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Overview

About the Document

This document details the features enabled by the SRM upgrade. The enhancement introduces new features and augmentations based upon observations made over the last two years with the goal of improving and simplifying the user experience.

Background and Context

The SRM upgrade introduces changes that will improve the creation of all SRM documents. Modern UI (User Interface) enhancements now allow for cutting and pasting from the Windows clipboard directly into SRM and the introduction of improved search parameters which now ease the creation of complex queries using natural language. Data elements that are frequently used will now display for selection as text is entered into SRM documents, allowing for auto-completion of entries, and reducing the overall number of searches needed. Descriptions and notes entered into SRM documents now support WYSIWIG formatting, which allows for improved documentation, and each text box can now be enlarged to provide more space while editing.

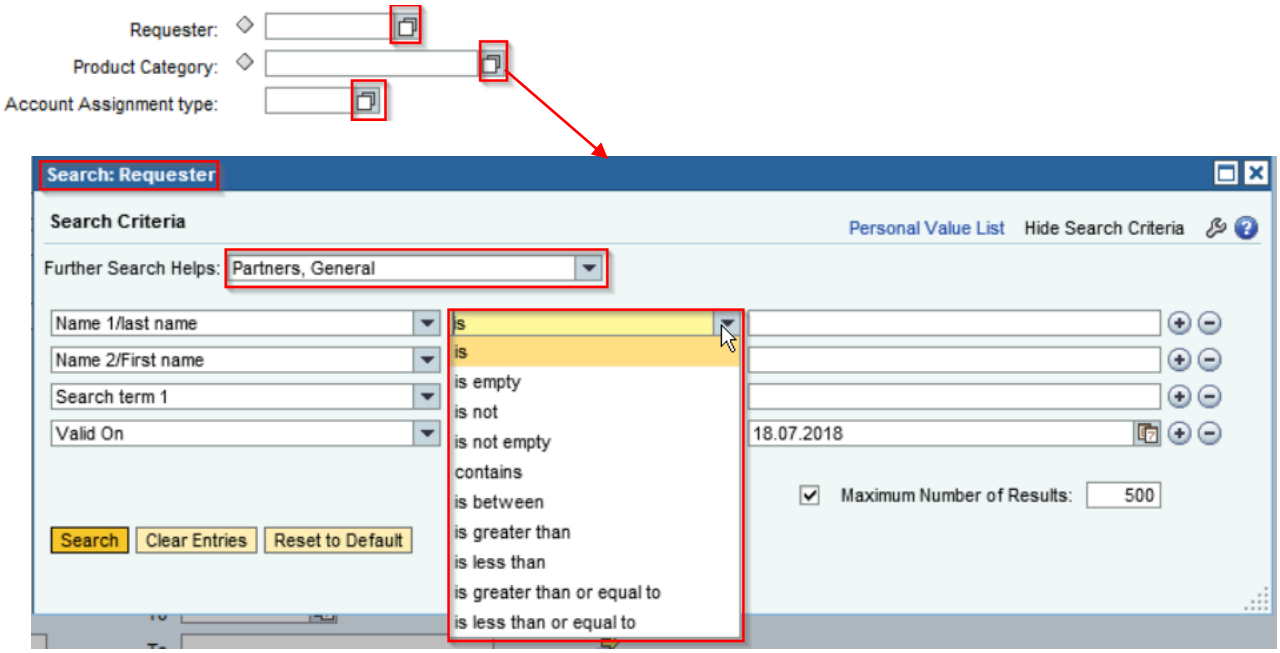
In the areas of Central Contracts and Shopping Carts, improved integration with Excel now allows for contract items and shopping cart items to be exported to Excel, updated, and imported back into SRM, simplifying the updating of large contracts. Shopping cart items rejected in SOCO will now allow for the buyer to record the reason for the rejection while automatically sending a notification to the requisitioner.

Maintenance of SRM documents has also been improved by enhanced filters now available to users, as a new selection screen improves data validation and reduces the time required to save updates. This update also introduces mass contract updates, which save time for the user by allowing them to apply changes to multiple contracts simultaneously within SRM. In addition, a list of SRM Document Types has been added to the POWL Query Screen, reducing the number of screens required to initiate an SRM document, and multi value search now grants the user the ability to select ranges for several categories.

1. General

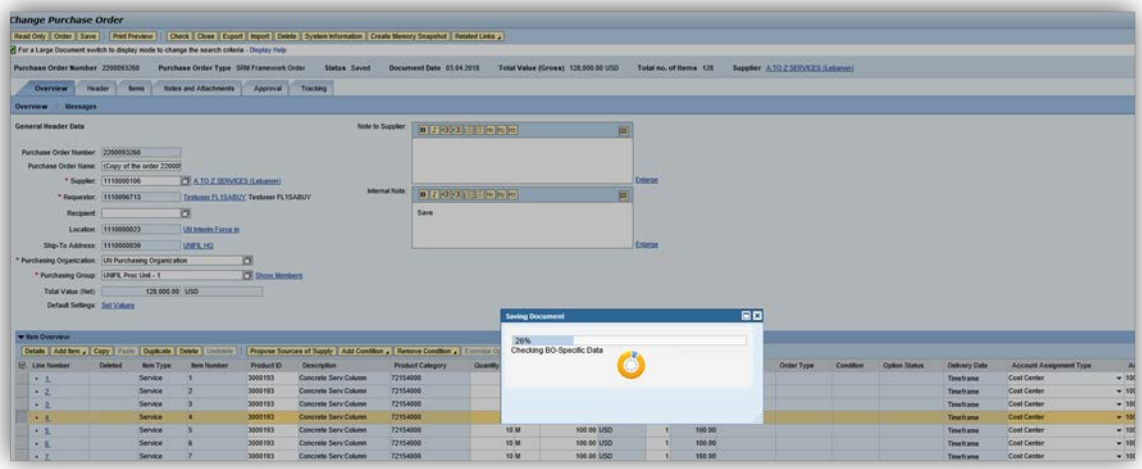
A. Improved Search

User friendly improvements have been added to enhance searches in all SRM fields.



B. Progress Bar Display

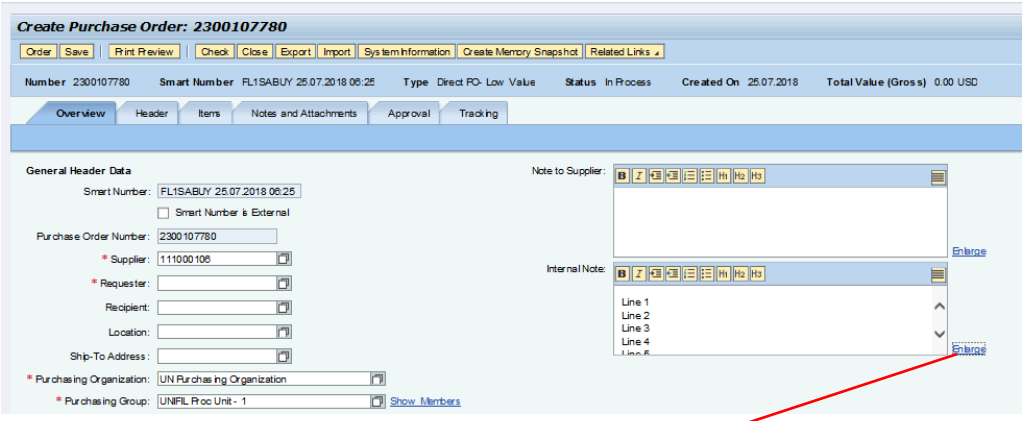
When retrieving, refreshing, or saving a large SRM document a Progress Bar will be displayed to inform the user of the progress of their activity.

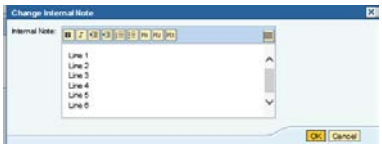


***Note**: This new feature is available for Contract, RFx and RFx Responses.*

C. Enlarged Text Boxes

SRM Text Boxes can be enlarged to allow the user to view more text. Previously, the user was required to scroll to view all text in a document.





Click the **Enlarge** button

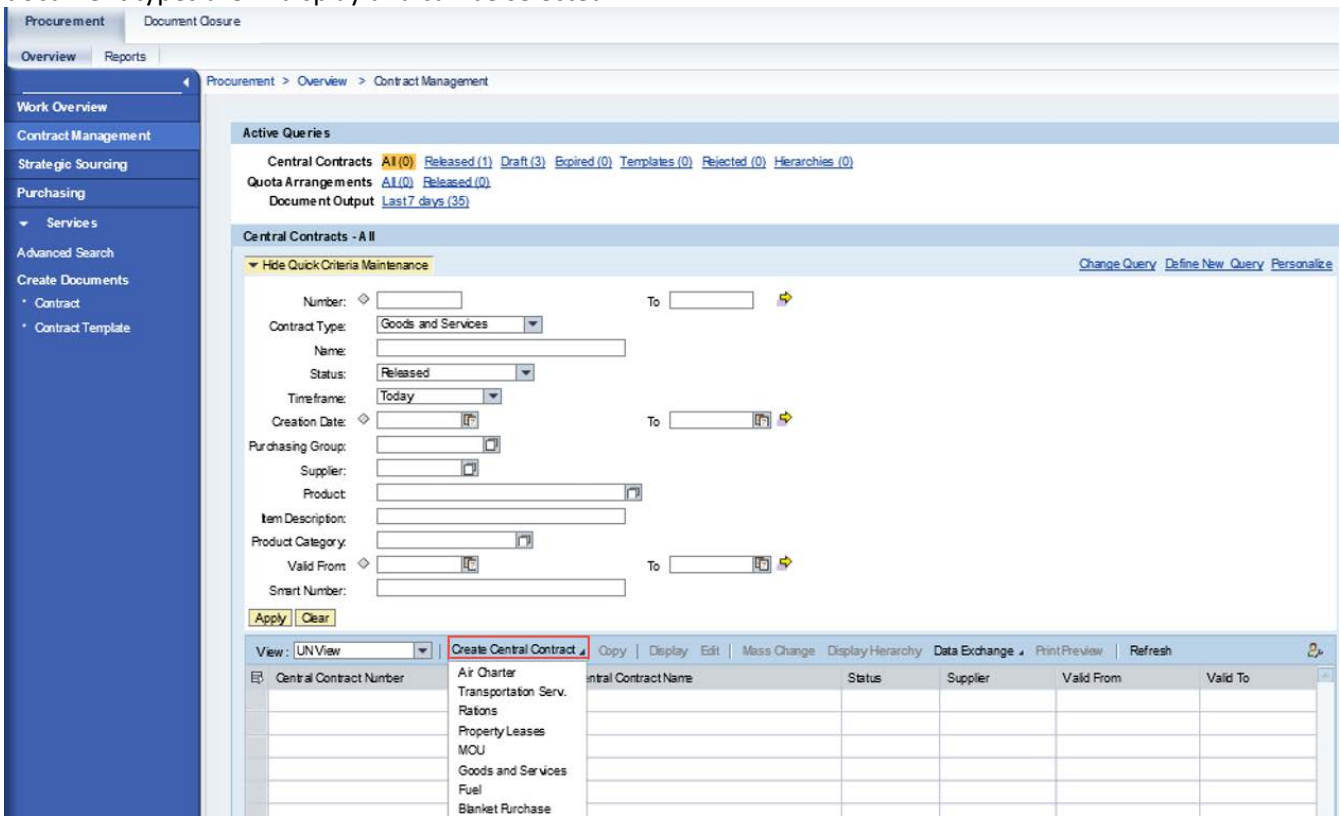
***Note**: The text boxes for the header of Purchase Order, Shopping Cart, RFX, and document Notes can be expanded to allow for a larger area to view descriptions and notes.*

SRM shopping carts and purchase orders now support improved text formatting for all long text boxes. The following features are added to improve the readability:

- Add three types of header style
- Use alphabetical and non-alphabetical lists
- Indent texts to the right or the left of the page
- Bold or italicize text

D. Document Type Dropdown Box

From a SRM personal object worklist (POWL), click **Create Central Contract** button, the field with list of document types are in display and can be selected.

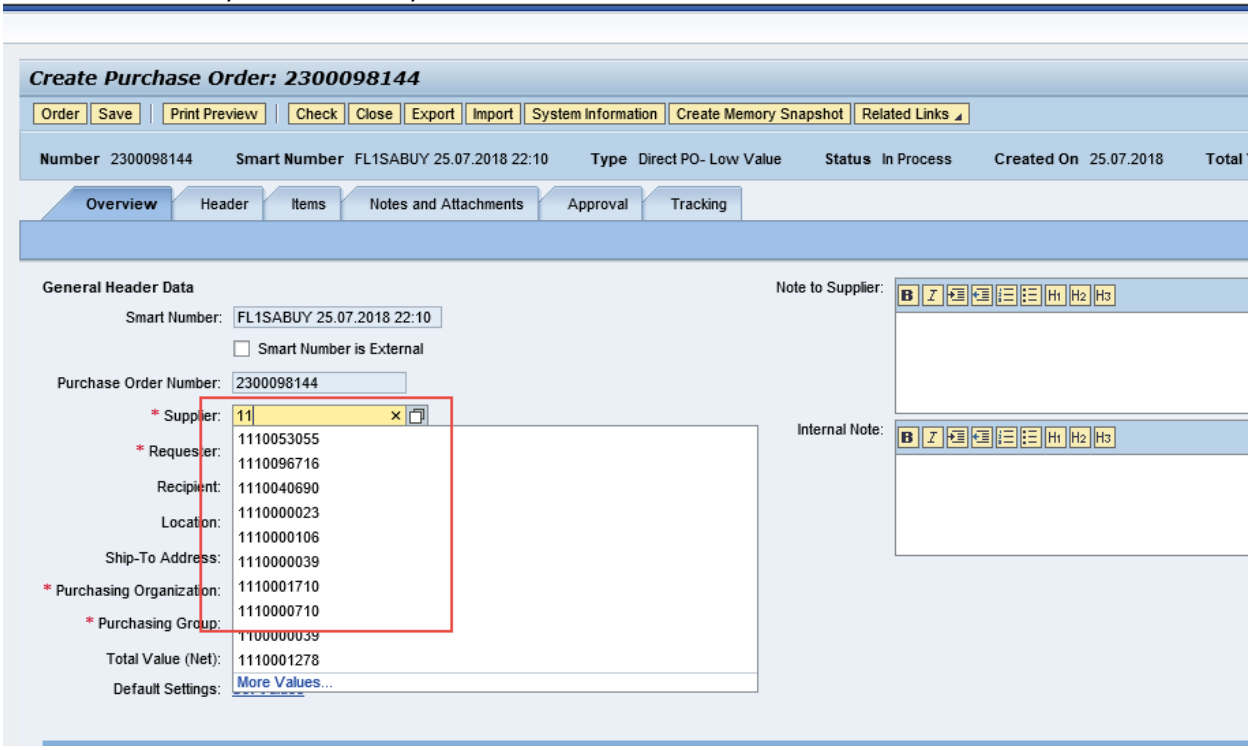


***Note**: Purchase Order and RFx Documents support this feature.*

E. Frequently used Entries

Entries which are frequently used in SRM are now displayed to allow auto-completion of text. By displaying frequently used entries, the number of lookups required when entering a document is reduced.

- Begin entering the value required to complete the entry. The application will prompt you with values that match your initial entry.

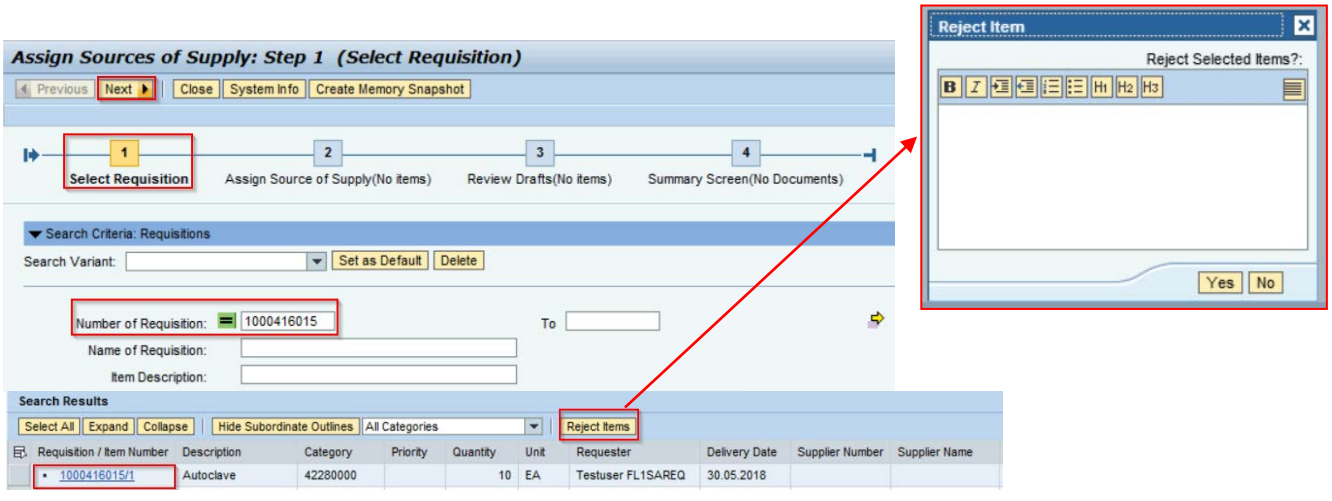


2. Purchase Order

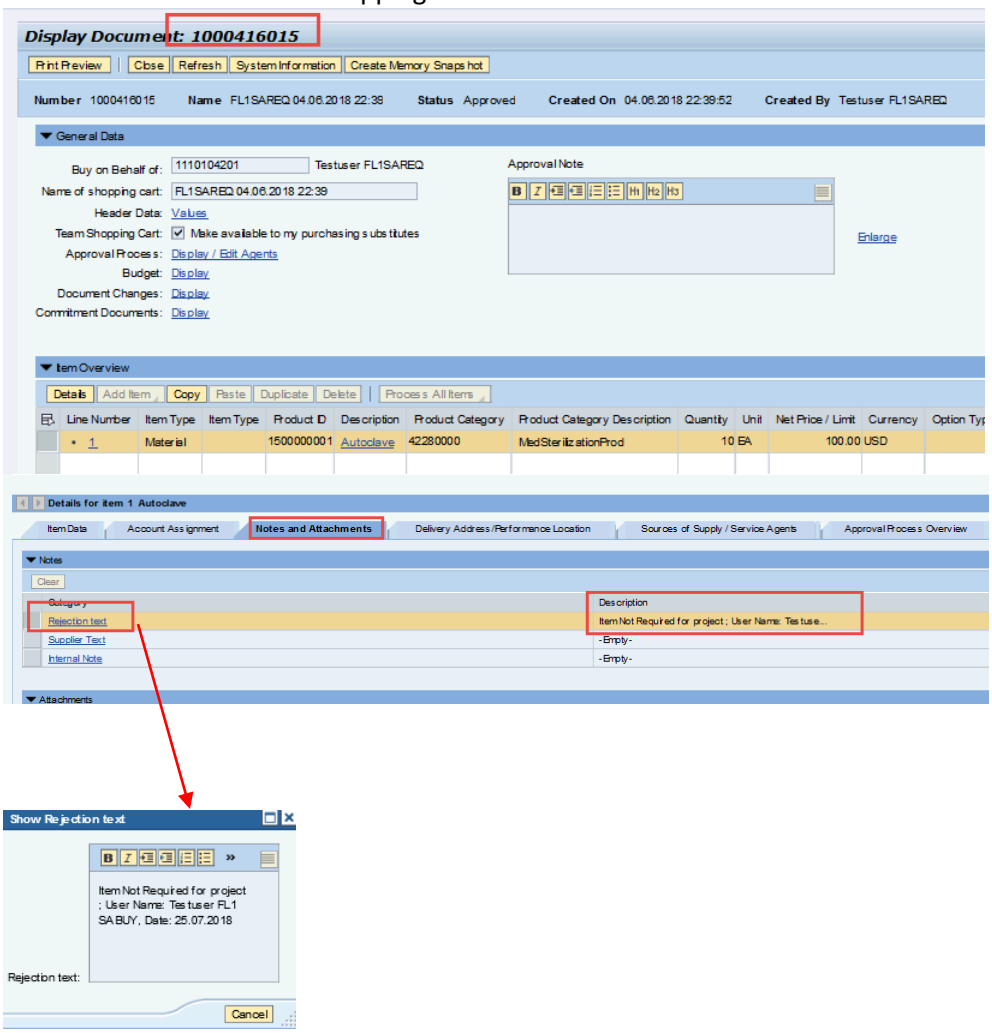
A. SOCO – Carry out Sourcing

i) Reason for Rejection of a Shopping Cart Item

The buyer can enter the reason for rejecting an item or items of a shopping cart or purchase requisition in the sourcing cockpit (SOCO).



The requisitioner can view the name of the buyer and the reason for the rejected item or items from the Notes and Attachments tab in the shopping cart.



- Upon clicking the **Reject Item** button, the buyer is to enter the reason in the Pop-up window.

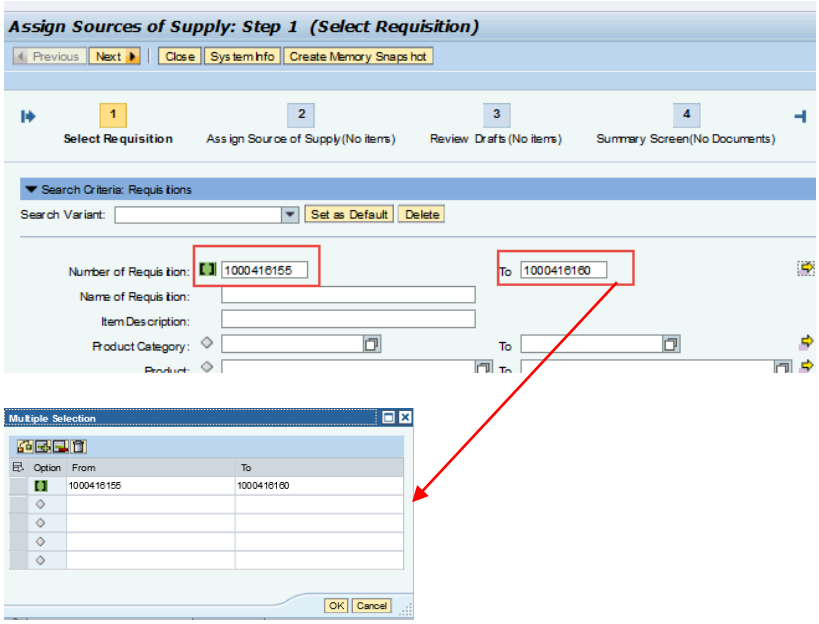
- The Requisitioner can view the reason for the rejection. The buyer's Unite ID and date/time of the rejection are updated automatically.

***Strongly Recommended**: The Buyer of the shopping cart item should provide clear instructions for the reason for the rejection that will be available to the requisitioner.*

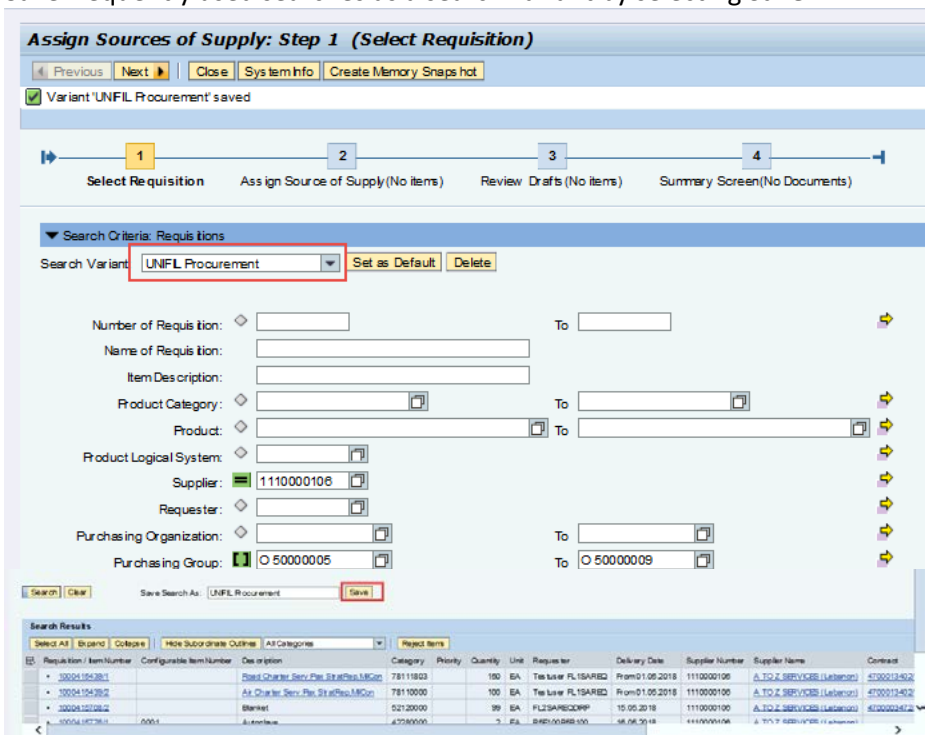
ii) Search Shopping Cart Document by Range or Creating a Default Criteria

A Buyer in SRM can search for requisitions by entering a range of Shopping Cart document numbers. Frequently used searches performed by a buyer can be saved as a Search Variant.

- Search requisitions by entering the shopping cart number range or enter multiple SC numbers



- Save frequently used searches as a search variant by selecting **Save**

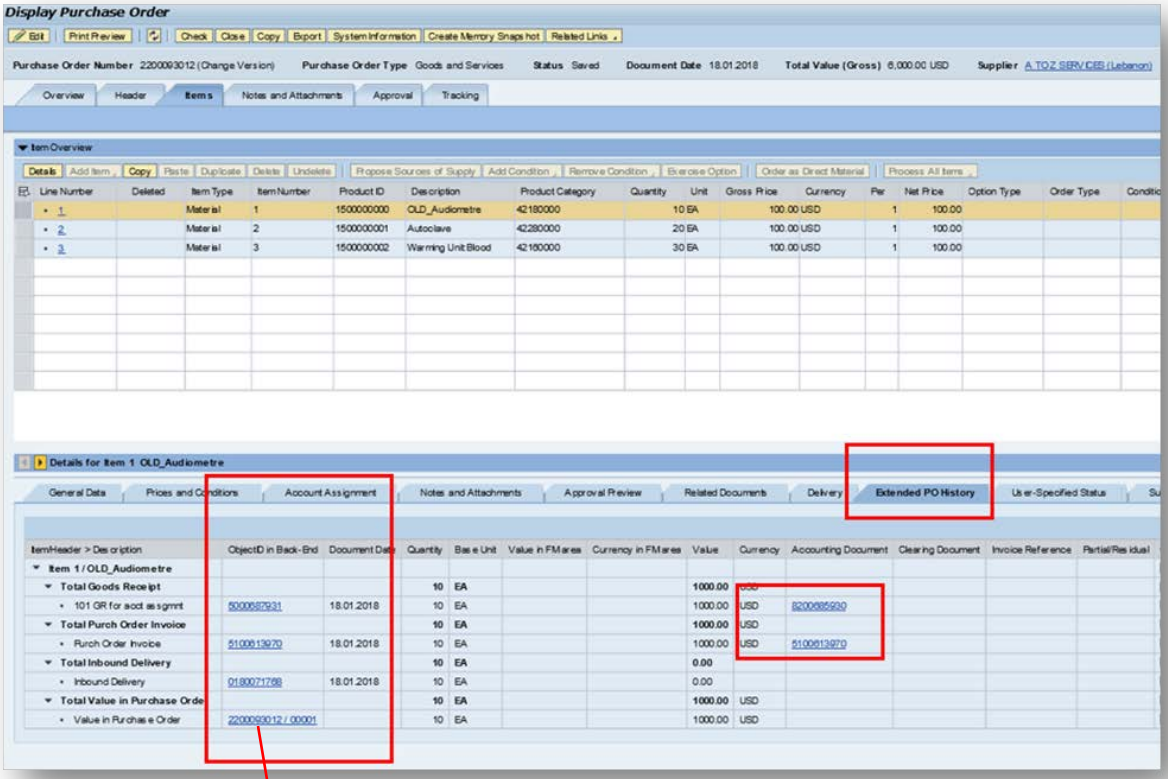


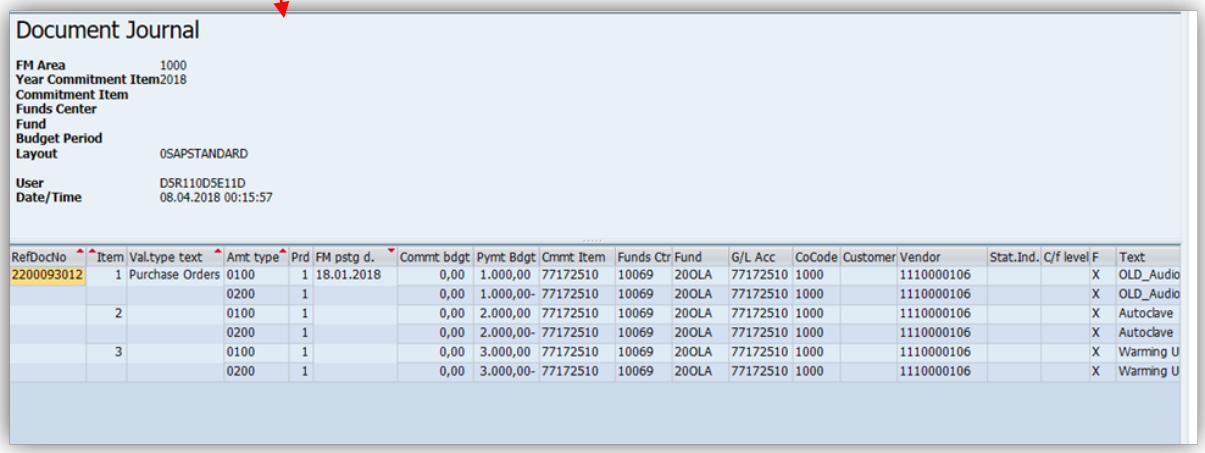
B. Purchase Order Items

i) Directly Access ECC Documents from SRM

Enable SRM Users to directly access financial documents in ECC when referenced in a SRM document from the Extended PO History tab.

- Inbound Delivery
- Goods Receipts
- Service Entry Sheet
- Invoices
- Purchase Order
- Accounting Document

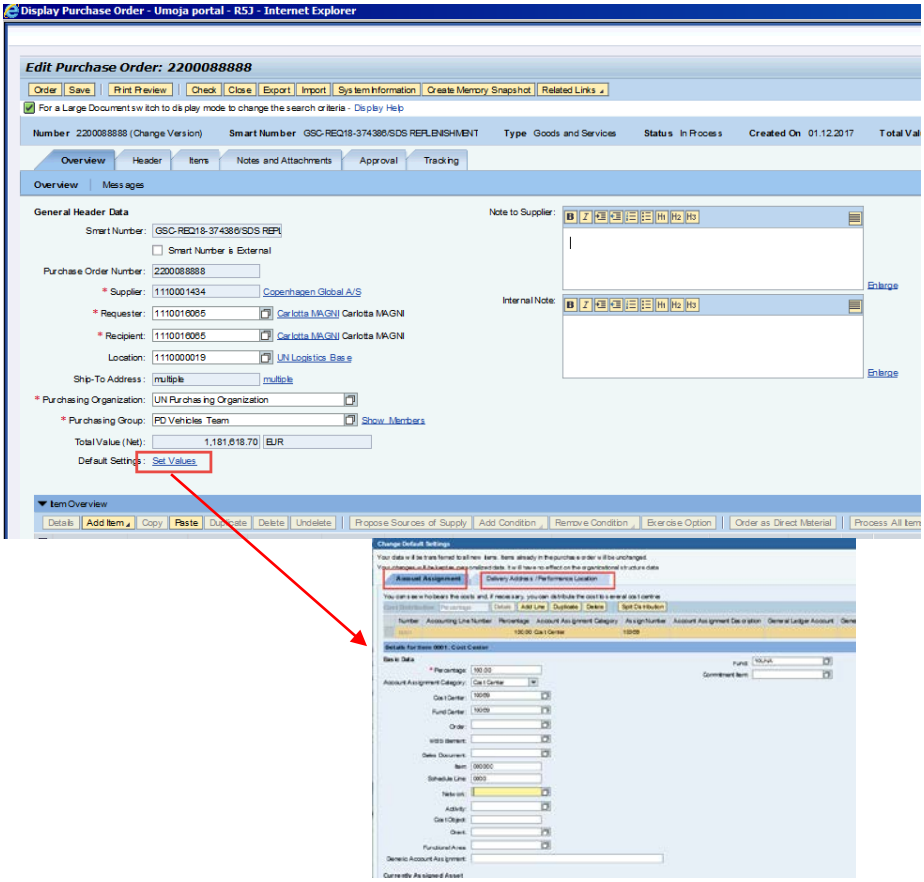




RefDocNo	Item	Val.type text	Amt type	Prd	FM pstg d.	Commt bdgt	Pymt Bdgt	Cmmt Item	Funds Ctr	Fund	G/L Acc	CoCode	Customer	Vendor	Stat.Ind.	C/f level	F	Text
2200093012	1	Purchase Orders	0100	1	18.01.2018	0,00	1.000,00	77172510	10069	20OLA	77172510	1000		1110000106			X	OLD_Audio
			0200	1		0,00	1.000,00-	77172510	10069	20OLA	77172510	1000		1110000106			X	OLD_Audio
	2		0100	1		0,00	2.000,00	77172510	10069	20OLA	77172510	1000		1110000106			X	Autoclave
			0200	1		0,00	2.000,00-	77172510	10069	20OLA	77172510	1000		1110000106			X	Autoclave
	3		0100	1		0,00	3.000,00	77172510	10069	20OLA	77172510	1000		1110000106			X	Warming U
			0200	1		0,00	3.000,00-	77172510	10069	20OLA	77172510	1000		1110000106			X	Warming U

ii) Set Defaults for Purchase Order Lines

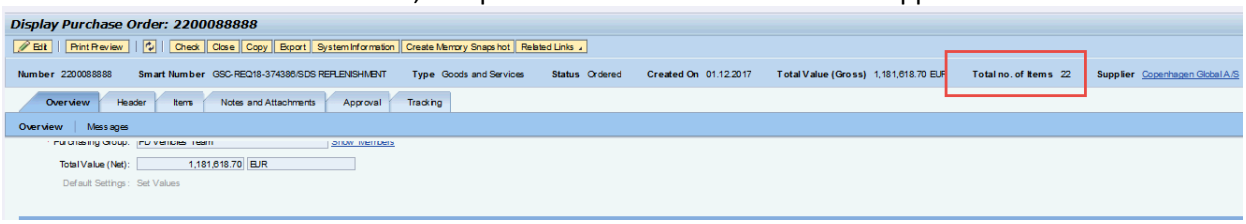
Users can set item defaults Account Assignment and Delivery Address for each line item, when creating a Purchase Order. This function was available prior for creating shopping cart line items.



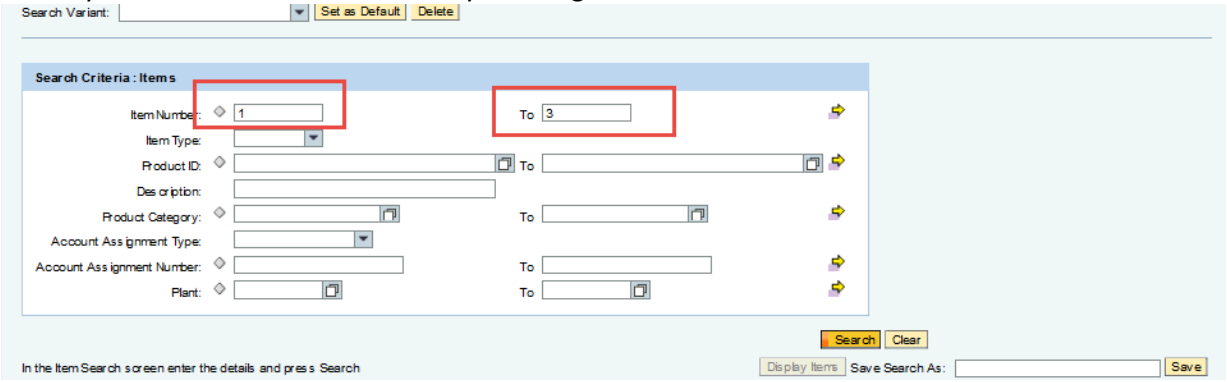
iii) Improvements in processing of Large Documents

A purchaser can limit the number of items displayed while editing a purchase order when the document contains more than 20-line items. By limiting the number of items, the amount of time required to process a large document is reduced.

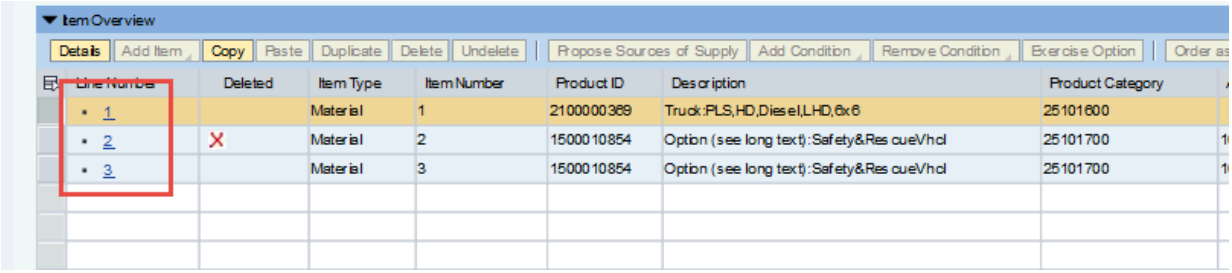
When a PO has more than 20 lines, an option to enter new search criteria appears.



The buyer can work on selected lines by entering the line item number in the Search Criteria Items.



The items requested will be available for editing.



Note: *This function will be enabled for Contracts in a future release.*

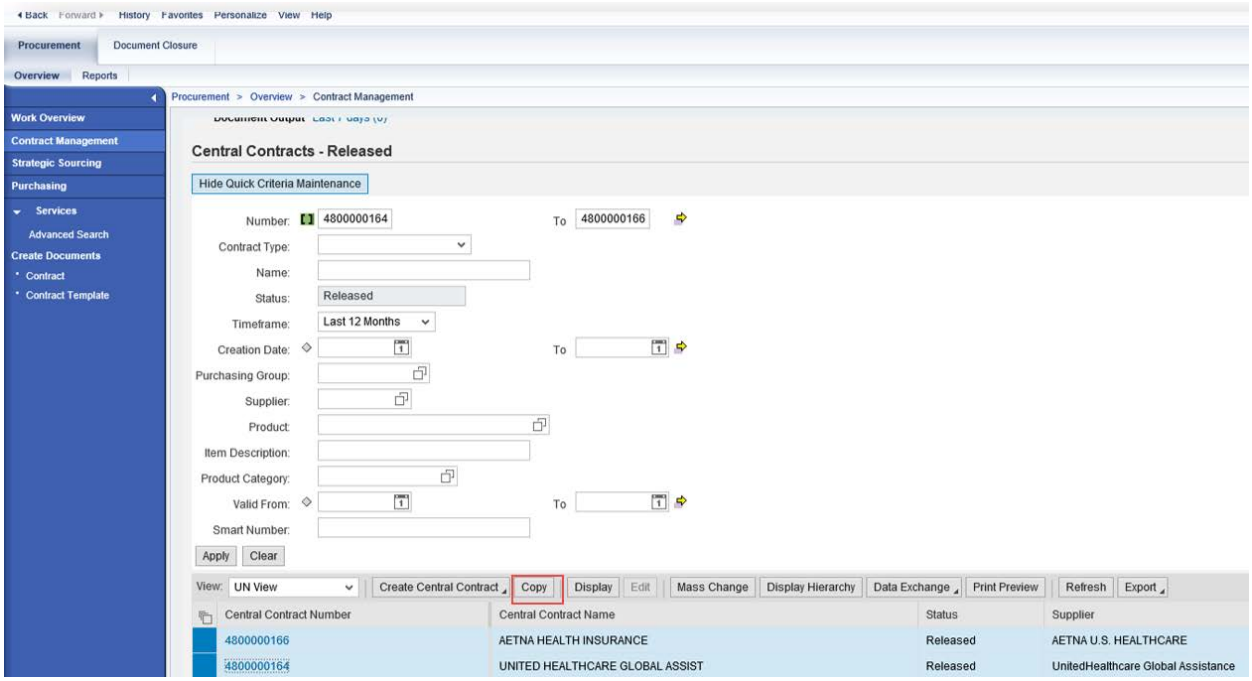
3. Contract Management

A. Updates to Contracts

i) Copy Multiple Contracts

A Buyer can copy multiple contracts from the personal object worklist (POWL) and set common attributes to each contract. The contract will be available as a saved contract for review before publishing. A background job runs for the creation of copied contracts. When the selected contracts are copied, the purchaser receives an e-mail notification regarding the successful creation of copied contracts.

- Creating new contracts by copying existing contracts.

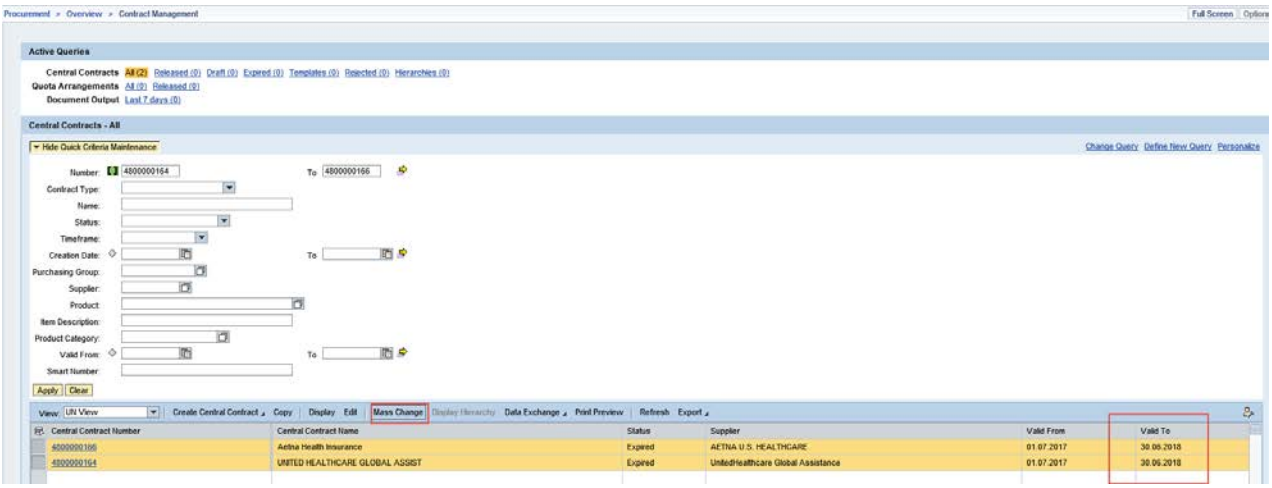


- Notification is submitted to the requester's inbox.

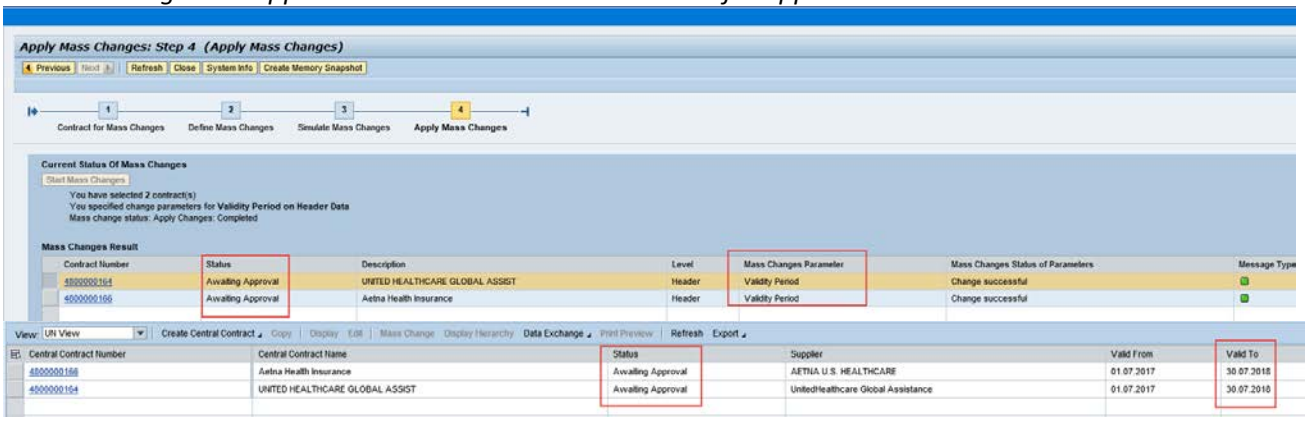
ii) Mass Changes to Contracts

Mass change of contracts allows for common attributes to be updated when selecting multiple contracts.

*After selecting multiple contracts, select **Mass Change** to update an Attribute to be set for each contract selected.*



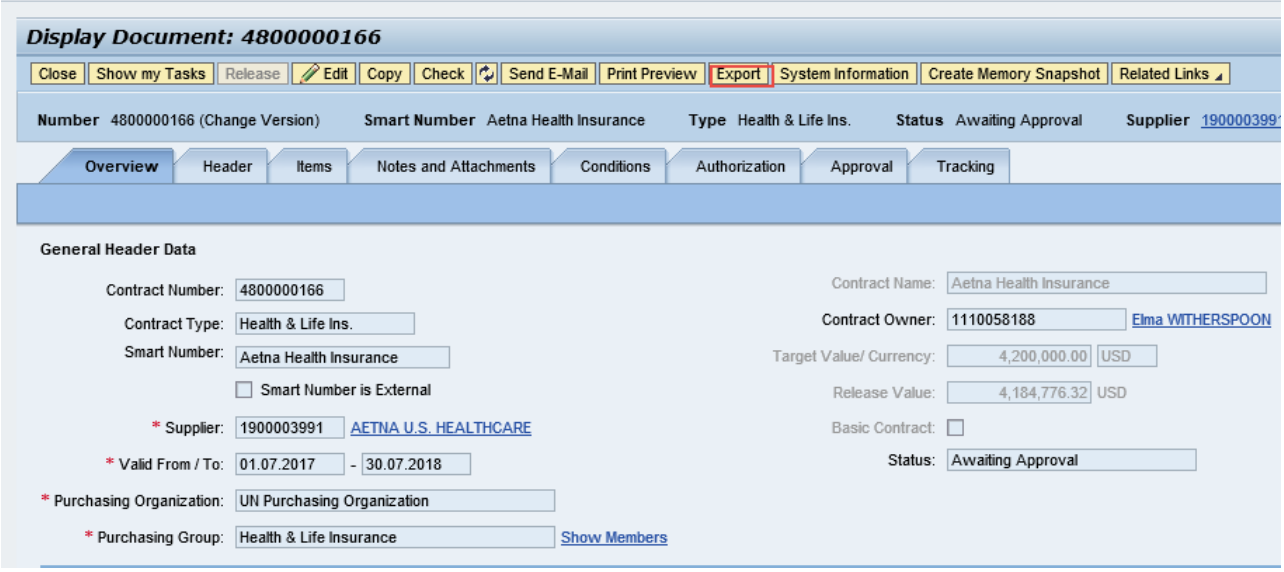
- *Changes are applied and the document is submitted for approval.*



B. Upload Data from Excel

SRM users can download and upload Contract or Purchase Order data from Microsoft Excel to update SRM documents. Excel support for Shopping Carts will be enabled in a future release.

- In SRM, create the header and at least one line
- Click **Export** button to export the contract to excel to a local drive
- Edit excel file following pre-defined formatting and save it in local drive
- In SRM, click **Import** button and locate the saved excel file to upload



RowTyp	Document	Change O	Item Numb	Product	Revision L	Description	ID of logica	Item Categ	Description	Product Ty	Description	Category I	Description	Catalog	Vendor Pr	External m	Mfr Part Nu
ITEMH	480000016																
ITEMD	480000016		000000000	000000000		Insurance	D5RCLNT1		Normal	02	Service	84130000					
ITEMD	480000016		000000000	000000000		Insurance	D5RCLNT1		Normal	02	Service	84130000	Ins&retiren				
ITEMD	480000016		000000000	000000000		Insurance	D5RCLNT1		Normal	02	Service	84130000	Ins&retiren				
ITEMD	480000016		000000000	000000000		Insurance	D5RCLNT1		Normal	02	Service	84130000	Ins&retiren				
ITEMD	480000016		000000000	000000000		Insurance	D5RCLNT1		Normal	02	Service	84130000	Ins&retiren				