Supplier Relationship Management

Shopper

MM_SRM_SHO_300
SRM Goes GREEN

Paper handouts of the SRM Shoppers presentation will not be provided.

Downloads are available @ www.uky.edu/Purchasing
Definition of SRM

**Supplier Relationship Management (SRM)** is an SAP product that facilitates public procurement via a web-based platform.

- Enables end users to procure goods and services via a “Shopping Cart” environment.
- Generates savings for the University through use of electronic catalogs and contracts.
SRM Implementation Schedule

Phase 1 – Campus
   Pilot Groups Online Training – August 2011
   Pilot Groups Go-Live – September 1, 2011
   Campus Online Training – September 2011
   Campus Go-Live – October 1, 2011

Post Go-Live Open labs will be available for walk-in training and assistance.

Phase 2 – Healthcare
   Summer 2012
## Role Terminology

<table>
<thead>
<tr>
<th>Current SAP Term</th>
<th>New SRM Term</th>
<th>SAP Role</th>
<th>SRM Role</th>
</tr>
</thead>
<tbody>
<tr>
<td>Requisition</td>
<td>Shopping Cart</td>
<td>Requisitioner</td>
<td>Shopper</td>
</tr>
<tr>
<td>Approve/Release</td>
<td>Approve</td>
<td>Approver</td>
<td>Approver</td>
</tr>
<tr>
<td>Receiving</td>
<td>Confirming</td>
<td>Receiver</td>
<td>Confirmer</td>
</tr>
</tbody>
</table>
### Training Requirements for SRM Roles

<table>
<thead>
<tr>
<th>Role</th>
<th>Training Requirements</th>
</tr>
</thead>
<tbody>
<tr>
<td>Shopper</td>
<td>Shoppers must fulfill a two-part training requirement:</td>
</tr>
<tr>
<td></td>
<td>a. Attend MM_SRM_SHO_300 - Shopper training session sponsored by the Purchasing Division</td>
</tr>
<tr>
<td></td>
<td>b. Take and pass web-based training course MM_SRM_SPS_200 - Shopper Personal Settings</td>
</tr>
<tr>
<td>Approver</td>
<td>Approvers are required to take and pass web-based training course MM_SRM_APP_300 - Approver</td>
</tr>
<tr>
<td>Goods Confirmer</td>
<td>Goods Confirmers are required to take and pass web-based training course MM_SRM_CON_300 - Goods Confirmations</td>
</tr>
</tbody>
</table>

Current user roles in SAP will not transfer to SRM. Each SRM user must take the applicable role-based training to receive their new permissions.
Role Combinations

End users can only have 2 of the 3 roles for security reasons.

<table>
<thead>
<tr>
<th>SRM Role Combinations</th>
</tr>
</thead>
<tbody>
<tr>
<td>Shopper - Confirmer</td>
</tr>
<tr>
<td>Shopper - Approver</td>
</tr>
<tr>
<td>Approver - Confirmer</td>
</tr>
</tbody>
</table>
## SRM New Terminology

<table>
<thead>
<tr>
<th>Term</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>POWL</td>
<td>Personalized Object Work List, a.k.a. “dashboard” serves as the Shopper’s home or starting point and contains document history, queries, etc.</td>
</tr>
<tr>
<td>Attributes</td>
<td>End user’s default personal settings</td>
</tr>
<tr>
<td>Catalogs</td>
<td>Also known as “punchouts”, catalogs are located on external suppliers’ websites</td>
</tr>
<tr>
<td>Contracts</td>
<td>Pre-loaded contracted items available to the shopper in SRM</td>
</tr>
<tr>
<td>Free Text</td>
<td>Used when items are not available from catalogs or contracts; entered from a supplier quote</td>
</tr>
<tr>
<td>Shopping Cart</td>
<td>Instead of a Requisition the tool utilized by Shoppers to purchase goods and/or services</td>
</tr>
<tr>
<td>Workflow</td>
<td>Process by which documents route to Inboxes within SRM</td>
</tr>
</tbody>
</table>
Current SAP Purchasing Process

- Departments usually initiate the process with vendor quote and requisition entry.
- Requisition arrives at Purchasing after approval.
- Purchasing processes purchase order based on established policies and procedures.
- Goods Receipts and Invoice Postings complete the 3-way match.
New SRM Purchasing Process - Catalogs/Contracts

- Catalogs and contracts are created and maintained by Purchasing, thus creating the Shopping Cart experience for the end user.

- If a needed good or service is not available from a catalog or contract, the Shopper may obtain a quote and enter a “Free Text” Shopping Cart.

- Encumbrance occurs when Shopping Cart is approved.
Shopper Overview

The **Shopper** role in SRM is responsible for creating a “Shopping Cart” to purchase goods and/or services from a particular supplier.

**Shopping Carts** are line item driven, thus allowing the Shopper to:

- Order items from multiple suppliers in one cart
- Assign multiple or split account assignments for each line item

Only one delivery address may be selected per Shopping Cart.
SRM Shopping Methods

There are **three** different types of shopping methods:

**Catalog orders** are used for the University’s highest volume suppliers. Shoppers will “punch-out” to the suppliers’ external websites. Approval is required for all orders over $2,000. SRM immediately creates and transmits a purchase order to the supplier.

**Contract orders** are used to select line items from established University contracts within the SRM environment. After appropriate approvals, SRM immediately creates and transmits a purchase order to the supplier.

**Free Text orders** are used when items cannot be found in catalogs or contracts. Shoppers enter information similar to the requisitioning process in the current SAP purchasing system. After approvals, free text shopping carts are forwarded to Purchasing for processing based on established policies and procedures.

*Purchase orders are the document issued for all shopping methods.*
Personalized Object Work List - Overview

Transaction codes are not used in SRM.

Personalized Object Work List

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

2. Navigate to the Shopper Tab

Launch Pad icons are **not** used with SRM roles.
Select Shopper tab
Personalized Object Work List – Shopping Cart

Click Shopping Cart to activate the POWL and display cart history, etc.
Quick Criteria Maintenance

POWL Active Queries section shows the following:

**Shopping Carts** – All (Carts you have created or been assigned), Saved, Awaiting Approval and Team Carts (Carts shared by team members)

**Confirmations** – All (Confirmations you have created or have been assigned), Saved and Deleted
**Quick Criteria Maintenance**

**Note:** Quick Criteria Maintenance is used to conduct searches for Shopping Carts (similar to ME2K, ME2L and ME5K in SAP)
Quick Criteria Maintenance – Search Examples

Example 1 – Search by Shopping Cart number

Example 2 – Search by Timeframe created

Bottom section reflects results from all searches
Create Shopping Cart - Settings

Shopping Cart Settings are additional settings above and beyond Personal Settings confirmed at the Navigation Pane.

• They should be set prior to creation of your first Shopping Cart.

• Not entering cart settings will mean default data must be entered manually for each line item.
Shopping Cart Settings

1. Select Shopping Cart

2. Click Create Shopping Cart
Shopping Cart Settings – Product ID

The Product ID column should be removed from view prior to creation of your first cart. This only needs done once.

3. Click Settings at far right of screen
4. Highlight Product ID and Select Remove
5. Click OK
1. Prior to creation of first Shopping Cart, click Set Values and confirm Default Settings are correct.

2. Set the default Shopping Cart type for campus as NBPO.

Note: Optional – additional default settings can be configured that apply to every Shopping Cart e.g., internal notes that would replicate on every cart.
Important: Minimum browser requirements for creating Catalog Shopping Carts are IE 8.0 or Firefox 5.0

Create Catalog Shopping Cart

Catalog orders: a.k.a. “punchouts” are used for the University’s highest volume suppliers and originate from external websites. Pricing is based on University contracts.
Catalog Order – Create

1. Add Approval and Supplier Notes if needed

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

Shopping Cart number automatically generates upon entering a new Shopping Cart

Naming convention populates automatically with your User ID and date/time stamp
Catalog Order – Add Items from Punchout

3. Once at the punchout site browse for needed items

OfficeMax site is customized for SRM use. User personal data is not recorded or transmitted between sites.

4. Select and add items to Shopping Cart

5. Select Checkout and the cart will carry over to SRM
Upon return to SRM, line items with pricing populate into the Shopping Cart. Additional items can be added via contracts or free text if needed.

6. Click to open Details section of Shopping Cart

7. Modify Account Assignment or Delivery Address if needed or Add Attachments
8. Click Check to confirm whether errors exist

9. Click Order to place order

Note: The Save option should only be used if the order is to be placed on hold. A Saved Shopping Cart does not move forward to the Approver.

10. Click Close button to close window. Do not click the X in upper right window corner to close.
The Catalog Shopping Cart next moves to the Approver if total is $2000 or greater. Once approved a purchase order automatically transmits to supplier for order placement.

Click Refresh to see Shopping Cart Status
OfficeMax Catalog Shopping Carts – Special Notes

Special features have been added to SRM for Catalog Shopping Cart orders from OfficeMax:

• Orders totaling $2000 or less from OfficeMax do not require approval. SRM automatically transmits a purchase order once a cart is created and ordered.

• Goods Confirmations are not required for OfficeMax orders.

• Upon shipment of goods, Shoppers and their supervisor will receive an email confirmation of the order.

• Future catalog suppliers are planned with similar features
Create Contract Shopping Cart

Contract orders work much like catalog orders. Rather than punching out to a supplier’s customized website, the Shopper selects line items from University contracts within SRM.

Once the Shopping Cart is created and approved at the department/unit/College level, SRM automatically processes and transmits a purchase order to the vendor.
1. From the POWL click Create Shopping Cart
2. Select UKY Contract Catalog from the drop down menu
3. Use the wildcard* search with all or part of an item description and click Search

**Note:** The bottom section displays items from all available University contracts with description, price, supplier, etc.
4. Enter quantity needed and Click Add to Cart

5. Add more items if desired – click Check Out when finished

Confirmation that items were added
Remember, you can add items to a Shopping Cart for multiple suppliers and cart types i.e., the same Shopping Cart can have catalog, contract, and free text items.

**Note:** Line item information populates directly into Shopping Cart.
6. Click Details

7. Review and complete Account Assignment, delivery address, etc. as needed

8. Click Check for errors

9. Click Order to complete
The UKY Contract Catalog also has a “Shopping List” feature. This allows Shoppers to pin items that may be needed for future orders to a list for easy browsing and ordering.

1. From the POWL click Create Shopping Cart
2. Select UKY Contract Catalog from the Add Item drop down menu.
3. Use the wildcard* Search function to find items of interest

4. From the results section, check box, enter quantity, and Click Add to Shopping List

5. Name the list and include notes if needed – Click Save
1. When items are needed for future ordering, select the Shopping Cart list from within the UKY Contract Catalog to display contents.
Contract UKY Shopping Cart – Order Shopping List

2. Confirm Quantity, check Select and click Add to Cart

3. Continue to add more items from either the UKY Contract Catalog or existing Shopping Lists. Click Check Out when finished.

Confirmation message: items were added
4. Click Transfer Items to move from the Shopping List to Shopping Cart

Item and related data populate into Shopping Cart
Contract UKY Shopping Cart – Order Shopping List

5. Click Details

6. Review and complete Account Assignment, delivery address, etc. as needed

7. Click Check for errors

8. Click Order to complete
“Free Text” Shopping Carts are only applicable when items cannot be found within SRM catalogs or contracts.
Free Text Shopping Cart – Overview

The first step in creating a Free Text Shopping Cart is obtaining a quote from a supplier. As the name “Free Text” implies, items are entered via free form into the Shopping Cart line items. The quote should be scanned and attached to the cart.

After area approval, all Free Text Shopping Carts route to Purchasing and are processed on a case-by-case basis based on established policies and procedures.
Free Text Shopping Cart - Create

1. Click Create Shopping Cart
**Free Text Shopping Cart – Add Text Line**

**Option 1** - Free Text line items may be added via the Add item drop down menu, or

**Option 2** - Free Text line items may also be entered by free hand at the line item level

<table>
<thead>
<tr>
<th>Item Overview</th>
<th>Details</th>
<th>Add Item</th>
<th>Copy</th>
<th>Paste</th>
<th>Duplicate</th>
<th>Delete</th>
</tr>
</thead>
<tbody>
<tr>
<td>Old Shopping Carts and Templates</td>
<td>Dell Catalog</td>
<td>OfficeMax Catalog</td>
<td>Old Shopping Carts and Templates</td>
<td>Dell Catalog</td>
<td>OfficeMax Catalog</td>
<td>Old Shopping Carts and Templates</td>
</tr>
<tr>
<td>Undefined Item Type</td>
<td>990000000</td>
<td>UNDEFIN</td>
<td>Undefined Item Type</td>
<td>990000000</td>
<td>UNDEFIN</td>
<td>Undefined Item Type</td>
</tr>
</tbody>
</table>
Free Text Shopping Cart – Add Text Line

2. If entering through the Add Item menu, complete information fields as required.

3. Click Add to Item Overview when done

The Product Category must be entered for all free text orders. Use the possible entries icon to identify the commodity type as closely as possible.
4. Click Details, to review and confirm Account Assignment, Delivery, etc.

Note: Data will populate directly into the Shopping Cart line item.
5. Confirm correct Account Assignment. Enter or search for new assignment if overwriting default values.

6. Confirm correct Delivery Address. Enter or search for new delivery address if overwriting default values.
A preferred vendor can be assigned to Free Text Shopping Carts through the Sources of Supply tab.

7. Click Possible Entries icon to perform a search.
8. Conduct search for supplier using wildcard (*) with a portion of the name.
9. Click Start Search.
10. Select the correct supplier and click OK. Repeat supplier entry on each line item.
Free Text Shopping Cart – Order

11. Click Check to confirm whether errors exist

Note: The Save option should only be used if the order is to be placed on hold. A Saved Shopping Cart does not move forward to the Approver.

12. Click Order to place order

13. Click Close button to close window. Do not click the X in upper right window corner to close
Ancillary Tasks & Edit Shopping Carts
Shopping Cart - Add Notes

Text notes can be added to any Shopping Cart

Approval Notes are for internal use only and do not print on the purchase order

Note to Supplier will print on the purchase order

Notes can also be added in the Notes and Attachments tab under the Details section
Shopping Cart – Add Attachments

Files can be attached to any Shopping Cart.
A scan of the quote should be attached to all Free Text Shopping Carts.

1. Click Notes and Attachments tab from the Details section

2. Click Browse to locate file

3. Navigate to file and click Open

4. Enter description (optional) and click OK
Determining Approvers

After a Shopping Cart is created and refreshed, designated Approver information can be viewed on the Approval Process Overview tab in the Details section.
The Related Documents tab shows all other documents that are part of the purchase transaction, with drill-down functionality (PO, Goods Confirmation, etc.)
Determining Shopping Cart Status via POWL

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

1. Click Refresh Button

Note: Area below displays Status of Shopping Carts
Shopping Cart – Edit

Shopping Carts can be edited before the approval process is completed.

Access the Shopping Cart via the POWL and click “Edit” to make changes as appropriate. Shoppers can change, add, or delete line items; change cost assignment information; add attachments, etc.

Shopping Carts cannot be edited after they are approved.

Contact Purchasing if uncertain as to how changes may affect the Shopping Cart or its correlated purchase order.
1. From POWL, click Refresh to see an updated view of Shopping Carts and their status

2. Select a Shopping Cart to edit
3. Click Edit

4. Click Continue to proceed
Shopping Cart – Edit

Note: Shopping Cart must be in edit mode in order to make necessary changes.

5. Click Details button to access line items for editing
Shopping Cart – Edit

6. Edit line item data as needed

7. Click Check for errors

8. Click Order to complete

Note: Possible line item data edits include Item Data, Account Assignment, and Notes & Attachments.
Inbox Overview

Note: Inbox communication for Shoppers may include Rejections, Edits, etc. pertaining to their Shopping Carts.
Inbox – Filter Settings

Filters are used to find specific Shopping Carts.

1. Select one or more search criteria to locate specific Shopping Carts.

Tab shows or hides Filters as desired.

If needed, Click Apply to search for a Specific Shopping Cart.

Note: Shopping Carts are automatically displayed in a scrolling format under the Tasks tab.
A Shopping Cart rejected by an Approver will return to the Inbox of the Shopper that created it.

Rejected documents can be found in the Inbox area.

Drilling into the Shopping Cart shows the Approver’s rejection note.
The Shopper must edit and re-order, accept the rejection, or delete the Shopping Cart.

Click Delete to remove Shopping Cart from workflow and terminate, or

Click Edit to make changes and re-order. Modified Shopping Cart returns to the Approver, or

Click Accept to accept the rejection. Shopping Cart may be copied to another cart in the future.
Fix Query Lock

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

Always click Close button to exit an open window.

Don’t click X to exit an open window.
If a window is closed using the X in the upper right hand corner, it is possible to be locked out of the system.

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

1. Scroll to bottom of screen and click Fix Query Lock.

2. Click any Active Query of your choice from the POWL to continue working.
Log Off

Click Log off to end myUK session

**IMPORTANT:** Do not click the red “X” icon in the upper right hand corner of your screen to exit, as you will lose all your work. Click “Log Off” link instead.
SRM Help Web Sites

• myHelp – MM & Purchasing Help web site:  
  http://myHelp.uky.edu/rwd/HTML/MM.html  
  – Contains Quick Reference Cards, updated and printable course manuals,  
    Reference Manual, etc.

• IRIS-MM web site: http://www.uky.edu/IRIS/MM