

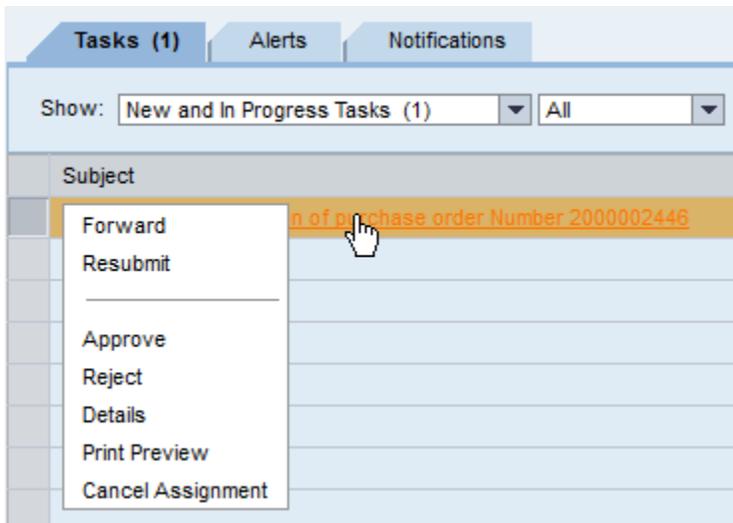
SRM Upgrade Improvements / Changes

Effective Monday, 11/17/2014, the LaGov ERP system has been upgraded. Process steps have not changed; however users will notice that SRM has a different look and feel as a result of this upgrade. Please see the following for examples of these changes.

Most Notable Improvements / Changes

Approvals

In the Work Overview screen the Action Buttons are no longer available under the table display of user tasks. If no review of the approval is required, *right click* on the document link to take the action from Work Overview (screen caption below). To review the document prior to taking an action, the process is the same prior to the upgrade; *left click* on the document link to display the document.



The Approval Help Scripts have been revised and can be accessed at the link(s) below for the complete step-by-step guide.

[Approval Help Scripts](#)

Also, new in Shopping Cart Approvals, an approval note can added specific to an item. To add a note at the item level, (1) click on the Approval Process 'Display / Edit Agents' link:



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The Approval Process Overview screen will open; (2) click on the 'Item' tab and highlight the specific item to which a note is to be added and click on 'Click here for approval note' link:

Approval Process Overview

Current Status: Header Approval Note

Current Process Step:

Currently Processed By:

Approval Process Data: [Download as XML](#)

Follow Up: Work Item to Requester at Process End

Header **Item**

Item Approval Status

Line Number	Item Number	Item Description	Approval Note
0001	000001	abd item	Item 1 rejected, adjust quantities to 5 for approval. (P002
0002	000002	xyz item	Click here for approval note

The Approval Note text box opens for entry; (3) after entering text, click 'Apply and Close':

Approval Note

An approval note can be added to a specific item on the Shopping Cart.

Apply and Close

The Shopping Cart creator views the item specific Approval Notes following the same navigation in steps (1) & (2) above.

RFx Response Comparison

When an RFx response includes an alternate, substitute, or supplemental item, in Response Comparison tab, Compare All Responses view, upon clicking 'Edit' to indicate Accept/Reject, a message is displayed indicating "RFx response from {NAME} contains bidder added items; open response to award".

Responses and Awards

[Print Preview](#) [Close](#) [Display](#) [Award](#) [Export](#) [Questions and Answers \(0 \)](#) [Synopsis](#)

RFx response from Carol Balascio contains bidder added items; open response to award

Remaining Time *6506 Days 23:45:25 | **Smart Number** Alternate **Type** RFx for SRM objects

Response Activity **Response Comparison** Surrogate Bidding

[Details](#) [Display Bidders](#) Exclude Options: Comparison Date: [Back to Response Comparison Main View](#)

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Screen Layout and Static Header

All procurement document screens have changed – Shopping Cart, RFX, Purchase Order, and Contract. Users continue to utilize the scroll bar on the right to move the entry screen(s) up and down; however, the Action Buttons, the Message Area, the Information Bar, and the Header Tabs are static. As a result of this improvement, it is no longer necessary to also display the Action Buttons at the bottom of the screen. See screen captions number 1 & 2 below.

1. Screen caption of a PO with the right hand scroll bar at the top:

The screenshot shows the 'Display Purchase Order: 2000085748' interface. At the top, there is a header bar with 'Action Buttons' (Edit, Print Preview, Check, Close, Copy, Export) and a 'Message Area' containing two messages: 'Line 0001: Delivery can take place on 12/23/2014; change to delivery date is possible' and 'Purchase order with document number 2000085748 is correct'. Below this is an 'Information Bar' with fields for Number (2000085748), Smart Number (QAS SRM Script 3 Scenario 2), Type (Standard PO), Status (Ordered), Created On (11/07/2014), Total Value (Gross) (400.00 USD), and Supplier (HALL MANUFACTURING INC). A 'Tabs' bar contains Overview, Header, Items, Notes and Attachments, Approval, and Tracking. The main area is titled 'Item Overview' and contains a table with columns: Line Number, Deleted, Item Type, Product ID, Item Number, Account Assignment Type, Description, Product Category, Quantity, Unit, Gross Price, Per, Net Price, Option Type, Order Type, Total Value, Option Status, Condition, Delivery Date, Currency, and Account Assignment Number. A single row is visible for Line 0001, Material, with a quantity of 5 EA and a total value of 400.00. A right-hand scroll bar is positioned at the top of the table area.

2. Screen caption of same PO with the right hand scroll bar pulled to the bottom:

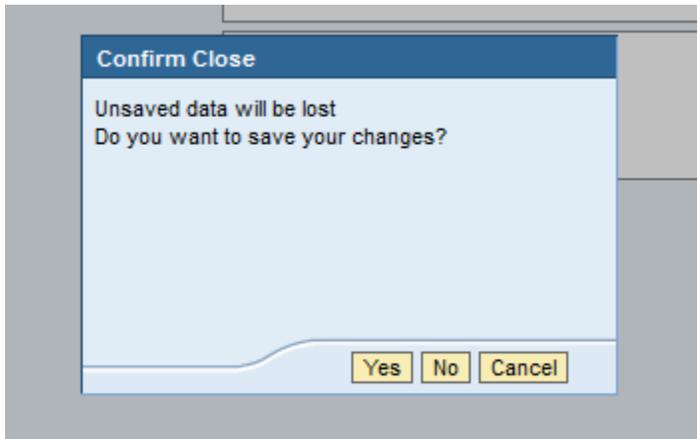
This screenshot shows the same 'Display Purchase Order: 2000085748' interface as above, but with the right-hand scroll bar pulled to the bottom. The top header bar, Message Area, Information Bar, and Tabs are static and remain at the top of the screen. The main table area is now empty, with only a summary table at the bottom right showing: Total Value (Net) 400.00 USD, Total Tax 0.00 USD, and Total Value (Gross) 400.00 USD. Below the table is a 'Details for Item 0001 BUSH-WHACKER BRAND NAME REPLACEMENT' section with tabs for General Data, Prices and Conditions, Account Assignment, Notes and Attachments, Approval Preview, Related Documents, Delivery, Extended PO History, User-Specified Status, Subcontracting, and Payment.

Notice in screen caption number 2 above the Action Buttons, Message Area, Information Bar, and Header Tabs are static at the top of the screen.

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Confirm Close Dialog Box

Upon closing a document to which changes have been made without clicking the Save button, users will receive a 'Confirm Close' dialogue box. Review carefully as the message in the dialogue box has changed with the upgrade.



'Details' Screen Layout

The layout of the 'Details' screens on all procurement document screens has changed; field descriptions are now right justified and input fields have been rearranged. Users should take note and be observant of these differences when creating procurement documents.

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Other Improvements / Changes

Action Buttons

Action Buttons have a new look; Edit has a pencil icon and refresh is Icon only:



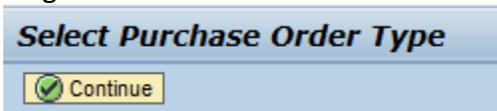
Related Links

Related Links to access Document Builder is an Action Button across the top:



Continue Button

When creating a PO or RFX directly there is a single Action Button labeled 'Continue' with a green check icon:



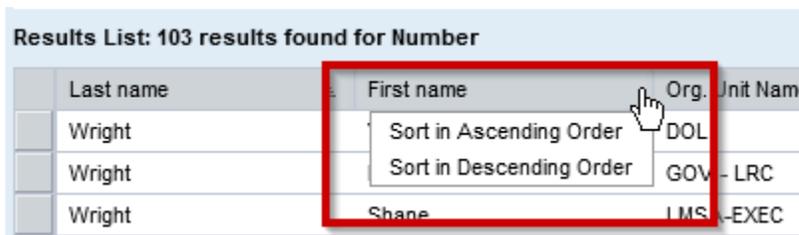
Buy on Behalf of

When creating a Shopping Cart, In the 'Buy on Behalf of' field is populated with BP (Business Partner) number and the name of BP appears to the right outside the field:



Ascending or Descending Sort Order

Users now have the ability to select ascending or descending sort:



To summarize, the process steps have not changed and SRM has a fresher more polished, professional look and feel. For any questions and/or assistance, please submit a [Help Desk ticket](#).