

[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
 - 51060224 – 5200001234
 - 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.

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/xls/Vendor%20List.xls>
- 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.

[Internal Goods/Services]

- When placing a University Stores order, start your order with entering the default Cost Assignment details as described above.
- Click the Internal Goods/Services link.
- Enter the item catalog number in the Product ID field and click Start.
- Your item will appear below. Click on the Product ID number

[Internal Goods/Services – Part 2]

- Enter the Quantity desired and change the Required On date to one month forward. Click Add to Cart.
- Click the magnifying glass to the right of the item in your cart. Enter the delivery information in Unloading Point and your name in Goods Recipient. Check your Cost Assignment details as explained above.

ePlus Technologies orders

- Click on the ePlus Technologies link in the Add Items section.
- See attached list of ePlus vendors.
- You can 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.
- Type your catalog number (or description) in the search bar and click Find It. You may get a Narrow Results page where you can click View Results. Then click Add to choose your item.

ePlus Technologies – Part 2

- 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.
- NOTE: Sometimes, you will need to click Go To Suppliers Website if the item you want doesn't exactly match the items in the catalog. This will send you to the Supplier's site where you can more accurately search your items.

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 G/L account is correct. You may need to change it again.

Finishing Details

- Under Additional Specifications, name the shopping cart as follows:
 - Dept. Number/Professor-You/Vendor
 - Example: 41409/Smith-Brown/McMaster
- 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 30***** number is your PO#.

Helpful websites

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

SRM ePlus Technologies Vendor List

- Airgas Mid America
- Applied Industrial Technologies
- Bell Industries
- Bio-Rad Laboratories
- CDW
- Cannon IV
- Creative Solutions
- Dell Computers
- Ecolab
- Fastenal
- Fisher Scientific
- Flex Pac Inc/Schnaible
- Food Stores
- GW Berkheimer
- GE Healthcare Bio-Sciences
- GovConnection
- Guy Brown Products/Concerto Office Supplies
- HP Products
- Indiana Oxygen
- Invitrogen Bioscience
- Kirby Risk
- McKesson General Medical
- Meunier Electronic Supply
- Motion Industries
- Newark Electronics
- PC Specialists dba TIG
- PerkinElmer Life Sciences
- Sensory Technologies
- Sherwin Williams
- Sigma-Aldrich
- Software House International (SHI)
- VWR

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

<u>Item:</u>	<u>G/L</u> <u>Account:</u>	<u>Item:</u>	<u>Object</u> <u>Codes:</u>	<u>G/L</u> <u>Account:</u>
Hardware	522015	Federal Express		530095
Lumber	522020	Book Allowance (Grad)		558050
Electrical Supplies	522025	Registration Fees		533370
Paint & Painting Supplies	522030	Conference Arrangements		533380
Gasoline	522040	Memberships		533645
Oil & Lubricants	522045	Registration Fees - Domestic		533600
Gasses	523005	Registration Fees - Foreign		533605
Chemicals	523020	Repairs And Maintenance		534000
Electronic Supplies	523025	Electrical Repairs		534015
Glassware & Plastics	523030	Electronic Repairs		534020
Paper Products (Office)	523035	Instrument Sharpening		534100
Metals	523040	In-state Travel		535010
Capital Fabrication S&E	523120	Out-of-State Travel		535010
Other Lab Supplies	523900	Foreign Travel		535010
Printing And Office Supplies	524000	Domestic Airfare		535010
Publishing Charges	524010	Foreign Airfare		535010
Copy Machine Charges	524015	Minor Equipment - Furniture		536005
Photographic S & E	524020	Minor Equipment - Scientific		536010
Printing & Duplication S&E	524040	Minor Equipment - Tools		536015
Printing & Dupl. Internal	524050	Minor Equipment - Books		536020
Printing & Dupl. External	524055	Minor Equipment - Computer		536030
Computer Supplies	524070	Minor Equipment - Software		536035
Programs	524080	Software Operating System		536045
Office Supplies	524125	Minor Equipment - Other		536900
Other Printing & Office	524900	Capitalized Equipment		537200
Freight	529005	Capital Equipment - Computer		537200
Express	529010	Hospitality		546435
Postage	530080			
Parcel Service (Ups & Ips)	530090			

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