

**CLARK COUNTY SCHOOL DISTRICT**  
BUSINESS AND FINANCE DIVISION  
TECHNOLOGY & INFORMATION SYSTEMS SERVICES DIVISION  
USER SUPPORT SERVICES  
EMPLOYEE BUSINESS TRAINING DEPARTMENT



*SAP Shopping  
Carts:  
Quick Reference Guide*

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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



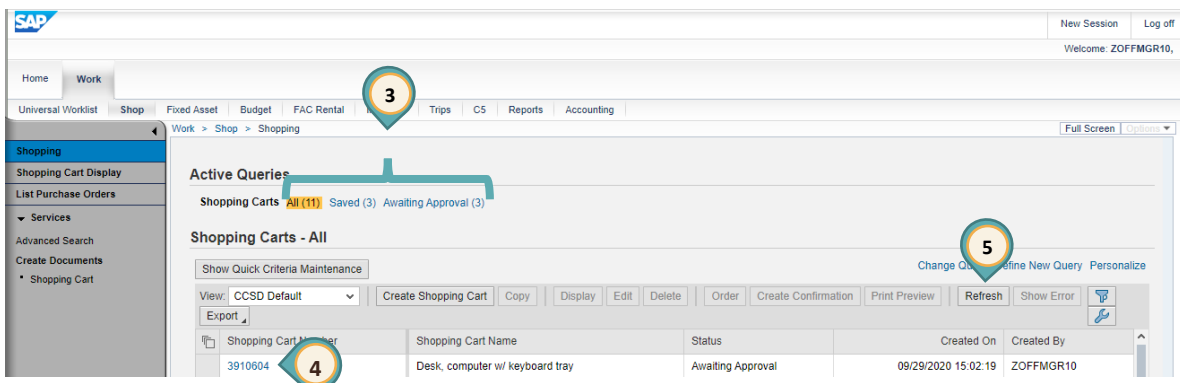
1. Select the **Work** tab.
2. Select **Shop**.

The work window displays the Active Queries.

#### Active Queries

Shopping Carts **All (11)** 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.

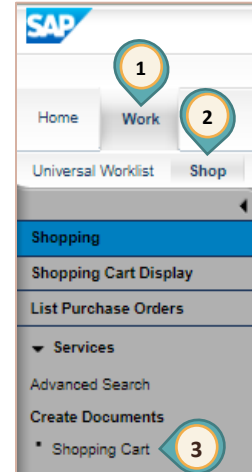


#### IMPORTANT!

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

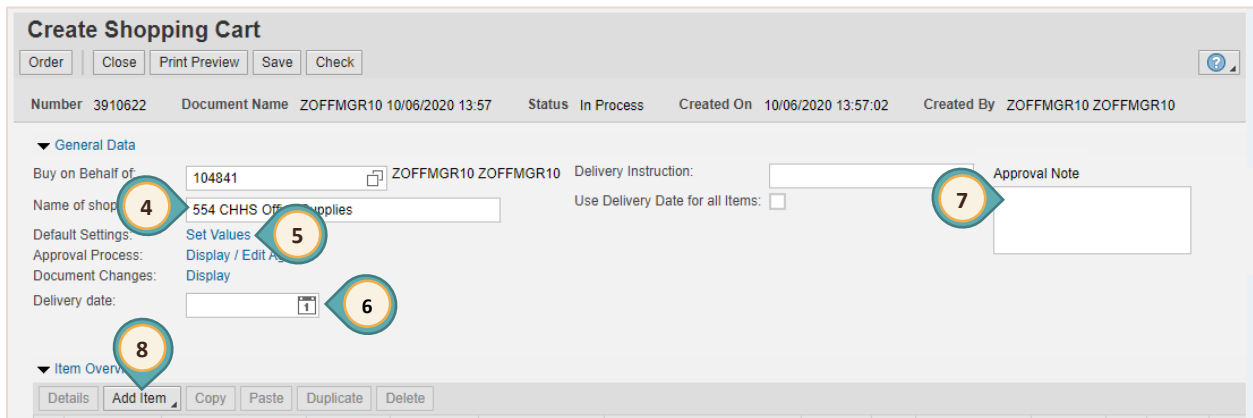
## Create Shopping Cart

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

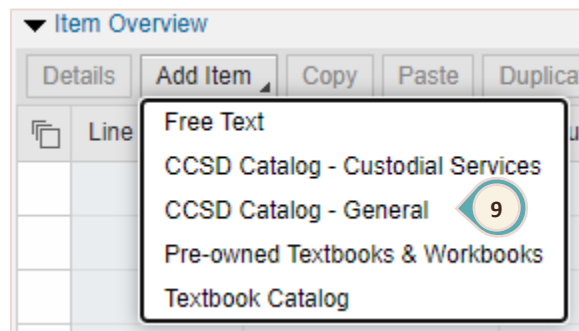


The **Create Shopping Cart** window opens in a new window.

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**.



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

Shop By Category

- Communication Equip >
- Computers/Technology >
- Furniture and Furnishings >
- Material Handling >
- Medical Equipment and Accessori... >
- Musical Instruments and Games a... >
- Office Equipment and Accessories ... >
- Paper Material/prod >
- Printing and Photographic and Au... >
- Special Ed/asst Tech
- Vocational >

Catalog Search by part #, supplier name, or keyword

Catalog Home

Recently Viewed Items

Adapter iPad Camera Lightning to USB Not A Vendor(CCSD-System). <b>\$28.00 USD / each</b>	BIC Round Stic Ballpoint Pens Office Depot Inc <b>\$1.22 USD / dozen</b>	Table Computer Station Gray Not A Vendor(CCSD-System). <b>\$296.02 USD / each</b>	Office Depot Brand Eraser Caps Office Depot Inc <b>\$0.42 USD / pack</b>

Catalog pencil

Catalog Home / Purchasing Organization : (no value) / "pencil"

138 item(s) found View: [List View] [Grid View] Sort by: Name - Ascending

Viewing: 50 items 1 2 3

**12** Add to Cart Compare Items

**BIC Mechanical Pencils**  
Supplier: Office Depot Inc  
Supplier Part #: 292475  
Available in: 0 Day(s)  
Type:  
BIC Mechanical Pencils, Xtra Strong, 0.9 mm, Assorted Barrel Colors, Pack Of 24 Pencils  
\$3.84 / pack **14**

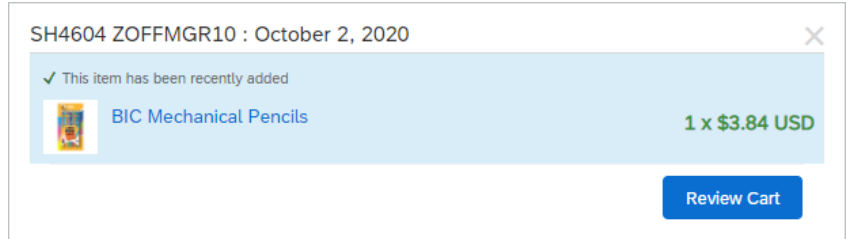
Qty:  **13** Add to Cart Add to Favorites

**BIC Mechanical Pencils**  
Supplier: Office Depot Inc  
Supplier Part #: 811943  
Available in: 0 Day(s)  
Type:  
BIC Mechanical Pencils, Xtra Life, 0.7 mm, Black Barrel, Pack Of 12  
\$2.09 USD / dozen

Qty:  Add to Cart Add to Favorites

**BIC Xtra Comfort Mechanical Pencils**  
\$2.81 USD / dozen

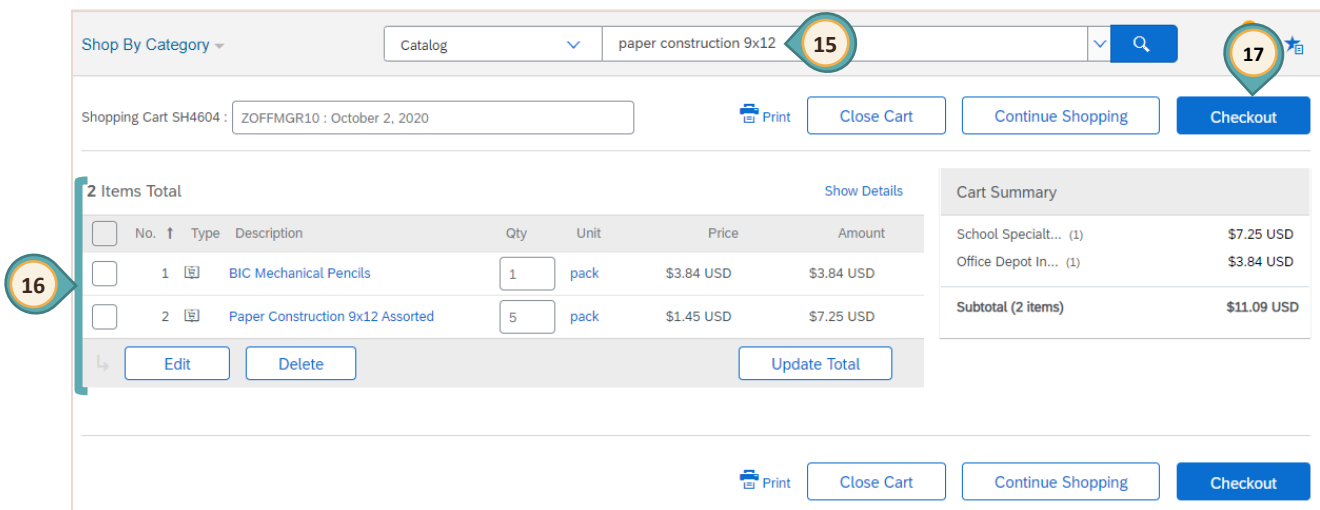
A window appears to confirm the item was added to the Cart. Click outside this window to continue shopping **or** select Review Cart if finished.



15. Enter a new **Keyword** search criteria or click the **Continue Shopping** button to continue to add additional items to the Cart.

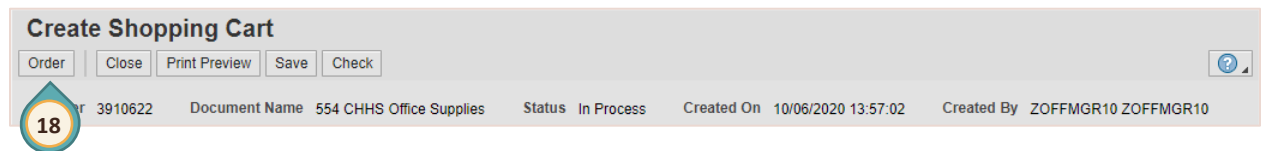
16. Review all items and quantities. Make changes if necessary.

17. Click **CHECKOUT**.

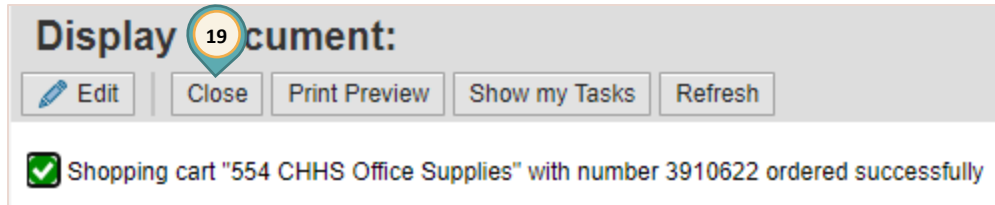


**IMPORTANT!** When shopping and adding items to this holding area, the user is **NOT** communicating directly with the **SAP** system, so the user must take care to transfer items (**CHECKOUT**) to the SAP shopping cart every 5 minutes. (This ensures that the user is not logged out of SAP for inactivity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



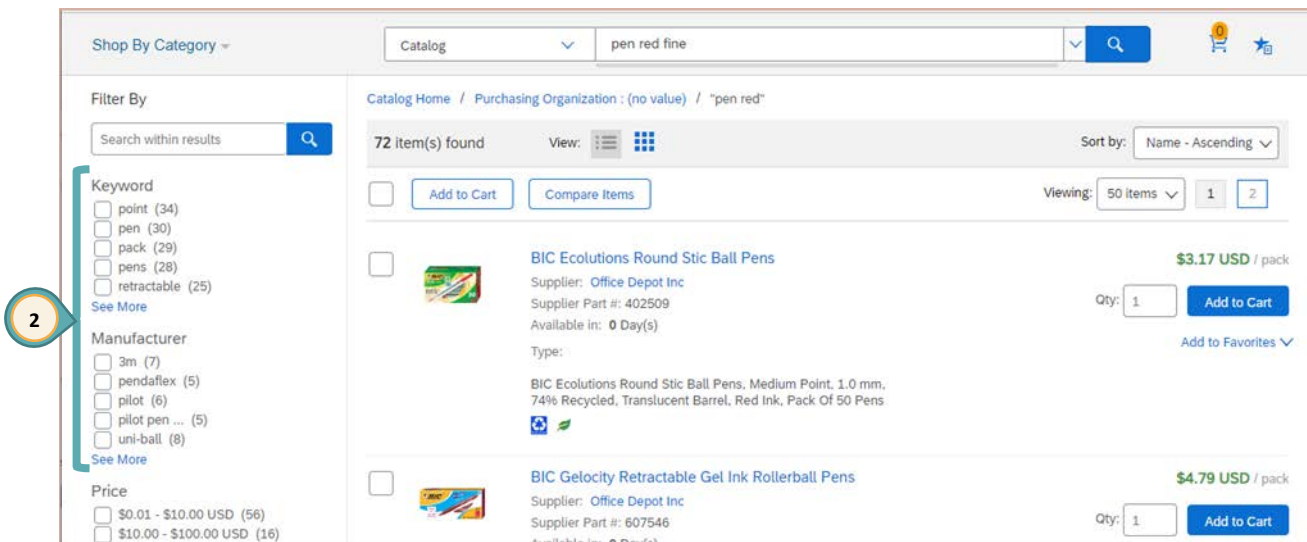
19. Click the **CLOSE** button. (Do **NOT** use the **X** in the upper right corner of the browser window.)

## Search Hints

1. Narrow search results by adding more descriptive words to the keyword search.

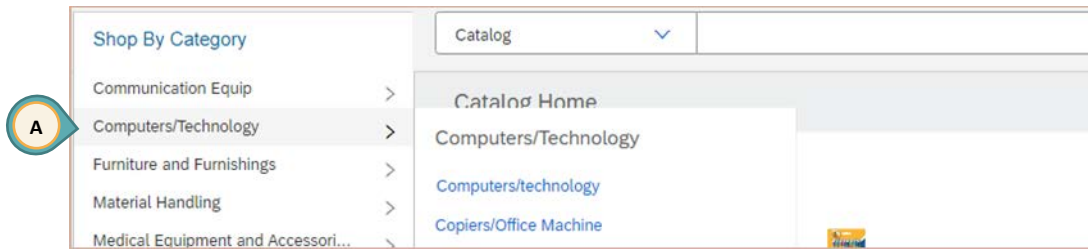


2. Use the **FILTER BY** checkboxes on the left to narrow the search by selecting additional keywords, manufacturers, suppliers, price, etc.

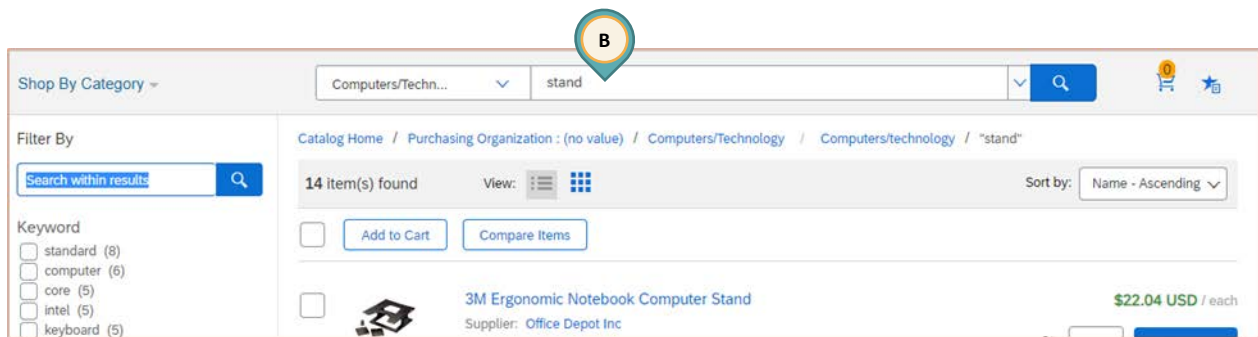


3. To use the **SHOP BY CATEGORY** feature:

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



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



## 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.

▼ General Data  
 Buy on Behalf of: 104841 ZC  
 Name of shopping cart: Intercom  
 Default Settings: Set Values 1  
 Approval Process: Display / Edit Agents  
 Document Changes: Display  
 Delivery date: [Calendar icon]

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

<i>If charging to a . . .</i>	<i>Then change . . .</i>
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:

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

Line Number	Item Type	Product ID	Description	Product Ca
1	Material	108366	Access Point Wireless	3200
	Undefined Item Type			DEFAULT

3. Select the **ACCOUNT ASSIGNMENT** tab.
4. Click the **ASSIGN NUMBER** search button.

Number	Accounting Line Number	Percentage	Account Assignment Category	Assign Number	Accou
0001		100.00	Cost Center	9310001554	HS

5. Select the desired account number.
6. Click **OK**.

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

## 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**.

The screenshot shows the SAP 'Create Shopping Cart' window. It is divided into two main sections: 'General Data' and 'Item Overview'. The 'General Data' section contains several input fields and buttons. Callout 4 points to the 'Name of shopping cart' field, which contains '554 CHHS Equipment Order'. Callout 5 points to the 'Set Values' button. Callout 6 points to the 'Delivery date' field. Callout 7 points to the 'Approval Note' text area. Callout 8 points to the 'Add Item' button. The 'Item Overview' section at the bottom shows a table with columns for Line Number, Item Type, Product ID, Description, Product Category, Quantity, Unit, Net Price, Limit, Currency, and Delivery Date. The table is currently empty.

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

Field	Description of Field
<b>Description</b>	Description of goods/services
<b>Internal Note</b>	<p>Additional information provided to the buyer that will assist in obtaining the items requested. For example:</p> <ul style="list-style-type: none"> <li>◉ More detailed information of the goods/services</li> <li>◉ Dollar amount not to exceed</li> <li>◉ Timeframe/duration (if for service)            * <i>Example:</i> Once per month for one year, 07/01/2020 – 06/30/2021</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)            * <i>Example:</i> “Do not order from XYZ Company; they were defective last time”</li> </ul>
<b>Product Category <sup>1</sup></b>	Identifies the buyer and the assigned G/L Account (cannot be “DEFAULT”)
<b>Quantity</b>	How many items are required
<b>Unit</b>	Unit of Measure: Each, Dozen, Pack, Set, Case, Lot, etc.
<b>Net Price</b>	Cost of individual item
<b>Delivery Date</b>	Suggested delivery date

10. Click **ADD TO ITEM OVERVIEW**.

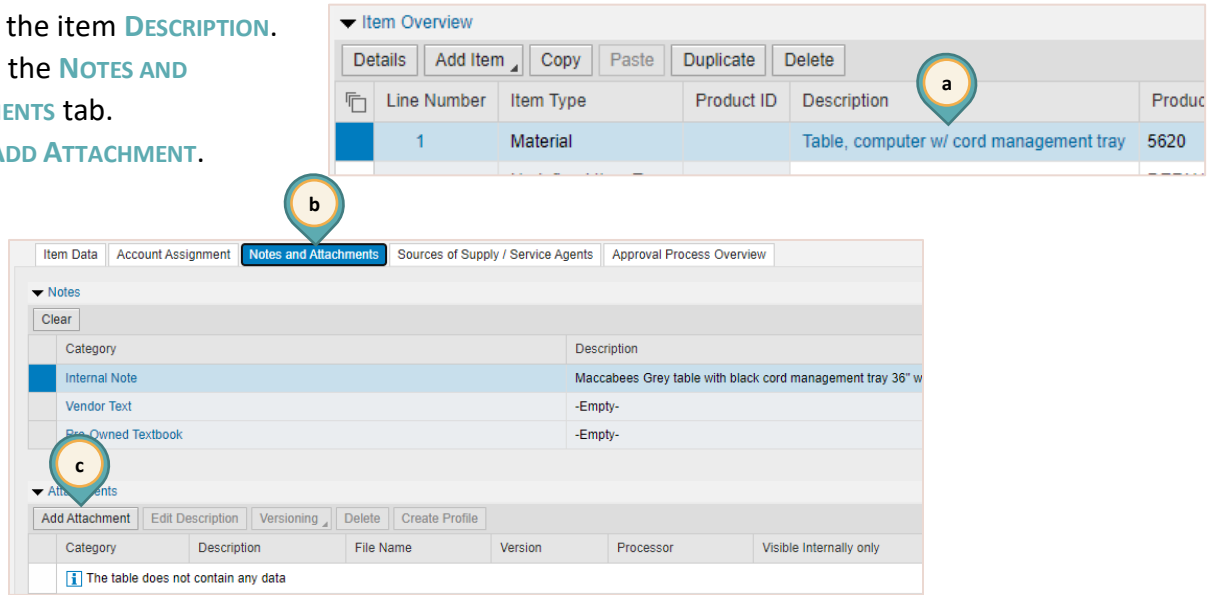
<sup>1</sup> Please contact the Purchasing Department at **(702) 799-5225** for assistance with determining Product Category.

11. Attach the quote to the order.

a. Select the item **DESCRIPTION**.

b. Select the **NOTES AND ATTACHMENTS** tab.

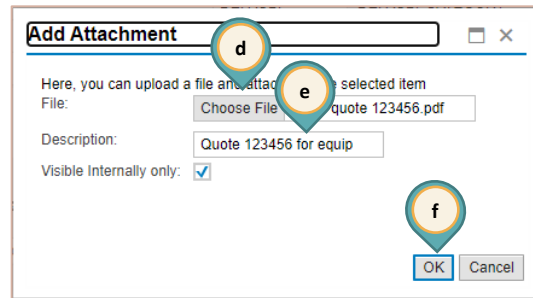
c. Click **ADD ATTACHMENT**.



d. **CHOOSE FILE** for the quote.

e. Enter the **DESCRIPTION**.

f. Click **OK**.

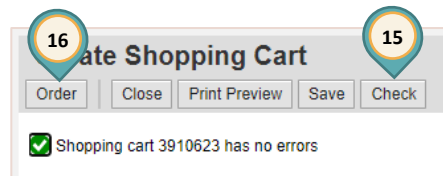


13. Continue adding line items to the order.

14. Add the **Shipping & Handling** fee.

15. Click **CHECK**.

16. Click **ORDER**.



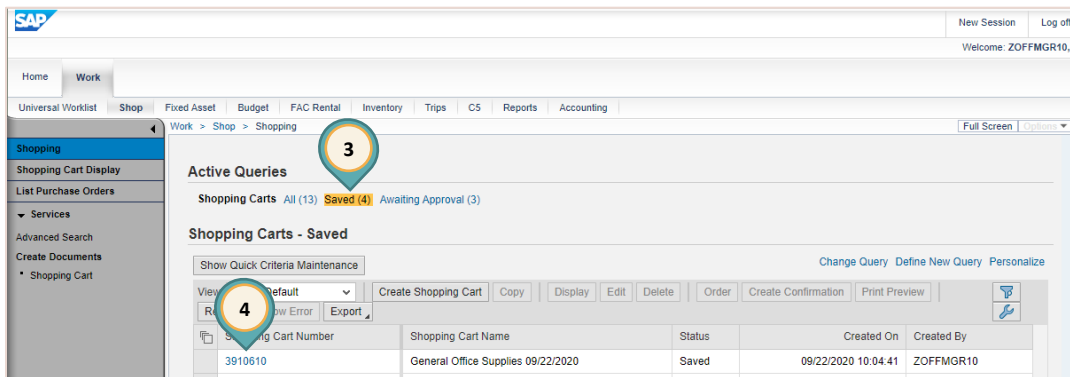
## Saved Shopping Cart

To complete or edit a shopping cart:

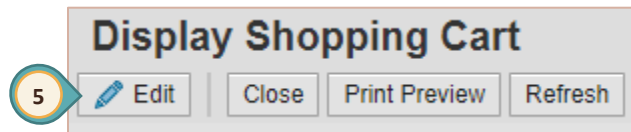


1. Select the **Work** tab.
  2. Select **Shop**.
- The work window displays the Active Queries.

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!

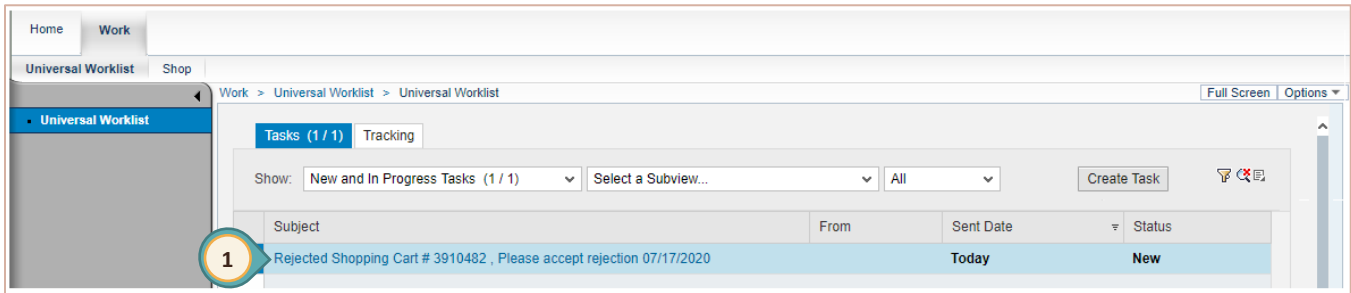
If the shopping cart Default Settings were changed (change in budget coding or delivery location), the Default Setting **MUST** be changed **AGAIN** before adding more items to the shopping cart.

## Accept Rejected Shopping Cart

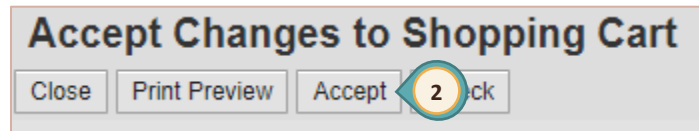
Any shopping cart that has been rejected must be “accepted” in order for budget funds to be released for further use.

From the Universal Worklist (UWL):

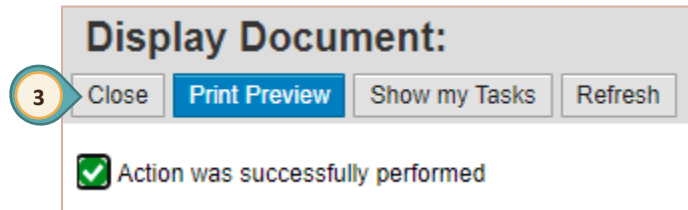
1. Click the rejected shopping cart link in the **Subject** area.




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



3. The Display Document window is displayed. Click **CLOSE**.



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