

[SRM Purchasing Training]

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[Logging In]

<https://erp-portal-prd.itap.purdue.edu/irj/portal>

- NOTE: Please use Internet Explorer, not Firefox
- Use your career account login and password
- Click on Purchasing Services

- NOTE: You must change your password every 30 days to continue logging in

[Getting Started – Account Number Basics]

- Your account numbers will be one of two formats:
 - Fund and Internal Order (starting with a 5 or an 8)
 - 41010000 – 8000001234
 - Fund, Cost Center, and Statistical Internal Order (starting with 75)
 - 21010000 – 4014009000 – 7500001234

[Most Common Types of Orders]

- ePlus Technologies
 - Examples: General Stores, Sigma-Aldrich, Fastenal, etc. See attachment
- Describe Requirement
 - Examples: McMaster, Indiana Fluid Systems, Praxair, Lafayette Electronics, etc. Most of the old Ariba vendors

[Setting Your Profile]

- Click on Workbench under the Purchasing Services Tab
- Click on Change My Settings
- Enter your personal information in the Position Tab and hit Save
- Under the User Account tab, change your decimal notation and date format if needed

[Placing an Order]

- Click on Go Shopping then Shop
- In the Ship-To Address/Performance Location, click on Display Details
- Click on the binoculars if you want to change the building (make sure this is set to your delivery building, not MMDC!!)
- If needed, go to the following website to change your default shipping address:
www.purdue.edu/purchasing/Helpdesk/address.php
- Enter your name and room number under C/O field. Do NOT change any other information or it will cause the order to fail!!!

Cost Assignment – Part 1

- Click on Display Details next to Cost Assignment to add account information
- If you have an account number with a Cost Center, enter it in this area. If not, click on the dropdown box next to Cost Center and change to Order. If Order does not appear, click on the three dots and select OR for Order then enter your order number.
- Fill in G/L account number. See handout for common G/L numbers.
- Fill in Business Area – Always 40

Cost Assignment – Part 2

- Click on the magnifying glass next to your business area.
- Enter your fund number. If you have an SIO, enter it in the Order blank.
- Click the X to close the Cost Assignment area. If you have any errors in your cost assignment, they should show up now.
- Use these Cost Assignment instructions for all types of orders in SRM.

Describe Requirement Orders

- You will use the Describe Requirement button to add orders for any vendor not in ePlus.
- Your order will ALWAYS be Goods. NEVER click on Services or else your order will fail.
- Enter a description of your item to purchase in the Description field.
- Enter the Quantity and Price.
- Change the Required On date to one month from the day you are ordering.

Describe Requirement – Part 2

- To find the Category, go to <http://www.purdue.edu/purchasing/Buying/GoodsandServices.htm> and click on SRM Vendor Lists.
- Use the Control + F function to find your vendor. There may be more than one category that your vendor falls into. Pick the category most relevant to your order.
- In the Category drop-down box in SRM, click on the three dots to bring up a search box. Use wildcard characters (*) to search for your category and select it.
- Click Add to Shopping Cart

Describe Requirement – Part 3

- You will now see a section called Items in Shopping Cart. Click on the magnifying glass to the right of your item.
- Click on the arrow to the left of Cost Assignment. Verify that your G/L Account is the same as the G/L you entered. (Many times, the G/L has changed due to the Category you picked earlier. Change it back to your original G/L)
- Click on the arrow to the left of Documents & Attachment. Click on Vendor Text. Enter your part number and full description in this text box.

Describe Requirement – Part 4

- Click on the arrow to the left of Sources of Supply/Service Agents. Search through the Vendor Overview to find your preferred vendor. Click the radio button next to the vendor and click Assign Vendor.
- If your vendor is not available on this vendor list, you can click the binoculars next to the Preferred Vendor field. You may then search and select another vendor. NOTE: By using this field, your order will go to the Purchasing team first and will take a few extra days to order.

Describe Requirement – Part 5

- To add another item, go back up to the top and click Describe Requirement and repeat the previous process. You will need to do every single step for each item you are ordering!
- To add an attachment (such as a quote), go into the Documents and Attachments section. Under Attachments, click Browse to find your file and attach it. Please use only letters and numbers in your file name or it will not display the file correctly.

ePlus Technologies orders

- Click on the ePlus Technologies link in the Add Items section.
- See attached list of ePlus vendors.
- The ePlus system still works the same as it did in Ariba, with a few additions.
- You can now limit to a specific vendor by clicking on Supplier Search. Click on your desired vendor(s) and hit Enter. Now when you do a search, you will only bring up items from your desired vendor.

ePlus Technologies – Part 2

- Type your catalog number in the Search bar. Once you see the item, click Add. You can then change quantities by going to your Shopping Cart and hitting Update Quantity. Click Checkout when you find all of your items. This will take you back into SRM where you will then want to review all of your item details.
- If searching for a product, type the item you are looking for. Then click View Results and add per instructions above.

ePlus Technologies – Part 3

- After placing your order through the ePlus interface, it will transfer into the SRM system. You will then need to drill down into each item to verify some of the information. Drill into the Cost Assignment tab and make sure the C/L account is correct. You may need to change it again.
- Drill into Documents and Attachments. In Reservation Unloading Point, enter your delivery building and room. In Reservation Goods Recipient, enter your name. If you do not do this, your order will not get delivered.

Finishing Details

- Under Additional Specifications, name the shopping cart as follows:
 - Dept. Number/Professor-You/Your Initials/Vendor
 - Example: 41409/Smith-Brown/ATB/McMaster
- Under Notes For Approval, list the old Legacy account number if you know it.
- Click Approval Preview. Make sure that Kimberley Gascho and Lori Bugher are listed as approvers. If you see Nancy Allrich as an approver, contact your account clerk for help as this will not allow the order to go forward.

Finishing Details – Part 2

- You will now add your Account Clerk as an approver to verify the order. Click Add Approver. Add the New Approval BEFORE the other listed approvers. (You will probably have to click on the space twice.) Type in their last name surrounded by wildcard characters (*). Once you find them, hit Transfer.
- Click on Check to check the order for errors. If it comes back without errors, click Order.
- On the next screen, click Print Shopping Cart and send this paperwork along with your purchase requisition to the business office for approvals.

[Checking Order Status]

- To check the status of an order you have placed, click on Order Status underneath Go Shopping in the Purchasing Services area.
- If you do not see your order, change the Timeframe to Last 90 Days and click Start.
- Click on the magnifying glass on the right hand side of your order. When it opens, click on a magnifying glass to the right of one of the ordered items.
- Scroll down to Follow-On Documents. If a Purchase Order shows up, this means that the order has been sent to the vendor. The 300**** number is your PO#. **Please write this number on your print out and bring it to the business office along with your signed purchase requisition.**

[Helpful websites]

- OnePurdue Portal:
<https://erp-portal-prd.itap.purdue.edu/iri/portal>
- SRM Vendor List:
<http://www.purdue.edu/purchasing/xls/Vendor%20List.xls>
- Purchasing Website:
<http://www.purdue.edu/purchasing/index.html>

Commonly Used Object Code and Corresponding G/L Account #'s

<u>Item:</u>	<u>Object Codes:</u>	<u>G/L Account:</u>	<u>Item:</u>	<u>Object Codes:</u>	<u>G/L Account:</u>
Hardware	5-4103	522015	Federal Express	5-5310	530095
Lumber	5-4104	522020	Book Allowance (Grad)	5-5406	558050
Electrical Supplies	5-4105	522025	Registration Fees	5-5611	533370
Paint & Painting Supplies	5-4106	522030	Conference Arrangements	5-5618	533380
Gasoline	5-4108	522040	Memberships	5-5623	533645
Oil & Lubricants	5-4109	522045	Registration Fees - Domestic	5-5631	533600
Gasses	5-4201	523005	Registration Fees - Foreign	5-5632	533605
Chemicals	5-4204	523020	Repairs And Maintenance	5-5700	534000
Electronic Supplies	5-4205	523025	Electrical Repairs	5-5703	534015
Glassware & Plastics	5-4206	523030	Electronic Repairs	5-5704	534020
Paper Products (Office)	5-4207	523035	Instrument Sharpening	5-5725	534100
Metals	5-4208	523040	In-state Travel	5-5901	535010
Capital Fabrication S&E	5-4269	523120	Out-of-State Travel	5-5903	535010
Other Lab Supplies	5-4298	523900	Foreign Travel	5-5906	535010
Printing And Office Supplies	5-4400	524000	Domestic Airfare	5-5918	535010
Publishing Charges	5-4402	524010	Foreign Airfare	5-5919	535010
Copy Machine Charges	5-4403	524015	Minor Equipment - Furniture	5-6101	536005
Photographic S & E	5-4404	524020	Minor Equipment - Scientific	5-6102	536010
Printing & Duplication S&E	5-4408	524040	Minor Equipment - Tools	5-6103	536015
Printing & Dupl. Internal	5-4410	524050	Minor Equipment - Books	5-6104	536020
Printing & Dupl. External	5-4411	524055	Minor Equipment - Computer	5-6106	536030
Computer Supplies	5-4420	524070	Minor Equipment - Software	5-6107	536035
Programs	5-4433	524080	Software Operating System	5-6109	536045
Office Supplies	5-4448	524125	Minor Equipment - Other	5-6198	536900
Other Printing & Office	5-4498	524900	Capitalized Equipment	5-6201	537200
Freight	5-5201	529005	Capital Equipment - Computer	5-6207	537200
Express	5-5202	529010	Hospitality	5-7988	546435
Postage	5-5304	530080			
Parcel Service (Ups & Ips)	5-5309	530090			

SRM ePlus Technologies Vendor List

Airgas Mid America
Applied Industrial Technologies
Bell Industries
Bio-Rad Laboratories
Business Furniture
Business Furniture Production
CDW
Cannon IV
Concerto Office products/Office Max
Creative Solutions
Dell Computers
Ecolab
Fastenal
Fisher Scientific
Food Stores
G.W. Berkheimer
GE Healthcare Bio-Sciences
H.P. Products
Indiana Oxygen
Invitrogen Bioscience
Kirby Risk
McKesson General Medical
Meunier Electronic Supply
Motion Industries
Newark Electronics
PC Specialists dba TIG
PerkinElmer Life Sciences
Pharmacy Stores
Schnaible Service & Supply Co
Sensory Technologies
Sherwin Williams
Sigma-Aldrich
Software House International (SHI)
VWR

Common SRM Describe Requirement Vendors

Agilent Technologies
Alro Steel
Applied Biosystems
Butler Tool & Design
Chemglass
Cole-Parmer
Digi-Key
Edmund Optics
Electron Microscopy
Fastenal
Grainger
GW Berkheimer
Indiana Fluid Systems
Invitrogen
Inweld Corp.
Kaman Industrial
Kirby Risk
Kurt J Lester Company
Lee Supply
LH Industrial
Mac Tools
McMaster Carr
Motion Industries
Mouser Electronics
MSC Industrial
National Instruments
Neff Engineering
Newark Electronics
Omega Engineering
People's Welding
Praxair
Spectra Gasses
Ted Pella Inc
Thorlabs
Travers Tool Company
Varian Instruments