

Non-Delegated SRM Shopping Carts – Campus Areas**Non-Delegated SRM Shopping Carts – Campus Areas****I. Purpose**

The SRM (Supplier Relationship Management) shopping cart informs Procurement Services of a department's need to procure goods or services for campus areas or non-material items. SRM is SAP's e-procurement interface. These items may be restricted from the procurement card and/or PRD (Payment Request Document).

This is not the procedure for the procurement of goods or services for UK Healthcare and Facilities materials. Refer to [B-3-3-4 Non-Delegated SAP Purchase Requisitions – Healthcare and Facilities Materials/Inventory](#).

II. Responsibilities**A. Department/Unit**

1. Create the SRM shopping cart and include specifications of required goods and/or services.
2. Request SRM change orders when needed for updated pricing, quantities, etc.
3. Complete the necessary goods confirmation after the goods and/or services are provided in a timely manner.

B. Business Officers

1. Review the SRM shopping carts for appropriateness, correct funding, and compliance with university policies.
2. Approve shopping carts when necessary.
3. Review the MRBR Reporting in Tableau to ensure Purchase Orders are confirmed timely and follow up with units with outstanding blocked invoices that are older than 30 days.

C. Procurement Services

1. Ensure the SRM shopping cart is in alignment with the University's policies and procedures.
2. Create the Purchase Orders.
3. Issue any change orders needed at the departments' request.
4. Work with vendors and departments to resolve any discrepancies (e.g., outstanding invoices, goods receipts, pricing issues, etc.).

D. Accounts Payable Services/UK Healthcare Accounting

1. Post invoices to the Purchase Orders in SAP
2. Assist Procurement Services in working with vendors and departments on outstanding invoices to resolve any discrepancies.

III. Policy

1. The SRM shopping cart must be created by the shopper from the requesting department. Specifications regarding pricing, quantity, product and/or service description, delivery address, date of delivery and accounting must be accurate

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and clearly stated in the shopping cart to insure the correct goods or services are provided.

2. Authorization to create a shopping cart in SRM is granted to an end user based on completing the following criteria:
 - a. SAP Statement of Responsibility form
 - b. SAP Access Request form
 - c. SAP courses specific to the desired SRM role

Online forms and training courses are available through Information Technology Services by contacting SAPtraining@uky.edu.

3. Approval and Processing

Depending on the shopping cart line-item type, the cart may require approval by the requesting department and may be forwarded to Procurement Services for review and processing. Procurement Services is responsible for making sure the request aligns itself with the University's policies and procedures as stated in the Commonwealth of Kentucky Model Procurement Code, KRS section 45A.

Determination of the appropriate action to be taken for the request - Invitation for Bids (IFB), Request for Proposal (RFP), Request for Quote (RFQ) and/or purchase order (PO) - is made by the assigned Procurement Agent. The PO is the final document created by Procurement Services. It serves as the formal order and is issued directly to the supplier for order fulfillment.

4. SRM Purchase Order Processes

The purchase order is a contractual document by which the supplier is notified of the acceptance of an Invitation for Bids (IFB), Request for Proposal (RFP) or formal quote. The requesting department is required to issue the Good Receipt and submit the original invoice to Accounts Payable Services for proper posting and payment.

5. Change Order

The change order is an official amendment to the purchase order and is issued by Procurement Services.

A departmental request for a change in pricing, quantities and/or description must be submitted in writing to Procurement Services.