### **CLARK COUNTY SCHOOL DISTRICT**

BUSINESS AND FINANCE DIVISION TECHNOLOGY & INFORMATION SYSTEMS SERVICES DIVISION USER SUPPORT SERVICES EMPLOYEE BUSINESS TRAINING DEPARTMENT

SAP Shopping

Carts:

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# **Ouick Reference Guide**



Revised: October 2020

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## SAP Shopping Carts: Quick Reference Guide

This guide provides detailed instructions for shoppers 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

SAP		
Home	1 Work	2
Universal	Worklist	Shop

1. Select the *Work* tab.

 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 of			
					Welcome: ZOF	FMGR10,			
Home Work Universal Worklist Shop Fi	xed Asset Budget FAC Rental	Trips C5 Reports Accounting							
					Full Screen	Options 🔻			
Shopping Shopping Cart Display List Purchase Orders • Services Advanced Search Create Documents • Shopping Cart	Shopping     Active Queries       Shopping Cart Display     Active Queries       List Parchase Orders     Shopping Carts + All(11)       Services     Shopping Carts + All       Shopping Carts - All     Shopping Carts - All       Create Documents     Shop Quelk Criteria Maintenance								
	The Shopping Cart	Shopping Cart Name	Status	Created On		^			
	3910604	Desk, computer w/ keyboard tray	Awaiting Approval	09/29/2020 15:02:19	ZOFFMGR10				

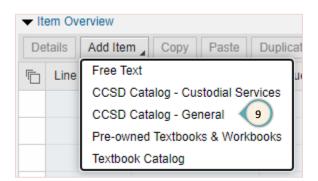


#### IMPORTANT!

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

### Create Shopping Cart

- SAP 1. Select the *Work* tab. 2. Select Shop. 1 3. Select **SHOPPING CART** from the menu on the left. Home Work Universal Worklist Shop The Create Shopping Cart window opens in a new window. 4. Edit NAME OF SHOPPING CART. Shopping 5. Change **DEFAULT SETTINGS** if necessary. Shopping Cart Display List Purchase Orders 6. Enter **Delivery Date** if necessary. Services 7. Enter APPROVAL NOTE if necessary. Advanced Search 8. Click ADD ITEM. Create Documents Shopping Cart < 3 **Create Shopping Cart** Order Close Print Preview Save Check Number 3910622 Document Name ZOFFMGR10 10/06/2020 13:57 Status In Process Created On 10/06/2020 13:57:02 Created By ZOFFMGR10 ZOFFMGR10 General Data ZOFFMGR10 ZOFFMGR10 Delivery Instruction: Buy on Behalf of Approval Note 104841 Use Delivery Date for all Items: 7 Name of shop 4 554 CHHS Of plies Default Setting Set Values 5 Approval Process: Display / Edit Document Changes: Display Delivery date: 1 8 Item Over Details Add Item Copy Paste Duplicate Delete
- 9. Select the desired catalog (for this example, the CCSD Catalog General was selected).



#### The window refreshes to display Ariba Product Catalog.

- 10. Enter **Keyword** search criteria (i.e., 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		Catalog	~	Search by part #, supplier name	e, or keyword	∽ <mark>```</mark> 🔮 材
Communication Equip Computers/Technology	>	Catalog Home	2			No
urniture and Furnishings Naterial Handling	>	Recently View	ed Items			٢
ledical Equipment and Access Iusical Instruments and Game ffice Equipment and Accesso	sori >	CLARK COU SCHOOL DIST Parebasing Depen	NT N BCT Etware		CLARK COUNTY SCHOOL DETRICT Particular Department	
aper Material/prod inting and Photographic and pecial Ed/asst Tech poctional	>	Adapter iPad Can USB Not A Vendor(CCS <b>\$28.00 USD</b> / ea	SD-System).	BIC Round Stic Ballpoint Pens Office Depot Inc \$1.22 USD / dozen	Table Computer Station Gray Not A Vendor(CCSD-System). \$296.02 USD / each	Office Depot Brand Eraser Ca Office Depot Inc <b>\$0.42 USD</b> / pack
Catalog	~	pencil			~	<u>م الم</u>
38 item(s) found Add to Cart	View: Compare It	ems			Sort Viewing: 50 item	
	Supplier: 0 Supplier Pa	nanical Pencils Office Depot Inc art #: 292475 n: 0 Day(s)			13 0	ty: 1 Add to Cart Add to Favorites
	BIC Mecha Of 24 Pend		rong, 0.9 mm, /	Assorted Barrel Colors, Pack		
		nanical Pencils Office Depot Inc				\$2.09 USD / doz
	Available i	art #: 811943 n: 0 Day(s)			Q	ty: 1 Add to Cart Add to Favorites
	Type: BIC Mecha	nical Pencils, Xtra Lif	e, 0.7 mm, Bla	ck Barrel, Pack Of 12		
	BIC Xtra	Comfort Mechanica	al Pencils			<b>\$2.81 USD</b> / doze

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.

SH4604 ZOFFMGR10 : October 2, 2020	×
$\checkmark$ This item has been recently added	
BIC Mechanical Pencils	1 x \$3.84 USD
	Review Cart

- 15. Enter a new **Keyword** search criteria or click the **Continue Shopping** button to continue to add additional items to the Cart.
- 16. Review all items and quantities. Make changes if necessary.
- 17. Click CHECKOUT.

	Shop By Category +	Catalog	~	paper	construction 9x12	15	✓ Q	17 1
	Shopping Cart SH4604 : ZOFFMGR10 : October 2,	, 2020			🖶 Print	Close Cart	Continue Shopping	Checkout
	2 Items Total					Show Details	Cart Summary	
	No. <b>†</b> Type Description		Qty	Unit	Price	Amount	School Specialt (1)	\$7.25 USD
16	1 🗐 BIC Mechanical Pencils		1 p	ack	\$3.84 USD	\$3.84 USD	Office Depot In (1)	\$3.84 USD
	2 🗵 Paper Construction 9x12 As	ssorted	5 p	ack	\$1.45 USD	\$7.25 USD	Subtotal (2 items)	\$11.09 USD
	La Edit Delete				Upd	ate Total		
					🖶 Print	Close Cart	Continue Shopping	Checkout

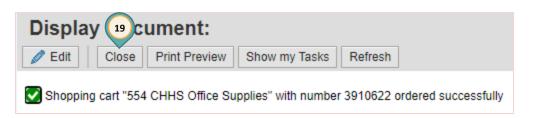
#### **IMPORTANT!**

When shopping and adding items to this holding area, the user is **NOT** communicating directly with the **SAP** system, so the user must take care to transfer items (**CHECKOUT**) to the SAP shopping cart every 5 minutes. (This ensures that the user is not logged out of SAP for inactivity in the system.

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



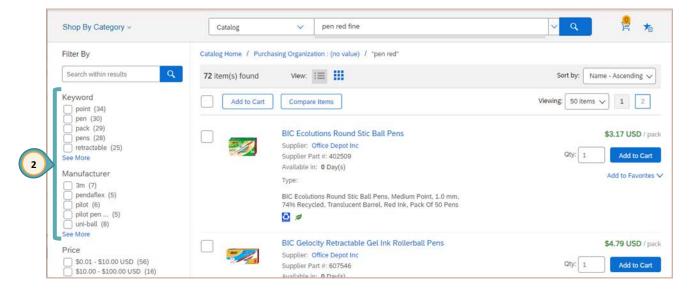
A message will appear stating that the Shopping Cart was ordered successfully.



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

earch H Narrow se		ults by adding more descrip	tive words to the keyword se	arch.
Catalog	~	pen red fine	✓ Q	<mark>0</mark> : <b>*</b>
log Home / Purch item(s) found		tion : (no value) / "pen red fine"	Sort by: N	ame - Ascending 🗸

2. Use the **FILTER By** checkboxes on the left to narrow the search by selecting additional keywords, manufacturers, suppliers, price, etc.



#### 3. To use the SHOP BY CATEGORY feature:

A) Hover over a main category and select a category from the menu.

Shop By Category		Catalog 🗸	
Communication Equip	>	Catalog Home	
Computers/Technology	>	Computers/Technology	
Furniture and Furnishings	>		
Material Handling	>	Computers/technology	
Medical Equipment and Accessori		Copiers/Office Machine	Thursday

#### B) Enter a **keyword** to search for an item within the selected category.

	В	
Shop By Category -	Computers/Techn V stand	<u>~ </u>
Filter By	Catalog Home / Purchasing Organization : (no value) / Computers/Technology	/ Computers/technology / "stand"
Search within results	Q 14 item(s) found View:	Sort by: Name - Ascending V
Keyword standard (8) computer (6)	Add to Cart Compare Items	
Core (5) intel (5) keyboard (5)	3M Ergonomic Notebook Computer Stand Supplier: Office Depot Inc	\$22.04 USD / each

### 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: Opens the Details for item area at the bottom of the window, which includes Item Data, Account Assignment, Notes and Attachments, and Sources of Supply.
- 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.

### Adjusting Default Settings: Coding or Storage Location

Default Settings are changed to:

- Code entire shopping carts to a different funding source
- Change the Storage Location (delivery location) for a particular shopping cart

From the General Data section of the Create Shopping Cart window:

1. Select **SET VALUES**.

The Change Default Settings window is displayed.



Change <u>Budget coding</u> for entire shopping cart:	Change <u>Storage Location</u> for entire shopping cart:			
2. Select the ACCOUNT ASSIGNMENT tab.	2. Select the <b>ITEM DATA</b> tab.			
3. Select the ACCOUNT ASSIGNMENT Category.	3. Click the <b>STORAGE LOCATION</b> search button.			
4. Select ASSIGN NUMBER.	4. Select the new location.			
5. Click OK.	5. Click OK.			

If charging to a	Then change
Grant * Must have grant information - (702) 799-5224	Cost Center drop-down to Order, enter the internal order number.
Special Revenue	Cost Center drop-down to Order, enter the internal order number.
Different Cost Center Group	Use the drop-down to choose a different Cost Center. This Cost Center must be attributed to a different Cost Center Group.



#### **IMPORTANT!**

If you have not completed your shopping cart and you Save it for completion later, you **MUST** change the default coding **AGAIN** when you come back to complete the shopping cart! Changes to default coding will only be transferred to new items. Items already in the shopping cart will be unchanged.

### Change Single Line Item

It is also possible to change the budget coding or storage location for a single item in the shopping cart. After transferring items to the shopping cart, from the Item Overview section of the Create Shopping Cart window:

Details for item 1 Intercom Wireless Full Duplex Package

Cost Distribution Percentage V Details

Number Accounting Line Number

see who bears the costs and, if necessary, you can distribute the cost to several cost centres

3

0001

- 1. Select the line.
- 2. Click **Details**.

-	▼ Item Overview									
2	2 Details Add Item (Copy Paste Duplicate Delete									
5	Line Number	Item Type	Product ID	Description	Product Car					
1	• <u>1</u>	Material	108366	Access Point Wireless	3200					
	•	Undefined Item Type			DEFAULT					

- 3. Select the Account Assignment tab.
- 4. Click the Assign NUMBER search button.
- 5. Select the desired account number.
- 6. Click OK.

II Values: Cost C	enter			
Results List: 28	results	s found for Assign Number	Personal Value List Show Search Criter	ia 🖉
Cost Center		Description	Logical system	
9310001554		CHHS-Reg Instruction	QSSCLNT310	-
9310002554		CHHS-Library Svcs	QSSCLNT310	
9310003554		CHHS-Field Trips	QSSCLNT310	
9310004554		CHHS-CoCurricular	QSSCLNT310	
9310005554		CHHS-Athletics	QSSCLNT310	
9310006554		CHHS-Medical Supply	QSSCLNT310	
9310007554		CHHS-Admin	QSSCLNT310	
9310008554		CHHS-Custodial	QSSCLNT310	
9310009554		CHHS-Security	QSSCLNT310	
9310011554		CHHS-Reg Instr. Emp	QSSCLNT310	

tt Assignment Notes and Attachments Sources of Supply / Service Agents Availability Approval Process Overview

Account Assignment Category Assign Number

9310001554

100.00 Cost Center

Accou

4

Percentage

### Free Text Order

A Free Text Order is used when the needed item is not found in any CCSD catalog. Before creating a Free Text Order, it is recommended to:

- 1. Verify with the Purchasing and Warehousing Department that the item is not on bid with CCSD.
- 2. If the item is under \$1,000 and can be purchased with the Pcard, proceed with that process. Call Accounting if the limit needs to be temporarily increased.
- 3. If the item isn't on bid, obtain a quote. Quotes should be obtained from approved CCSD vendors. Contact Purchasing and Warehousing for an approved vendor.

To create a Free Text Order:

- 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.
- 9. Select FREE TEXT.

	- General Data									
	Buy on Behalf of:	104841	ZO	FFMGR10 ZOFFMGR10	Delivery Instruction:			Approval Not	e	
4	Name of shopping cart:	554 CHHS Equip	ment Order		Use Delivery Date for all Items:		7			
	Default Settings:		5							
	Approval Process: Document Changes:	Display / Edit A								
	Delivery date:		1							
	Details Add Item	Copy Paste	Duplicate Del	ete						
	E Line Number It		Droduct ID D		togony Draduct Catagony Decor	ntion Quantity	Linit Not Drice / Limi	Curronou	Dor 1	Daliyany Data

Field	Description of Field				
Description	Description of goods/services				
Internal Note	<ul> <li>Additional information provided to the buyer that will assist in obtaining the items requested. For example:</li> <li>More detailed information of the goods/services</li> <li>Dollar amount not to exceed</li> <li>Timeframe/duration (if for service) <ul> <li><i>Example:</i> Once per month for one year, 07/01/2020 – 06/30/2021</li> </ul> </li> <li>Required on date</li> <li>Suggested supplier's name, address, phone number (if available, but not necessary)</li> <li>Quantity, if needed to further explain request</li> <li>Complete description of goods/services</li> <li>Dimensions, color, size, specifications, manufacturer name and number, etc.</li> <li>Direct information (for the buyer eyes only) <ul> <li><i>Example:</i> "Do not order from XYZ Company; they were defective last time"</li> </ul> </li> </ul>				
Product Category <sup>1</sup>	Identifies the buyer and the assigned G/L Account (cannot be "DEFAULT")				
Quantity	How many items are required				
Unit	Unit of Measure: Each, Dozen, Pack, Set, Case, Lot, etc.				
Net Price	Cost of individual item				
Delivery Date	Suggested delivery date				

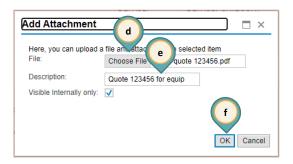
The Add Item with Free Description window is displayed. Complete all of the following fields.

10. Click ADD TO ITEM OVERVIEW.

<sup>&</sup>lt;sup>1</sup> Please contact the Purchasing Department at **(702) 799-5225** for assistance with determining Product Category.

11. Attach th	ie quote to th	ie order.								
a. Select	the item <b>Desc</b>	CRIPTION.		verview						
b. Select	the <b>NOTES</b> ANI	D	Details	Add Iter	n 🖌 Cop	y Paste	Duplicate	Delete		
Ατταςημ	ENTS tab.		🖺 Line	e Number	Item Ty	е	Product	ID Descriptio	n 🎴	Produc
c. Click A	DD ATTACHMEN	JT.		1	Materia			Table, con	nputer w/ cord management tray	5620
	Item Data Account As  Notes Clear Category	ssignment Notes and Attac	hments So	urces of Supply	/ Service Ag	nts Approva	I Process Overviev	Y		
	Internal Note Vendor Text					Maccabees Gr -Empty-	ey table with black	cord management tra	y 36" w	
	C C C C C C C C C C C C C C C C C C C	k				-Empty-				
	Add Attachment Edit	Description Versioning	Delete C	eate Profile						
	Category	Description	File Name		Version	Process	sor	Visible Internally only		
	The table does r	not contain any data								

- d. CHOOSE FILE for the quote.
- e. Enter the **DESCRIPTION**.
- f. Click OK.



- 13. Continue adding line items to the order.
- 14. Add the Shipping & Handling fee.
- 15. Click CHECK.
- 16. Click Order.



### Saved Shopping Cart

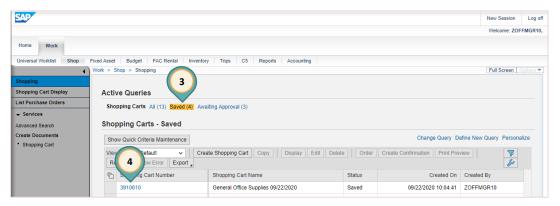
To complete or edit a shopping cart:



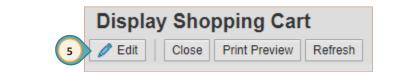
- 1. Select the *Work* tab.
- 2. Select *Shop*.

The work window displays the Active Queries.

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



5. Click EDIT.



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





#### **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								
	<u>م</u> ( ا	Vork > Unive	ersal Worklist > Universal Worklist					Full Screen Opti	tions 🔻
Universal Worklist	t		(1 / 1) Tracking New and In Progress Tasks (1 / 1)	✓ Select a Subview	✓ All	~	Create Task	77 (X.E)	Î
		Subje	ect		From	Sent Date			
		1 Rejec	cted Shopping Cart # 3910482 , Please a	accept rejection 07/17/2020		Today	New		

- The Accept Changes to Shopping Cart window opens in a new browser window. Click ACCEPT.
- 3. The Display Document window is displayed. Click **CLOSE**.

Close	Print Preview	Accept 2 ck	
Disp	lay Docur	nent:	
3 Close	Print Preview	Show my Tasks	Refresh
Actio	n was successful	lly performed	

Accept Changes to Shopping Cart



#### **IMPORTANT!**

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