



SHOPPING CART: Create an SERV Order

Use this Job Aid to:

- Learn how to create a Service Agreement PO through SAP

BEFORE YOU BEGIN

You will need to know what you would like to order, the vendor, and the General Ledger (G/L) account to charge.

Create an SERV Order

Use the SERV document type on service or service miscellaneous, maintenance and master consulting service contract orders. Not included are LEAS, CAPP and independent contractors (BLPO) document types.


SERV purchase orders payments may be created as one-time, monthly and/or annual payments or when different values for the services are provided. Each time a service is received and invoiced by the vendor, a confirmation is performed by the requestor for the dollar amount charged for that instance of the service. University orders under \$5,000.00 do not need confirmations of goods receipts. This in turn is decremented from the available funds assigned to the purchase order.

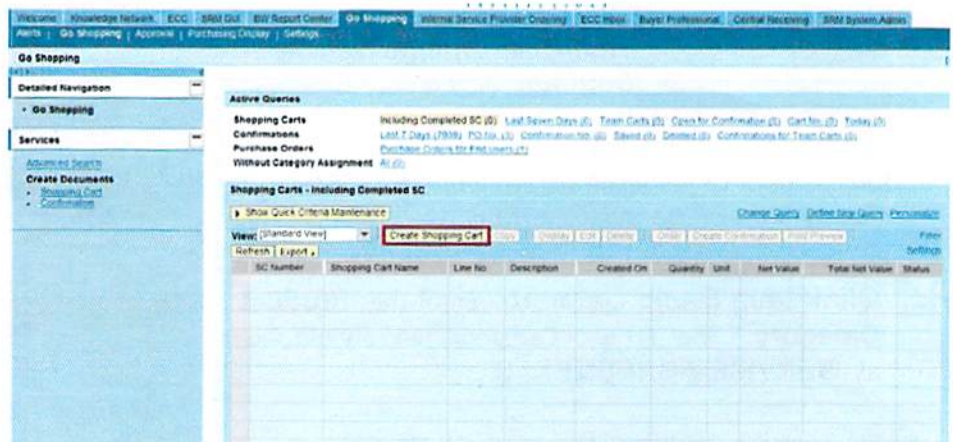
1. **Create a Cart.** At the Shopping Home Page, click "Create Shopping Cart."

Helpful Hint

You may want to close the "Detailed Navigation" panel

on the left side of the screen to give you more room.

Do that by clicking on the small  in the top right corner of the panel.



2. Enter General Data. The “Create Shopping Cart” screen will appear. Start your order in the “General Data” section of this screen.

- The first step is to rename the cart to something that you will recognize and that will make it easier for you to locate the cart in the future. This sample cart is renamed “Dr. Smith Maintenance Agreement 04/11/13.”

Order Edit Close Print Preview Save Check

General Data

Buy on Behalf of: Christina Harris

Name of shopping cart: **Dr. Smith Maintenance Agreement 04/11/13**

Default Settings: [Set Values](#)

Team Shopping Cart: Make available to my purchasing substitutes

Approval Process: [Display / Edit Agents](#)

Document Changes: [Display](#)

Document Type: SERV

Shopping Cart Vendor: 12345

3. Click “Set Values” next to the label “Default Settings” to set the default values that will be carried throughout this cart. For example, you can set up the cost assignment and G/L number, split the cost distribution, and set up the product category for the cart here, and the default data will populate each line in the cart.

Helpful Hint When the “Change Default Settings” dialog box appears, you won’t see all of the tabs that are available to you. Stretch the box horizontally so that all of the tabs appear or just click on the white file folder to display a list of the available tabs.

Order Edit Close Print Preview Save Check

General Data

Buy on Behalf of: Christina Harris

Name of shopping cart: Dr. Smith Maintenance Agreement 04/11/13

Default Settings: **Set Values**

Team Shopping Cart: Make available to my purchasing substitutes

Approval Process: [Display / Edit Agents](#)

Document Changes: Display

4. Click Item Basic Data tab. Enter the “Product Category.” The “Product Category” field should show as “SERVICE AGREEMENTS”.

- Click the Product Category icon in the field to “Search Product Category”. Type a portion of the description surrounded by asterisks (*) into the Description field, i.e: *agree*.
- Click “Start Search”.
- Clicking the words “SERVICE AGREEMENTS” will automatically populate the “Product Category” field.

Change Default Settings

Your data will be transferred to all new items. Items already in the shopping cart will be unchanged.

Item Basic Data Account Assignment Internal Note

Buy on Behalf of: Christina Harris

Goods Recipient: Christina Harris

Product Category: **41100000** LAB SUPPLIES & EQUIP

Purchase Group: Purchasing Grp 37 JHU

Company Code: JOHNS HOPKINS ENTER

Location / Plant: 1001 Mudd Hall Central 1001 Mudd Hall Central Stores

Storage Location: Storeroom

OK

Search Product Category

Display As: Flat List

Note: Placeholder search with * is possible. Search ignores upper/lowercase spelling.

Product Category ID:

Description: ***agree***

Logical System:

Restrict Number of Value List Entries 500

Start Search Reset

Item Detail 0 Unsaved data will be lost		
Description	Category ID	Logical System
SERVICE AGREEMENTS	SERVAGMT	R3PCLNT800

OK Cancel

- Click the **“Account Assignment”** tab to enter the cost center, internal order, WBS elements and general ledger numbers for one or more account assignments.

Change Default Settings

Your data will be transferred to all new items. Items already in the shopping cart will be unchanged.

Item Basic Data | **Account Assignment** | Internal Note | Delivery Address / Performance Location

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

Cost Distribution: Percentage (dropdown) | Details | Add Line | Duplicate | Delete | Split Distribution

Number	Accounting Line Number	Percentage	Account Assignment Category	Assign Number	Account Assignment Description	General L
0001		100.00	Internal Order			633024

- Choose the appropriate **“Cost Distribution”** from the dropdown list: Percentage, By Quantity or By Value.
- From the **“Accounts Assignment Category”** dropdown list, select the cost center, internal order or WBS element numbers for one or more account assignments.
- Click in the field under the header **“General Ledger Account.”** Verify the appropriate G/L account with your financial administrator and then enter it into this field.

Note: Even after the default values are set, individual items within the cart can still be changed to different values. This feature can be a great time-saver for carts with multiple lines.

- Click the **“OK”** button at the bottom of the pop-up to accept the changes.

- Select the **Document Type** for your order. In this case, we'll change it to **“SERV”**.

Document Type: All Values

Show Filter Criteria | Personal Value List Settings

TransactionType	Description
EMPO	Emergency Purchase
IMPO	Bill Only PO
LEAS	Lease Purchase Order
LVPO	Low Value Purchase
MXPO	Facilities PO Maximo
PROJ	Facilities Projects
RADP	Radiation Purchase
RXPO	Rx Pad PO
SERV	Service Agreement PO
SPPO	Sponsored Projects

OK | Cancel

Order | Edit | Close | Print Preview | S:

General Data

Buy on Behalf of: Christina Harris

Name of shopping cart: Dr. Smith Maintenance Agri

Default Settings: Set Values

Team Shopping Cart: Make available to my pr

Approval Process: Display / Edit Agents

Document Changes: Display

Document Type: SERV

7. Enter Shopping Cart Vendor Number. Enter the vendor number or select the vendor by clicking the icon in the **“Shopping Cart Vendor”** field.

- When the search pop-up window appears, you may fill in any of the fields to search for your preferred vendor.
- The easiest way to search for a supplier is to enter the vendor’s name in the **“Vendor Name”** field, using wildcard characters both before and after the name. This will make sure you will be able to find the vendor even if the business name has additional words or characters before or after the main part that you recognize.
- After you’ve entered your search criteria, click **“Start Search”** to display a list of vendors.
- The search results populate below the **“Start Search”** button.
- Click the supplier name just once and the vendor data will be automatically populated in your cart.
- You can also click the gray box to the left of the vendor number and click **“OK”** to transfer the vendor information and return to the cart.

Order Edit Close Print Preview Save Check

General Data

Christina Harris Approv

Business Partner Number: All Values

Hide Filter Criteria

Vendor Number:

Vendor Name:

Purch. Organization:

Purch. Org. ID:

Country Key:

Region:

Postal Code:

City:

Street:

Restrict Number of Value List Entries To

Start Search Reset

Vendor Num...	Vendor Name	Name 2
1000299	ADVANCED TARGETING SYSTEMS	
1000616	ACADEMY OF NUTRITION AND DIETETICS	FKA AMER
1000653	AMERICAN MARKETING OF PLASTICS LLC	

OK Cancel

8. Contract/Line. If this order is a Johns Hopkins Health System order, you may enter the JHHS contract number and contract line number into the Contract/Line field.

Note: This field is *not* mandatory. This is for **JHHS use only**.

Approval Process: [Display / Edit Agents](#)

Document Changes: [Display](#)

Document Type:

Shopping Cart Vendor:

ADVANCED TARGETING SYSTEMS

Contract / Line:

Item Overview

Details Add Item Copy Paste Duplicate Delete

JHHS Contract Number

JHHS Contract Line Number

Product Category

LAB SUPPLIES & E

LAB SUPPLIES & E

9. Item Overview. Go to the first line in the order and start entering the order information. You'll work your way across the line for each item before you press Enter.

Note: If you set up the default cart settings, much of this information will already be populated for you.

Item Overview												
Details Add Item Copy Paste Duplicate Delete												
Line Number	Product ID	Description	Product Category Description	Quantity	Unit	Net Price / Limit	Per	Currency	Delivery Date	Notes	Attachments	At
•			SERVICE AGREEMENTS	1.000		0.00	1	USD	04/12/2013	Q	Q	
•			SERVICE AGREEMENTS	1.000		0.00	1	USD	04/12/2013	Q	Q	

- Start with the **"Description"** field and enter text that identifies an activity or phase in the contract. If a quote will be attached, please, include the quote number in the description field.
- Ensure the **"Product Category Description"** shows the **"SERVICE AGREEMENTS"**.
- Enter the **"Quantity"**. This could be the quantity of the items or the total dollar value of the materials or services requested, or the total budgeted for the service. For example, when entering the "Quantity" you will need to know how payment will be made:
 - **Will your department be billed per month at the same amount?** Then, enter the quantity as 12 months at 1,000.00 USD per month.
 - **Will your department be billed a onetime payment?** Then, enter the quantity as 1 YR at 12,000.00 USD per year.
 - **Will your department be billed a different value as service is provided** such as when your department has a contracted labor fee, the service is provided and the department receives a bill for \$100.00? Then, enter the quantity as 12000.00 DOL at 1.00 USD.
- Enter the Unit of Measure in the **"Unit"** field. This should be the Unit of Measure described in the agreement or DOL if the dollar amount was listed in the Quantity field.
- In the **"Net Price/Limit"** field, enter the price per each single item or if the dollar amount was listed in the Quantity field, enter 1.00.
- The **"Delivery Date"** is when the service is expected to end and the Delivery Date must reflect the end date of the agreement.
- Ignore the **"Per"** field.
- When finished, click **"Enter"** on the keyboard to apply your selections.

Item Overview												
Details Add Item Copy Paste Duplicate Delete												
Line Number	Product ID	Description	Product Category Description	Quantity	Unit	Net Price / Limit	Per	Currency	Delivery Date	Notes	Attachments	At
•		Maintenance Quote 12345	SERVICE AGREEMENTS	12000.00	DOL	1.00	1	USD	04/18/2014	Q	Q	
•			SERVICE AGREEMENTS	1.000		0.00	1	USD	04/12/2013	Q	Q	

Helpful Hint

Don't forget to click **"Enter"** on your keyboard when you have completed the line to ensure your order details appear.

- 10. Details Button.** After you click “Enter”, the “Details” button will become active. Click it to display the details for the first line in your order.

Line Number	Product ID	Description	Product
1		Maintenance Quote 12345	SERVIC
			SERVIC

- 11. Item Data.** The first tab, “Item Data” will automatically be displayed.

Enter the Supplier Product Number or the Manufacturer Part Number, where applicable.

Item Data | Account Assignment | Notes and Attachments

Identification

Item Type: Material

Product ID: []

Description: Maintenance Quote 12345

Product Category: SERVAGMT SERVICE AGREEM

Order as Direct Material:

Company Code: JHEN JOHNS HOPKINS ENTERPRISE

Supplier Product Number: []

- 12. Account Assignment.** Check to ensure your “Account Assignment” information is accurate.

Helpful Hint

If an error occurred, you are able to correct it. Update information. In the following order, click the “Copy”, “Change All Items” and “Paste” buttons to ensure all of the updated/corrected information is applied to all of the line items.

Details for item 1 asdf

Item Data | **Account Assignment** | Notes and Attachments | Delivery Address/Perform

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

Cost Distribution Percentage Details Add Line Copy Paste Duplicate Delete

Number	Accounting Line Number	Percentage	Account Assignment Category	Assign Number
0001		100.00	Internal Order	1234567890

Clipboard

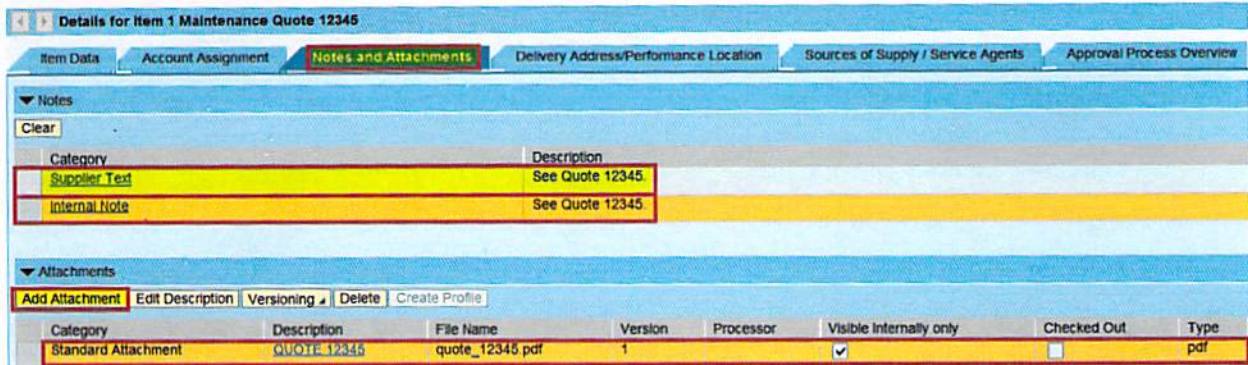
13. Attach Required Documents. Click the “Notes and Attachments” tab to attached documents to the Shopping Cart. All supporting documents to show services and pricing (Invoice, Quote, Bill, Estimation of Work, Statement of Work, Contract, Agreement and or Proposal) have to be attached to the shopping cart. To attach documents, click the “Add Attachment” button. A pop-up window will prompt you to browse for the document(s) that you would like to attach.

Helpful Hint

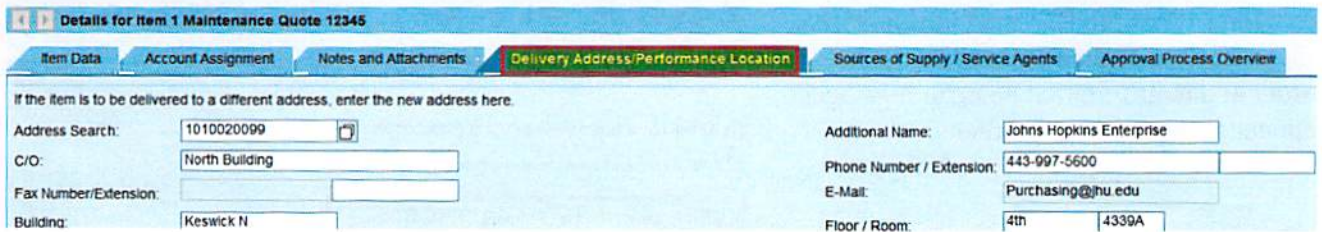
If notes and/or attachments are added to one line item, they must be attached to all line items to avoid splitting the shopping cart into multiple purchase orders.

Helpful Hint

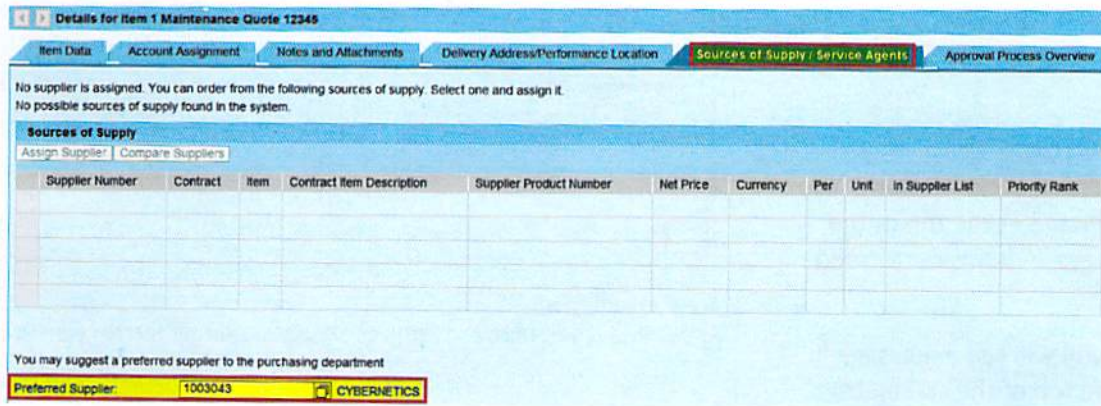
Please, refer to quote or other document numbers that the vendor uses in both the Supplier Text so the vendor will know which of its documents go with the purchase order.



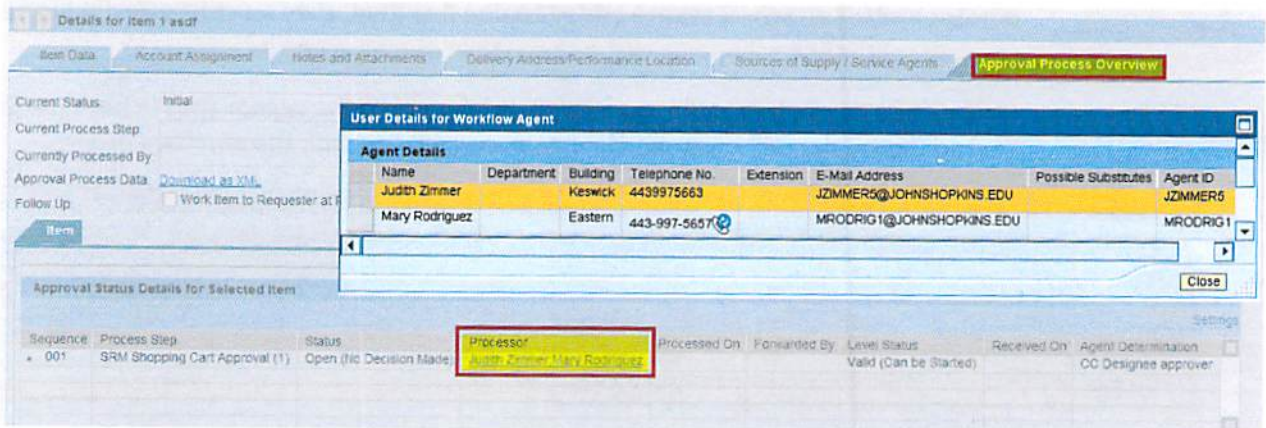
14. Delivery Address/Performance Location tab. Ensure all of the delivery information is still accurate under the “Delivery Address/Performance Location” tab.



15. Sources of Supply/Service Agents tab. Ensure the Shopping Cart Vendor is still correct under the “Sources of Supply/Service Agents”.



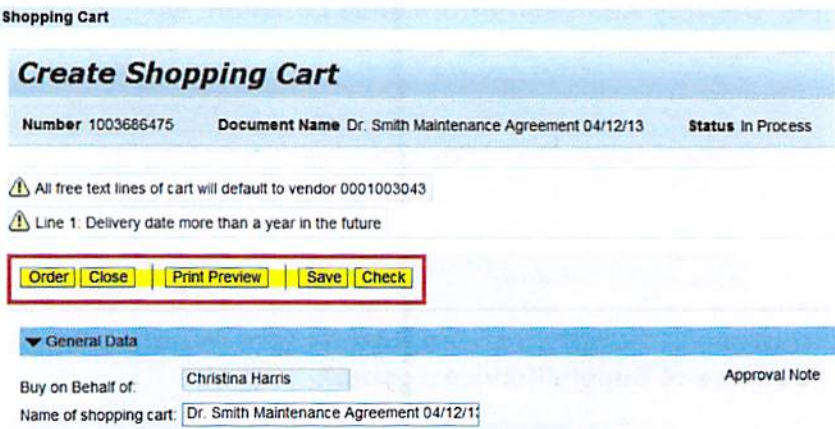
- 16. Approval Process Overview.** Click the “Approval Process Overview” to view the “Approvers” on your shopping cart. To find the Approvers’ contact information, click their names under Process. Clicking the linked names opens the “User Details for Workflow Agent” pop-up. This pop-up contains the names, departments, buildings, telephone numbers, email addresses and JHED IDs of the Approvers. You will then be able to contact the Approvers, if needed.



Helpful Hint

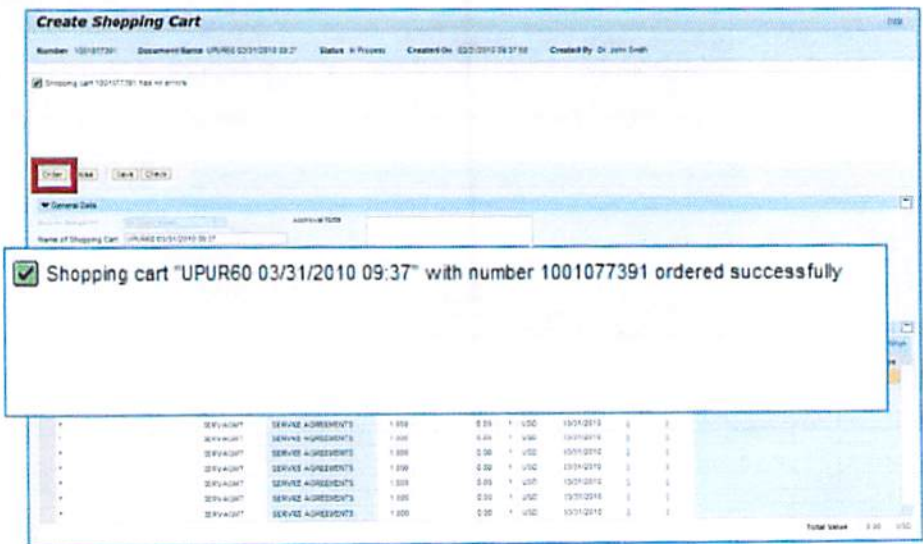
JHHS: Additional approval will be required by Clinical Eng for your hospital and Capital Administration.

- 17. Check the Order.** Your order is now complete. Click the “Check” button at the top or bottom of the screen to verify the order and to ensure that no error messages appear at the top of the screen.



- 18. Place the Order.** Once you have verified the order, click “Order”. You will see a message at the top of the screen that says “Actions performed successfully.”

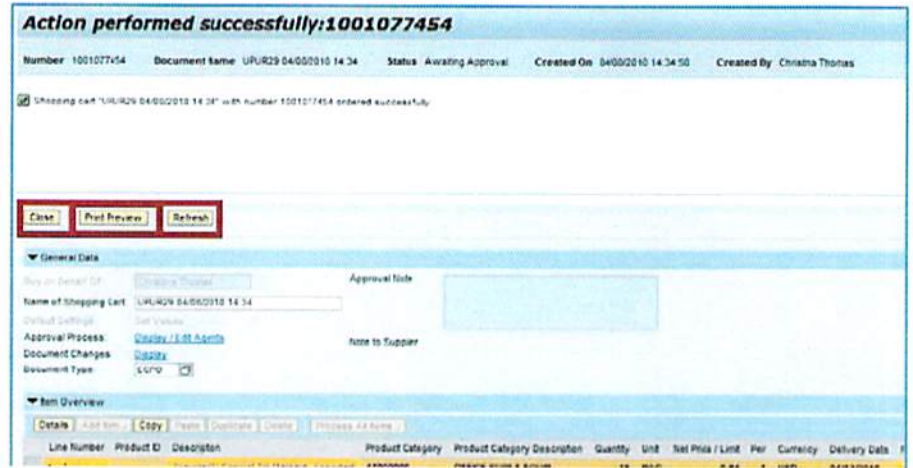
In addition, you will see a message in the box at the top of the screen that says that the shopping cart was ordered successfully.



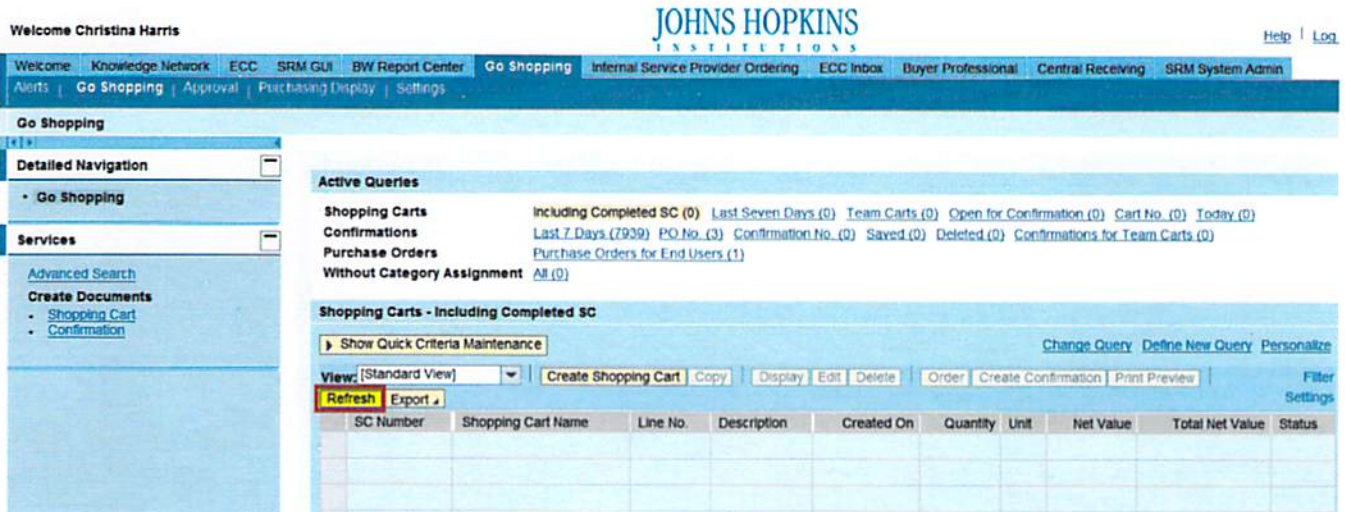
19. **Click the Refresh.** When your order is complete, click the “Refresh” button.

20. **Print Preview.** You will then be able to “Print Preview”. Always print or save a copy of the order.

21. **Click the Close button.** You will then be able click the “Close” button to close the cart and return to the Shopping Cart Home Page.



22. **Click the Refresh.** Click the “Refresh” on the Shopping Cart Home Page to see the new shopping cart order in your queue.



23. **All done!** The SERV Shopping Cart order has been successfully entered into SAP and will process to the next workflow step.



Always click “Refresh” when you get to the Shopping Cart Home Page to see your most recent orders; the document numbers will not appear in the search results until you have clicked “Refresh”.