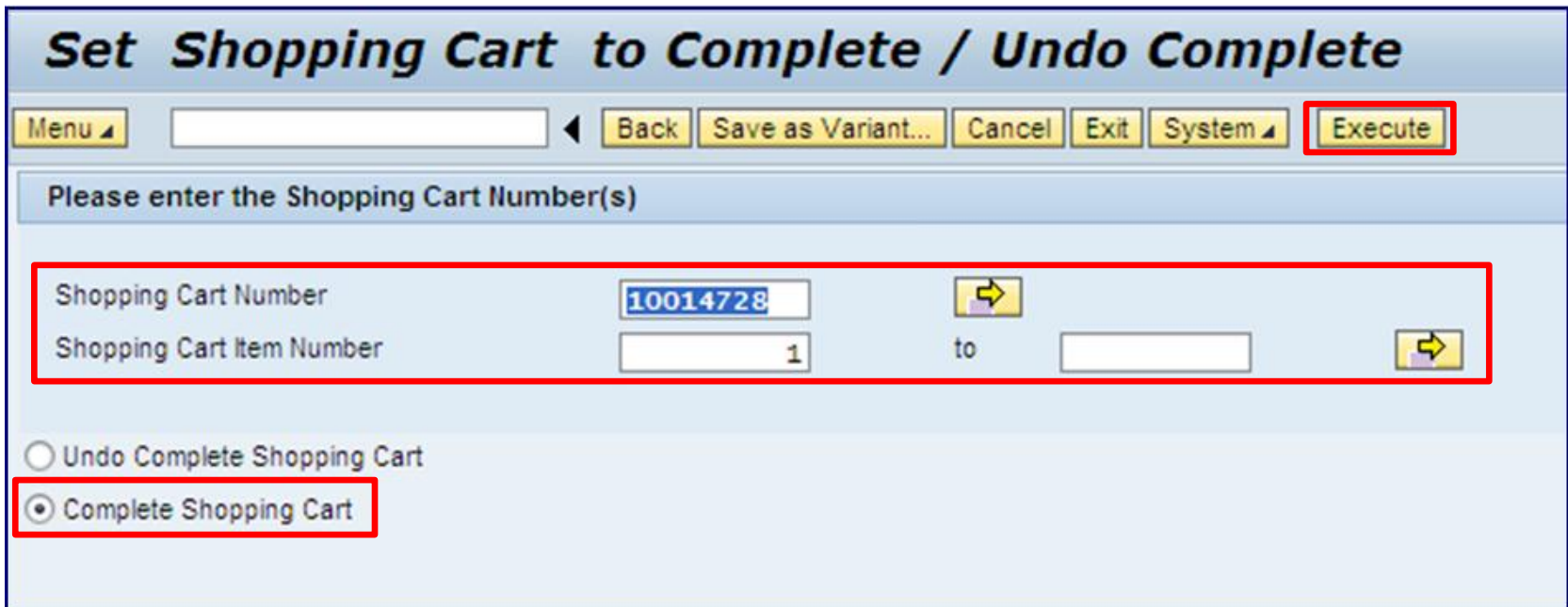
Left navigation pane under – Create Documents

- Select **Shopping Cart Complete**



Liquidating Commitments & Completing Shopping Carts

- Completing the Shopping Cart
 - Enter the Shopping Cart Number(s)
 - Enter the Shopping Cart Item Number(s)
 - Select the Complete Shopping Cart radio button
 - Select the EXECUTE button



Set Shopping Cart to Complete / Undo Complete

Menu ◿ [] ◀ Back Save as Variant... Cancel Exit System ◿ **Execute**

Please enter the Shopping Cart Number(s)

Shopping Cart Number →

Shopping Cart Item Number to →

Undo Complete Shopping Cart

Complete Shopping Cart

Liquidating Commitments & Completing Shopping Carts

- Record updated message will display
- Select BACK button to complete additional Shopping Carts or EXIT button to leave the program

Set Shopping Cart to Complete / Undo Complete

Menu ▾ ◀ **Back** Cancel **Exit** System ▾

SC Number	ITEM Number	MESSAGE
10014728	0000000001	Record updated

Liquidating Commitments & Completing Shopping Carts

Carry Out Sourcing Process

- After liquidating the PO, go to Carry Out Sourcing
- Locate the Shopping Cart through normal search criteria

Assign Sources of Supply: Step 1 (Select Requisition)

Previous Next Close

1 2 3 4
Select Requisition Assign Sources of Supply (No Items) Review Drafts (No Items) Summary Screen (No Documents)

▼ Search Criteria: Requisitions

Number of Requisition: 10014721 Name of Requisition:

Item Description: Product Category:

Product: Supplier:

Requester: External Requirement:

Purchasing Organization: Account Assignment Category:

Purchasing Group: Account Assignment Number:

Priority: Intended for Grouping:

Delivery Date Range: Include Locked Items:

Delivery Date: To:

Search

Select All Expand Collapse Hide Subordinate Outlines All Categories Reject Items

Requisition / Item Number	Description	Category	Priority	Quantity	Unit	Requester	Delivery Date	Supplier Number	Supplier Name	Co
• 10014721/1	225/75R17 Radial Tires	25172500		25.000	EA	Cynthia Anderson	06/28/2013	100012	JACK WILLIAMS THE COMPANY INC12045678	

Liquidating Commitments & Completing Shopping Carts

- Select the Shopping Cart
 - For multiple items, hold down the Ctrl key and select the *gray* block
- Select the REJECT ITEM button

Assign Sources of Supply: Step 1 (Select Requisition)

Previous Next Close

1 Select Requisition 2 Assign Sources of Supply (No Items) 3 Review Drafts (No Items) 4 Summary Screen (No Documents)

▼ Search Criteria: Requisitions

Number of Requisition: 10014721 Name of Requisition:

Item Description: Product Category:

Product: Supplier:

Requester: External Requirement:

Purchasing Organization: Account Assignment Category:

Purchasing Group: Account Assignment Number:

Priority: Intended for Grouping:

Delivery Date Range: Include Locked Items:

Delivery Date: To:

Search

Select All Expand Collapse Hide Subordinate Outlines All Categories **Reject Items**

Requisition / Item Number	Description	Category	Priority	Quantity	Unit	Requester	Delivery Date	Supplier Number	Supplier Name
10014721/1	225/75R17 Radial Tires	25172500		25.000	EA	Cynthia Anderson	06/28/2013	100012	JACK WILLIAMS TIRE COMPANY INC12345678

Liquidating Commitments & Completing Shopping Carts





- A dialog box will display asking if you want to “Reject Selected Items?”
 - You will need to select the YES button to complete the Shopping Cart



Purchase Order and Shopping Cart Business Partner Update

Business Partner Update

- If the Commonwealth business partner associated with the Purchase Order or Shopping Cart has retired or has been separated from the organization, end users receive a “No Address Found” hard stop

	No address found for partner function type Goods Recipient
	No address found for partner function type Requester
	User does not exist
	Partner 0000318230 is blocked

Business Partner Update

- The following slides will provide instructions for executing a new transaction that provides purchasing agents with the ability to change the retired business partner to another active partner within the organization.
- The updates should be made to the Purchase Order and, where applicable, to the associated Shopping Cart.
- The business partner update transaction has been added to the SRM Purchase Role.

Important Note: If the Purchase Order is in a “Held” status, it must be returned to an “Ordered” status before updating the business partner. If the business partner is updated on a “Held” document, the business partner will not update properly.

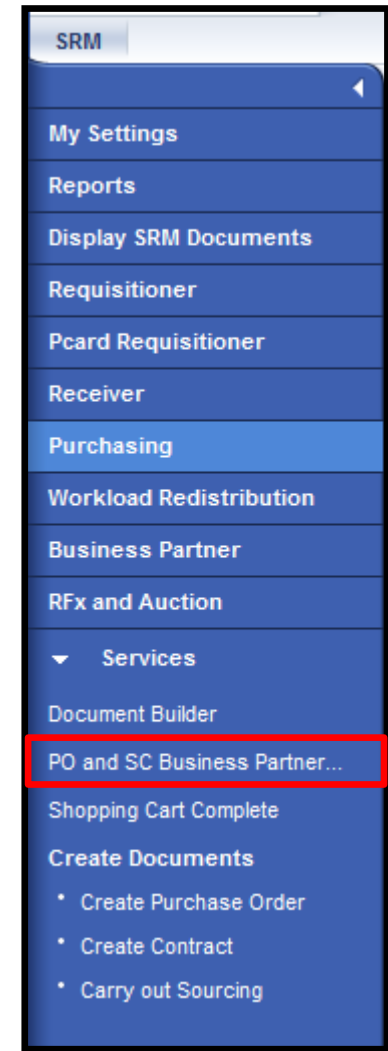
Business Partner Update

- Select **Purchasing**

Left navigation pane under - Services

- Select **PO and SC Business Partner Update**

The update program requires a document number and the new business partner



Business Partner Update

Change Business Partner in SRM Documents

Menu ▾ [] ◀ Back Save as Variant... Cancel Exit System ▾ Execute

Document Number * [] to [] ➡

Object Type * []

New Business Partner * []

Test Run

- Enter the Document Number – a Purchase Order or Shopping Cart number
- Enter the Object Type (this is the document type such as Purchase Order, Shopping Cart, Solicitation, or Contract)

Business Trans. Cat. (1)

Restrictions

Trans. Cat.	Trans. Type Descr.
BUS2000113	Contract
BUS2121	Shopping Cart
BUS2200	RFx
BUS2201	Purchase Order
BUS2202	Supplier Quote
BUS2203	Confirmation
BUS2205	Incoming Invoice
BUS2206	Supplier List
BUS2208	Auction
BUS2209	Purch. Order Response
BUS2210	Invoice Default
BUS2230	SUS Purchase Order
BUS2231	Shipping Notif.
BUS2232	SUS PO Confirmation
BUS2233	SUS Confirmation
BUS2234	SUS Invoice

Business Partner Update

New Business Partner

Test Run

- Enter the New Business Partner Number (different from the employee number) – if unknown, this can be found by using the search functionality

Business Partner Number (1)

Partners by address | Partners, General | Partners by BP Role | Partners by bank details

City

Postal Code

Street

House Number

Country Key

Name 1/last name

Name 2/First name

Search term 1

Search term 2

Business Partner

Valid On

Maximum No. of Hits

Business Partner Number (1)

Partners by address | Partners, General | Partners by BP Role | Partners by bank details


Country ...	Name 1/last name	Name 2/First name	Search ter...	Search ter...	Partner
US	ESPELAND	VALERIE	ESPELAND	VALERIE	707319
US	ESPELAND	VALERIE	ESPELAND	VALERIE	707319
US	ESPELAND	VALERIE	ESPELAND	VALERIE	707319
US	ESPELAND	VALERIE	ESPELAND	VALERIE	707319

Business Partner Update

- Select the TEST RUN checkbox at the bottom
- Select the EXECUTE button

Change Business Partner in SRM Documents

Menu ▾ ◀ Back Save as Variant... Cancel Exit System ▾ **Execute**

Document Number to 

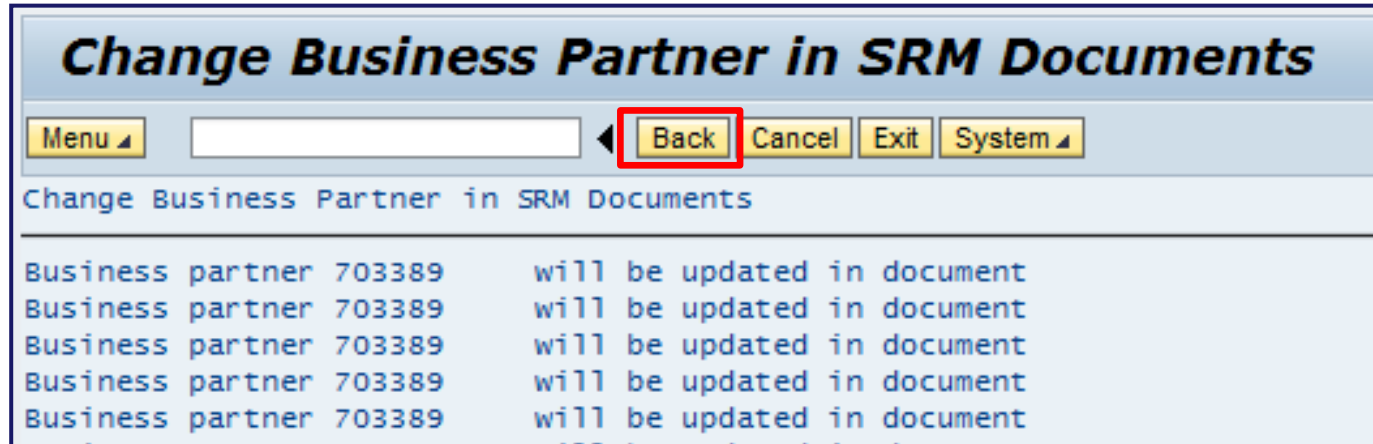
Object Type

New Business Partner

Test Run

Business Partner Update

- Receive message that document can be updated with new business partner:



Change Business Partner in SRM Documents

Menu ▾ ◀ Back Cancel Exit System ▾

Change Business Partner in SRM Documents

Business partner 703389	will be updated in document
Business partner 703389	will be updated in document
Business partner 703389	will be updated in document
Business partner 703389	will be updated in document
Business partner 703389	will be updated in document

- Select the BACK button

Business Partner Update

- Deselect the TEST RUN checkbox
- Select the EXECUTE button

Change Business Partner in SRM Documents

Menu ▾ ◀ Back Save as Variant... Cancel Exit System ▾ **Execute**

Document Number to

Object Type

New Business Partner

Test Run

Business Partner Update

- Business partner has been successfully updated:

Change Business Partner in SRM Documents

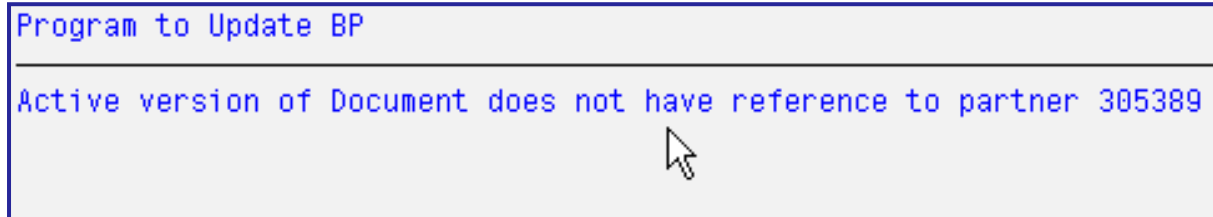
Menu ▾ ◀ Back Cancel Exit System ▾

Change Business Partner in SRM Documents

703389	has been changed
703389	has been changed
703389	has been changed
703389	has been changed

Business Partner Update

- If the document is unable to be updated, the message may look something like this:



```
Program to Update BP
-----
Active version of Document does not have reference to partner 305389
```

- Select the BACK button and enter the correct business partner number
- If the document is awaiting approval, you will need to make a small text change and “order” to retrigger the zero-step workflow
- If that fails, please submit an online remedy ticket

Summary

This completes your lesson, you should now be able to:

- Understand the special features of SRM 7.0
- Perform the necessary functions to create a PO
- Create and edit legal documents in Document Builder (DB)
- Print POs
- Make necessary edits to POs
- Access POs to delete individual line items or delete an entire order
- Redistribute work to other sourcing professionals
- Source a requirement and create a PO
- Liquidate the balance of a PO when a partial Goods Receipt is done

Knowledge Check

1. Where would you find the Partner Info?
 - a. Basic Data sub-tab
 - b. Approval sub-tab
 - c. General Data sub-tab

Knowledge Check

2. Can you split the Cost Distribution by Value?
 - a. Yes
 - b. No

Knowledge Check

3. Where would you find the Text fields?
 - a. Documents and Attachments
 - b. Notes and Attachments
 - c. Documents
 - d. Document Builder

Knowledge Check

4. A PO that was ordered must be deleted at the line item level.
 - a. True
 - b. False



pennsylvania

DEPARTMENT OF GENERAL SERVICES

SAP

Supplier
Relationship
Management

SRM 7.0

**Creating & Maintaining
Purchase Orders**

Thank you!