



SRM Goods Confirmations

SRM_CON_300





SRM Goods Confirmations – Revised Spring 2013



What is SRM?

Supplier Relationship Management (SRM) is an SAP e-procurement product that uses a web-based platform. It is the University's formal procurement system.

- Enables end users to procure goods and services via a “Shopping Cart” environment.
- Generates savings for the University through use of electronic catalogs.
- Integrates with SAP functionality and processes.
- Functional responsibility for SRM is held with the Materials Management (MM) team within the Enterprise Applications Group.



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What is SRM Goods Confirmation?



SRM Goods Confirmation shows physical receipt of goods or services within a department or unit. The person conducting Goods Confirming affirms that ordered items are correct, in good condition, and in accordance with requirements of the purchase order.

Who Should Receive SRM Goods Confirmation Training?



Any persons authorized to confirm receipt of goods and services on behalf of their department or unit.

Note: SRM is a phased implementation. It is currently utilized by all departments and areas within the academic campus sector. Phase II of implementation is forthcoming and will include the following areas:

- UK HealthCare
- College of Medicine
- Facilities areas using Plant Maintenance (PM)

The above areas continue to use SAP for procurement activities. Any person(s) within the above areas should take course MM_REC_320 (SAP Goods Receiving) rather than the SRM Goods Confirmations course.

SRM Roles



Level	SRM Role	Role Description	Corresponding SRM document type
Department	Shopper	Responsible for creating a "Shopping Cart" to purchase goods and/or services from a particular supplier	Shopping Cart
Department / College / Unit	Approver	Approves Shopping Carts for their department or area	--
Purchasing	Buyer	Responsible for university-wide contracting processes for various commodities	Purchase Order
Department	Goods Confirmer	Confirms physical receipt of goods/services in satisfactory condition	Goods Confirmation
Accounts Payable	--	Posts invoices against purchase orders	Invoice Receipt

Role Combinations



In order to maintain checks and balances there is a limit on the number and structure of roles any one person may hold. The following matrix shows all permissible combinations for various procurement roles within myUK.

SAP (R3/MM)
SRM
PRD

SIMILAR ROLES		
REQUISITIONER	APPROVER	RECEIVER
SHOPPER	APPROVER	GOODS CONFIRMER
CREATOR	APPROVER	

	PRD CREATOR	SAP REQUISITIONER	SRM SHOPPER	SAP SRM/PRD APPROVER	SAP RECEIVER	SRM GOODS CONFIRMER
OPTION 1	✓	✓	✓	✗	✓	✓
OPTION 2	✗	✗	✗	✓	✓	✓
OPTION 3	✗	✓	✓	✓	✗	✗

The same person is not required to hold all roles within any one option. The combinations reflect the maximum roles within each option any one person may hold.

Training Requirements for SRM Departmental Roles

Role	Training Requirements
Shopper	Shoppers are required to take and pass the SRM_SHO_300 SRM Shoppers course via the <i>myUK</i> Training module.
Approver	Approvers are required to take and pass the MM_APP_300 Combined Approvers course via the <i>myUK</i> Training module.
Goods Confirmer	Goods Confirmer are required to take and pass the SRM_CON_300 Goods Confirmations course via the <i>myUK</i> Training module.

Goods Confirmation Overview

Creation of the goods confirmation:

- Confirms ownership of goods/services by the University.
- Expenses purchase of the items against the appropriate cost object.
- Releases check payment to the vendor.

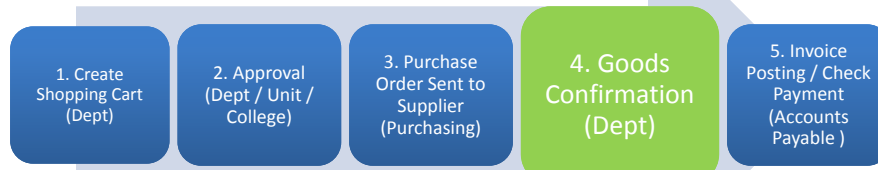
Failure to create a goods confirmation after items are delivered will result in a payment block. The vendor cannot receive a check payment until the goods confirmation is completed.

Goods confirming should not be completed if items are damaged or incorrect in any way.

If partial quantities of goods or services are received over time, partial goods confirmations can be completed to allow payments to the vendor.

Contact the Contracting Officer in Purchasing responsible for the purchase order for questions or guidance.

SRM General Process Flow (5 Steps)



- The department creates Shopping Carts for goods and services, with approval(s) to follow.
- Purchasing processes and places the purchase order with the supplier.
- Along with the purchase order, goods confirmations and invoice postings complete the 3-way match and payment releases.
- Encumbrances occur along the way and are expensed at the creation of the goods confirmation.

How to Identify PO Number



The purchase order number must be known prior to creating the goods confirmation. It can be found from the following sources:

- Packing list accompanying the goods / services.
- Conduct search against the Shopping Cart number.
- Many goods confirmers also hold the SRM Shopper role and thereby can identify the PO number from their Shopping Cart / Related Documents tab. In addition, Approvers commonly have access to purchase order records from within their Inbox.



Personal Settings, POWL, and Goods Confirmation Layout

Personal Settings Overview

Personal Settings relate to the user's *employee* data and are established via Site Navigation.

- Default information populates into this area based on data from Human Resources org structure.
- Personal Settings must be confirmed and setup for all roles during the first visit to SRM to ensure a successful confirmation experience.

Login to myUK

1. Click Link Blue from the UK Home Page

2. Click myUK from the Link Blue site

3. Login to myUK using your AD and password

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Confirmations Tab and Site Navigation

TIP: User can expand or collapse Site Navigation by clicking on the triangle

4. Select the Confirmations tab

5. Click Settings

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Personal Settings – Position Tab



6. Click Edit to begin changes

7. Form of address is required

8. Email address is the only data on the Position tab to be edited

Employee ID 22864 Name Mr. Craig L.

[Edit] [Close] [Read Only] [Check]

▼ Personal Data

Form of Address: * Mr. Academic Title: Academic Title

First Name: * Craig Last Name: * Locke

Position User Account

Organizational Assignment

Department: 3P025 31002227; MM-Buyer-025 Craig Locke

Position: P0105M5 50121217; Contracting Officer I

Functional Assignment

Department Head Of: Department Head Of

Purchasing Group: 3P025 31002227; MM-Buyer-025 Craig Locke

Department Address

Street/ House Number: 322 Peterson Serv

Postal Code/ City: 40506 Lexington

Country: US

Attributes for Position Contracting Officer I

Attribute: Attribute

Department Address Details

Building: Building

Floor/ Room Number: Floor/ Room Number

Inhouse Mail: Inhouse Mail

Communication Type: Communication Type

Phone Number/ Extension: 859-257-2964

Fax Number / Extension: 859-257-1951

E-Mail: * clocke@email.uky.edu

Personal Settings – Position Tab



Organizational and Functional Assignments populate automatically and relate to the employee's position.

Department Address within the Position tab is organizational data only and will always be the 322 Peterson Building address.

Note: None of the above items are edited within Personal Settings. If any of your organizational or functional assignments data appears to be incorrect, or you have changed departments, please notify srmhelp@uky.edu.

Employee ID 22864 Name Mr.

[Save] [Close] [Read Only] [Check]

▼ Personal Data

Form of Address: * Mr. Academic Title: Academic Title

First Name: * Craig Last Name: * Locke

Position User Account

Organizational Assignment

Department: 3P025 31002227; MM-Buyer-025 Craig Locke

Position: P0105M5 50121217; Contracting Officer I

Functional Assignment

Department Head Of: Department Head Of

Purchasing Group: 3P025 31002227; MM-Buyer-025 Craig Locke

Department Address

Street/ House Number: 322 Peterson Serv

Postal Code/ City: 40506 Lexington

Country: US

Attributes for Position Contracting Officer I

Attribute: Attribute

Department Address Details

Building: Building

Floor/ Room Number: Floor/ Room Number

Inhouse Mail: Inhouse Mail

Communication Type: Communication Type

Phone Number/ Extension: 859-257-2964

Fax Number / Extension: 859-257-1951

Personal Settings – User Account Tab



9. Click User Account Tab

10. Edit date format if desired

Standard Settings

User ID: * CLOCKE

E-Mail: clocke@email.uky.edu

Time Zone: EST Eastern Time (New York)

Language: English

Date Format: MM/DD/YYYY

Decimal Notation: 1,234,567.89

My Procurement Substitutes

Add Line Remove

Settings

Save and Exit Personal Settings



11. Click Save when all settings are completed

Employee ID: 123456789 Name: Mr. Craig Locke

Save Close Read Only Check

Personal Data

Form of Address: * Mr. Academic Title:

First Name: * Craig Last Name: * Locke

Position User Account

Standard Settings

User ID: * CLOCKE

E-Mail: clocke@email.uky.edu

Time Zone: EST Eastern Time (New York)

Language: English

Date Format: MM/DD/YYYY

Decimal Notation: 1,234,567.89

Introduction to the POWL



SRM roles are tab-based with the Personalized Object Work List driving the user's work tasks.

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.

Navigating to Personalized Object Work List



Click Confirmations within Site Navigation to activate the POWL

Note: You are still on the Confirmations Tab.

The screenshot shows the SRM Goods Confirmations interface. At the top, there's a navigation bar with tabs: 'Team Logon Pad', 'SLCM Testing', and 'Confirmations'. Below this, a sidebar on the left contains 'Confirmations' and 'Services' sections. The main content area displays 'Active Queries' and a table of 'Confirmations - All'. A callout box points to the 'Confirmations' tab in the sidebar, stating 'Click Confirmations within Site Navigation to activate the POWL'. Another callout box points to the 'Confirmations' tab in the top navigation bar, stating 'Note: You are still on the Confirmations Tab.'.

Confirmation Number	Confirmation Name	Item Number	Product Description
5600010367	Collaborator Reimbursement	1	Collaborator Travel Expense Reimb.
5600010212	A&S Replacement Computers	1	Qty: 20 OptiPlex 3010 Desktop
5600009902	Valet parking A&S Faculty Party	1	Valet Service on 12/08/12
5600011331	February 2013 Quench Payment	1	720-UV-HC (Kitchen, 214 POT)
5600011331	February 2013 Quench Payment	2	720-UV-HC (Kitchen, 308 POT)
5600010117	Bryant's for faculty holiday party	1	Invoice 326082
5600009388	A&S Recruiting Tablecloth	1	A&S Recruiting Tablecloth

Personalized Object Work List Overview



The POWL is driven by pre-configured queries that display Goods Confirmations and other documents that relate to your role(s).

Note: Goods Confirmations are identified as 10-digit numbers prefixed with 56.

Active Queries

Purchase Orders [Confirmations pending \(3\)](#)

Confirmations [All \(38\)](#) [Saved \(0\)](#) [Deleted \(0\)](#)

Confirmations - All

Show Quick Criteria Maintenance

View [Standard View] Create Confirmation Display Edit Return Delivery Delete/Cancel Evaluate Notify Recipient Print Preview

Confirmation Number	Confirmation Name	Item Number	Product Description	Vendor
5600010367	Collaborator Reimbursement	1	Collaborator Travel Expense Reimbursemen	324182
5600010212	A&S Replacement Computers	1	Qty: 20 OptiPlex 3010 Desktop	128613
5600009902	Valet parking A&S Faculty Party	1	Valet Service 12/08/12	313224
5600011331	January 2013 Quench Payment	1	720-UV-HC (K... 214 POT)	177117
5600011331			720-UV-HC (K... POT)	177117
5600010117			Invoice 3	
5600009388	A&S Re			

Clicking any query at the top will display the relevant documents in the bottom section. Clicking the number will display the Goods Confirmation in new window or tab.

POWL also shows line item contents of each confirmation, date created, status, etc.

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Goods Confirmation Layout



SRM assigned Confirmation number

Purchase Order number against which Goods Confirmation was created

Note: Purchase Orders are identified as 10-digit numbers prefixed with 75.

Display Confirmation

Confirmation Number: 5600011330 Purchase Order Number: 7500013963 Status: Posted in the Backend Confirmed Value:

Close Print Preview Refresh Cancel Return Delivery System Information Create Memory Snapshot

Overview Header Item Notes & Attachment Approval Tracking

Confirmation Name: Tiffany Barnes Poly Sci MacBookPro Reference Document:

02/07/2013

Copy Paste Duplicate Delete Copy All Outstar

Line Number	Description	Outstanding Quantity	Per	Delivery Date
1	MacBook Pro 13-inch	0	1	01/31/2013
2	Apple Care Plan	0	1	01/31/2013

Commonly used Action Buttons

Component tabs contained extended information if needed for review.

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Set Requestor Number in Queries



Each SRM user is assigned a unique "Requestor" number. In order for your queries to reflect the correct documents, the Requestor number must be set within Quick Criteria Maintenance.

1. Click the Confirmations (All) query

2. Open Quick Criteria Maintenance

Active Queries

Purchase Orders Confirmations pending (40)

Confirmations All (1285) Saved (0) Deleted (0)

Confirmations - All

Hide Quick Criteria Maintenance

Number:

Confirmation Name:

Purchase Order Number:

Timeframe: Last 30 Days

Item Description:

Product Category:

Supplier:

Requestor:

Goods Recipient:

Account Assignment Value:

Document Date: To

Apply

3. Click the Possible Entries icon for Requestor

Set Requestor Number in Queries



4. Enter your Last and First name with (*) on each end of both terms

5. Click Start Search

Vendor: General Value List

Hide Filter Criteria Personal Value List Settings...

City:

Postal Code:

Street:

House Number:

Country Key:

Name 1/last name:

Name 2/First name:

Search term 1:

Search term 2:

Vendor:

Valid On: 02/08/2013

☒ Restrict Number of Value List Entries To 500

Start Search Reset

More Search Helps: Partners by address

OK Cancel

Set Requestor Number in Queries



Vendor: General Value List

▼ Hide Filter Criteria

City:

Postal Code:

Street:

House Number:

Country Key:

Name 1/last name: *MCCROSKY*

Name 2/First name: *MEGAN*

Search term 1:

Search term 2:

Vendor:

Valid On: 02/08/2013

☒ Restrict Number of Value List Entries: 500

Start Search **Reset**

Add to Personal Value List

Name2/first nm	Name 1/last nm	Vendor	Search term 1	House Num
MEGAN	MCCROSKY	5691	MCCROSKY	

OK **Cancel**

6. Highlight your selection from the search results

7. Click OK

Set Requestor Number in Queries



Active Queries

Purchase Orders [Confirmations pending \(40\)](#)

Confirmations [All \(1285\)](#) [Saved \(0\)](#) [Deleted \(0\)](#)

Confirmations - All

Quick Criteria Maintenance

From: To:

Item Name:

Item Number:

Timeframe: Last 30 Days

Item Description:

Product Category:

Supplier:

Requestor: 5691

Goods Recipient:

Account Assignment Value:

Document Date: To:

Apply

8. Click Apply

Requestor number populates into field

TIP: It is a good idea to record your unique Requestor number for future use.

Set Requestor Number – Confirmations Pending



It is common for confirmers to also hold the SRM Shopper role for their department. If you hold both roles, you should also set your Requestor number in the Purchase Order – Confirmations Pending query. This will make all open purchase orders relating to your Shopping Carts easily available for confirming.

1. Click the Purchase Orders - Confirmations Pending query

2. Open Quick Criteria Maintenance

3. Enter or search for your unique Requestor number

4. Click Apply

Active Queries

Purchase Orders Confirmations pending (40)

Confirmations All (0) Saved (0) Deleted (0)

Purchase Orders - Confirmations pending

Hide Quick Criteria Maintenance

Number: To

Purchase Order Name:

Item Description:

Status: Outstanding Confirmations

Creation Date: To

Supplier:

Requestor:

Goods Recipient:

Product Category:

Account Assignment Value:

Apply



Create Goods Confirmation

Begin Create Goods Confirmation



Student Administration | Financial Aid View of Student | Enterprise Services | Strategic Procurement | SRM System Admin | myUK | Purchasing Admin | Faculty Services | myReports | IRIS Test

Confirmations

Detailed Navigation

- Confirmations
- Inbox
- Settings
- Display Purchase Order

Services

Advanced Search

Create Documents

- Confirmation

Central Functions

- Notify Recipient

Related Links

- Shopping Cart Report
- Business Analysis Report

1. Click the Confirmation link under Create Documents

Confirmations - All

Show Quick Criteria Maintenance

View (Standard View) | Create Confirmation | Display | Edit | Return Delivery | Delete/Cancel | Evaluate | Notify Recipient

EP	Confirmation Number	Confirmation Name	Item Number	Product Description
	5600010367	Collaborator Reimbursement	1	Collaborator Travel Expense Reimbu
	5600010212	A&S Replacement Computers	1	Qty: 20 OptiPlex 3010 Desktop
	5600009902	Valet parking A&S Faculty Party	1	Valet Service on 12/08/12
	5600011331	February 2013 Quench Payment	1	720-UV-HC (Kitchen, 214 POT)
	5600011331	February 2013 Quench Payment	2	720-UV-HC (Kitchen, 308 POT)
	5600010117	Bryant's for faculty holiday party	1	Invoice 326082
	5600009388	A&S Recruiting Tablecloth	1	A&S Recruiting Tablecloth

Confirmation Process – Search for PO Number



Search Purchase Order

Start Close

To create a confirmation, you need to select a purchase order as a reference. Proceed as follows: search for the required purchase order, then select it from the search results below.

Purchase Order Number: 7500014310 Item Description:

Timeframe: Product ID:

Shopping Cart Number: Shopping Cart Name:

Search

2. Enter the Purchase Order number

3. Click Search

TIP: If the purchase order number is unknown, you can determine it by performing searches on other criteria (e.g., Shopping Cart number, etc.).

Confirmation Process – Search for PO Number



Search Purchase Order

Start Close

To create a confirmation, you need a purchase order as a reference. Proceed as follows: search for the required purchase order and select it from the search results below

Purchase Order Number: 7500014310
 Timeframe: Product ID:
 Shopping Cart Number: Shopping Cart Name:

Search

Your search returned the following results; select the required purchase order as a reference and then create the

Search Results: Purchase Orders

Purchase Order / Item Number	Document Name / Item Name	Ordered Quantity	Ordered Value
7500014310	Local PO1 CLOCKE 02/06/2013 13:27		

4. Highlight the purchase order number under Search Results

5. Click Start

Confirmation Process – Create Confirmation



The Goods Confirmation screen will open in a new window or tab showing all line items and quantities from the purchase order. If previous confirmations have been created for partial items or quantities, only remaining items will be shown.

Create Confirmation

Confirmation Number: 5600011366 Pu Value: 0.00 USD

Close Print Preview Check Confirm

Overview Header Item Notes & Comment Approval Tracking

Confirmation Name: Chairs for front lobby area Reference Document: XKP-9846
 Delivery Date: 02/08/2013

Item Overview

Details Add Item Paste Duplicate Delete Copy All Outstanding

Item	Quantity	Unit	Price	Per	Delivery Date
Chair	0	EA	212.44	1	02/06/2013

6. If desired, enter a unique Confirmation Name (Makes confirmations more recognizable within your POWL display.)

Confirmation date populates automatically

7. Enter packing list number (optional)

Confirmation Process – Create Confirmation



Create Confirmation

Confirmation Number: 5600011366 Purchase Order Number: 7500014310 Status: In Process Confirmed Value: 0.00 USD

Close | Print Preview

Overview | Header | Item | Notes & Attachment

Confirmation Name: Chairs for front lobby area Delivery Date: 02/08/2013

Item Overview

Details | Add Item | Copy | Paste | Duplicate | Delete | Copy All Outstanding Quantities

Line Number	Description	Outstanding Quantity	Confirm Quantity	Unit	Price	Per	Delivery Date
1	H2111 Guest chair	1	1	EA	212.44	1	02/06/2013

The outstanding quantity populates from the purchase order.

8. The Confirm quantity automatically populates at 0. The Confirmer must enter the quantity being received.

Goods Confirmation from POWL



Create Confirmation

Confirmation Number: 5600011366 Purchase Order Number: 7500014310

Close | Print Preview | Check | Confirm | Hold | Revert

Overview | Header | Item | Notes & Attachment

Confirmation Name: Chairs for front lobby area

9. Click to check for errors

Create Confirmation

Confirmation Number: 5600011366

☒ Confirmation has no errors

10. Click Confirm to finish

Create Confirmation

Confirmation Number: 5600011366 Purchase Order Number: 7500014310

Close | Print Preview | Check | Confirm | Hold | Revert

Overview | Header | Item | Notes & Attachment

Confirmation Name: Chairs for front lobby area

Display Confirmation

Confirmation Number: 5600011366 Purchase Order Number: 7500014310

☒ Your confirmation 5600011366 has been Posted

11. Click Close to exit

Close | Print

Display Goods Confirmation from POWL



Goods Confirmations you create are listed within the Confirmations (All) query.

Click Refresh to see latest status

Active Queries

Purchase Orders Confirmations pending (3)

Confirmations All (1) Saved (0) Deleted (0)

Confirmations - All

Show Quick Criteria Maintenance

View [Standard View] Create Confirmation Display Edit Return Delivery Delete/Cancel Evaluate Notify Recipient Print Preview Refresh

Confirmation Number	Confirmation Name	Item Number	Product Description	Status	Reference Document	Quantity
5600011366	Chairs for front lobby area	1	H2111 Guest chair	Posted in the Backend	XKP-9846	

Contents of Goods Confirmation can be displayed any time by clicking the number.

Create Partial Goods Confirmation



If needed, goods confirmers can perform partial receiving against a purchase order. A confirmation can be created against specific lines only or less than full quantities ordered within a line.

Create Confirmation

Confirmation Number: 5600011366

Close Print Preview

Overview Header

Confirmation Name:

Confirm quantities automatically populate at 0. For less than full quantities, enter only the amount received. The difference will remain on the purchase order for future confirming.

For any full lines not received, leave confirm quantity at 0. The line will remain open on the purchase order for future confirming.

Outstanding Quantity	Confirm Quantity	Unit	Price	Per
675	500	EA	6.00	1
5	4	EA	20.00	1
35	0	EA	2.00	1

Extra charge for size XXL

Check for errors and Confirm to finish

Close Print Preview Check Confirm Hold

Cancel Goods Confirmation – Overview



Occasionally it may be necessary to cancel a goods confirmation. Reasons for cancellation could be:

- Damaged goods discovered after confirmation created.
- Incorrect quantity was entered.
- Goods confirmed against incorrect PO number.

Goods confirmers may cancel:

- All items on a goods confirmation.
- Only specific lines on a goods confirmation.

The quantity confirmed for a given line item cannot be altered. If a specific quantity is incorrect, the entire line must be canceled.

Canceled line items return to the purchase order record.

Cancel Goods Confirmation



1. Highlight the Goods Confirmation to be canceled from your POWL

Note: Return Delivery button should not be used for cancellations.

2. Click Delete/Cancel

3. Click Yes

Confirmation Number	Confirmation Name	Item Number	Product Description	Status
5600011366	Chairs for front lobby area	1	H2111 Guest chair	Posted in the Backend

Really delete/cancel selected Confirmation?

Yes No Cancel

Cancel Goods Confirmation



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IRIS
Integrated Resource Information System

Create Cancellation

Number of Cancel: 5600011368 Purchase Order Number: 7500014310 Status: In Process Conf

Close Print Preview Check **Confirm** Hold System Information Create Memory Snapshot

4. Highlight line(s) to be canceled

5. Click Confirm to complete cancellation

Cancellation completed successfully and is assigned unique number.

TIP: Multiple line items can be canceled by holding the CTRL + SHIFT keys and selecting items.

6. Click Close to finish

Display Cancellation

Number of Cancel: 5600011368 Purchase Order Number: 7500014310

☒ Your cancellation 5600011368 has been Posted

Close Print Preview Refresh System Information

Line Number	Description	Confirmed Quantity	Unit	Price
1	H2111 Guest chair	1	EA	212.44

Supplementary Tasks



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IRIS
Integrated Resource Information System



Minimum Browser Requirements



Since SRM operates within SAP, the follow specific browser versions are required to ensure proper operation:

- Firefox >= 2.0
- Microsoft Internet Explorer = 5.5 thru 8
- Opera >= 7.0
- Safari >= 3.0

For more information or if you have problems that may relate to browser requirements visit: <http://www.uky.edu/ukit/eag/desktop-information>.

For additional assistance contact Enterprise Applications Group (EAG) email: irismain@email.uky.edu.

Using Tabs Instead of Open Windows



SRM tasks open in new browser windows by default. If desired, you can configure your browser to instead open new tabs within a single browser window.

The image shows two parts of a tutorial for configuring Internet Explorer. On the left, the 'Tools' menu is open, and a yellow callout box points to it with the text: 'Select Tools from your browser menu and choose Internet options'. The 'Internet Options' option is highlighted at the bottom of the menu. On the right, the 'Tabbed Browsing Settings' dialog box is shown. A yellow callout box points to the 'Enable Tabbed Browsing' checkbox, which is checked, with the text: 'Check boxes as indicated and click OK'. The 'Warn me when closing multiple tabs' checkbox is also checked. The 'Always switch to new tabs when the current tab is closed' checkbox is checked. The 'Enable Quick Tabs' checkbox is checked. The 'Open only the first home page when a new tab is opened' checkbox is unchecked. The 'Enable Tab Groups' checkbox is unchecked. The 'When a new tab is opened, open:' dropdown is set to 'Your first home page'. The 'When a pop-up is encountered:' section has three radio buttons: 'Let Internet Explorer decide how pop-ups should open' (selected), 'Always open pop-ups in a new window' (unchecked), and 'Always open pop-ups in a new tab' (unchecked). The 'Open links from other programs in:' section has three radio buttons: 'A new window' (unchecked), 'A new tab in the current window' (selected), and 'The current tab or window' (unchecked). The 'OK' button is highlighted with a red rectangle.

Note: Graphics shown are from IE 8.0
– Your browser menu may offer different options.

POWL – Quick Criteria Maintenance



Quick Criteria Maintenance is an extension of the highlighted query in the upper section of the POWL. Opening it will display additional search criteria allowing the confirmer to perform customized document searches. It can be hidden when not in use.

Confirmations - All

► Show Quick Criteria Maintenance

View [Standard View] Create Confirmation

Confirmation Number Confirmation Name

1. Click within POWL to expand Quick Criteria Maintenance

2. Confirmer can enter one or more criteria to search for specific document(s)

3. Click Apply to execute searches

Confirmations - All

▼ Hide Quick Criteria Maintenance

Number: To

Confirmation Name:

Purchase Order Number:

Timeframe: Last 30 Days

Item Description:

Product Category:

Supplier:

Requestor: 5691

Goods Recipient:

Account Assignment Value:

Document Date: To

Apply

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Quick Criteria Maintenance – Search Examples



Confirmations - All

▼ Hide Quick Criteria Maintenance

Number: 5600011250 To

Confirmation Name:

Purchase Order Number:

Timeframe: Last 30 Days

Item Description:

Product Category:

Supplier:

Requestor: 5691

Goods Recipient:

Account Assignment Value:

Document Date: To

Apply

View [Standard View] Create Confirmation

Confirmation Number Confirmation Name

5600011250 Illustrations for ESS and J

Search Example 1 –
Enter specific confirmation number and click Apply. Confirmation will display in lower portion of POWL.

Search Example 2 –
Enter specific Supplier number and click Apply. Only confirmations against PO's from that supplier will display in lower section.

Tip: If a query returns erroneous results, open Quick Criteria Maintenance and confirm whether invalid criteria may be entered.

Confirmations - All

▼ Hide Quick Criteria Maintenance

Number: To

Confirmation Name:

Purchase Order Number:

Timeframe: Last 30 Days

Item Description:

Product Category:

Supplier: 126652

Requestor: 5691

Goods Recipient:

Account Assignment Value:

Document Date: To

Apply

View [Standard View] Create Confirmation Display Edit Return Delivery Delete/Cancel Evaluate Notify Receiver

Confirmation Number	Confirmation Name	Item Number	Product Description	Vendor
5600010510	Weldenmichael MacBook	1	MacBook Air 11-inch	126652
5600010510	Weldenmichael MacBook	2	Apple Care Protection Plan	126652
5600011218	HIVE replacement stock	1	iPads with 16 GB	126652
5600011218	HIVE replacement stock	2	AppleCare for iPads	126652
5600011218	HIVE replacement stock	3	MacMini 2.5 GHz	126652
5600011218	HIVE replacement stock	4	AppleCare for MacMinis	126652

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Manage and Maximize POWL



Confirmers can personalize how their POWL handles and displays documents for improved visual feel and navigation.

Active Queries
 Purchase Orders [Confirmations pending \(4\)](#)
 Confirmations [All \(13\)](#) [Saved \(0\)](#) [Deleted \(0\)](#)

Confirmations - All
 Hide Quick Criteria Maintenance

Number: To
 Confirmation Name:
 Purchase Order Number:
 Timeframe: Last 30 Days
 Item Description:
 Product Category:
 Supplier: 126652
 Requestor: 5691
 Goods Recipient:
 Account Assignment Value:
 Document Date: To

View [Standard View]

Confirmation Number	Confirmation Name	Item Number	Vendor	Status
5600010510	Weldenmichael MacBook	1	126652	Posted in the Backend
5600010510	Weldenmichael MacBook	2	126652	Posted in the Backend

Queries can be customized for specific document searches.

Search terms within Quick Criteria Maintenance can be added or removed.

Number of columns and visible rows can be configured for better workspace layout.

A Quick Reference Card for Managing and Maximizing the POWL is available from the Purchasing SRM website at: <http://www.uky.edu/Purchasing/srmquickrefcards.htm>.

Create Confirmation with Reference from POWL



TIP: The Purchase Orders - Confirmations Pending query shows purchase orders yet to be confirmed by a department. For any orders within the POWL, the confirmer may use the "Create Confirmation with Reference" feature. The confirmation is automatically created for the full quantity with no entry into the confirmation screen itself.

1. Highlight the line item

2. Click Create Confirmation With Reference

Purchase Orders - Confirmations pending (4)
[All \(13\)](#) [Saved \(0\)](#) [Deleted \(0\)](#)

Purchase Orders - Confirmations pending
 Show Quick Criteria Maintenance

View [Standard View]

Purchase Order Number	Purchase Order Name	Item Number	Item Name
7500014418	Local PO1 WLHOLL2 02/08/2013 13:24	1	Mr. Coffee 12-cup Coffee Maker
7500014199	Local PO1 CLOCKE 02/04/2013 09:34	1	Website Illustrations
7500014167	Local PO1 PJSTEW2 02/01/2013 12:05	1	R815 Chassis
7500014165	Local PO1 PJSTEW2 02/01/2013 11:54	1	PowerVault MD3600i

Create Goods Confirmation against "Reverse" PO's



Some types of purchase orders are in "reverse" format. Reverse orders are setup as one line item with a lump sum dollar amount for the entire order, regardless whether the quote has multiple lines. Reverse format is usually used for complex orders such as furniture or computers. When confirmations are created against reverse purchase orders, the confirmed quantity must be for the dollar amount of the order.

Purchase order is in reverse format with number of dollars as quantity and Unit = LOT.

To confirm full amount, enter the matching number of dollars.

Confirmation Name: Reference Document:

Delivery Date: 02/08/2013

Item Overview

Details Add Item Copy Paste Duplicate Delete Copy All Outstanding Quantities

Line Number	Description	Outstanding Quantity	Confirm Quantity	Unit	Price	Per
1	PowerEdge R720 w/Components	13,168.400	13168.40	LOT	1.00	1

Note: Partial confirmations can be created against reverse purchase orders. Simply enter the reduced number of dollars into the Confirm Quantity box.

Obtain Hard Copy of Goods Confirmation



If needed for records or auditing, a hard copy of the confirmation can be obtained via the Print Preview button within the POWL.

Highlight confirmation and click Print Preview

Confirmations - All

Show Quick Criteria Maintenance

View [Standard View] Create Confirmation Display Edit Return Delivery Delete/Cancel Evaluate Notify Recipient **Print Preview**

Confirmation Number	Item Number	Product Description	Vendor	Status	Quantity
5600011381	1	REGULAR UNLEADED	123736	Posted in the Backend	
5600011381	2	BIO-DIESEL	123736	Posted in the Backend	

Save or print .pdf hard copy as desired

Supplier: **Wiley Oil Company**
 4000 N. 4th St.
 Richmond, KY 40476
 USA

Goods receipt: **5600011381**
 Receipt number: **5600011381**
 Receipt description: **REGULAR UNLEADED**
 Requested by: **jd007**
 Created by: **jd007**
 Created on: **02/08/2013 15:30:30**

Goods receipt details:

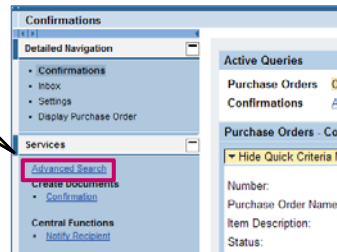
Item	Product number	Description	Purchase order number/Item	Assigned to	Delivery date
1	1402280	REGULAR UNLEADED	138 14021 1 LOT	Cost center: 104000070	07/02/2012
2	4321460	BIO-DIESEL	138 14021 1 LOT	Cost center: 104000070	07/02/2012
3		FUEL ADDITIVE	138 14021 1 LOT	Cost center: 104000070	07/02/2012
BT		LOT	138 14021 1 LOT	Cost center: 104000070	10/00000

Using Advanced Search

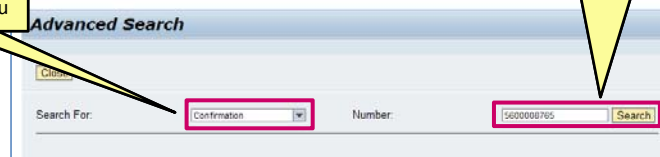


Confirmers can also use the Advanced Search feature to locate documents if needed.

1. Click Advanced Search from within Site Navigation



2. Select Confirmation from dropdown menu

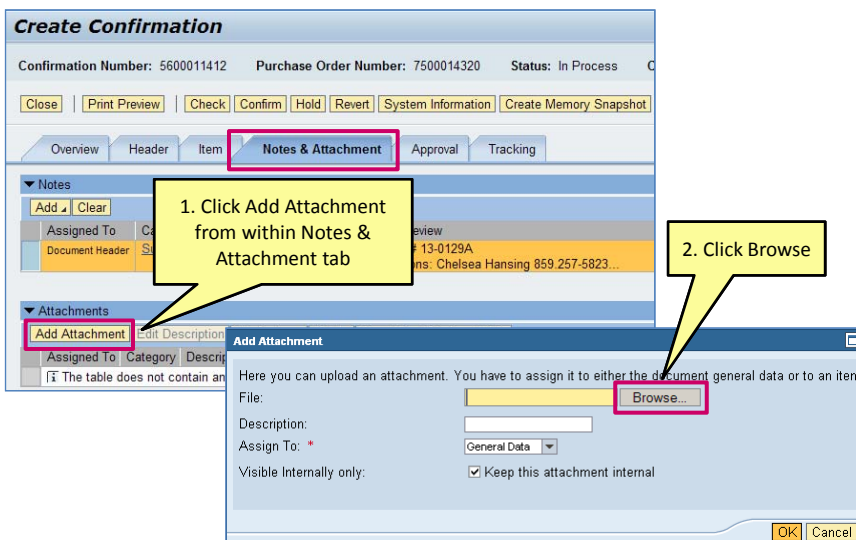


3. Enter the Confirmation number. Click Search to display the document in new tab or window.

Add Attachments



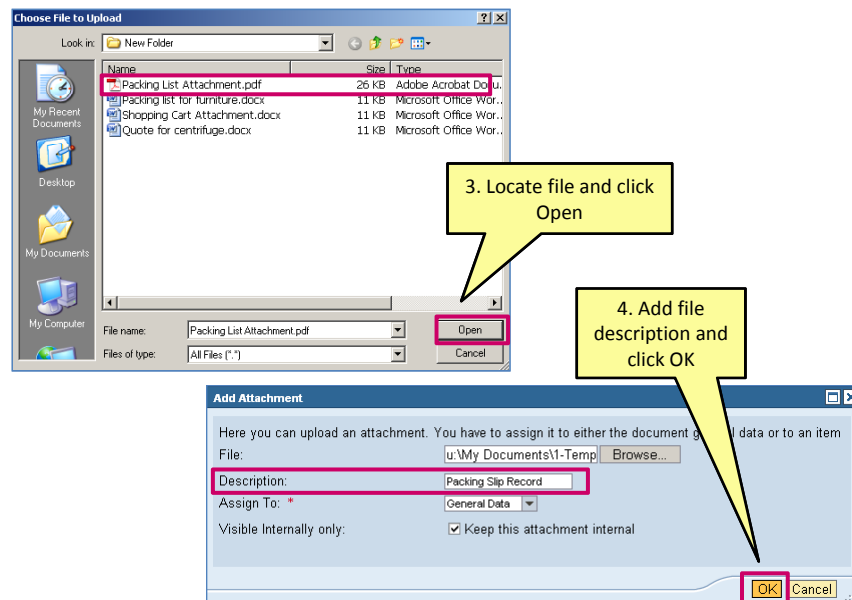
Attachments can be added to the confirmation if desired.



1. Click Add Attachment from within Notes & Attachment tab

2. Click Browse

Add Attachments



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Naming Convention for Attachments



When creating attachments, refrain from inserting special characters, such as @, #, \$, *, \, ' , +, etc. into the filename.

Filenames should also not include spaces between words nor underscores. Files should be named with a purely alphanumeric format.

Examples of suitable filenames:

- Medtechquote1001.pdf
- Furniturelayout.doc

Examples of unsuitable filenames:

- API Printing Quote.pdf (filename includes spaces)
- Fisher+incubator \$1000.doc (filename includes special characters)

Only the following file formats are acceptable as attachments:

- PDF, XLS, XLSX, DOC, DOCX, TXT, TIF, BMP, GIF, HTML

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Tracking Tab



Display Confirmation

Confirmation Number: 5600011353 Purchase Order Number: 7500013942 Status: Pending Confirmed value: 885.00 USD

Close | Print Preview | Refresh | Cancel | Return Delivery | System Information | Create Memory Snapshot

Overview | Header | Item | Notes & Attachment | Approval | **Tracking**

▼ History

View: United States Dollar

Document	Name	Document Number	Backend Document Number
Purchase Order	Local PO1 WLHOLL2 01/28/2013 11:27	7500013942	7500013942
Confirmation		5600011353	2013/5500577818
Invoice			2013/5106314577

▼ Status

The Tracking tab shows other documents that are part of the purchase transaction, some with drill-down functionality (PO, Goods Confirmation, etc.).

Shows related documents including PO number. Drill into the number to display the documents.

How to Determine Assigned Purchasing Buyer



A Purchasing Buyer is automatically assigned to every purchase order.

Display Purchase Order: 7500013942

Purchase Order Number: 7500013942 Purchase Order Type: Standard PO SRM Status: Ordered

Supplier: Promotional Products Plus LLC

Show My Tasks | Edit | Close | Print Preview | Refresh | Check | Export | System Information

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

General Header Data

Local PO1 WLHOLL2 01/28/2013

☐ Smart Number is External

Number: 7500013942

192086 Promotional Products Plus LLC

7245 Shana Hall

7245 Shana Hall

Location: 3 University of Kentucky

Ship-To Address: 1 UK

Purch. Organization: * Office Of The President

Purchasing Group: * MM-Buyer-037 Wendy Holland Brown [Show Members](#)

Total Value (Net): 885.00 USD

The assigned buyer can be found on the Overview tab on the purchase order.

Set Last Delivery Indicator



If completing a partial confirmation and the remaining line item quantity is no longer needed, the Last Delivery Indicator can be set to release the remaining encumbrance and close the line item.

Confirmation Number: 5600011416 Purchase Order Number: 7500014320 Status: In Process Confirmed Value: 3,120.00 USD

Close | Print Preview | Check | Confirm | Create Memory Snapshot

Overview | Header | Item | Notes | Sking

Confirmation Name: Document:

Delivery Date: 02/08/2013

Item Overview

Details | Add Item | Copy | Paste | Duplicate | Delete | Copy All Outstanding Quantities

Line Number	Description	Outstanding Quantity	Confirm Quantity	Unit	Price	Per	Delivery Date	Last Delivery
1	Sport Grey Short Sleeve T-Shirts	675	500	EA	6.00	1	02/15/2013	☒
2	Set-up Fee normal spot color	5	3	EA	20.00	1	02/15/2013	☒
3	Extra charge for size XXL	35	30	EA	2.00	1	02/06/2013	☒

Note: If confirming on the full quantity of a line item, the system automatically sets the Last Delivery Indicator. It is only set manually if you are confirming less than a full quantity and do not plan to confirm the remaining quantity.

Changes to PO Quantities



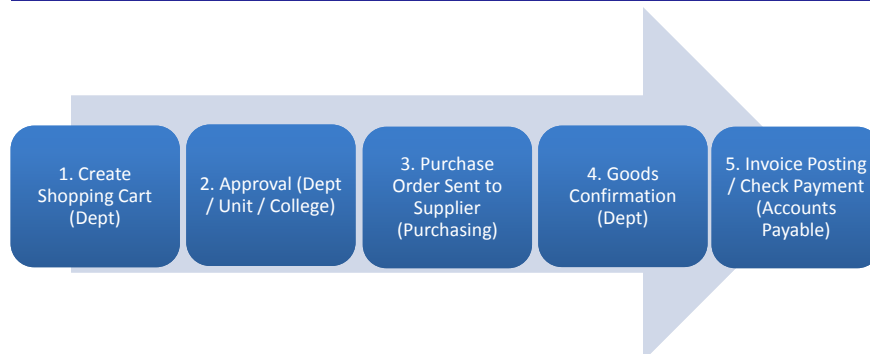
Occasionally changes may need made to a purchase order quantity.

Example: A department orders 1000 imprinted ink pens; the vendor ships and invoices 1025 pens as result of the manufacturing process.

To facilitate the over-run, the purchase order must be increased to the new quantity before the goods confirmation is completed. If the goods confirmation is not created for the correct amount, the 3-way match will not complete and check payment will not process.

Contact the responsible Purchasing buyer for any orders which may include over-runs or need the quantity adjusted for other reasons.

Diagnose Process Problems



As an SRM order evolves through the process, the POWL will reflect the status in which it resides (e.g., Approved, in Purchaser's worklist, etc.).

Problems can be frequently diagnosed based on the order status in the process.

Example: With the purchase order being in place, the Goods Confirmation and the Invoice Posting complete a "3-way match" allowing check payment to release. Common problems relate to one or more of these tasks not being completed.

Diagnose Process Problems



1. To check whether Goods Confirmations and Invoices are posted, click Display Purchase Order from within Site Navigation.

2. The SAP Display Purchase Order screen will appear. Click on Purchase Order / Other Purchase Order to enter the PO number.

3. After PO displays, select Purchase Order History tab within Details section.

4. Goods confirmations and invoice postings are posted and match, allowing check payment. If either is missing, or there is a mismatch, the check will not process.

S...	M/V	Material Do...	Item	Posting Date	Quantity	Qty in	Amount in LC	Amount Reference
GR	101	5500487200	1	03/19/2012	1	02	12.04	12.04
Tr./Ev.		Goods receipt	1	02	1	12.04	12.04	12.04
IR	5105181252	1	03/17/2012	1	02	1	12.04	12.04
Tr./Ev.		Invoice receipt	1	02	1	12.04	12.04	12.04

Inbox Overview



All SRM users have Inboxes. Document-related messages and other communications move throughout Workflow to users' Inboxes.

Callouts:

- Different types of communications can be found among various tabs
- Messages can be managed using various display menus
- Access your Inbox through Site Navigation

The screenshot shows the IRIS system interface. The top navigation bar includes 'Launch Pad', 'Employee Self-Service', 'Student Services', 'Enterprise Services', and 'Admin'. The left sidebar shows 'Inbox' selected under 'Detailed Navigation'. The main content area has tabs for 'Tasks (1/1)', 'Alerts', 'Notifications', and 'Tracking'. Below the tabs, there's a 'Show:' dropdown set to 'New and in Progress Tasks (1/1)' and a 'Select a Subview' dropdown set to 'All'. A table lists messages with columns: Subject, From, Sent, Priority, Due, and Status. The first message is 'Accept Decision / Adjust Shopping Cart Number 9000003494' from 'Streetman, Reagan' sent 'Today' with 'Normal' priority and 'New' status. At the bottom, there's a summary for the selected message: 'Accept Decision / Adjust Shopping Cart Number 9000003494', 'Sent: Today by Streetman, Reagan', 'Priority: Normal', 'Status: New', and a note that the shopping cart RSTRE2 11/15/2011 10:22 was changed.

Inbox – Filter Settings



Filters can be used to better manage messages or find specific documents within the Inbox.

Callouts:

- Select from various search criteria to locate or manage specific messages
- Can also search messages based on specific text
- Link shows or hides Filters as desired

The screenshot shows the 'Filter Settings' section of the IRIS system. It includes a 'Show:' dropdown set to 'New and in Progress Tasks (1/1)' and a 'Select a Subview' dropdown set to 'All'. Below these, there are checkboxes for 'High Priority', 'Due Date: Select One...', 'Sent Date: Select One...', and a 'Text:' search field. There are 'Apply' and 'Reset' buttons. A 'Hide Filters' link is visible on the right. The table below shows the same message as in the previous slide: 'Accept Decision / Adjust Shopping Cart Number 9000003494' from 'Streetman, Reagan' sent 'Today' with 'Normal' priority and 'New' status.

Close Open Windows or Tabs



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

Always click Close button to exit an open window or tab

Note: Don't click X to exit an open window or tab

Fix Query Lock

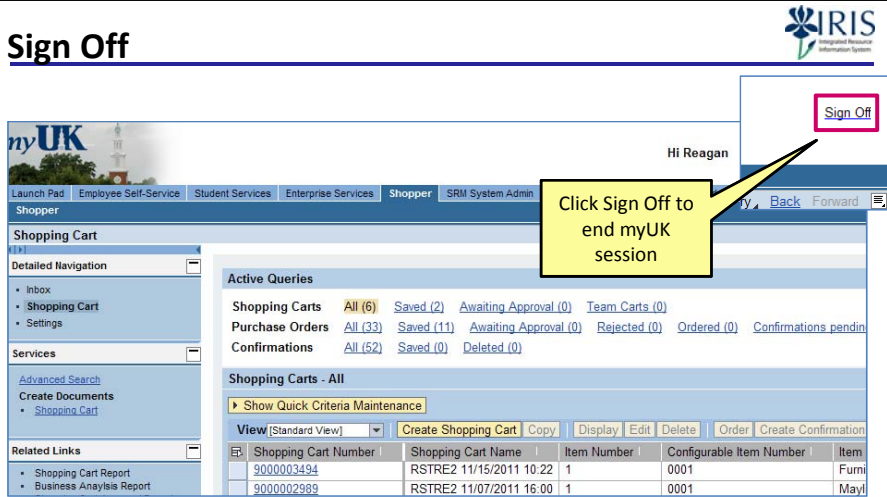


If a window or tab is closed using the X in the upper right hand corner rather than clicking the Close button, it is possible to be locked out of the system.

1. If you receive a "Query Locked" message, scroll to bottom of screen and click Fix Query Lock.

2. Click any Active Query from the top of your POWL to continue working.

Sign Off



IRIS Integrated Resource Information System

myUK

Hi Reagan

Launch Pad Employee Self-Service Student Services Enterprise Services Shopper SRM System Admin

Shopper

Shopping Cart

Detailed Navigation

- Inbox
- Shopping Cart
- Settings

Services

Advanced Search

Create Documents

- Shopping Cart

Related Links

- Shopping Cart Report
- Business Analysis Report

Active Queries

Shopping Carts All (6) Saved (2) Awaiting Approval (0) Team Carts (0)

Purchase Orders All (33) Saved (11) Awaiting Approval (0) Rejected (0) Ordered (0) Confirmations pending

Confirmations All (52) Saved (0) Deleted (0)

Shopping Carts - All

Show Quick Criteria Maintenance

View [Standard View] Create Shopping Cart Copy Display Edit Delete Order Create Confirmation

Shopping Cart Number	Shopping Cart Name	Item Number	Configurable Item Number	Item
9000003494	RSTRE2 11/15/2011 10:22	1	0001	Furni
9000002989	RSTRE2 11/07/2011 16:00	1	0001	Mayl

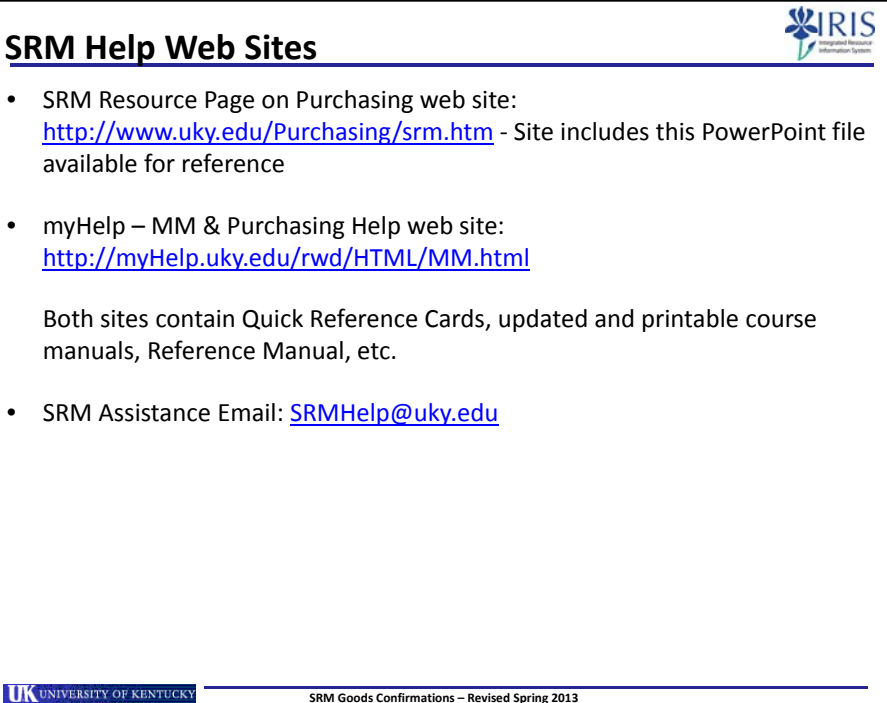
Remember: Be sure to click the "Sign Off" link when exiting SRM to close all applications.

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SRM Help Web Sites



IRIS Integrated Resource Information System

- SRM Resource Page on Purchasing web site:
<http://www.uky.edu/Purchasing/srm.htm> - Site includes this PowerPoint file available for reference
- myHelp – MM & Purchasing Help web site:
<http://myHelp.uky.edu/rwd/HTML/MM.html>

Both sites contain Quick Reference Cards, updated and printable course manuals, Reference Manual, etc.

- SRM Assistance Email: SRMHelp@uky.edu

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Printing Course Manual (Optional)



If desired, a printable (Adobe PDF) version of this course manual is available for your convenience.

To access and print the manual:

1. Click on the printer (the manual will open in a separate browser window)
2. Print the course manual
3. Close the separate browser window
4. Return to this course window
5. Click on the green Continue button below



To proceed without printing, click on the green Continue button below.

Check for Understanding



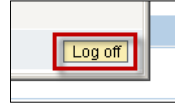
In order to receive full credit for the SRM Goods Confirmations course, you must now successfully complete the Check for Understanding – a quiz covering the main concepts presented in this course.



Course Completion



To complete this WBT, click on the yellow Log off button in the lower corner of this window.



Note: This window will close, and you should be returned to the main, myTraining page for this WBT. The main page will refresh (usually within 30 seconds, depending on network traffic), and you should receive a green, system message confirming your participation.

Your participation in this course has been completed.

You may then safely navigate away from the main page.