SAP SRM Common Issues, Definitions, and Process Flow.

The Procurement Process

Step One: Before You Begin

- Check for Available Funds (Requisitioner)
- If funds are not available, the Fund Approver will perform a budget transfer.

Step Two: Create a Shopping Cart

- Create an Internal Catalog Shopping Cart
- Create a Free Text Shopping Cart

Step Three: Fund Approver Process

- The Fund Approver will approve by individual line items.

Step Four: Shopping Cart Processed into a Purchase Order

- **Internal Catalog Shopping Carts** - if the appropriate budget was used for the item purchased, the shopping cart request will be sent the the supplier. If the appropriate budget was not used and the Fund Approver released the shopping cart, the shopping cart will go to the HISD Procurement department for processing.
- **Free Text Shopping carts -** will automatically go to the HISD Procurement Department for process.

Step Five : Supplier will ship goods

Step Six: End User will Post a Confirmation

Welcome to SAP SRM ™ (Supplier Relationship Management) Training

About Your Training Manual

Our Sections are set up based upon ***job function***. Each color represents a particular job function. Each section contains ***reference numbers*** for each type of transaction.

Conventions Used in This Book

The SAP SRM Management Manual uses these conventions to make it easier for you to understand the material:

Color Section	Job Function	Example
	(Gold) This section can be utilized by a Requisitioner and a Fund Approver.	**How to Connect to SRM**
	(Maroon) This section can be utilized by a Requisitioner.	**Creating a Shopping Cart**
	(Green) This section can be utilized by the Fund Administrator.	**Approving a Shopping Cart**
	(Purple) This section can be utilized by any SAP User. (Reports, Index)	**Reports, SAP Licenses and Forms**

Section One: SAP Portal Basics — Reference Number

How to Connect to the SAP Portal 1000

- How to Log onto the SAP Portal
- How to Log off the SAP Portal

SAP Portal Business Process 1010

- The Procurement Process
- SAP Portal Terminology and Definitions

SAP Portal Basic Navigation 1020

- Learning about the Requisitioner and the Approver Menu Tabs
- Navigation Definitions
- Important Icons

SAP Portal Terminology and Definitions

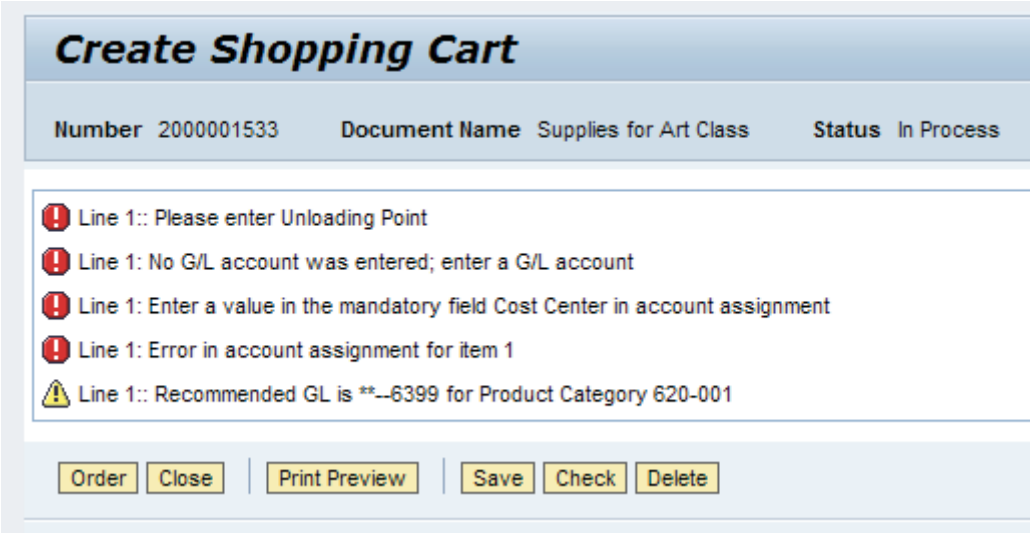
Check for available funds	From the end user's perspective, this is the **first step** in the procurement process. You must do this before creating a shopping cart.
Shopping Cart	Virtual container used to designate the items a customer intends to purchase From the end user's perspective, this **second step** in the procurement process is a request for goods or services.
Catalog Shopping Cart	These items are on an **annual contract** and have **material master data in SRM** that contains a product category, product description, price and possibly a vendor source. **This will also include items stored in one of HISD's warehouses.**
Free Text Shopping Cart	These items have **no material master data or vendor source**, nor is there a contract governing these items. All information about the items must be entered into the SRM system when the shopping cart is created.
Plant	A four-digit number that identifies a specific school, facility, or work location.
Release a Shopping Cart	From the end user's perspective, this is the third step in the procurement process. The **fund administrator** must release (approve) the items in the shopping cart once it has been created.
Purchase Order	From the end user's perspective, this is the **fourth step** in the procurement process. This is an actual request to a vendor for a specific good or service. This document based on information provided in the shopping cart.
Confirmations	From the end user's perspective, this is the last step in the procurement process. After the goods or services have arrived, this document is created to document the movement of the goods. Once the end user has posted a confirmation, the vendor can be paid.
Product Category	A number that identifies a group of several related materials.
Supplier	A number that identifies a specific vendor in the SAP Portal.
Product ID	A number that identifies a specific item in SRM.
Universal Worklist	Folder containing all documents and resubmissions sent to a user. This is officially the SRM Inbox.
Queries	The conditions of a request for information available in the system.

These terms are used during the shopping cart process.

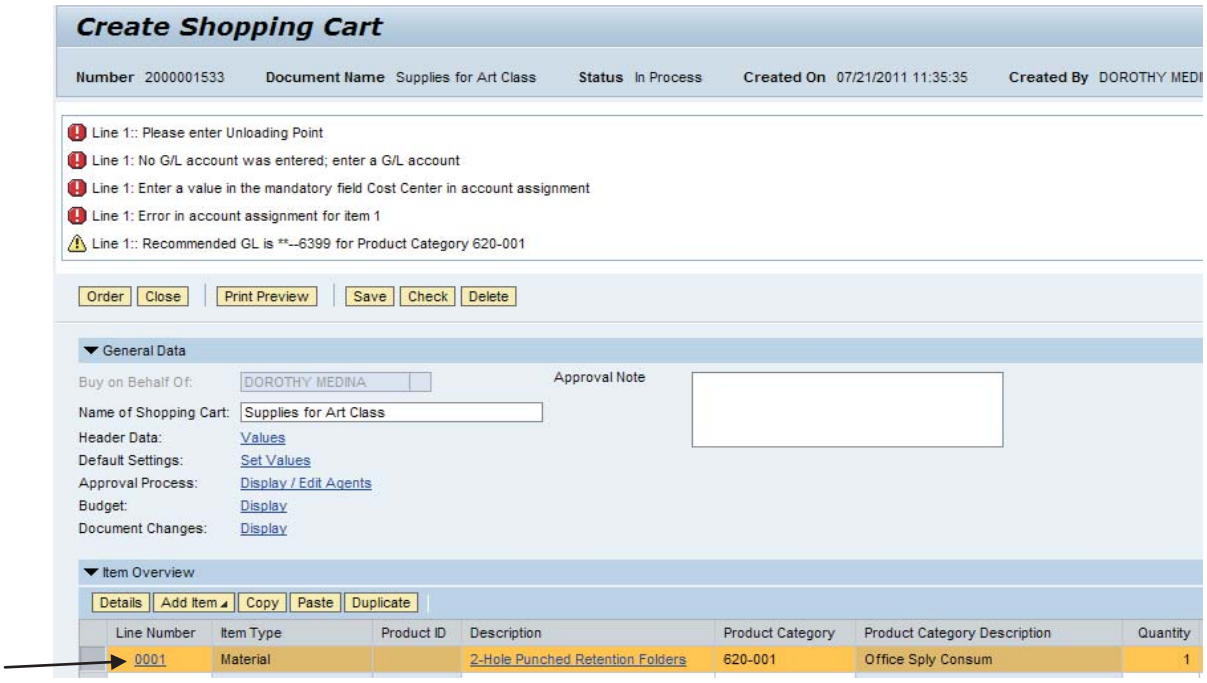
Short text	A brief description of a good or service.
Order Quantity	The amount (number) of a good or service being requested.
Unit	The descriptor that specifies how the quantity of an item is measured. For example, years, box, gallon, each.
Supplier Product Number	The specific part/product number of the item requested.

Correcting Errors within Shopping Carts

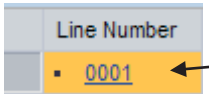
When you select the check button errors may appear at the top of your shopping cart.

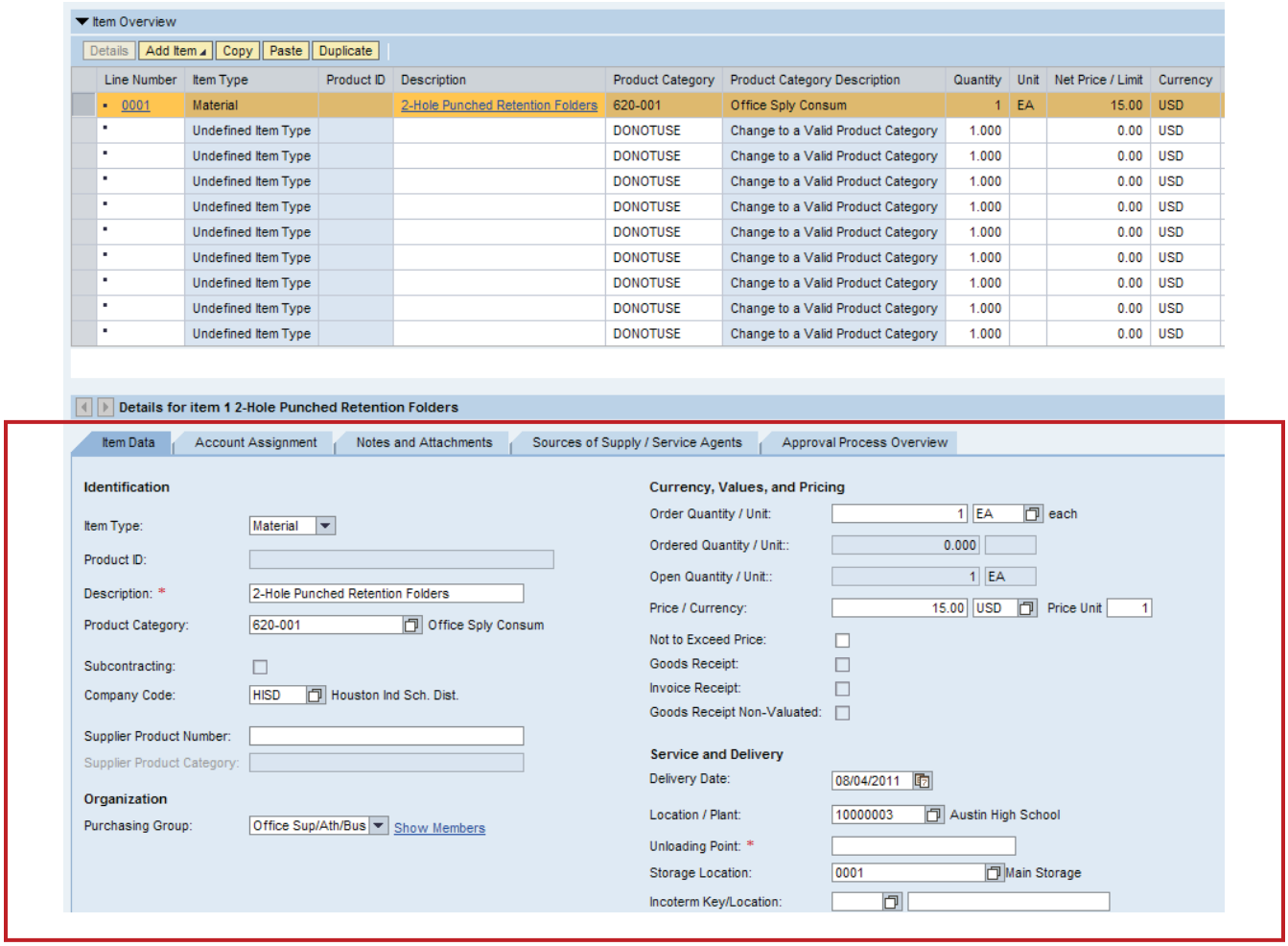


The messages will indicate what line within your shopping cart that may have a problem. It may also indicate a recommended budget. You must then go to the specific row and correct the errors.



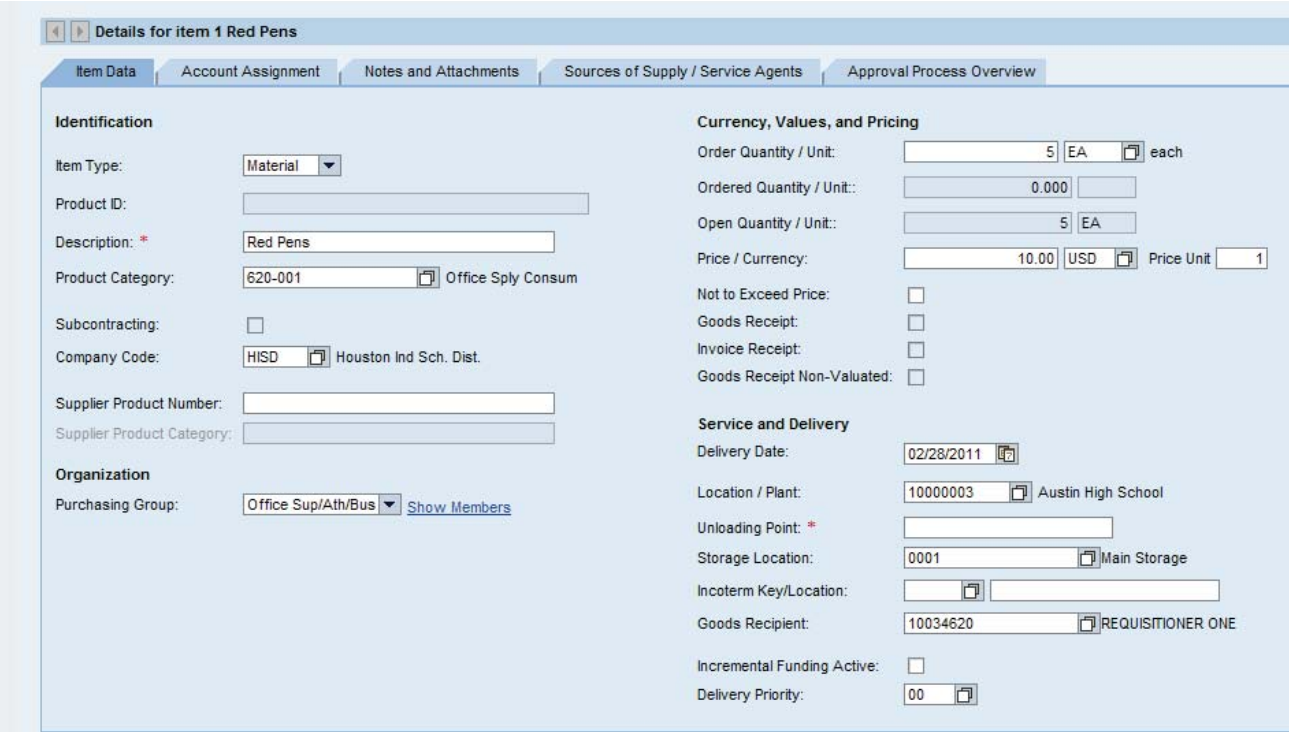
Double click the specific line number.



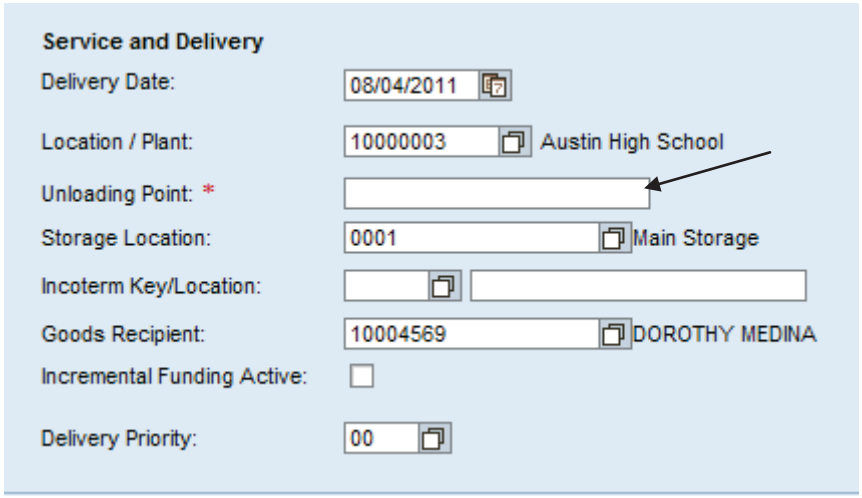


The **Details** section will drop down. Depending on the error message you receive, correct your errors. The Details Section has 5 sections.

Step One:

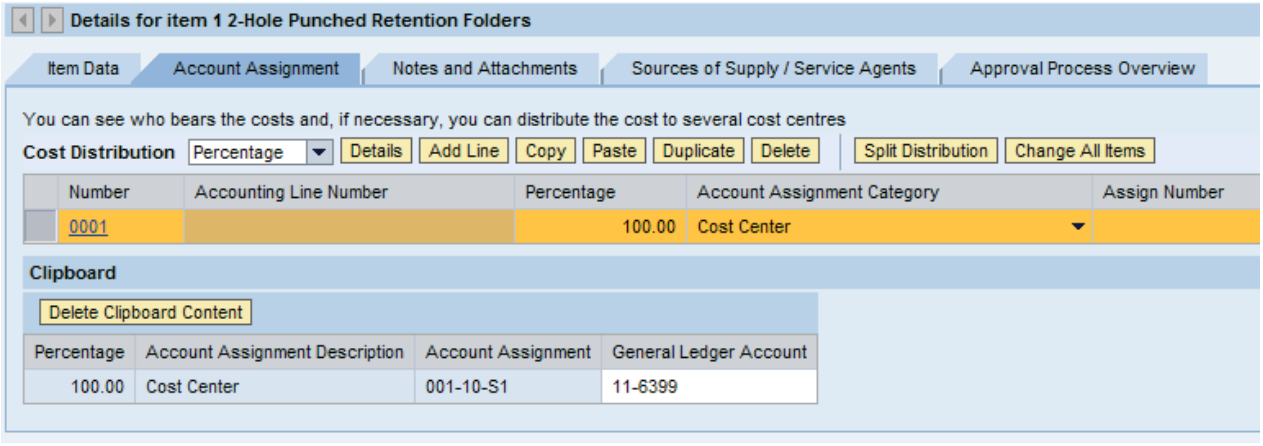


Complete information needed under the **Item Detail** tab such as **Unloading Point.**



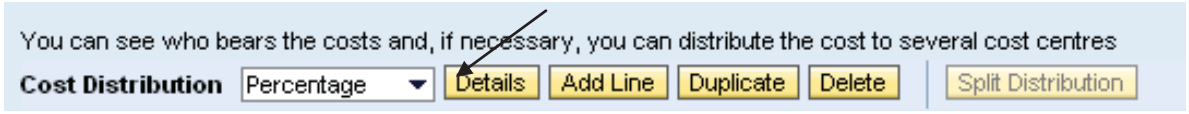
Step Two:

Go to the next tab, **Account Assignment**:

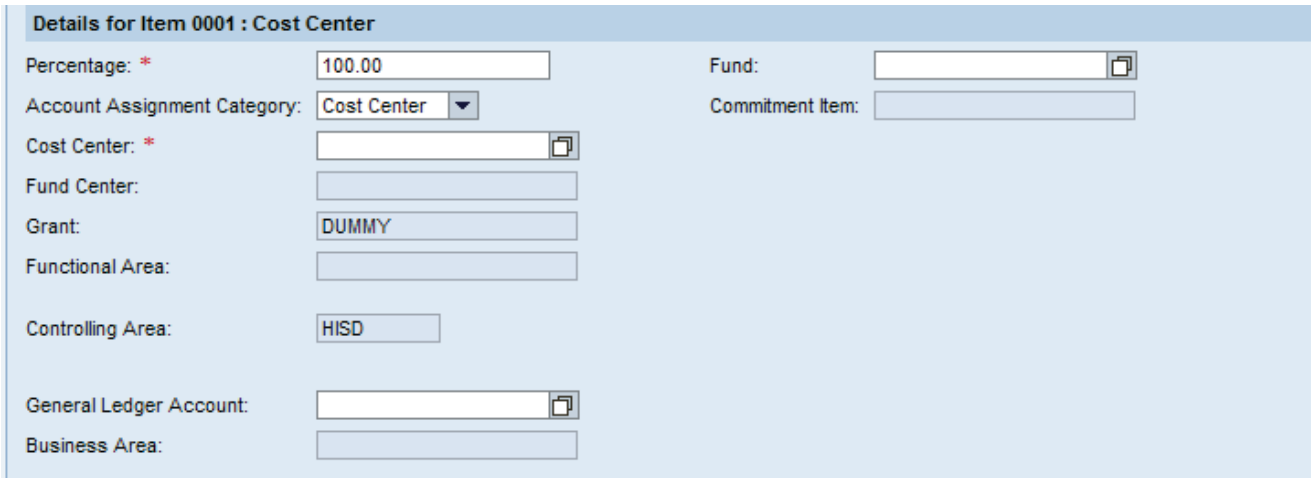


Select how you would like to distribute your funds. The system will default to percentage. Use the **default - percentage.**

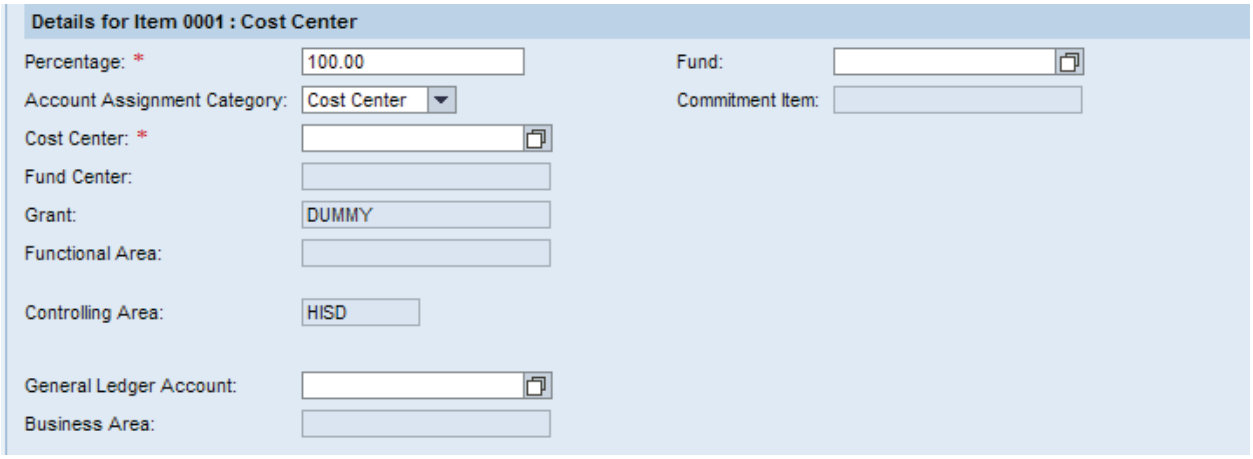
Select the Details Button.



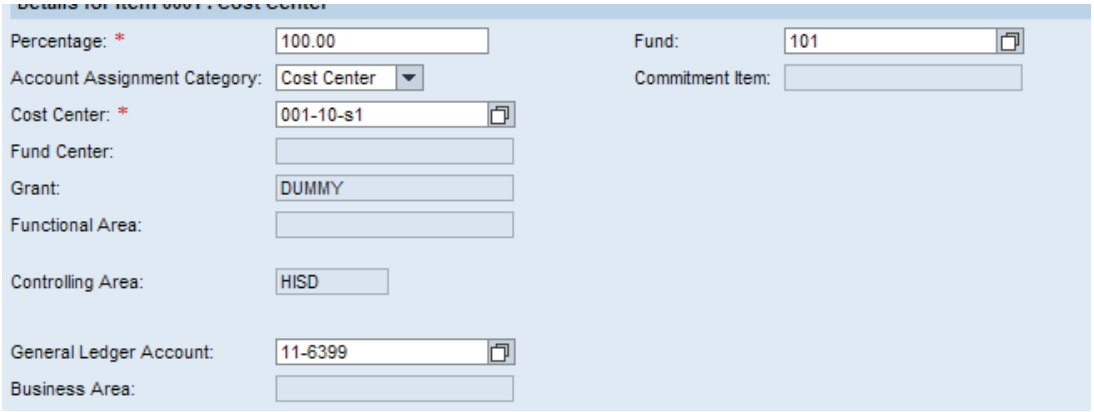
Budget information will drop down.



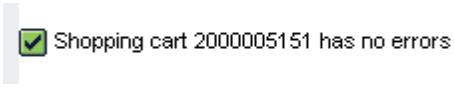
Budget Information



	Verify that **Cost Center** is selected for the **Account Assignment Category**.
	Enter the **Cost Center** of the budget to be used for this shopping cart. **Ex**: *001-10-S1*
	Enter the **General Ledger Account** (G/L Account No.) of the budget to be used for this shopping cart. **Ex**: *11-6399*
	Enter the **Fund** of the budget to be used for this shopping cart. **Ex**: *101*



Select the Check button.

Repeat steps until you receive a 

message.

Click the Order Button.

Results

You have successfully corrected errors within your shopping cart.

If you were unsuccessful when attempting the steps to complete this transaction, please double check your entries, and review the online documentation and **Frequently Asked Questions** found on the SAP Web portal department site at https://www.houstonisd.org/portal/site/SAP . If the error or problem persists, contact the Service Desk at 713-892-7378.