



LaGov SRM eProcurement Tips

Agency Quarterly Training
June 20, 2018



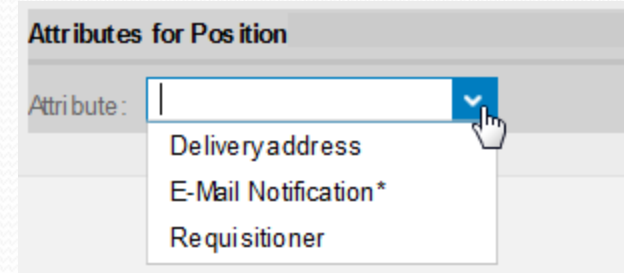
Topics Overview

- ❖ **SRM LaGov Basics**
- ❖ **Shopping Carts in SRM**
- ❖ **Purchase Orders in SRM**
- ❖ **Professional Services in SRM**
- ❖ **Help and Training Options**



Personalization

- ❖ Verify that the Default Delivery address is set correctly
- ❖ Verify that the email notifications are marked accordingly.





Searching in SRM

❖ Active Queries/Advanced Search –

- Using the wild card (*) search

- Matchcode, what is it?

Purchasing Group:



- Using different search criteria to find what you need

Active Queries

Central Contracts **11** Released (0) Draft (0) Expired (0) Templates (0) Rejected (0) Hierarchies (0)
Quota Arrangements All (0) Released (0)
Document Output Last 7 days (0)

Central Contracts - All

Hide Quick Criteria Maintenance

Number: To

Contract Type:

Name:

Status:

Timeframe:

Creation Date: To

Purchasing Organization:

Purchasing Group:

Supplier:

Product:

Item Description:

Product Category:

Distribution:

Valid From: To

Schedule Number:

T-Number:

Smart Number:

View: [Standard View]

Creation Date: To

Purchasing Organization:

Purchasing Group:

Supplier:

Quick Tip Apply = Save/Process New Search Criteria

Refresh = Updates the Existing Search Criteria (changed or not)



Perform Sourcing

- ❖ Searching in Perform Sourcing
- ❖ No Authorization Error Messages: “Why?” You are NOT the P-Group on the Shopping Cart!

1 Select Requisition 2 Assign Sources of Supply (No Items) 3 Review Drafts (No Items) 4 Summary Screen (No Documents)

▼ Search Criteria: Requisitions

Number of Requisition: 1000142589

Item Description: []

Product: []

Requester: []

Purchasing Organization: []

Purchasing Group: []

Priority: []

Delivery Date Range: []

Delivery Date: [] To: []

Name of Requisition: []

Product Category: []

Supplier: []

External Requirement: []

Account Assignment Category: []

Account Assignment Number: []

Intended for Grouping:

Include Locked Items:

Search

Settings

****Quick Tip**** Set the Default Purchasing Group to “Own Purchasing Group”.

Review Drafts (No Items) Summary Screen (No Documents)

Settings

Define how initial search screen must start

Define default search values; you can also define values when search starts upon opening the screen

Start Screen Settings

No Preselection

Own Purchasing Group

Default Search

Start Search Upon Opening Application

Default Search Values



Shopping Cart Creation

- ❖ Enter information in Default Settings – Applies to All Lines
 - Location (if your agency has more than one plant/agency number)
 - Account Assignments
 - Purchasing Group

Number 1000174558 Name P00158888 05/10/2018 10:17 Status In

▼ General Data

Buy on Behalf of: 55736 CHRISTIE MCCOLLOUGH

Name of shopping cart: Name Your Cart

Default Settings: **Set Values**

Header Data: Values

Change Default Settings

Your data will be transferred to all new items. Items already in the shopping cart will be unchanged.

Item Basic Data Account Assignment Internal Note

Buy on Behalf of: CHRISTIE MCCOLLOUGH

Goods Recipient: CHRISTIE MCCOLLOUGH

Product Category: GM_ONLY DO NOT USE - GM MATERIAL GROUP

Purchase Group: 820 OSP ONE TIME BUY BID TEAM

Company Code: LAGOV

Location / Plant: Division of Administration

Unloading Point:

Storage Location: Default Stg Loc

OK

Quick Tip Enter Default Settings ***before*** adding the lines on a Shopping Cart and it will apply to all lines.



Reasons for doing a Shopping Cart

- ❖ Shop MDM Statewide Contract – this may result in “Auto PO” (more to come on this...)
- ❖ Shop a Punch-out Catalog
- ❖ Purchasing requisition for OSP Processing – this may result in RFX or be converted straight into a Purchase Order or Contract by OSP
- ❖ Professional Services Contracts - Always have to start with a shopping cart
- ❖ May be an Agency Requirement



Creation of Auto PO

- ❖ Why does a shopping cart create an auto PO?
 - Below \$5,000.00 and shopped State contract, or
 - Below \$5,000.00 and a confirming purchase.

- ❖ Your PO was automatic created - where do you find the Purchase Order Number?
 - Shopping Cart - Related Documents Tab

Details for item 0001 / 0000000001 / Rhino BN Equip

Item Data | Account Assignment | Notes and Attachments | Delivery Address/Performance Location | Sources of Supply / Service Agents | Approval Process Overview | **Related Documents** | Control Agency

▼ History

View: American Dollar

Document	Name	Document Number	Back-End Document Number	Status	Date
Shopping Cart	Rhino BN Equip	1000164634/1		Follow-on Document Created	05/10/2018
	Total				
Purchase Order	Rhino BN Equip	2000310225/1	2000310225/1	Ordered	05/10/2018
	Total				



Change a PO that was processed by OSP

- ❖ Notice there is no Edit Button and the Purchasing Group is OSP.
- ❖ If you open a PO to make a change and there is not edit button, **ALWAYS** look at the Purchasing Group.

Display Purchase Order: 2000270807

Check Close Export Related Links

Number 2000270807 Name Mobile Radio - DAF Type Standard PO Status Ordered Created On 06/16/2017 Total Value (Gross) 22,438.74 US

Overview Header Items Notes and Attachments Approval Tracking

General Header Data

Smart Number: Mobile Radio - DAF
 Smart Number is External

Purchase Order Number: 2000270807

*Supplier: 310019172 MID STATE COMMUNICATION SERVICES

*Requester: 45296 JENNIFER BELLO

Recipient: 45296 JENNIFER BELLO

*Location: 224 Dept of Agriculture and Forestry

Ship-To Address: 1 LaGovRootOr

*Purchasing Organization: LaGov Purchasing Organization

*Purchasing Group: 820 OSP MAINT SERV BLKT BUYER 1 2 Show Members

Total Value (Net): 22,438.74 USD

Note to Supplier: THIS IS A REPURCHASE AGAINST ORIGINAL PO # 2000242306, FILE #X1000137644

Internal Note: Purchase Order Documents Include:

Item Overview

Details Add Line Add Subline Cut Copy Paste Delete Undelete Propose Sources of Supply Add Condition Remove Condition

Line Number	Deleted	Item Number	Product ID	Description	Product Category	Quantity	Unit	Gross Price	Currency	Per	Net Price	Option Ty
0001		1		MOBILE RADIO	43191510	73	EA	307.38	USD	1	307.38	

Quick Tip No edit button - Purchasing Group is not yours - you must use workload redistribution



Workload Redistribution

❖ To complete the process successfully the screen should look like this:

Display Document:

Processing of the documents has been completed

Search for Documents

Document Types

Requirements:
Purchase Orders:
RFIs:
Contracts:

Status: All
Purchasing Organization: LaGov Purchasing Organization
Purchasing Group:
Document Number: 2000270807
Creation Date/Delivery Date/Submission Deadline/Validity Period: From To

Search Undo Entries

Search Result: 1 Documents

Select All Assign To: LaGov Purchasing Organization 160 DAF PROCUREMENT Go Assign Automatically Refresh Messages

Document Number	Document Name	Type	Status	Purchasing Organization	Purchasing Gr
2000270807	Mobile Radio - DAF	Purchase Order	Completed	LaGov Purchasing Organization	160 DAF PRO

Quick Tip after opening workload redistribution highlight your purchasing group and (Ctrl+X) to cut & copy the name. Then (Ctrl+V) paste it into the second blank field before the word “GO”.

Quick Tip 2 DON'T open the purchase order from inside workload redistribution.



Editing the Purchase Order

- ❖ Clicking check - shows the “PO previously processed by OSP” error.

Edit Purchase Order: 2000270807

Order Save Print Preview Check Close Export Import Cancel Park Related Links

PO previously processed by OSP. Click here for further instructions. - Display Help

Funds Management posting date is later than the delivery date (item 00000000001)

Line 0001: Delivery date is a holiday or weekend

Could not determine fiscal data

Number 2000270807 (Change Version) Name Mobile Radio - DAF Type Standard PO Status In Process Created On 06/16/2017 Total Value (Gross) 22,438.74 USD Supplier MID S

Overview Header Items Notes and Attachments Approval Tracking

General Header Data

Smart Number: Mobile Radio - DAF

Smart Number is External

Purchase Order Number: 2000270807

* Supplier: 310019172 MID STATE COMMUNICATION SERVICES

* Requester: 45296 JENNIFER BELLO

* Recipient: 45296 JENNIFER BELLO

* Location: 224 Dept of Agriculture and Forestry

Ship-To Address: 1 LaGovRootOr

* Purchasing Organization: LaGov Purchasing Organization

*** Purchasing Group: 160 DAF PROCUREMENT** Show Members

Total Value (Net): 22,438.74 USD

Note to Supplier: THIS IS A REPURCHASE AGAINST ORIGINAL PO # 2000242306, FILE #X1000137644

Internal Note:

Item Overview

Line Number	Deleted	Item Number	Product ID	Description	Product Category	Quantity	Unit	Gross Price	Currency	Per	Net Price	Option Type	Order Type	Item Type	Total Value
0001		1		MOBILE RADIO	43191510	73	EA	307.38	USD	1	307.38			Material	22,438.74

Quick Tip NEVER change the purchasing group back to OSP until you are ready to click “Order”

Quick Tip 2 A document can ALWAYS be saved with the red errors.



Workload Redistribution to change accounting

- ❖ The General Ledger Code defaults based on the Product Category that is entered on the line (or derived from a State Contract)

General Data | Prices and Conditions | **Account Assignment** | Notes and Attachments | Approval Preview | Related Documents | Extended PO History

Order as Direct Material

Cost Distribution | Percentage | Details | Add Line | Copy | Paste | Duplicate | Delete | Split Distribution | Change All Items

Number	Accounting Line Number	Percentage	Account Assignment Category	Assign Number	Account Assignment Description	Gener
0001		100.00	Operating	1602693	CENTRAL SERVICES	4440

Details for Item 0001 : Operating

Basic Data

Percentage: 100.00 Fund: 1604086 FOREST PROTECTION TA

Account Assignment Category: Operating

Cost Center: 1602693 CENTRAL SERVICES

Fund Center: //

Order:

WBS Element:

NOT RELEVANT

Functional Area: NOT_RELEVANT NOT_RELEVANT

Controlling Area: 0010

General Ledger Account: 4440 ACQUISITIONS - EQUIP

Business Area: 160

- ❖ If you change the Product Category after you enter the General Ledger (Account Assignment) your General Ledger code will be overwritten with the code tied to your new Product Category.

***Quick Tip* ALWAYS check your accounting before you order the PO.**



Determining if a PO has Invoices or Receipts

- ❖ Attempt to delete the item line and receive error

Order Save Print Preview Check Close Export Import Cancel Park Related Links

❗ Not possible to delete the item as follow-on documents exist - [Display Help](#)

⚠ Funds Management posting date is later than the delivery date (item 0000000001)

⚠ Funds Management posting date is later than the delivery date (item 0000000002)

- ❖ Go to the Extended PO History Tab to check for follow-on documents

Details for Item 0007 OFFICE SUPPLY CATALOG CONTRACT

General Data	Prices and Conditions	Account Assignment	Notes and Attachments	Approval Preview	Related Documents	Extended PO History	User-Specified Status			
Item/Header > Description	ObjectID in Back-End	Document Date	Quantity	Base Unit	Value in FM area	Currency in FM area	Value	Currency	Accounting Document	Clear
▼ Item 0007 / OFFICE SUPPLY CATALOG CONTRA										
▼ Total Goods Receipt										
101 GR for acct. assgt.	5000301947	08/18/2017	10	EA			0.00	USD		
102 GR for acct.assgt rev	5000302001	08/18/2017	10-	EA	-		-0.00	USD		
101 GR for acct. assgt.	5000302002	08/18/2017	10	EA			0.00	USD		
▼ Total Invoice - Gross										
Invoice - Gross	5100579216	08/18/2017	10	EA			689.70	USD	5100579216	
▼ Total Value in Purchase Order										
Value in Purchase Order	2000281403 / 0000000		10	EA			689.70	USD		

Quick Tip This information is available on all POs and updated as things are processed



Completed changes

- ❖ Change the Purchasing Group back to OSP to Order PO.

! PO previously processed by OSP. Click here for further instructions: [Display Help](#)

- ❖ Use the dialog box to give you the Purchasing Group that needs be added for the PO to be ordered

Help □ ×

PO previously processed by OSP. Click here for further instructions:

Message No. ZSRM368

Procedure

This Purchase Order has been previously processed by OSP, therefore the Purchasing Group must be changed to **O 90000060** before ordering.

WARNING: Change the Purchasing Group ONLY after ALL necessary changes have been made and the PO is ready to be ordered.

- ❖ Columns in SRM can be sorted Ascending or Descending to put things in a format that makes it easier to search
- ❖ Always hit Check before you hit Order to make sure there are no additional Red errors.

Quick Tip If you change P-Group to OSP and Red errors appear – change it back to your P-Group in case the PO needs to be saved prior to completion.



Tracking Tab

- ❖ This tab offers information and [links](#) to;
 - All previous versions of the PO – historical data
 - The Shopping cart or other related documents that are linked
 - All Invoices, Receipts and Service Entry Sheets.
 - When/Who has touched, changed, and/or approved the document

⚠ Funds Management posting date is later than the delivery date (item 0000000001)
 ⚠ Line 0001. Delivery date is a holiday or weekend

Number 2000270807 (Change Version) Name Mobile Radio - DAF Type Standard PO Status Saved Created On 06/16/2017 Total Value (Gross) 22,438.74 USD Supplier MID STATE COMMUNICATION SERVICES

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

▼ History Filter Set

Document	Name	Document Number	Back-End Document Number	Status	Date	Net Value	Currency
Shopping Cart	P00087569 06/07/2017 11:49	1000150826		Approved	06/07/2017	22,438.74	USD
Purchase Order	Mobile Radio - DAF	2000270807	2000270807	Ordered	06/16/2017	22,438.74	USD
Confirmation			2017/5000297571		08/01/2017	0.00	USD
Invoice			2018/5100570662		08/01/2017	22,438.74	USD

▼ Status
 System Status
 Created > Incomplete > Held

▼ Version Overview

Detail Compare

Version	Document/Version Type	Created On	Changed On	Document Name
C1	Change Document	05/10/2018 13:59:05	05/10/2018 13:59:05	Mobile Radio - DAF
1	Active Document	06/16/2017 08:27:17	05/10/2018 13:55:34	Mobile Radio - DAF

▼ Change Documents

○ Changed Since ○ Changed From/To Search Expand All Collapse All Hide Query Filter Settings

Header/Item Attribute	Old Value	New Value	Changed By	Changed On	Changed At	Version
Header						
Item Number 1 - MOBILE RADIO						



Multi-Year Contracts

- ❖ When creating a multi-year contract – how much of the total value should be encumbered in each fiscal year?
- ❖ Standard lines (not “optional”) encumber when the PO gets to “Ordered” status.
- ❖ Option lines are only created to defer encumbrance to **future fiscal years!**
- ❖ When creating option lines – dates are Important!

Quick Tip Each fiscal year (07/01 – 06/30) the contract covers should have a line of it's own.



Option Line Required Dates

- ❖ Required Date – **ALWAYS** the full term of the contract (should match the PO Begin and End Date)
- ❖ Exercise Period – **ALWAYS** the first 60 days of the fiscal year in which the line should encumber, 07/01/20xx-08/31/20xx. The most misunderstood of all date fields.
- ❖ Period or Performance – Begin date is **ALWAYS** the begin date of the Fiscal Year line should encumber (match the begin date of exercise period). The end date is **ALWAYS** the end date of the contract (PO end date).

Note If the term of the contract does not follow the Fiscal Year – you may have lines for a partial fiscal year, i.e. a 3 year contract with 4 lines.



Shopping Cart for RFP

- ❖ It is important to be aware of your desired end result when creating a shopping cart for an RFP awarded contract.
 - Shopping Cart – RFP - PO = Limit or Service Line Item Type

Line Item:

Line Number	Item Type	Item Type	Description	Product Category	Quantity	Unit	Currency	DeliveryDate	Notes
0001	Limit		OBD II FY 13-14	77101704			USD	Timeframe	1

Output Form:

LINE	Description	Quantity	Unit	Unit Price	Extended Amount
1	Product Category:77101704 OBD II FY 13-14	N/A	N/A	N/A	

- Shopping Cart – RFP – Contract (44) = Service Line Item Type ONLY

Line Item:

Line Number	Item Type	Description	Product Category	Quantity	Unit	Currency	DeliveryDate
0001	Service	District 08 Debris Removal Monitoring	80101500	1	EA	USD	Timeframe

Output Form:

LINE	Description	Quantity	Unit	Unit Price	Extended Amount
1	Product Category:80101500 District 08 Debris Removal Monitoring	1	EA		



RFP Text & the Output form

- ❖ The type of item type used on a line will impact the output form that posts to LaPac after the RFP is Published.

Name of Solicitation: Certification of LA On-Board Diagnostic

Notice to bidder:

Addendum 1 - This addendum is to correct the address that is listed under "Submit Non-Electronic Response to:" section located in the upper right hand corner of the Request for Proposal Internal Form. The previous address listed, 1201 Capitol Access Road, Baton Rouge, LA 70802 is incorrect. The correct address is 617 North Third Street, Ste. 1271, Baton Rouge, LA 70802.

Addendum 2 - Questions and Answers

RFX text:

This Request for Proposal form is an internal form only. Please refer to the Request for Proposal for all requirements to submit a proposal. Vendors are to complete Attachment 2, Schedule of Prices and submit with their proposals as directed in the Request for Proposal document.

RFX Information	Bidders	Items	Notes and Attachments	Weights and Scores	Approval	Tracking
▼ Notes						
Add Clear						
Assigned To		Category		Text Preview		
Document Header		Header Tendering Text		This Request for Proposal form is an internal form only....		
Document Header		Synopsis Description		Addendum 1 - This addendum is to correct the address tha...		

Quick Tip Header Tendering Text can be added on the RFP output form to direct proposers to the RFP document.



RFX – Check boxes

- ❖ The check boxes that are selected on the Items tab will impact how the bidder responses can be entered.

RFX Information Bidders **Items** Notes and Attachments Weights and Scores Approval Tracking

▼ Item Overview

RFX Response Required for All Items Bidder Can Add New Items Allow RFX Response Modification Bidder Can Change Quantities

Details Add Line Add Subline ↑ ↓ Cut Copy Paste Delete Expand A

Line Number	Item Type	Item Type	Option Type	Product ID	Description	Lot	Product Category	Quantity	Unit	Currency	Delivery Date	Notes	Attachm
0001		Limit			Original Contract FY18	<input type="checkbox"/>	80101500			USD	Timeframe	1	0
0002		Limit	Optional		Original Contract FY19	<input type="checkbox"/>	80101500			USD	Timeframe	1	0
0003		Limit	Optional		Original Contract FY20	<input type="checkbox"/>	80101500			USD	Timeframe	1	0
0004		Limit	Optional		Original Contract FY21	<input type="checkbox"/>	80101500			USD	Timeframe	0	0

RFX Information Bidders **Items** Notes and Attachments Weights and Scores Approval Tracking

▼ Item Overview

RFX Response Required for All Items Bidder Can Add New Items Allow RFX Response Modification Bidder Can Change Quantities

Details Add Line Add Subline ↑ ↓ Cut Copy Paste Delete

Line Number	Item Type	Item Type	Option Type	Product ID	Description	Lot	Product Category	Qua
0001		Service			Drinking Water Revolving Load Fund	<input type="checkbox"/>	43231500	

- ❖ When responses can't be entered correctly the award process will be greatly affected.



LaGov Service Type and LaGov Process Type

❖ LaGov Service Type:

Further Properties

Supplier Product Number:

Option Type:

LaGov Process Type:

LaGov Service Type:

LaGov Special Funding:

❖ LaGov Process Type:

LaGov Process Type:

LaGov Service Type:

LaGov Special Funding:

tion

- Sole Source
- Emergency
- Confirming
- Confirming with Inventory
- Line Item Appropriation

****Quick Tip**** Delegated Authority and OSP-PC approval are connected to individual LaGov Service Types



Amendments Processes

- ❖ SRM OSP-PC Approval workflow triggers

- Changes to the Begin or End Date on a PO/Contract:

PO Begin Date: 08/15/2018 * Valid From / To: 05/01/2018 - 04/30/2021
PO End Date: 06/30/2021

- An increase or decrease Total Value/Target Value of a PO/Contract:

Total Value (Gross) 22,400.00 USD Target Value/ Currency: 38,802,000.00 USD

- Changes to the LaGov Service Type:

LA Gov Service Type: PER

- ❖ Amendments that require OSP-PC approval but do not change the maximum contract amount or contract term (scope changes, etc.) should be submitted for OSP-PC approval by using the Add Approver button.

Approval Process Data: [Download as XML](#)
Follow Up: Work Item to Requester at Process End

Header	Item			
Header Approval Status				
Add Approver Remove Approver				
Sequence	Process Step	Status	Processor Determination	Processor
001	SRM Purchase Order Approval	Open (No Decision Made)	ADHOC	BRADFORD VAN OSS



Approvals Tab

- ❖ All workflow approvers names and level of approval is shown
- ❖ Contact information for each approver is provided (in case you need to reach out to one)
- ❖ The “Currently Processed By” field shows where the PO is in approvals

Sequence	Process Step	Status	Processor Determination	Processor	Received On
001	SRM Shopping Cart Approval (1)	Approved	SC Fund Manager	ANDRE' METOYER	05/02/2018 11:32:45
002	SRM Shopping Cart Approval (1)	Approved	SC Fiscal Approver	JOHN MCCLANAHAN	05/04/2018 07:56:22
003	SRM Shopping Cart Approval				

User Details for Workflow Agent

Name	Department	Building	Telephone No.	Extension	E-Mail Address	Possible Substitutes	Agent
ANDRE' METOYER			225-287-7670		ANDRE.METOYER@LA.GOV		P0002

Reviewer(s) for the Document

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

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

Quick Tip Always validate the approvers on the approval tab before clicking “Order”.

Quick Tip If your document is in “awaiting approval” status this tab will clearly show where/who it is within the workflow process – works on ALL Documents in SRM!



Year End Roll

- ❖ The Fiscal Year Rollover Indicator Defaults to “Yes” on all PO creations. If you do not wish to have the PO roll to the next fiscal year, set the indicator to “No”.
- ❖ The FY Rollover Indicator is located on the Header Tab / Agency sub-tab.

The screenshot shows a software interface with a top navigation bar containing tabs: Overview, Header (highlighted with a red box), Items, Notes and Attachments, Approval, and Tracking. Below this is a sub-navigation bar with tabs: General Data, Notes and Attachment, Output, Budget, Table Extension, Control Agency, Agency (highlighted with a red box), and Doc. The main content area shows a dropdown menu for 'FY Rollover' with 'Yes' selected and 'No' as an option. Below this, the text 'Commodity & Service Procurement' and 'La Gov Process Type:' are visible.

- ❖ Commodity (Operating Services) type purchase orders can only be carried forward once, whether the roll indicator says yes or no.

Quick Tip This roll indicator can be set at any point during the life of the PO. If you know when you create it that it won't roll then it should be set then.



LaGov Help in SRM

- ❖ Help Scripts where they are located
- ❖ Help Desk Tickets and how to access
- ❖ SRM Training in Leo and Class Registration

Log in Portal:

LaGov - STATE OF LOUISIANA
ENTERPRISE RESOURCE PLANNING SYSTEM

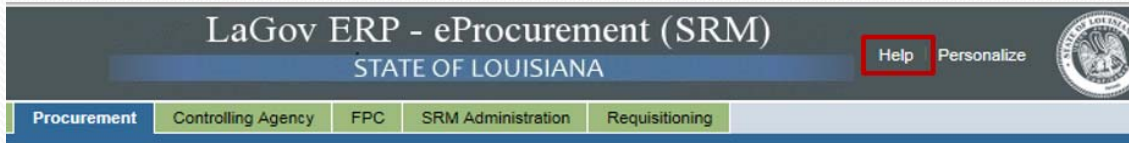
User * Ex: P00654321
Password * Case sensitive
[Forgot Password?](#) [Locked?](#)

[First Time User?](#)
[Online Help](#)
[System Availability](#)
[System Requirements](#)

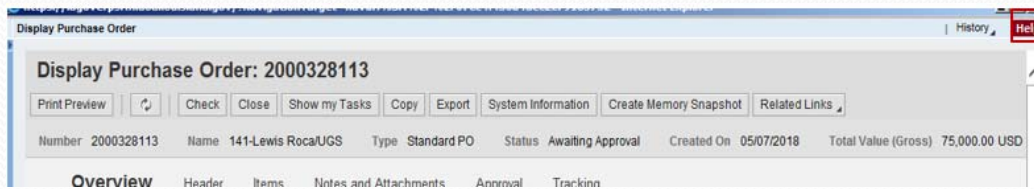
On the first set of tabs after log in:



In eProcurement:



Within any document in LaGov:



Help Desk Ticket:

eProcurement (SRM)

Areas

- > **SRM Statewide Conversion*
- > **Frequently Asked Questions
- > Approvals
- > Contracts
- > Goods Receipt/Service Entry Sheet
- > Purchase Orders
- > Requisitioning (Shopping Carts)
- > RFX - Bids
- > SRM & Procurement Relevant Reports
- > SRM Miscellaneous

Help Content

- > Enroll in ListServ
- > How To - Insurance Types
- > **Web Help Desk Ticket**
- > Web Help Desk Ticket - How do I create?



LaGov Help in SRM

- ❖ Help Script views and uses – under eProcurement there are several selections to choose from.

eProcurement (SRM)

Areas

- › [**SRM Statewide Conversion*](#)
- › [*Frequently Asked Questions](#)
- › [Approvals](#)
- › [Contracts](#)
- › [Goods Receipt/Service Entry Sheet](#)
- › [Purchase Orders](#)

- ❖ Within the help script different viewing selections are possibly by selecting the drop down.

LaGov ERP

Search

[Advanced Search](#)

Projects (Help Development Team Log In)

Actions

- [Language \(en_US\)](#)

Areas

- [Glossary](#)
- [Help](#)
- [About](#)

Cancel A Purchase Order

Purpose

Use this procedure to cancel a purchase order or a line item on a purchase order after the PO is in an "ordered" status and the P

Last Update

May 25 2016

Work Instruction - .xhtml
Simulation (HTML) - .html
Cue Card - .xhtml



Agency Production workshops

- ❖ Agency specific production workshops are available for groups of 10 or more upon request
- ❖ They will be coordinated through Mary Olexy.
- ❖ These types of workshops include;
 - Any common issues the Agency is having
 - Any SRM processing questions that may need to be addressed
 - Any specific production work that needs to be handled within the workshop
 - Attendees should include people from Finance/Budget/Purchasing to help with answering Agency questions and processes.
- ❖ Web based and classroom training can be located in “My Training” in Leo.
 - [Course Catalog > Statewide Courses > LaGov ERP Courses > *LaGov Job Function-based Trng Programs > LaGov Logistics Job Functions > LaGov LOG eProcure SRM Buy/Requistn Prog](#)



Questions