



SRM: PURCHASING GROUPS

AGENCY INSTRUCTION DOCUMENT

Introduction

Purchasing Groups are part of the LaGov SRM Organizational Structure, which includes the hierarchy that determines which Purchasing Groups are authorized to process procurements for specific departments/agencies and which are authorized to process procurements at a statewide level.

- State employees who have the system capability to perform procurement functions in SRM (process bids/RFP's, issue purchase orders and contracts for good and/or services) will be referred to as Purchasing Groups.
- A Purchasing Group (P-Group) is a Logistics organizational unit that represents a single employee in SRM.
- Although the name "Purchasing Group" suggests that multiple employees may be grouped into one Purchasing Group, only one employee will be associated with a single Purchasing Group in the LaGov solution.

In addition to those who currently have "buyer", "contract officer", or other purchasing type job titles, other employees may be identified as Purchasing Groups in SRM. For example, some Procurement and Contractual Services Managers may also be given this capability in order to accommodate workload distribution functions or so that they can actually perform procurement functions if necessary, e.g., in the absence of those with actual "buyer" job functions.



Instructions for Agency

The state's legacy systems maintain information relating to commodity buyers and contract officers. The AGPS/CFMS Agency System Administrator will be requested to validate that commodity buyers and contract officers are associated with the appropriate Agency number.

The instructions and details for validating the Buyers (Purchasing Groups) can be found in the following section.

The AGPS/CFMS Agency System Administrators must validate and update that the Purchasing Groups (Buyers and Contract Officers) are appropriately associated to the Agency number.

Below are the instructions that must be followed when validating the Purchasing Group Data in AGPS\CFMS:

- 1. The AGPS/CFMS Agency System Administrator will insert the buyer position number on all buyers or contract officers that will be purchasing groups in SRM.**
- 2. Only those ABUY records with the correct agency number and buyer position number combination will be created as purchasing groups in SRM.**
- The AGPS/CFMS Agency System Administrator must validate the information maintained in AGPS\CFMS to identify/validate all employees identified as a Purchasing Group is accurate.
- In case an employee no longer needs to be maintained in AGPS\CFMS as a Buyer/Purchasing Group, the employee status code should be changed to inactive.
- In case an employee should be added as a buyer in AGPS\CFMS:

The AGPS\CFMS System Administrator will enter the employee into AGPS\CFMS and complete the required fields in the ABUY table.
- Some contract officers use generic names, such as "Contract Officer", "Contract Review Officer", or "Susan Smith", on ABUY in AGPS/CFMS. Generic names will not be used in SRM as generic identifiers. Any lines that contain generic names should be changed to reflect the name of the employee, *and employee's Position Number* associated with the corresponding Agency.
- In case an employee needs to be maintained as a buyer or contract officer in AGPS/CFMS, but will not be a purchasing group in SRM, the AGPS/CFMS Agency System Administrator should not populate the buyer position number on ABUY.

Note: The objective of this exercise is to ensure that all buyers and their appropriate position numbers are reflected in AGPS. If a buyer purchases for multiple agencies, that buyer's position number should be added to only one record.



Please consider the following when validating the individuals who have been identified as Purchasing Groups:

- Personal, Professional, Consulting, Cooperative Endeavor and Social Services contract creators/maintainers **should** be identified as Purchasing Groups in AGPS/CFMS on the ABUY Screen by the AGPS/CFMS Agency System Administrator.
- Commodity and Operational Services Buyers **should** be identified as Purchasing Groups on the ABUY Screen in AGPS/CFMS by the AGPS/CFMS Agency System Administrator.
- Requesters (employees who create Requisitions or Requests for contracts) **should not** be added as Purchasing Groups in AGPS/CFMS.
 - However, on the rare exception that the same user requires the capability to perform procurement functions (create Bids/RFP's, P.O.'s, Contracts)the LaGov Team should be contacted to discuss these exceptions.
- Various job titles not traditionally related to or not directly responsible for day-to-day procurement and contract processing may be a Purchasing Group in SRM and should be included in the data, if applicable. Some examples are
 - Procurement Managers
 - Contractual Services Managers
 - Administrative Program Managers
 - Office Coordinators

Subsequent Process for Extracting Legacy Data:

1. Once the new field in the ABUY screen has been populated by all agencies, the LaGov Team will send Agencies an extract of all Active Buyers from AGPS/CFMS. This extract will help Agencies determine current Buyers or Contract Officers, as well as, To-Be Purchasing Groups.
2. To-Be Purchasing Group will be identified by the ABUY Buyer Position Number.
3. To ensure valid data is being uploaded into the HR and SRM applications, the AGPS/CFMS ABUY Buyer Position Number will be compared to the HR Position Number to validate the accuracy of the HR Position Number and the Employee Name.