

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



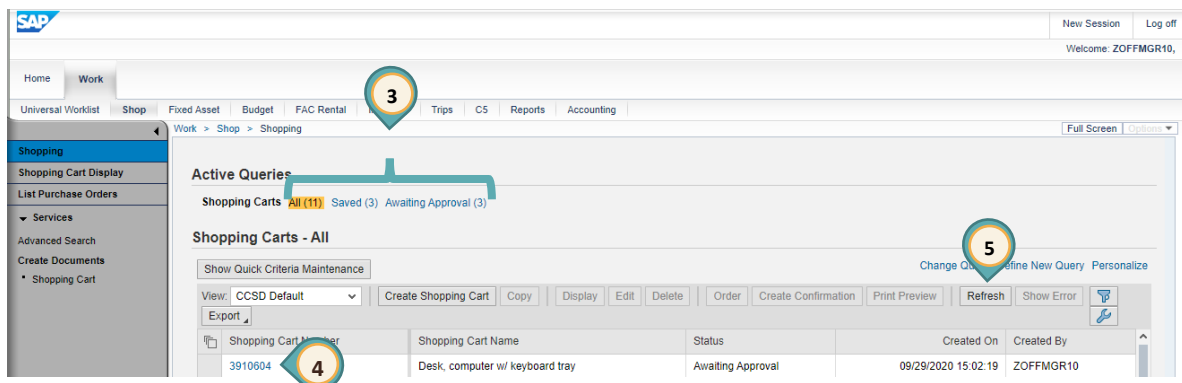
1. Select the **Work** tab.
2. Select **Shop**.

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.

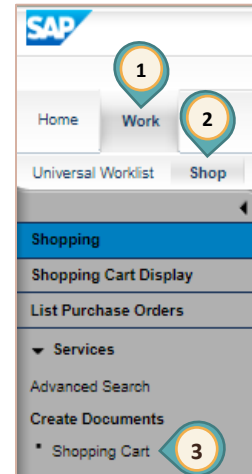


IMPORTANT!

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

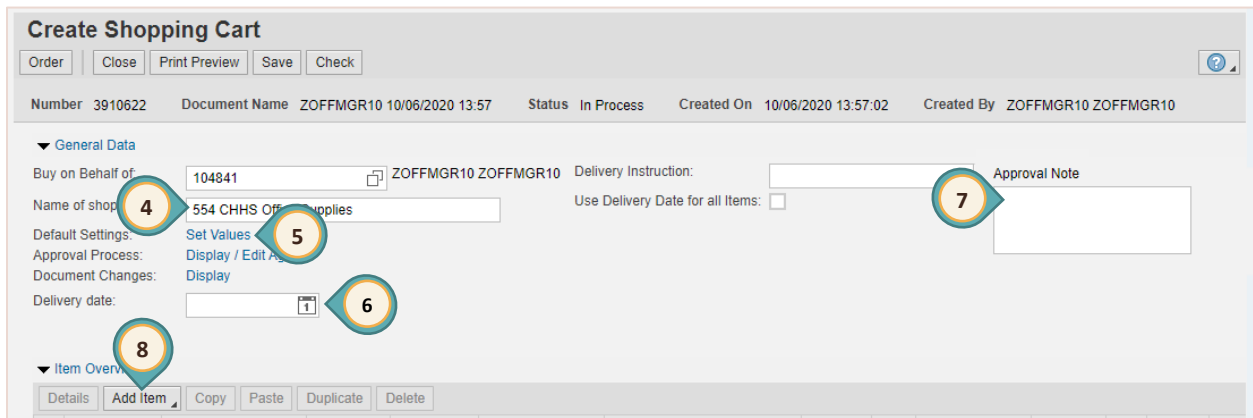
Create Shopping Cart

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

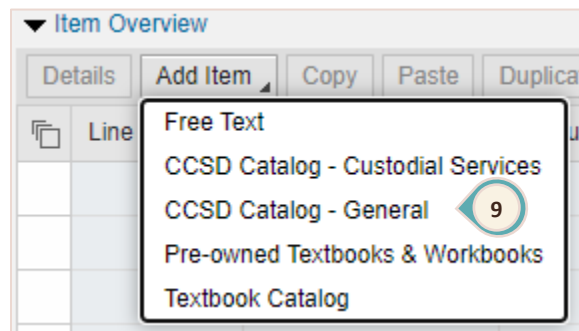


The **Create Shopping Cart** window opens in a new window.

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).



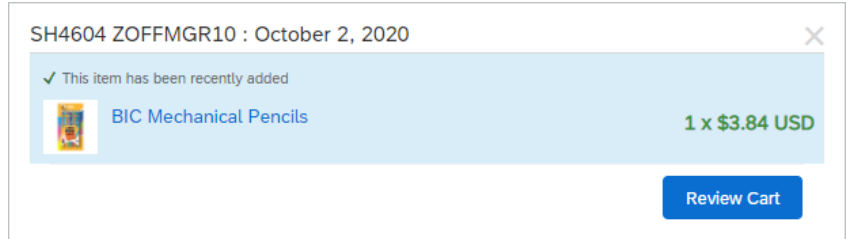
The window refreshes to display **Ariba Product Catalog**.

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**.

The screenshot shows the SAP Ariba Product Catalog interface. At the top, there is a search bar with the text "Catalog" and "Search by part #, supplier name, or keyword". A magnifying glass icon is circled with a callout '10'. To the right of the search bar is a shopping cart icon with a '0' and a star icon. Below the search bar, the page title is "Catalog Home". There is a "Recently Viewed Items" section with four items listed: "Adapter iPad Camera Lightning to USB", "BIC Round Stic Ballpoint Pens", "Table Computer Station Gray", and "Office Depot Brand Eraser Caps". Each item has a price per unit: "\$28.00 USD / each", "\$1.22 USD / dozen", "\$296.02 USD / each", and "\$0.42 USD / pack".

The screenshot shows the SAP Ariba Product Catalog search results for the keyword "pencil". The search bar contains "Catalog" and "pencil". The search button is circled with a callout '10'. Below the search bar, the page title is "Catalog Home / Purchasing Organization : (no value) / 'pencil'". There are 138 items found. The results are sorted by "Name - Ascending". The first item is "BIC Mechanical Pencils" with a price of "\$3.84 / pack". The quantity field is circled with a callout '13' and the "Add to Cart" button is circled with a callout '14'. The second item is "BIC Mechanical Pencils" with a price of "\$2.09 USD / dozen". The third item is "BIC Xtra Comfort Mechanical Pencils" with a price of "\$2.81 USD / dozen".

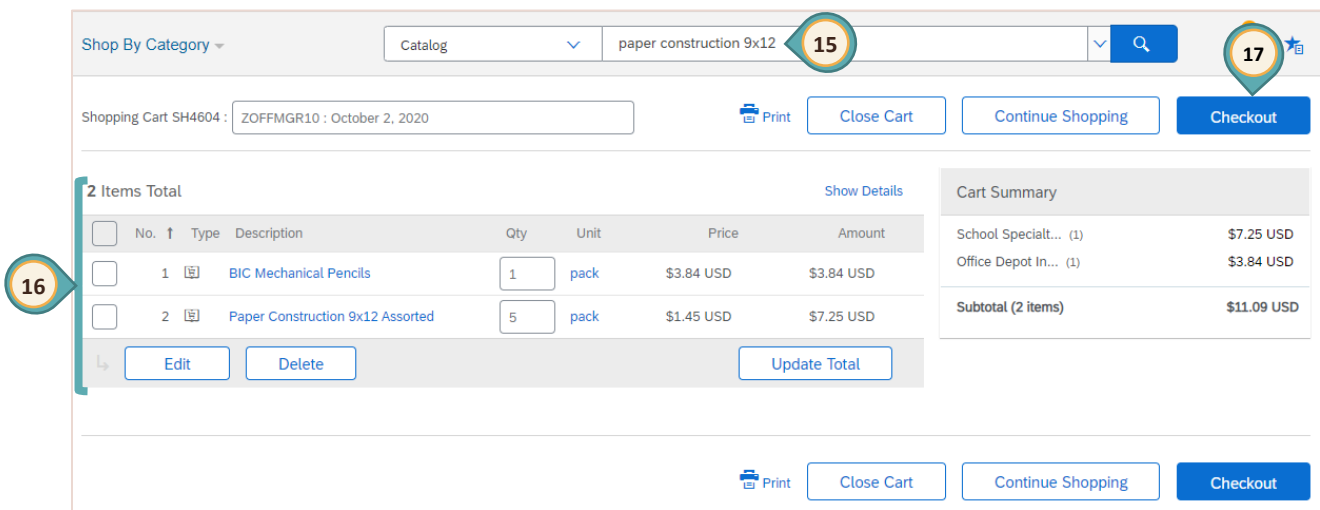
A window appears to confirm the item was added to the Cart. Click outside this window to continue shopping **or** select Review Cart if finished.



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

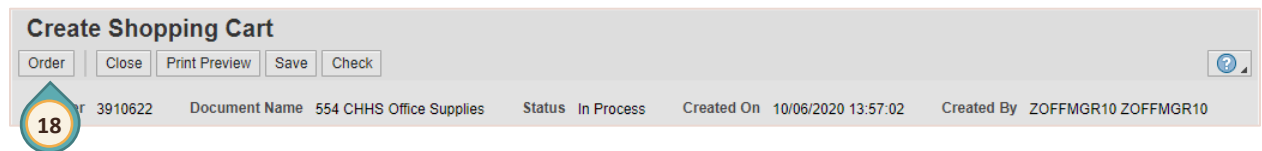
16. Review all items and quantities. Make changes if necessary.

17. Click **CHECKOUT**.

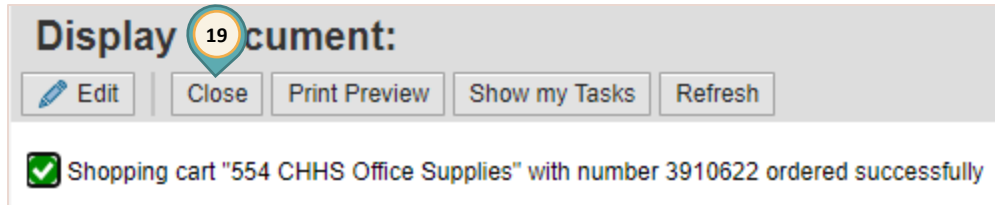


IMPORTANT! When shopping and adding items to this holding area, the user is **NOT** communicating directly with the **SAP** system, so the user must take care to transfer items (**CHECKOUT**) to the SAP shopping cart every 5 minutes. (This ensures that the user is not logged out of SAP for inactivity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



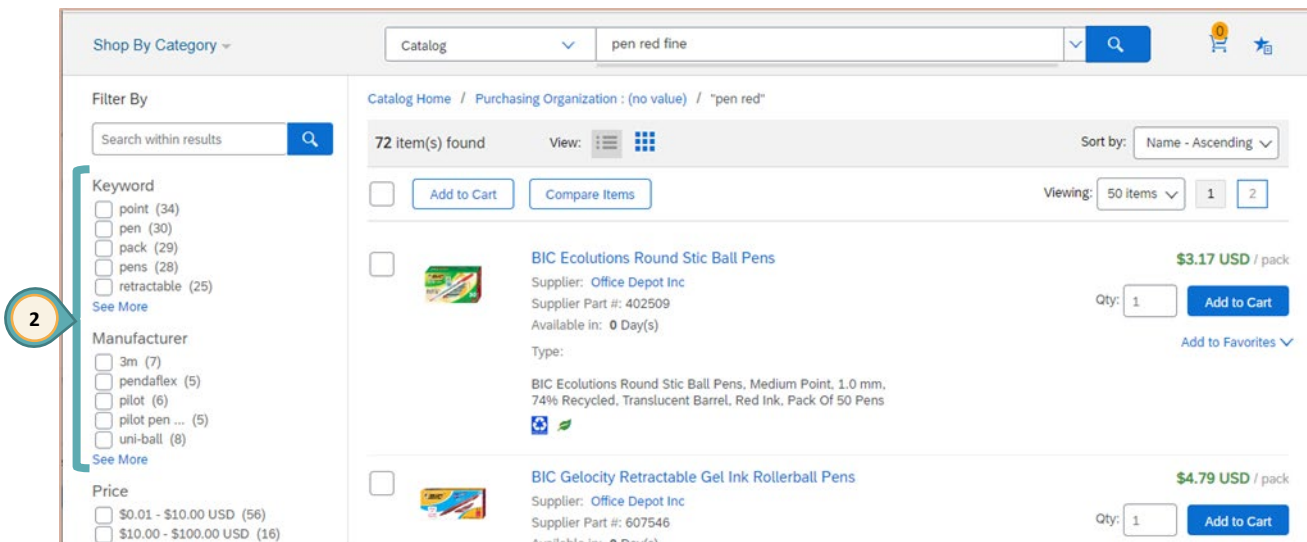
19. Click the **CLOSE** button. (Do **NOT** use the **X** in the upper right corner of the browser window.)

Search Hints

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

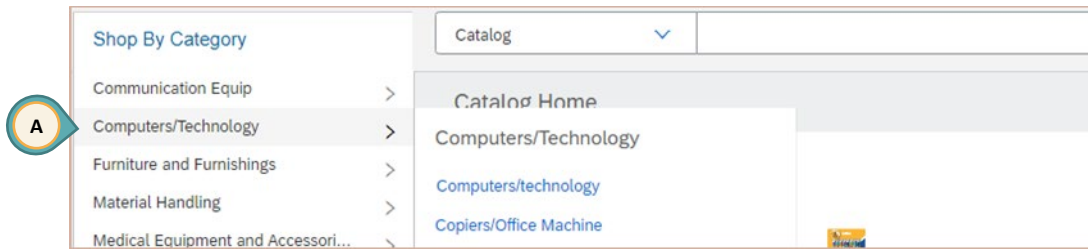


2. Use the **FILTER BY** checkboxes on the left to narrow the search by selecting additional keywords, manufacturers, suppliers, price, etc.

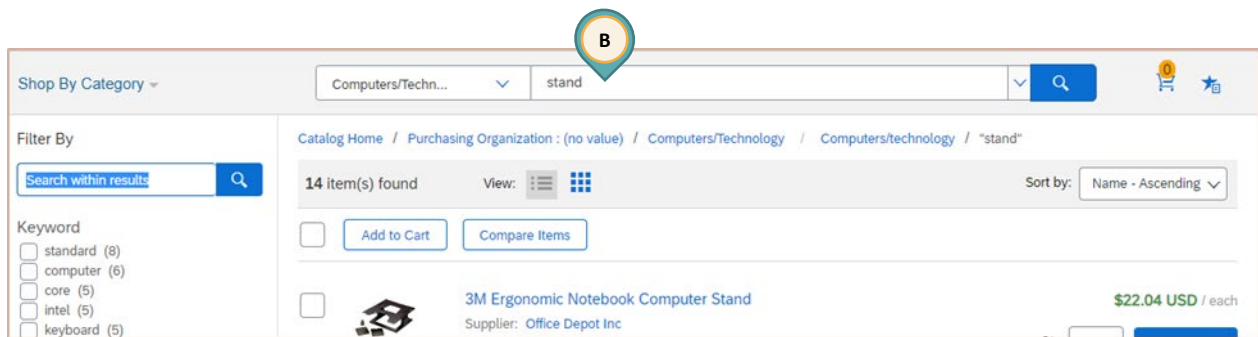


3. To use the **SHOP BY CATEGORY** feature:

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 ACCOUNT ASSIGNMENT tab.	2. Select the ITEM DATA tab.
3. Select the ACCOUNT ASSIGNMENT Category.	3. Click the STORAGE LOCATION search button.
4. Select ASSIGN NUMBER .	4. Select the new location.
5. Click OK .	5. Click OK .

<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**.

Item Overview					
Details Add Item ▾ Copy Paste Duplicate Delete					
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.

Details for Item 1 Intercom Wireless Full Duplex Package					
Account Assignment Notes and Attachments Sources of Supply / Service Agents Availability Approval Process Overview					
You can see who bears the costs and, if necessary, you can distribute the cost to several cost centres					
Cost Distribution					
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**.

All Values: Cost Center		
Results List: 28 results found for Assign Number		
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.

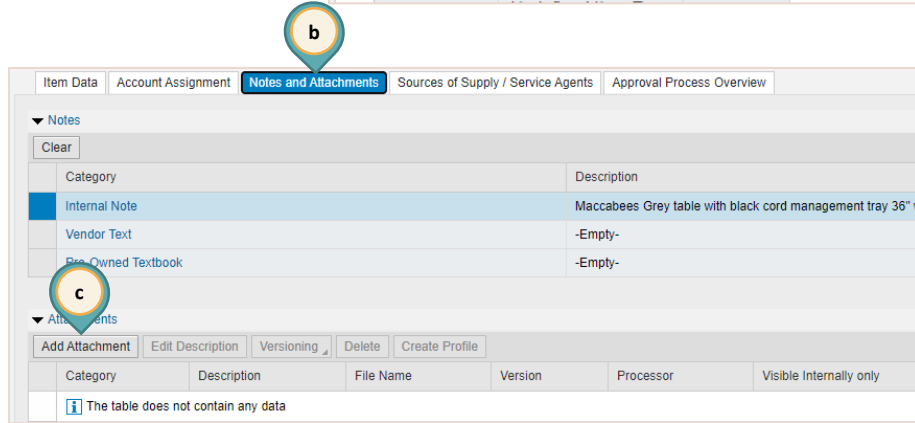
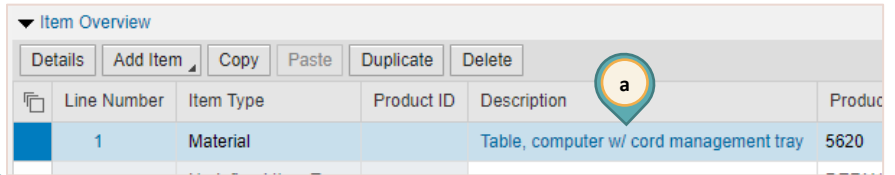
Field	Description of Field
Description	Description of goods/services
Internal Note	<p>Additional information provided to the buyer that will assist in obtaining the items requested. For example:</p> <ul style="list-style-type: none"> ◉ More detailed information of the goods/services ◉ Dollar amount not to exceed ◉ Timeframe/duration (if for service) * <i>Example:</i> Once per month for one year, 07/01/2020 – 06/30/2021 ◉ Required on date ◉ Suggested supplier’s name, address, phone number (if available, but not necessary) ◉ Quantity, if needed to further explain request ◉ Complete description of goods/services ◉ Dimensions, color, size, specifications, manufacturer name and number, etc. ◉ Direct information (for the buyer eyes only) * <i>Example:</i> “Do not order from XYZ Company; they were defective last time”
Product Category ¹	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

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

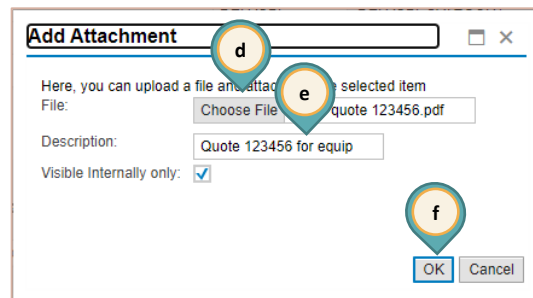
¹ Please contact the Purchasing Department at **(702) 799-5225** for assistance with determining Product Category.

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**.

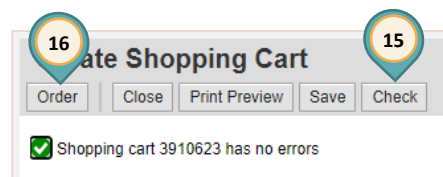


13. Continue adding line items to the order.

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

15. Click **CHECK**.

16. Click **ORDER**.



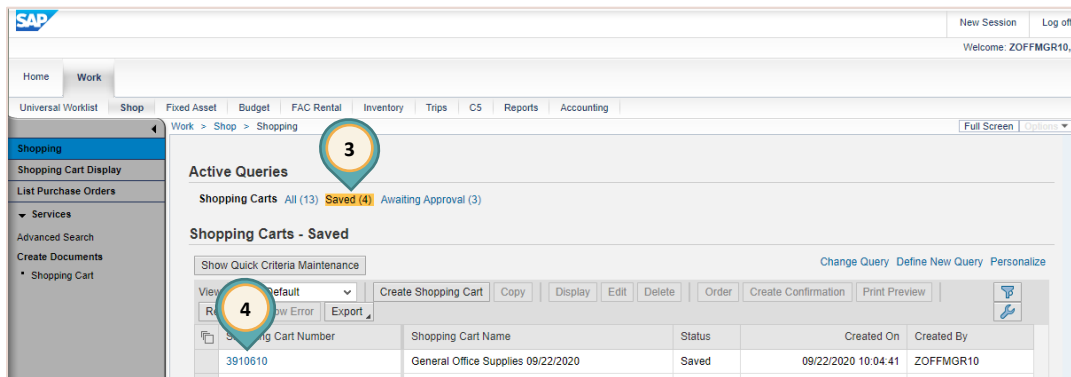
Saved Shopping Cart

To complete or edit a shopping cart:

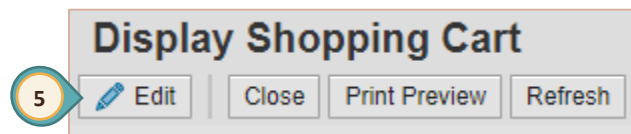


1. Select the **Work** tab.
 2. Select **Shop**.
- The work window displays the Active Queries.

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!

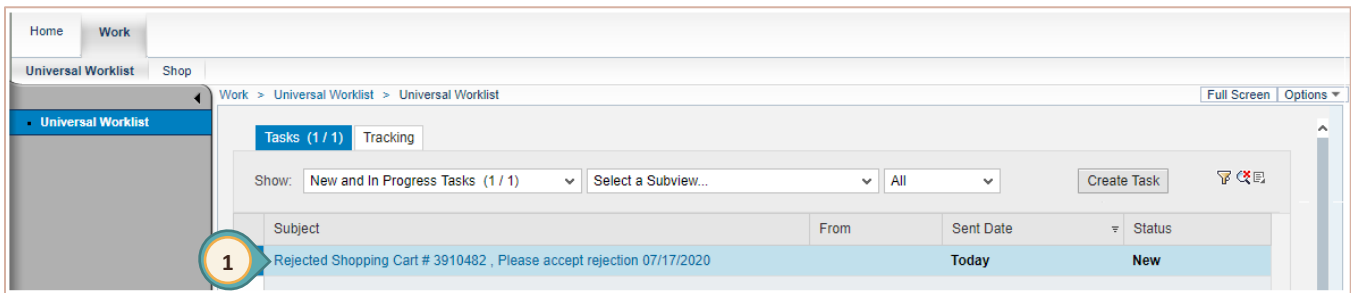
If the shopping cart Default Settings were changed (change in budget coding or delivery location), the Default Setting **MUST** be changed **AGAIN** before adding more items to the shopping cart.

Accept Rejected Shopping Cart

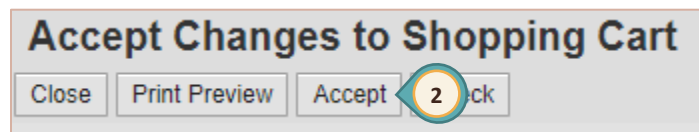
Any shopping cart that has been rejected must be “accepted” in order for budget funds to be released for further use.

From the Universal Worklist (UWL):

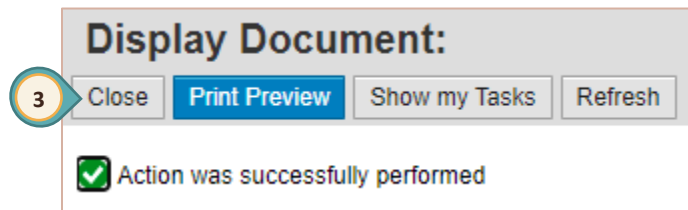
1. Click the rejected shopping cart link in the **Subject** area.



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.

If the Rejected Shopping Cart is not accepted within five business days, the SAP system will automatically accept it. If this occurs, user acceptance is no longer needed.