CLARK COUNTY SCHOOL DISTRICT

OPERATIONAL SERVICES UNIT TECHNOLOGY & INFORMATION SYSTEMS SERVICES DIVISION USER SUPPORT SERVICES EMPLOYEE BUSINESS TRAINING DEPARTMENT

SAP for Custodians: Ouick Reference Guide

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Revised: July 2020

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This manual was created in collaboration with the Budget and Purchasing Business Systems Support Departments.

SAP for Custodians: Quick Reference Guide

This guide provides detailed instructions for custodians on how to order supplies through the SAP Portal.

Active Queries

Three active queries have been created for shoppers in the SAP system. They are:

ALL - Displays all of the shopping carts created by the user.

SAVED - Displays the user's saved shopping carts.

AWAITING APPROVAL - Displays the user's shopping carts waiting to be approved.

These queries will display only shopping carts created by the user.

Running Active Queries



1. Select the *Work* tab.

2. Select Shop.

The work window displays the Active Queries.

Active Queries
Shopping Carts All (1) Saved (0) Awaiting Approval (0)

- 3. Select the query type (All, Saved, or Awaiting Approval). The query results will be displayed.
- 4. Select the SHOPPING CART NUMBER to see details of the shopping cart.
- 5. Select **REFRESH** to ensure the most current results are displayed.

SAP					New Session	Log o	
					Welcome: ZF	ZHDCUST	
Home Work							
Universal Worklist Shop	Work > Shop > Shopping				Full Screen	Options •	
Shopping						~	
Shopping Cart Display	Active Queries						
List Purchase Orders	Shopping Carl All (1) Saved (0) Awaitin	q Approval (0)					
- Services	• • • • • • • • • • • • • • • • • • •						
Advanced Search	Shopping Carts - All			(5)			
Create Documents • Shopping Cart	Show Quick Criteria Maintenance			Char, dery I	Define New Query Personalia	lize	
View: CCSD Default View: CCSD Default CCeate Shopping Cart Copy Display Edit Delete Order Create Confirmation Print Preview Refresh Show Error							
	E Shopping Cart	Shopping Cart Name	Status	Created On	Created By		
	3910472 4	ZHDCUST1 07/15/2020 12:54	Saved	07/15/2020 12:54:21	ZHDCUST1		



IMPORTANT!

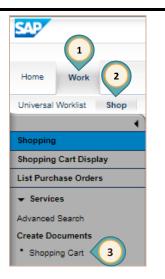
The most current shopping cart query results will **NOT** be displayed unless the **REFRESH** link is selected.

Create Shopping Cart

- 1. Select the *Work* tab.
- 2. Select Shop.
- 3. Select **SHOPPING CART** from the menu on the left.

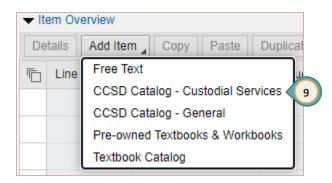
The **Create Shopping Cart** window opens in a new window.

- 4. Edit NAME OF SHOPPING CART.
- 5. Change **DEFAULT SETTINGS** if necessary.
- 6. Enter **DELIVERY DATE** if necessary.
- 7. Enter **APPROVAL NOTE** if necessary.
- 8. Click ADD ITEM.



	Create Shopp	ing Cart nt Preview Save Check	01
	Number 3910470 Do	cument Name ZHDCUST1 07/09/2020 14:10 Status In Process Created On 07/09/2020 14:10:21 Created By John Doe	
			^
	Buy on Behalf of:	99999999 Dahn Doe Delivery Instruction: Approval Note	
(4)	Name of shopping cart:	ZHDCUST1 07/2020 14:10 Use Delivery Date for all Items:	
	Default Settings:	Set Values 5	
	Approval Process: Document Changes:	Display / Edit Age	
6	Delivery date:	1	
			- 1
	- Item Overview		E .
	Details Add Item	Copy Paste Duplicate Delete	

9. Select the desired catalog (for this example the CCSD-Custodial Services catalog was selected).



The window refreshes to display Ariba Product Catalog.

- 10. Enter KEYWORD search criteria (ie item name or number).
- 11. Click **SEARCH** or press the **Enter** key.
- 12. Click the **Select** box for desired item.
- 13. Change **QUANTITY** as desired.
- 14. Click ADD TO CART.

SAP			10		11 🕷 🤉 💈
Shop By Category Building and Construction Industrial Production and Office Equipment and Acc Shop By	Manufac >	Catalog Catalog Home Catalog Home Recently Viewed Supplie Not A Vendor(CCSD-System). Custodial/cleaning	ETS Waxies Enterprises Inc Custodial/Cleaning	Brady Industries LLC Custodial/Cleaning	Note
Supplier Purchasing Organization	>	Industrial Productio View All	Industrial Productio View All	Industrial Productio View All	Industrial Productio View All
Catalog		wel			✓ Q 🦉 🎽
talog Home / Purchas item(s) found	View:				Sort by: Name - Ascending V
CLAR COUNTY SCHOOL DUTIET Anhadig Byertreef		Day(s)			\$14.39 USD / each Qty: 1 Add to Cart Add to Favorites ✓
CLARE CONTY CLARE CONTY CLARE CONTROL CARLON DEPTROT Residual gages reserved	Supplier: Not A Supplier Part # Available in: 0 Type:		10in	13	\$18.31 USD / case Qty: 1 Add to Cart Add to Favorites V
CLARK COUNTY SCHOOL DISTRICT		Singlefold 4000/cs A Vendor(CCSD-System).			\$18.08 USD / case

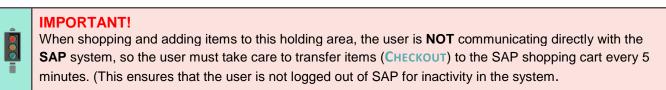
A window appears to confirm the item was added to the Cart. Click outside this window to continue shopping **or** select Review Cart if finished.



- 15. Enter a new **Keyword** search criteria to continue to add additional items to the Cart.
- 16. Click **REVIEW CART** after all items have been added. Review all items and quantities. Make changes if necessary.

	Shop By C	ategory -	Ca	italog		√ mop	15	רע ע	2 📩 📩
	Shopping Ca	art SH4507	: ZHDCUST1 : July 9, 2020			🖶 Prir	Close Cart	Continue Shopping	Checkout
ſ	2 Items To	otal					Show Details	Cart Summary	
	No.	t Type	Description	Qty	Unit	Price	Amount	Not A Vendor(CC (2)	\$21.17 USD
		1 🔋	Towel Paper Multifold 4000/cs	1	case	\$18.31 USD	\$18.31 USD	Subtotal (2 items)	\$21.17 USD
		2 頃	Frame Dust Mop 5in x 24in	1	each	\$2.86 USD	\$2.86 USD		
l	ц. [Edit	Delete			U	pdate Total		
									17
						📑 Prir	t Close Cart	Continue Shopping	Checkout

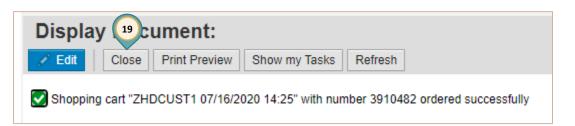
17. Click CHECKOUT.



18. After the checkout process is complete, the window will close and the **Create Shopping Cart** window will be displayed. Click **Order**.



A message will appear stating the Shopping Cart was ordered successfully.



19. Click the **CLOSE** button. (Do **NOT** use the **X** in the upper right corner of the browser window.)

Additional Shopping Cart Tools

After items in the holding area have been transferred to the SAP shopping cart, additional action buttons are available. They are:

- Details: Detailed information about the specific item in question, such as Supplier, Part Number, etc.
- Add Item: Add more items to the shopping cart
- Copy: Copy items that exist in the shopping cart into a clipboard. Used most often during a free text order.
- Paste: Paste the copied item from the clipboard, adding them to the list.
- Duplicate: Make duplicates of selected items that exist in the shopping cart. (This is the same as doing a copy followed by a paste.)
- Delete: Delete items in the shopping cart items can only be deleted before the shopping cart has been approved.

Saved Shopping Cart

To complete or edit a shopping cart:



1. Select the *Work* tab.

2. Select Shop.

The work window displays the Active Queries.

Active Queries
Shopping Carts All (1) Saved (1) Awaiting Approval (0)

- 3. Select *Saved* to display the Saved Active Query results. (Select the **REFRESH** button to ensure the most current results are displayed.)
- 4. Click the **SHOPPING CART NUMBER** to display the Shopping Cart in a new window.

SAP					New Session	Log off
					Welcome: ZH	IDCUST1,
Home Work						
Universal Worklist Shop						
	Work > Shop > Shopping				Full Screen	Options 🔻
Shopping						~
Shopping Cart Display	Active Queries					
List Purchase Orders	Shopping Carts All (1) Saved (0) Awaitin	ng Approval (0)				
✓ Services						
Advanced Search	Shopping Carts - All					_
Create Documents Shopping Cart	Show Quick Criteria Maintenance			Change Query De	fine New Query Personaliz	ze
chopping our	View: CCSD Default - Creat	e Shopping Cart Copy Display Edit Delete O	rder Create Confirm	ation Print Preview Refresh Sh	ow Error	
	Export _				S	
	Cart Shopping Cart	Shopping Cart Name	Status	Created On	Created By	
	3910472 (4)	ZHDCUST1 07/15/2020 12:54	Saved	07/15/2020 12:54:21	ZHDCUST1	

5.	Click Edit.		Display Shopping Cart					
		5	🥒 🖉 Edit		Close	Print Preview	Refresh	

- 6. Edit the shopping cart as needed (adjust quantity, add additional items, etc).
- 7. Click Order.

Click CLOSE.	Edit Shopping Cart
7	Order Read Only Close Print Preview Save Check Delete
	8

IMPORTANT!

If the shopping cart Default Settings were changed (change in budget coding or delivery location), the Default Setting **MUST** be changed **AGAIN** before adding more items to the shopping cart.

Accept Rejected Shopping Cart

Any shopping cart that has been rejected must be "accepted" in order for budget funds to be released for further use. From the **Universal Worklist** (UWL):

1. Click the rejected shopping cart link in the **Subject** area.

Home Work							
Universal Worklist	Shop						
	•	Nork > Universal Worklist > Universal Worklist				Full Screen	Options 🔻
Universal Worklist		Tasks (1 / 1) Tracking Show: New and In Progress Tasks (1 / 1) Select a Subview	✓ All	~	Create T	ask 🛛 🖗 🤻 🗉	Â
		Subject	From	Sent Date	÷ S	tatus	
		Rejected Shopping Cart # 3910482 , Please accept rejection 07/17/2020		Today	N	ew	

2. The Accept Changes to Shopping Cart window opens in a new browser window.

	Click ACCEPT.	Accept Changes to Sh	opping Cart	
		Close Print Preview Accept 2	ck	
3.	The Display Do Click CLOSE.	ocument window is displayed.	Display Doc Close Print Previe	W Show my Tasks Refresh



IMPORTANT!

Rejected shopping carts should **ALWAYS** be processed using the **ACCEPT** button.