SAP for Custodians:
Quick Reference Guide

Revised: July 2020

CCSD
CLARK COUNTY
SCHOOL DISTRICT

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Rev. July 2020

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.

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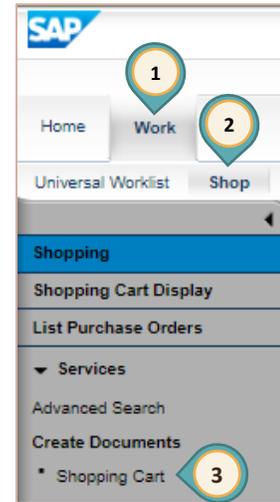
The **Create Shopping Cart** window opens in a new window.

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.
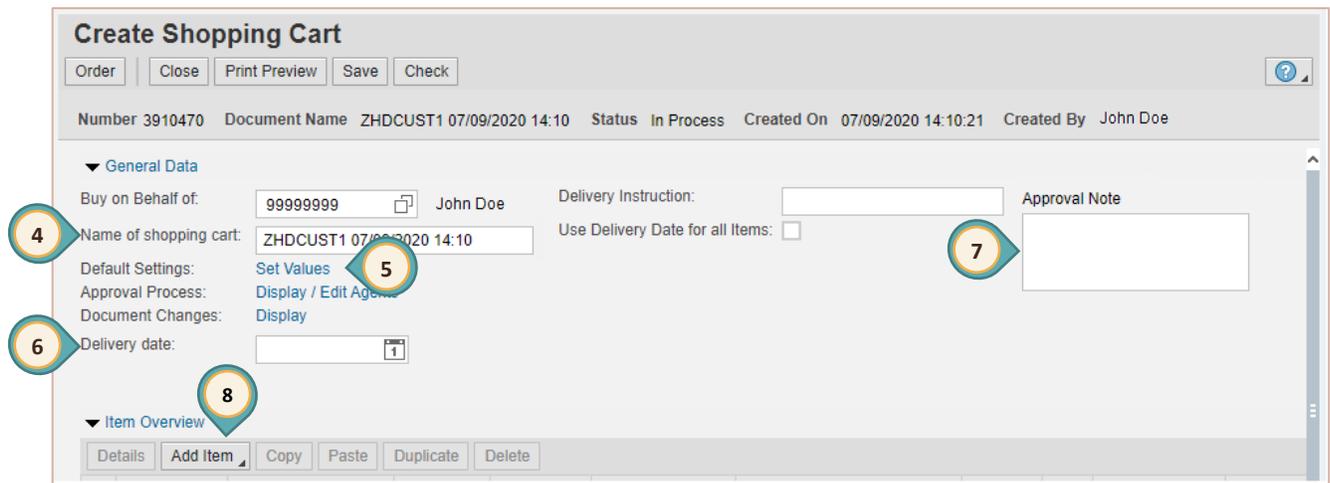
9. Select the desired catalog (for this example the CCSD-Custodial Services catalog was selected).
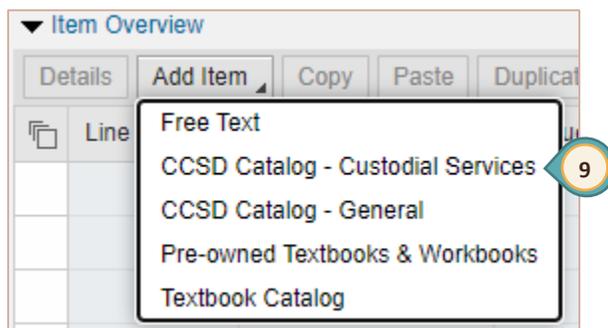
The window refreshes to display **Ariba Product Catalog**.

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.
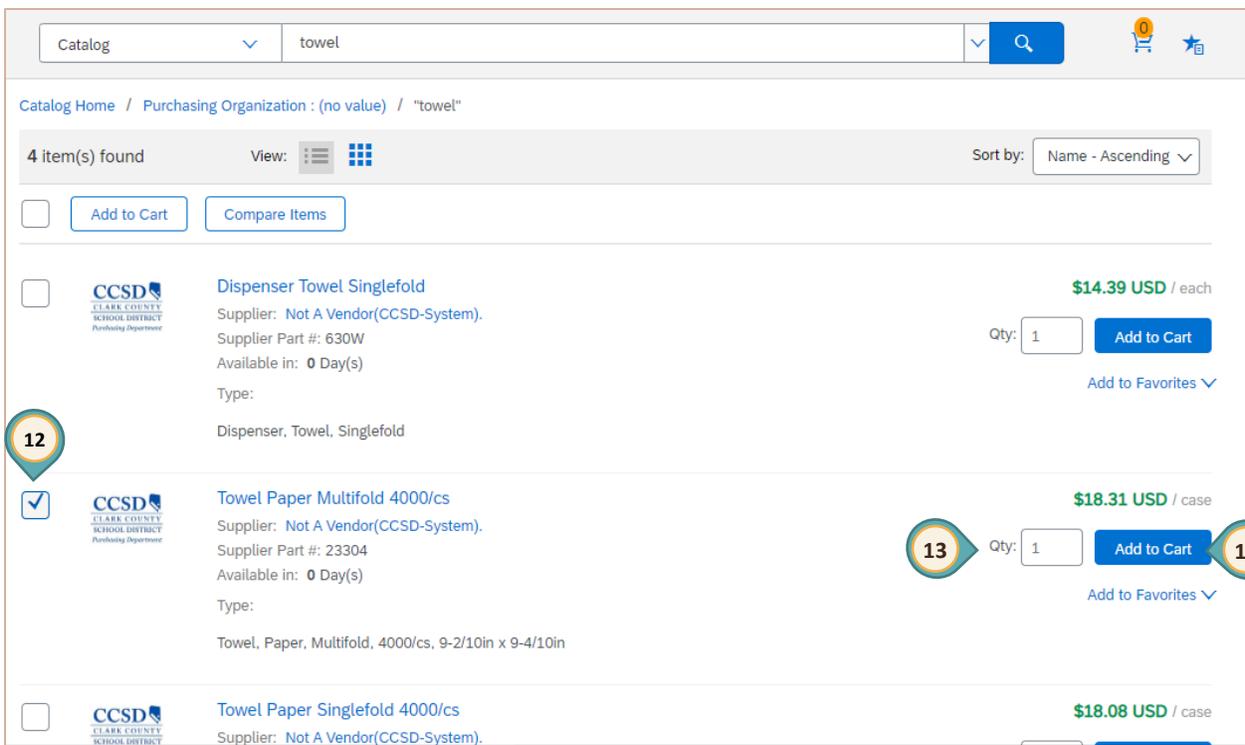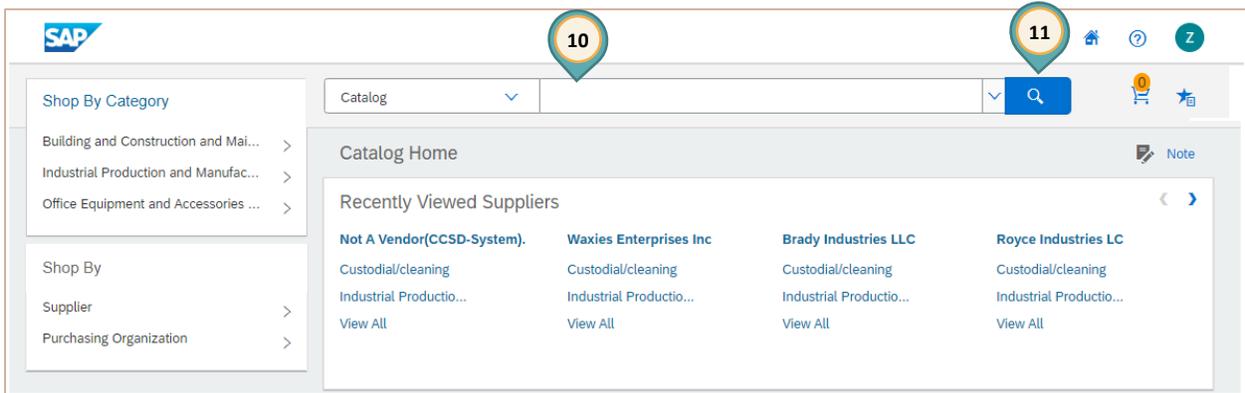
A window appears to confirm the item was added to the Cart. Click outside this window to continue shopping **or** select Review Cart if finished.
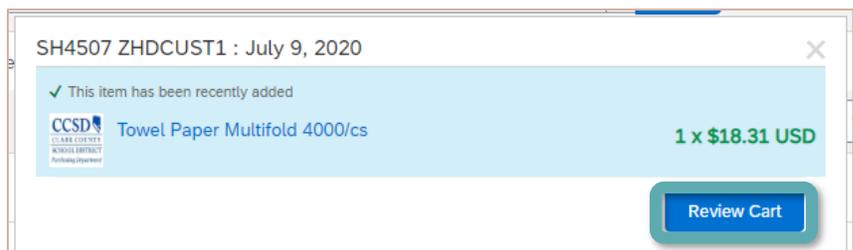
15. Enter a new **KEYWORD** search criteria to continue to add additional items to the Cart.
16. Click **REVIEW CART** after all items have been added. Review all items and quantities. Make changes if necessary.

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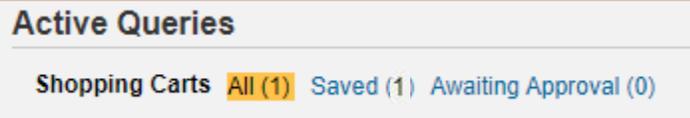
3. Select *Saved* to display the Saved Active Query results. (Select the REFRESH button to ensure the most current results are displayed.)
4. Click the SHOPPING CART NUMBER to display the Shopping Cart in a new window.

5. Click EDIT.

Display Shopping Cart

⑤ ✎ Edit | Close | Print Preview | Refresh
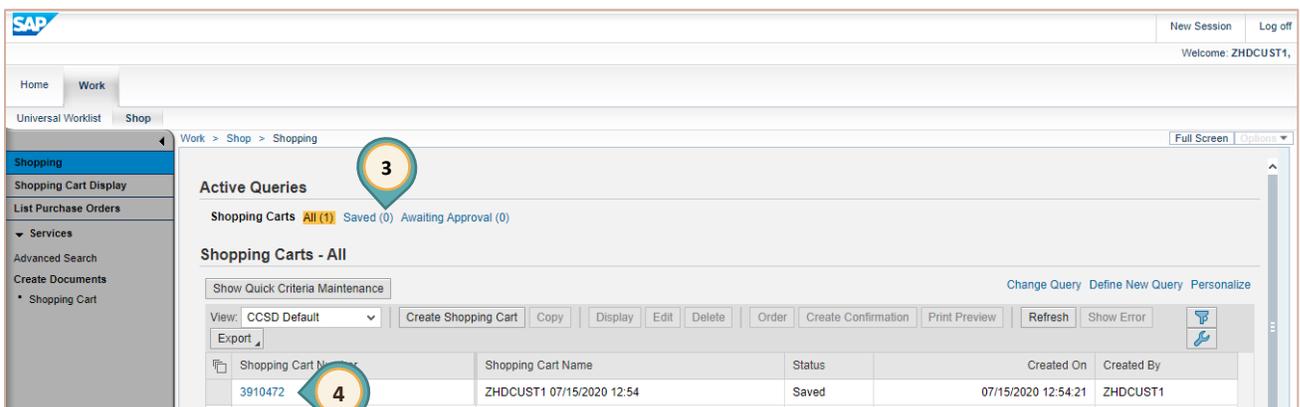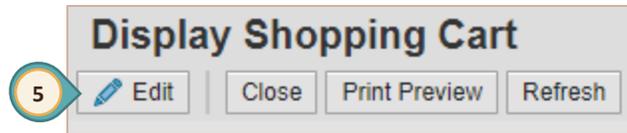
6. Edit the shopping cart as needed (adjust quantity, add additional items, etc).
7. Click ORDER.
8. Click CLOSE.

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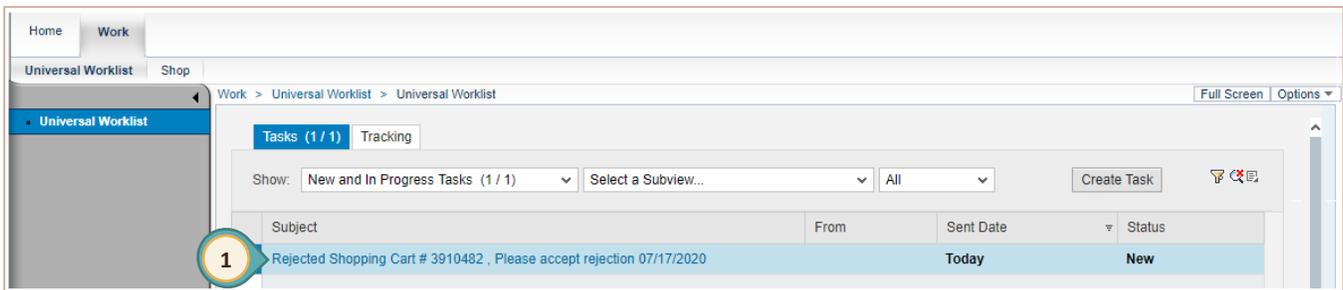
2. The Accept Changes to Shopping Cart window opens in a new browser window. Click ACCEPT.

Accept Changes to Shopping Cart

Close | Print Preview | Accept ② ck
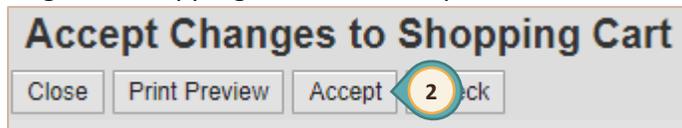
3. The Display Document window is displayed. Click CLOSE.

Display Document:

③ Close | Print Preview | Show my Tasks | Refresh

✅ Action was successfully performed
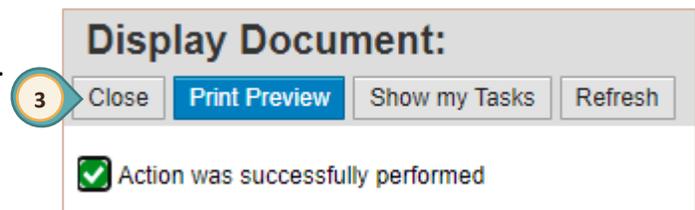
> 🚦 **IMPORTANT!**
> Rejected shopping carts should **ALWAYS** be processed using the ACCEPT button.