JOHNS HOPKINS
MEDICINE

JOHNS HOPKINS HEALTH SYSTEM CORPORATION
THE JOHNS HOPKINS HOSPITAL

SAP SHOPPING CART

USER GUIDE

JHM SAP Training Team
www.hopkinsmedicine.org/sap

Table of Contents

PROCUREMENT AT JOHNS HOPKINS

This section is a general discussion of how supplies and services are procured using the SAP system's Shopping Cart. First we'll look at how Shopping Cart fits into the Supply Chain picture along with Online Payment and Travel.

SAP SHOPPING CART IS ONE PART OF SUPPLY CHAIN

The Johns Hopkins SAP Supply Chain system controls the flow of goods and services. The SAP Shopping Cart is the transaction which allows you to procure items by requesting the Purchasing Department to create a Purchase Order document to send to the vendor. The following table illustrates the differences between Shopping Cart, Online Payment, and Travel/Expense Reimbursement.

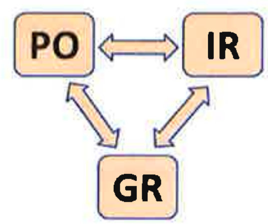
Transaction	Explanation	Primary Document
Shopping Cart	The vendor requires a purchase order before providing supplies, or .	Purchase Order (PO)
FV60 Online Payment Request	Hopkins does not require that a purchase order be created to provide these specific supplies *(See the PO Exception list in the Appendix)*	Vendor Invoice *(for designated non-PO purchases)*
Trip Travel and Expense Reimbursement	Items are initially purchased using an individual's personal funds	Employee Expense Receipt

WORKFLOW: SHOPPING CARTS TO CONFIRMATIONS

The SAP Shopping Cart is really a requisition. By ordering with the shopping cart you are sending a request to one of our purchasing agents to procure the items for you. The purchasing agent orders the items listed in your shopping cart by sending a document called a Purchase Order (PO) to the vendor. The vendor responds by sending you the items, along with a bill (Invoice). This invoice references the PO number used to order the items. When the items are delivered to you, SAP must be notified, by confirming the receipt, so that the vendor is paid. Here is a graphic representation of this sequence.

THE THREE-WAY MATCH

In accounting, the three-way match refers to a procedure used when processing an invoice received from a vendor or supplier. The purpose of the three-way match is to avoid paying incorrect and perhaps fraudulent invoices.



Three-way refers to the three documents (PO, IR, GR) involved:

1. Purchase order (PO) that was prepared by the Purchasing Group.
2. The vendor's invoice (IR) which was received becomes part of an organization's accounts payable if approved.
3. The receiving report, or Goods Receipt (GR) that was prepared by the organization.

Match refers to the comparison of the quantities, price per unit, terms, etc. appearing on the vendor's invoice to the information on the purchase order and to the quantities actually received. After the vendor's invoice has been validated by the three-way match, it can be further processed for payment.

At Johns Hopkins, this receiving report is called a Goods Receipt, or a Confirmation of Goods Receipt (GR).

If you neglect to do a GR when your items are delivered, you might receive an email from the SAP system informing you of a problem with the invoice. If you get one of these emails, you need to go back to the Shopping Cart document and create a confirmation of goods receipt. Goods Receipts are discussed on page 31.

THREE WAYS TO ORDER WITH SHOPPING CART

This is not an "official" breakdown of ordering methods but it's a convenient way to differentiate between three common approaches.

1. Ordering from a hosted catalog. The term Hosted Catalog is used in SAP to mean a list of items which are commonly needed within the entity. Many of these products are carried in stock in various plants (warehouses, storerooms, etc.) This is how people order supplies from the MDC, warehouse, storeroom,

central stores, etc. (There are several names for what are essentially storage plants for stock items.) The key fact about this type of order is that the item must have a Product ID number.

Product ID, and is the first column in the item overview section. Some people prefer the term SAP number. Regardless, it is the number assigned to that particular product to identify it in the catalog.

2. Ordering from a HopkinsSelect eMarketPlace vendor. Office Depot is the most common example of this type. The key fact about this type of order is that the system sends you to that vendor's website where you can browse and order online.

3. Ordering free text.

GETTING READY TO ORDER

Before you open a new Shopping Cart screen it's a good idea to be ready with a few important facts and numbers. For example:

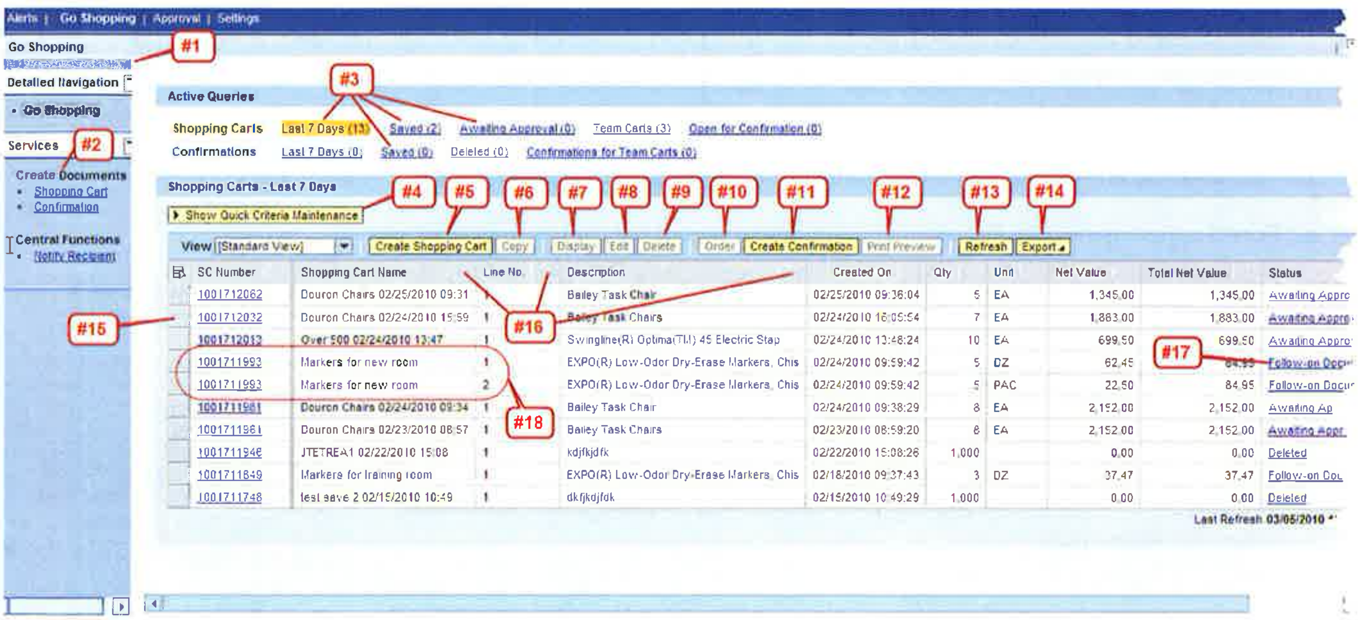
- The number of the account you will use to pay for the order. This may be a Cost Center number or an Internal Order number (fund or grant), or a WBS number from a project plan.
- The General Ledger account number which identifies how the item will be budgeted. GL numbers are six digits. In shopping carts, they usually start with 63 or 64. For example the GL number for office supplies is 633032.
- The Product Category of the item. For JHHS shoppers the product category defaults to Patient Supp & Disp, which includes most clinical supplies. If you're ordering from Office Depot, you'll need to change the product category to OFFICE SUPP & EQUIP.
- If you will be ordering items using information obtained from a vendor's website or catalog, try to have the item's description, catalog number, and price ready.

THE SHOPPING CART HOME SCREEN

The "Go Shopping" screen is your starting point and your control center. This is the screen you get when you click Go Shopping / Go Shopping in SAP.

From this one screen you can create a new cart, check the status of carts, confirm, research, and more.

FEATURES OF THE SHOPPING CART "HOME PAGE"



1. The left-pointing triangle above the **Detailed Navigation** panel lets you close that section. This provides a wider view space for your cart list.

2. The **Detailed Navigation** panel has links to create carts and confirmations. Note that the main part of the screen also has buttons for these functions.

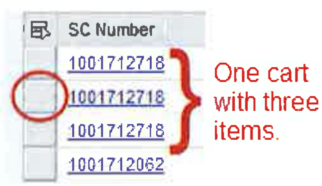
3. The **Active Queries** section lists a number of predefined (system) queries. Selecting one of these choices changes the list of items in the Shopping Carts view.

4. The **Show Quick Criteria Maintenance** button opens a list of fields to further modify the currently viewed query.

5. Click the **Create Shopping Cart** button to start a new cart.

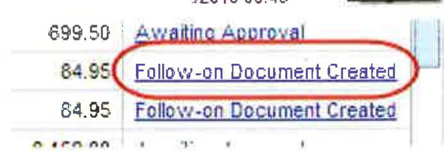
6. The **Copy** button creates a new shopping cart containing all the items and information that were in the original cart. Item information can then be deleted or changed, and new information added. Note that this is similar in function to the Old Purchase Orders and Templates function in the previous version of Shopping Cart, but does not replace it.
7. The **Display** button opens a selected cart for viewing. If it's a saved or unapproved cart, it may be edited. Note that clicking the Shopping Cart number does the same thing.
8. **Edit** opens a selected cart for editing, but only if the cart can be further edited at that point in the workflow. This does the same thing as clicking the **Display** button mentioned above, followed by the **Edit** button within the displayed cart.
9. **Delete** deletes a selected cart, but only if deletion is allowed at that point in the workflow. Important note: a deleted cart does not disappear from the list. It remains on the list of carts but the status of the cart is changed to Deleted.
10. The **Order** button puts a selected Saved cart into workflow.
11. The **Create Confirmation** button lets you go to the goods receipt screen for the selected cart.
12. **Print Preview** generates the standard shopping cart pdf file for the selected cart.
13. **Refresh** forces SAP to display the most up-to-date list of carts. You should click Refresh after every change in your shopping carts.
14. **Export** saves the shopping cart list as an Excel file.
15. Click the gray square on the left of a row in any list to select that row.

    In the Active Query views, the individual items in a cart are listed separately. If you select one item in the cart and then click an action button, that action will affect the whole cart.



16. Sort by any column in an Active Query view, by clicking in the blank space on the right of the column heading.

17. Click once on the underlined text in the status column to get more information. For example, if the status is *Follow-on Document Created*, you can click the text to move immediately to the Shopping Cart screen which displays the Purchase Order and other information.

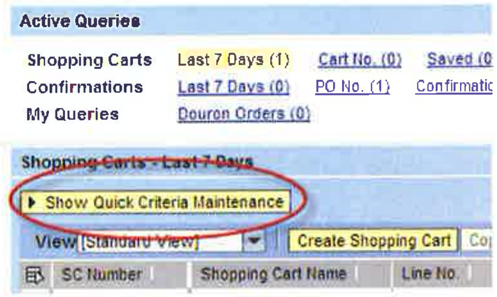


18. Note: by default, the active query view displays the items in a cart on each row. Therefore a single cart may be represented by multiple rows.

QUICK CRITERIA MAINTENANCE

In the Go Shopping Screen, the system displays the last seven days of orders, by default.

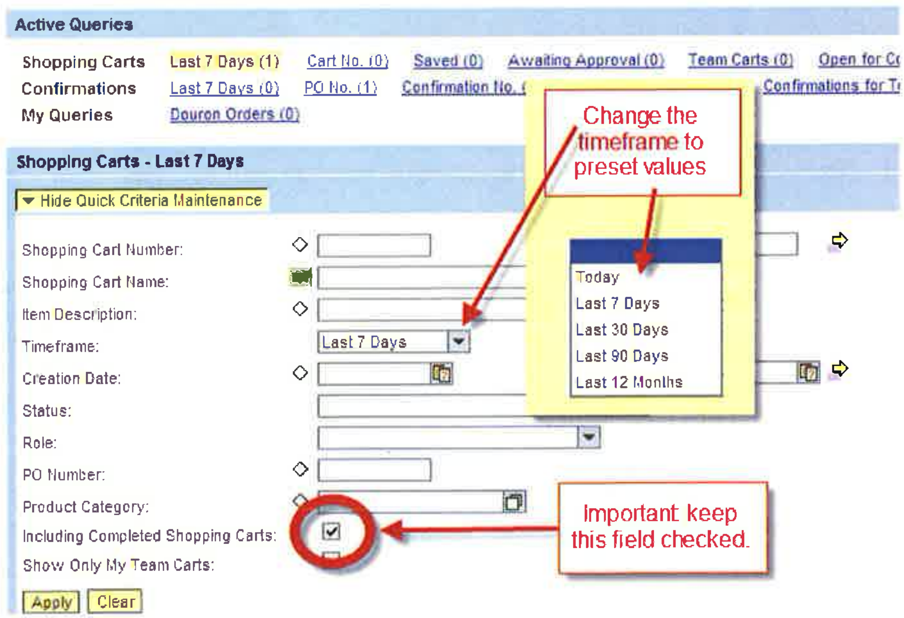
To view older carts or to find specific carts, you can modify the search criteria for the Last 7 Days query. Do this by clicking on the Show Quick Criteria Maintenance button. This opens the criteria section, allowing you to change the timeframe.



Note that you can also search for shopping carts based on criteria such as the shopping cart name or number, the PO number, the items in the cart.

The **Creation Date** range feature allows you to search for carts created more than 12 months ago.

Clicking the **Apply** button at the bottom of the section makes it happen.



VERY IMPORTANT: Any changes you make to the criteria remain in effect until you manually change them back. Therefore, you may want to erase any entries in the fields, such as cart name, when you're finished and click Apply again to set your criteria back to the default.

You can also click the Clear button to erase all criteria. But if you do this, be sure to enter a timeframe and put a check in the completed shopping carts field.

CREATING SHOPPING CARTS

This section describes three general kinds of shopping carts:

- HopkinsSelect eMarketplace carts - which are used to order materials from the "online" or "punchout" vendors.
- Internal Catalog carts - which are used to order approved materials from vendors whose products are listed in the "hosted catalogs". This includes items in the storeroom or MDC.
- Free text carts - which are used to order any item (or service) not available through the eMarketplace or an internal catalog.

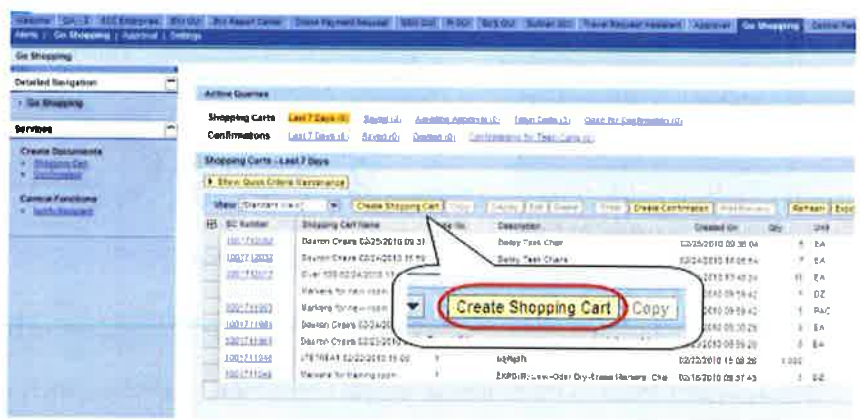
STARTING SAP AND CREATING A NEW CART

Whichever shopping cart you need to make, they all start out this same way.

1. Access SAP by double-clicking the SAP@JH icon[1] on your desktop.

2. In SAP, click the **Go Shopping** tab, then again click the **Go Shopping** tab on the next line.

3. In the Shopping Cart "home" screen, click the Create Shopping Cart button located along the top of the query view.



[1] If your computer doesn't have the SAP icon, type the URL ***sap.johnshopkins.edu*** in the address bar of your browser. DO NOT include http or www.

4. In the **General Data** section at the top of the screen, change the name of the cart, if desired.

CREATING A FREE TEXT SHOPPING CART

In this example, the cart is for eight chairs from Douron, Inc. In their catalog, they are listed as Bailey Task Chairs, Catalog # 1234, price $269.00 each. Also, we have a quote from Douron, which we will attach to the cart.

1. Open a new shopping cart.

2. In the **General Data** section at the top of the screen, change the name of the cart, if desired.

   Note: by default, a new shopping cart's name defaults to your JHED ID, date, and time.

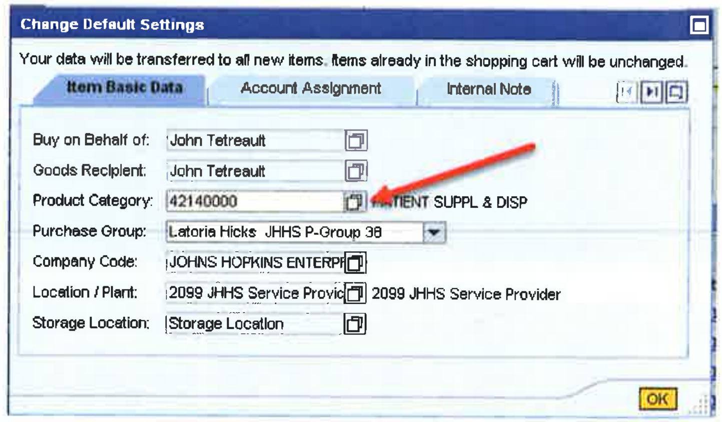
   Renaming the cart is optional, but it does make it easier to search for the cart in the future. For this example, change the name to "Douron – Chairs for waiting room".

SETTING DEFAULT VALUES

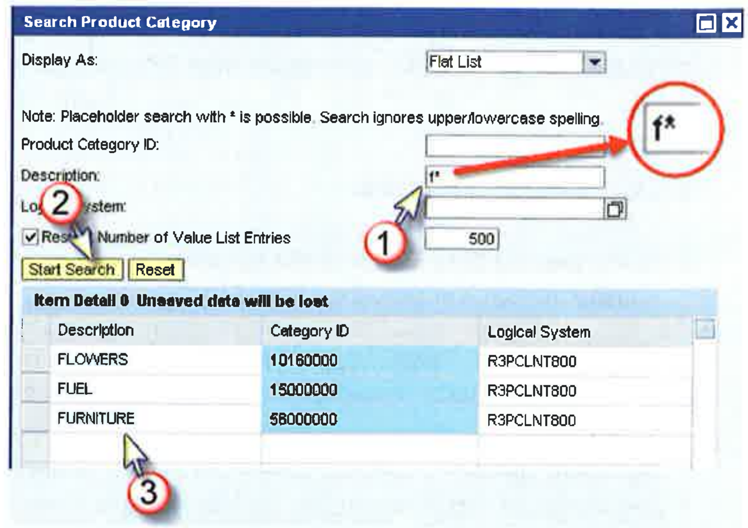
Do this every time

3. The next step is to set the default settings for the cart. Click Set Values.

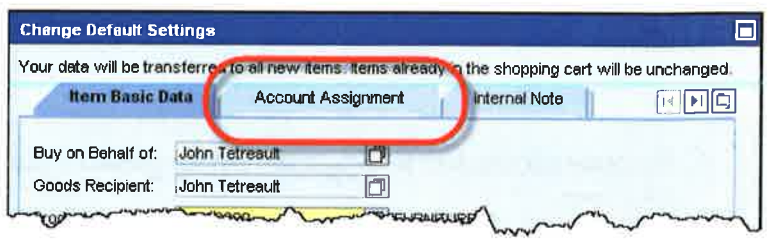
4. This opens the Change Default Settings dialog box. There are several tabs along the top. In the first tab, Item Basic Data, click the white lookup box next to the Product Category field. We need to change the category to furniture.



5. In the Search Product Category box, click into the Description field and enter f* (to find anything that starts with an f). Then click Start Search. In the results list, select Furniture by clicking once on the name.



6. Next, we'll set the values for the account assignment, so click the Account Assignment tab, at the top of the dialog box.



7. The Account Assignment table is where you specify what account, or accounts, will fund the purchase and what G/L (General Ledger) number will be used. In this example, all of the appropriate information is already filled in by default. This is because:

   1. The Cost Distribution method (Percentage) is left as is because we are not splitting the cost in this example and so that field is irrelevant. Note: for instructions on how to do a split distribution, refer to the section titled "Setting up a split distribution in an account assignment", on page **Error! Reference source not found.Error! Bookmark not defined.**.

   2. Again, because we are not splitting the cost in this example, we leave the percentage for line 1 at 100.00.

   3. The Account Assignment Category defaults to Cost Center because, in this example, the requisitioner is a Health System employee and so Cost Center is set her default category. A JHU employee would see the category set to Internal Order.

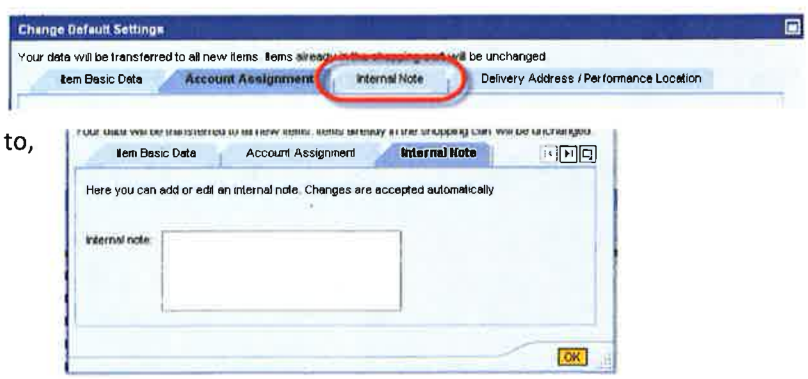
Can change this to IO #

   4. The Assign Number is already filled in with the requitioner's default Cost Center - which she was able to set in her Personal Settings. Internal Order numbers (funds and grants) which are commonly used by JHU requisitioners, cannot be set up as defaults in the Personal Settings screen and must be entered in for each cart.

   5. The General Ledger Account number is already filled in because we selected Furniture as the Product Category in the previous tab. The system automatically filled in the correct general ledger code corresponding to the purchase of furniture, 631001. Note: this does not always happen. If that field is blank, you should find out what is the correct GL number to use for this purchase.

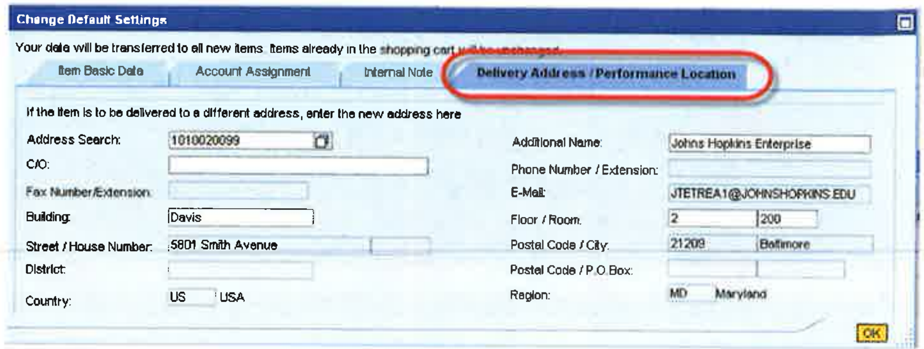
   6. The business area is a three digit number identifying where you work. You can safely leave this blank because the system will fill it in for you. Note that the number is the first 3 digits of your cost center number. For School of Medicine it is 170. In our practice example, it's 480, but we'll leave it blank.

8. Click the Internal Note tab if you need to type a message to someone in Purchasing. In this case, we won't need to, so we can skip that tab.



Use this If you are sending my order to different department.

9. To change the delivery address for the items in this cart, click the Delivery Address / Performance Location tab. Only do this when you need to override your default address. For instructions on how to use this screen, refer to the section titled *Changing the Delivery Address for a Shopping Cart*, on page 41.



10. We're now finished with the Default Settings, so click OK to return to the cart.

Note **IMPORTANT NOTE**: When you click the OK button on this Change Default Settings window, the system will use those settings as default values for any **NEW** items. This means that if you have any rows in your cart already, it will not change the values in those.

In this example, we will skip the three options below the default settings. They are rarely needed.

Note Note: The team shopping cart option allows you to share your shopping cart with your designated "purchasing substitutes." For instructions on this feature, refer to the section titled *Using Team Shopping Carts* on page 45.

The next field is Document type. In this example, we will leave it as is. The default document type for all new carts is ECPO which stands for Electronic Commerce Purchase Order. For an explanation of the other document types refer to page 54 in the appendix.

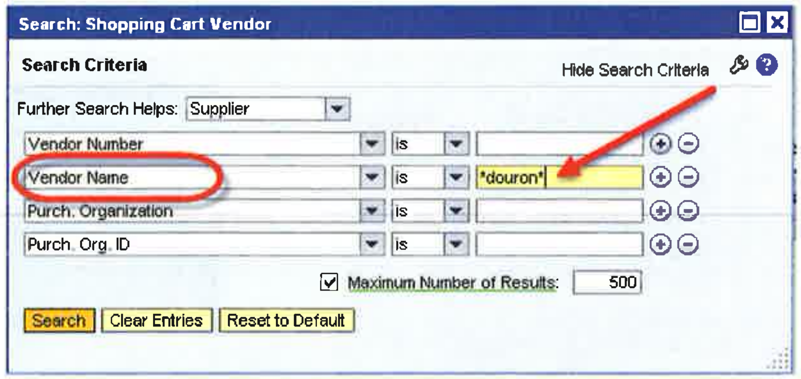
SEARCHING FOR A VENDOR

Since this example is a free text shopping cart (not eMarketPlace, not hosted catalog) we need to specify the vendor. We know the name of the company is Douron but we don't know its SAP vendor number. Follow these steps to search for a Shopping Cart vendor.

1. Click the white lookup box next to the Shopping Cart Vendor field.

2. This opens the vendor search screen. Click into the Vendor Name field and type *douron*. Make sure you put an asterisk before and after your search term.

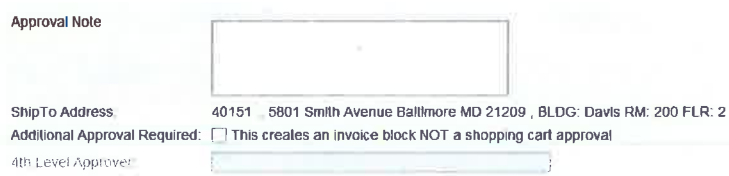
   Then click Search.



Note: Here's another way: change the middle parameter from "is" to "contains"; then just type douron without the asterisks, as illustrated below:

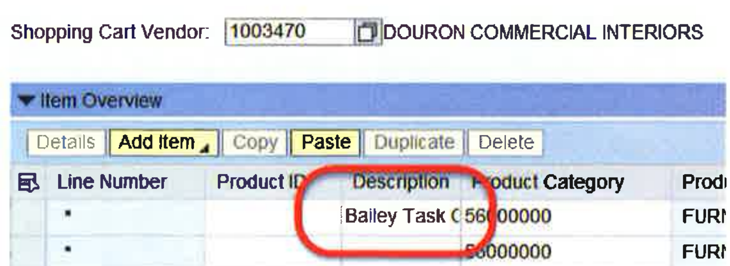
3. In the search results, click once on the vendor's name. This closes the search window and places the vendor number in the Shopping Cart Vendor field.

We will skip the other fields in the General Data section because we don't need them for this cart.



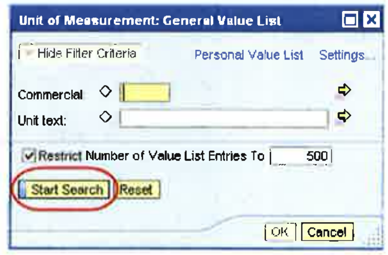
ENTERING ITEM DATA

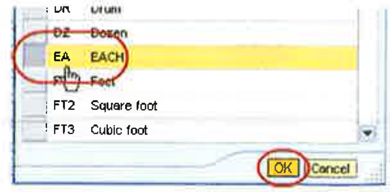
1. Click into the Description field in the Item Overview section. Enter the name of the item as it appears in the catalog or vendor's listing.



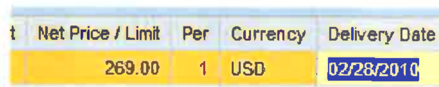
2. Tab to the **Quantity** field and enter the number of items needed, if more than one. Then tab to, or click into, the **Unit** field. Manually enter the unit abbreviation (EA for Each).

3. To view the list of allowed units and their abbreviations, click the search button, then **Start Search.**





4. Tab to, or click into, **Net Price / Limit** field. Enter the price per unit.

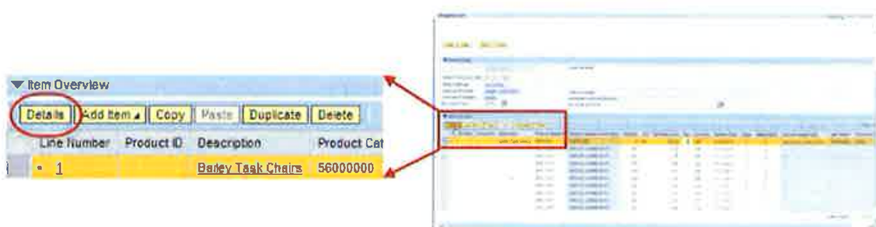


You have now entered the basic information for the first item in the cart. To "post" the item information into the cart, you can either click the Check button at the top of the screen or you can simply press the Enter key.

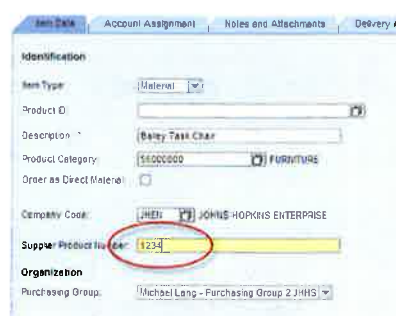
5. Press the Enter key on the keyboard.

At this point you may see messages at the top of the shopping cart screen. These messages come in 3 colors: red, yellow, green. For now, you only need to know that the yellow and green messages can be safely ignored but the red ones indicate errors and must be addressed. The appendix at the end of this document has a table of common error messages and what to do about them.

6. Click the **Details** button along the top of the item overview section.



7. In the **Item Data** section, enter the catalog number (or product or item #) in the field labeled **Supplier Product Number**.

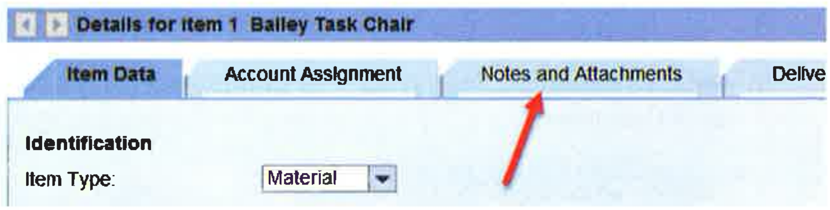


ATTACHING FILES TO A SHOPPING CART

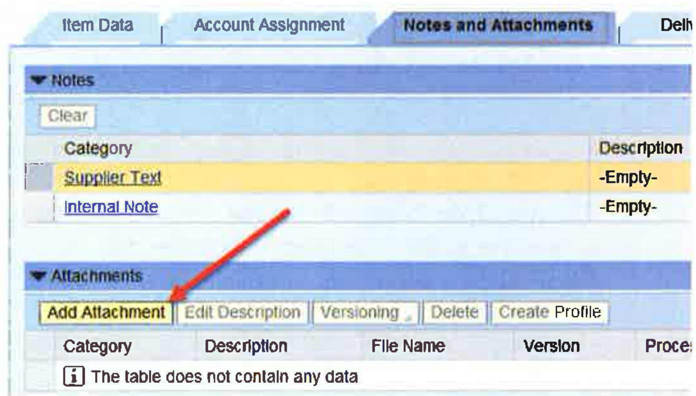
Don't use this unless instock SAP #

1. In this example, we need to attach the quote sent by the vendor. Make sure you've highlighted the first item listed in the Item Overview section, then click the Details button.

2. Select the tab labeled Notes and Attachments.

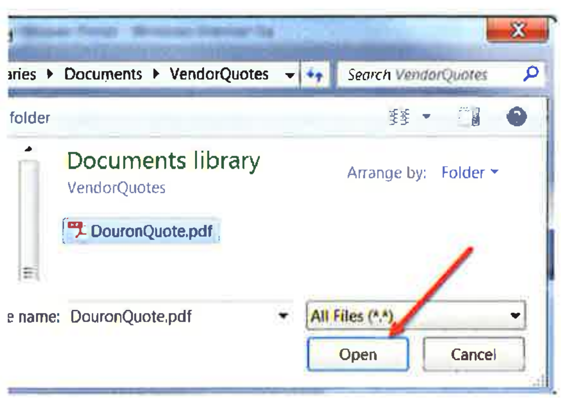


3. Scroll to the bottom of the window, if necessary and click the button labeled Add Attachment.

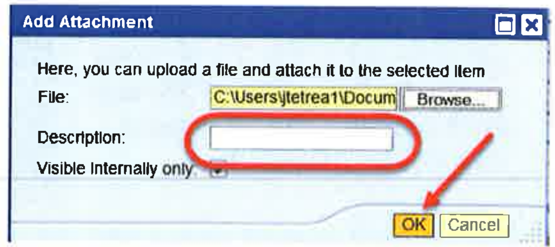


4. Click Browse.

5. Select the file and click Open.

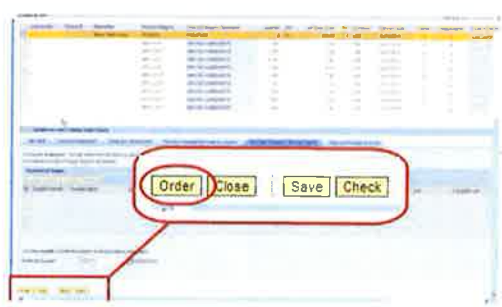


6. Enter a description of the file, if desired. Then click OK.



7. Note: by default the attachment is set to visible internally only. Uncheck this if the attached file is intended to go to the vendor.

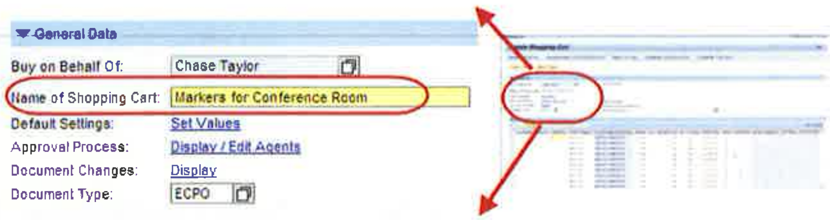
1. Click the **Order** button to put the cart into workflow. Click **Check** to scan for errors. The **Save** button puts the cart on hold. The **Close** buttons allows you to exit the cart without saving.



2. After the cart is ordered, click the **Close** button to return to the Go Shopping screen.

ORDERING FROM OFFICE DEPOT

1. Open a new shopping cart.
2. In the **General Data** section at the top of the screen, change the name of the cart, *if desired*.



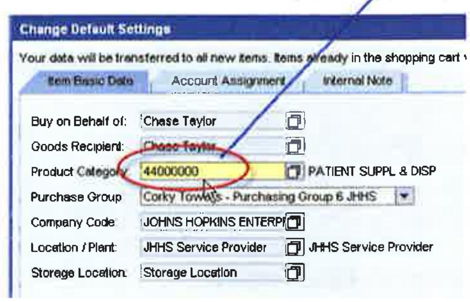
3. Click **Set Values**, also in the **General Data** section.

44000000
office
supplies

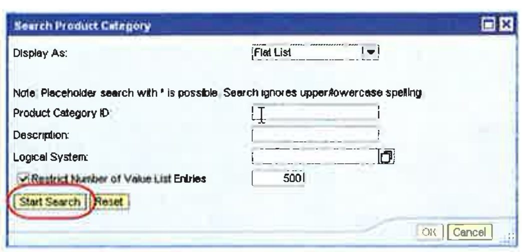
4. Change the product category to Office Supplies:

   Click the search button next to the Product Category field.

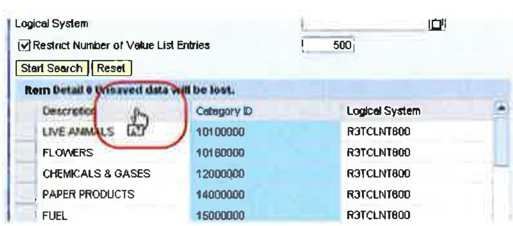
   (Tip: A quick way to change to Office Supp & Equip is to type the number 44 followed by six zeros into the product category field.)



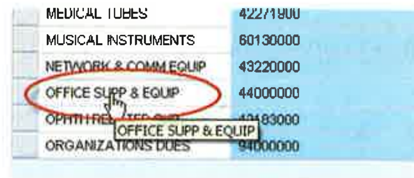
5. Next, click **Start Search**.



6. To make it easier to find your category, sort the list in alphabetical order by clicking on the **Description** field.

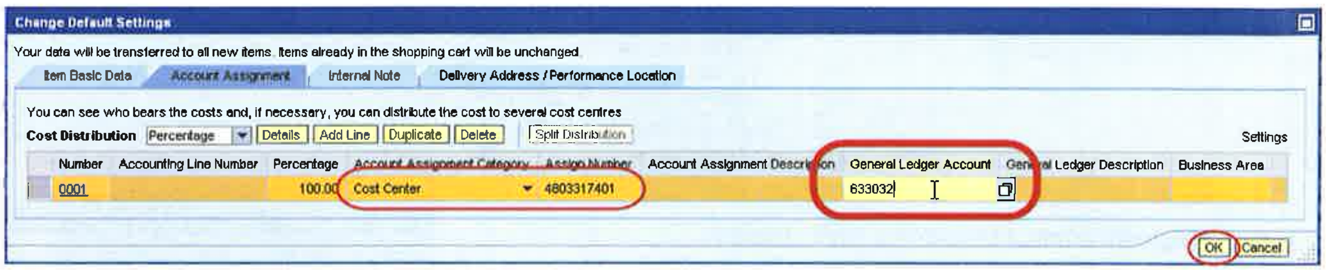


7. Select the category OFFICE SUPP & EQUIP by clicking on the name once.

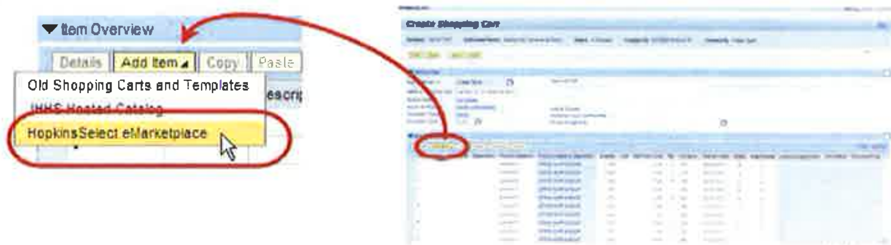


8. Click the Account Assignment tab.

9. Click into the General Ledger Account field and enter the number ***633032***[1], then click the OK button. Note that JHU requisitioners should also enter the correct Internal Order number in the **Assign Number** field.



10. In the **Item Overview** section of the cart, click the **Add Item** button, then select **HopkinsSelect eMarketplace**.



11. Access the Office Depot site.

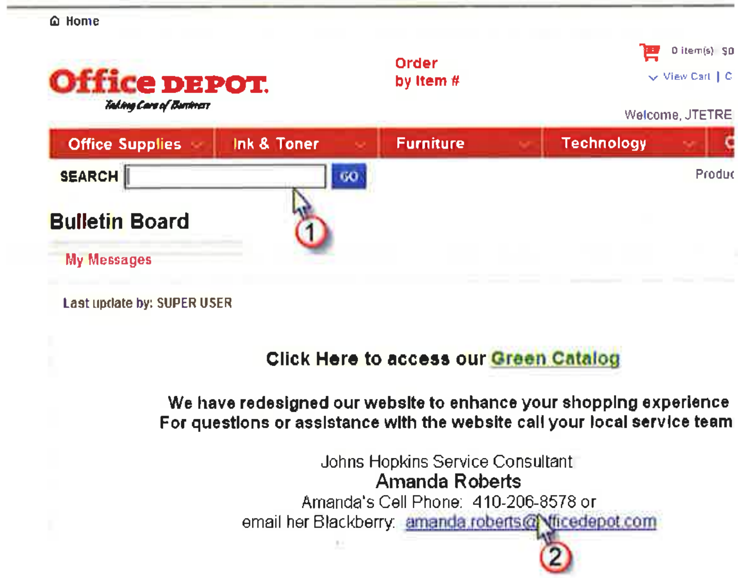
In this example we will order dry-erase markers.

Note: If you already know the Office Depot Item #s for the products you want, use the Order by Item # link at the top of the screen. Otherwise, you can search or browse.

[1] Note to JHU (School of Medicine) shoppers. Some university departments prefer to use the General Ledger number 632001 for Office Supplies.

12. Click into the search field (1) at the top of the screen.

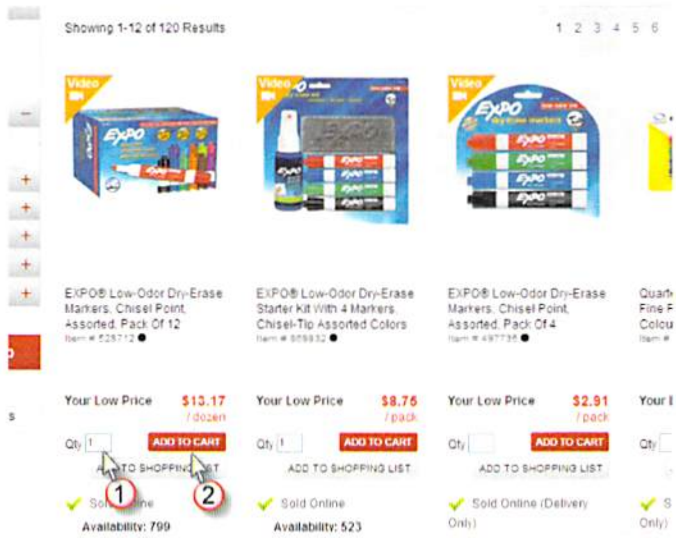
13. NOTE: if you have questions about your Office Depot order, you can contact the Office Depot representatives (2) listed at the home screen.



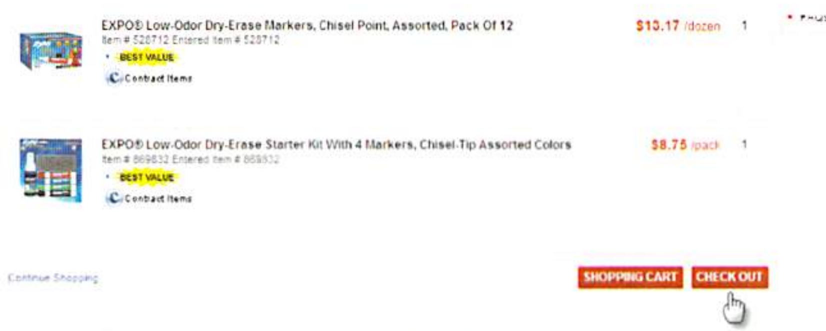
14. In the search field at the top of the screen, enter the item name or number, then click the search button.

15. Select the category of product, if necessary.

16. When you find the item(s) you want, enter the quantity in the QTY field ①, then click the red Add to Cart ② button.

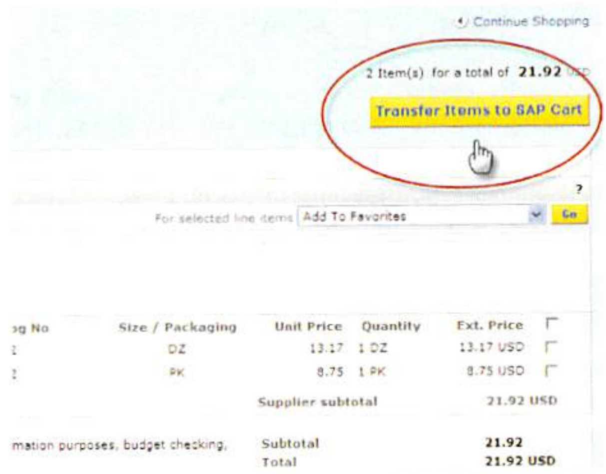


17. When ready, click the Checkout button.



18. Click the Continue button.

19. Click Transfer Item to SAP Cart.

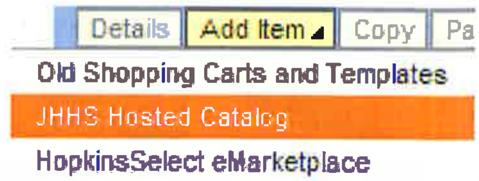


20. Click the **Order** button when ready.

21. Click **Close** to exit the shopping cart.

ORDERING FROM THE INTERNAL CATALOGS

The Internal (Hosted) Catalogs are options on the "Add Item" button. These catalogs are mainly for clinical and lab supplies, but other types of products may be added to these lists as well. Items are added to the Internal Catalogs after they have been approved by the Supply Chain Shared Services Center.

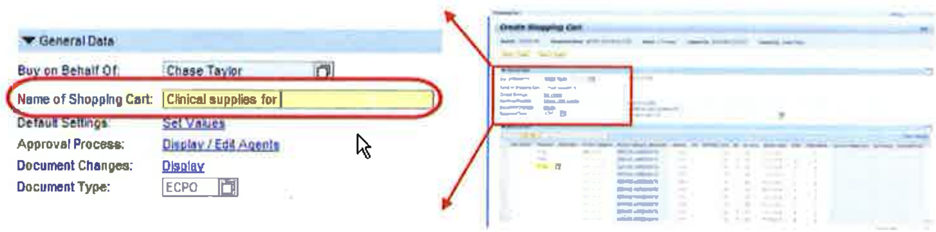


The key, differentiating, feature of the internal catalogs is that all items in these catalogs are given unique Product ID#'s in SAP.

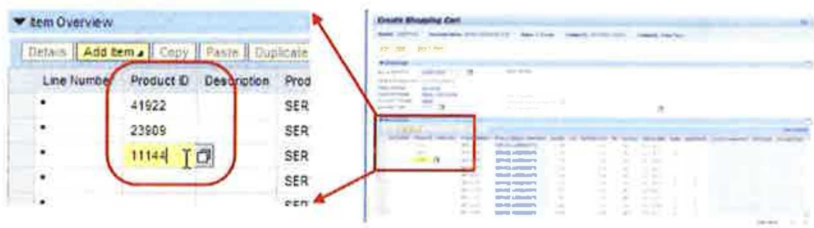
ORDERING BY NUMBER

The best way to order from the Hosted Catalog is by number. If you know the Product ID number (think of this as the warehouse item number) you can order very quickly by simply entering the number and pressing enter.

1. In the **General Data** section at the top of the screen, change the name of the cart, if desired.

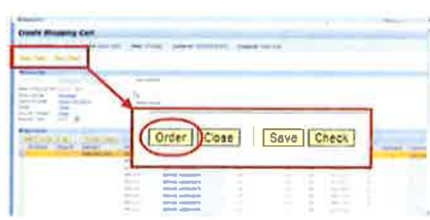


2. Enter the three Product ID numbers in the Product ID field by clicking into each field and entering the number.



3. Press the Enter key when you've entered all the numbers.

4. Click **Order** to complete the order.

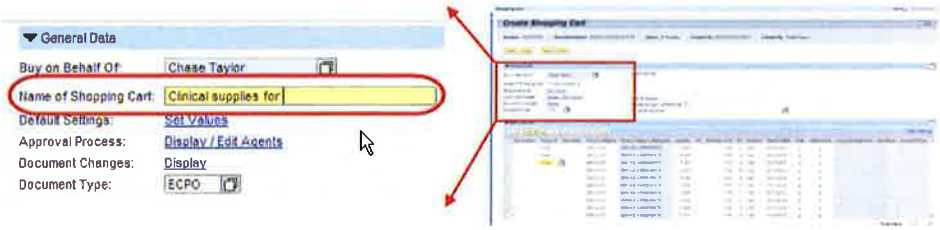


SEARCHING THE CATALOG

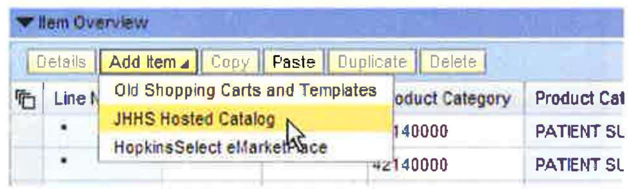
If you don't know the Product ID # for the item you need, you'll have to search in the catalog. In the example below the only thing we know about the item is the manufacturer part number, which is LR05501.

1. Open a new shopping cart.

2. In the **General Data** section at the top of the screen, change the name of the cart, if desired.

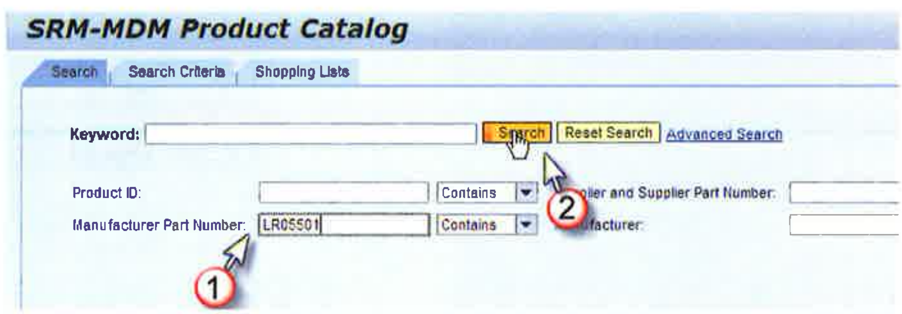


3. Click Add Item, select JHHS Hosted Catalog. (Or whichever hosted catalog your group uses.)



4. The SRM-MDM catalog opens to the main search screen. Click the link at the top for **Advanced Search**.

5. In the Manufacturer Part Number field, enter LR05501. Then click the Search button.

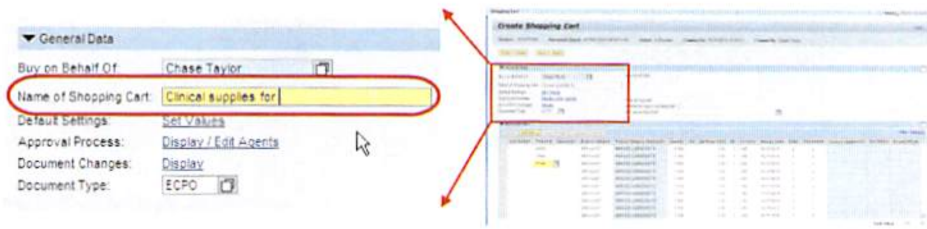


6. Change the quantity, if desired, then click the shopping cart icon to add the item to your cart.

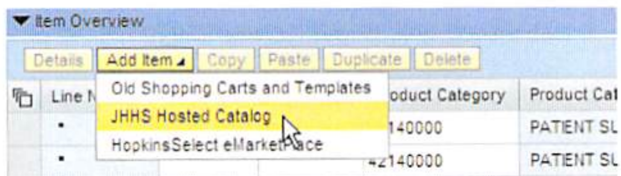
USING LISTS IN THE HOSTED CATALOG

The hosted catalog screen lets you create lists of your favorite items. Shopping lists can be either public or individual. In some cases you may have pre-defined, public shopping lists set up for your work group. The advantage of shopping from a list is that you get to choose from a much smaller pool of items and you can be confident that these are the specific items your group regularly uses.

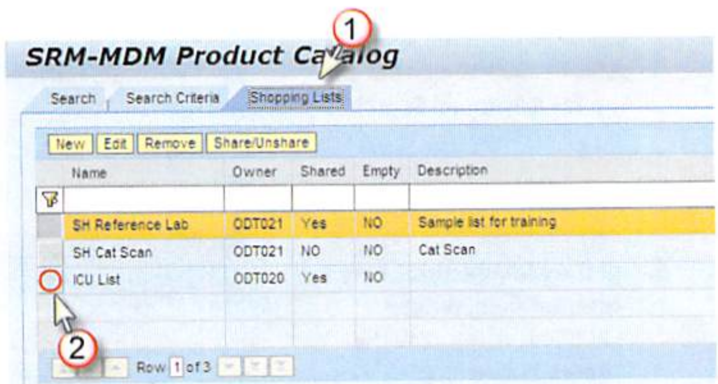
1. Open a new shopping cart.
2. In the **General Data** section at the top of the screen, change the name of the cart, if desired.



3. Click Add Item, select JHHS Hosted Catalog. (Or whichever hosted catalog your group uses.)

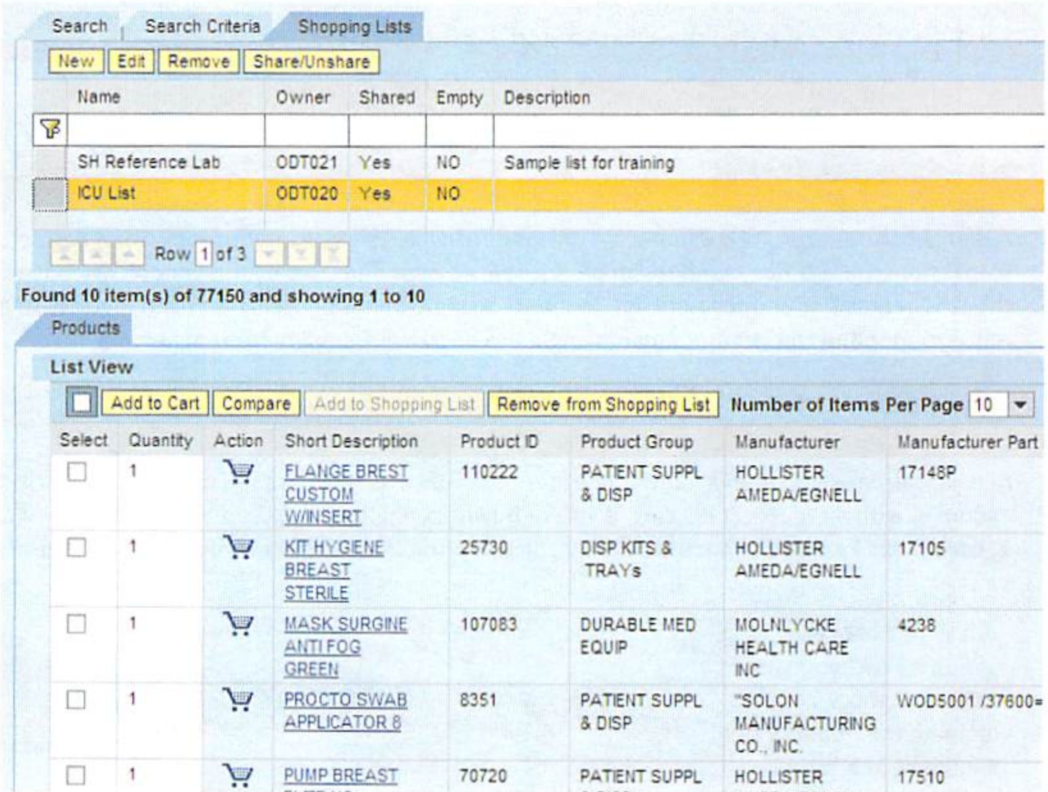


4. When the MDM screen opens, click the Shopping Lists tab.
5. Then click the selection box next to the list you want to use.



6. The table in the lower part of the screen displays the products in your highlighted list.

   To order from the list, check the Select boxes, and change quantities as needed. Then click the Add to Cart button.



CREATING A BLANKET PURCHASE ORDER (BLPO)

WHY USE A BLANKET PO?

A Blanket Shopping Cart is used when a vendor provides services periodically for a defined time period. The blanket purchase order number can be referenced over and over by the vendor when issuing invoices. Because of this, the requisitioner does not have to create a unique shopping cart for each invoice, saving time for the requisitioner and the vendor, and making it easier to track activity for that service.

HOW BLANKET SHOPPING CARTS ARE SET UP

A key difference between a BLPO and other types of carts is the way in which the quantity field is used. For example, with a regular ECPO cart, if you're buying a single item priced at $432.19, you would set the quantity at 1, the unit as EA and the price as 432.19. Simple. The Item Overview row for that item would look like this:

But with a blanket shopping cart you should NOT do it this way. Instead, the quantity field should be the total amount of the blanket, the unit should be DOL (dollar) and the Net Price / Limit should be 1. The item overview row would then look like this:

Don't do it this way for BLPO carts.

Description	Product Category	Product Category Description	Quantity	Unit	Net Price / Limit	Currency	Per	Delive
Something we need	42140000	PATIENT SUPPL & DISP	1	EA	432.19	USD	1	06/25/

It's very important to set up your BLPO with the total price in the Quantity field and the unit as DOL. This is because when the invoices for the PO come in, a Goods Receipt can be confirmed for the amount of the invoice, thereby decrementing the total quantity in the PO.

Do it this way for BLPO carts.

Description	Product Category	Product Category Description	Quantity	Unit	Net Price / Limit	Currency	Per
Service Contract	SERVAGMT	SERVICE AGREEMENTS	5,000	DOL	1.00	USD	1

In some cases, the blanket shopping cart may be set up using units of time. For example, if the agreement is for $600 per month for 1 year, you could set up the cart this way:

Unit is Month

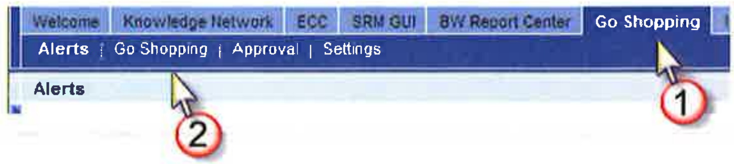
Description	Product Category	Product Category Description	Quantity	Unit	Net Price / Limit	Currency	Per
Service Contract	SERVAGMT	SERVICE AGREEMENTS	12	MON	600.00	USD	1

HOW TO CREATE THE BLPO CART

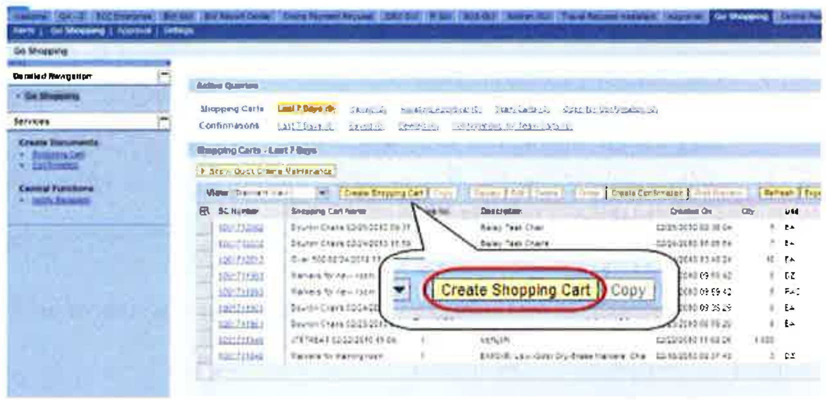
Consider this scenario: the office in which you work has a waiting room area, open to the public, containing a large aquarium with tropical fish. The aquarium is serviced by a local pet shop on a regular basis – usually every two weeks, or as needed. After each service, the vendor sends an invoice for labor and materials. The invoice amounts may vary from visit to visit.

After researching last year's expenditures for this charge, you estimate that the cost this year for caring for the aquarium will likely be about $2500. To set this up, you'll create a BLPO shopping cart. Follow these steps.

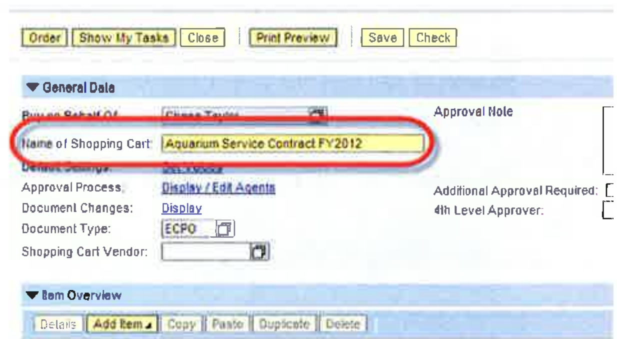
1. In SAP, click the **Go Shopping** tab, then again click the **Go Shopping** tab on the next line.



2. In the Shopping Cart "home" screen, click the Create Shopping Cart button located along the top of the query view.



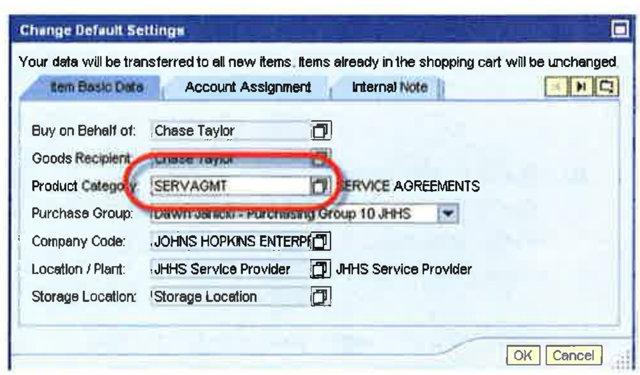
3. In the **General Data** section at the top of the screen, change the name of the cart, if desired.



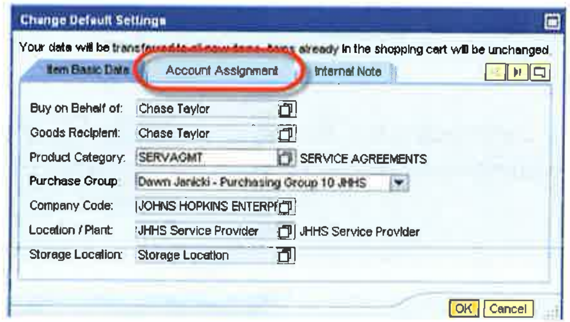
4. Set values for Default Settings, as

needed.

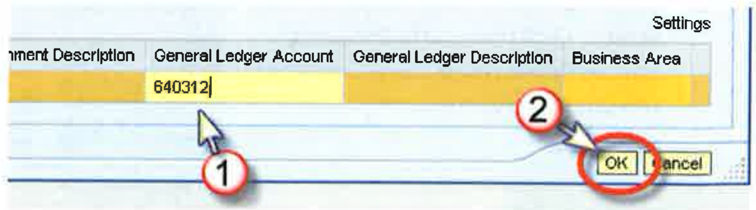
5. Change the product category to Service Agreements by entering SERVAGMT in the Product Category field.



6. Click the Account Assignment tab.

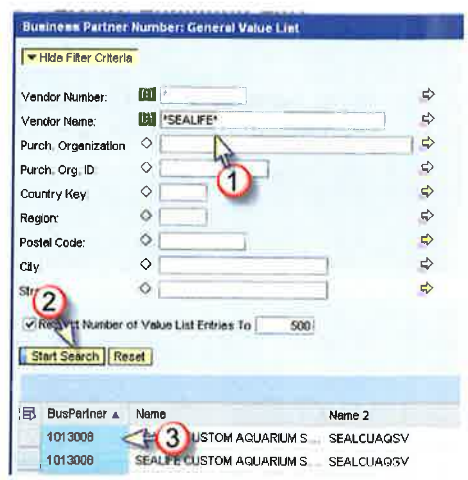


7. Click into the General Ledger Account field and enter the number ***640312***, then click the OK button. This is the GL# for maintenance services. If your department prefers to use a different GL#, then use that one.



(Note that JHU requisitioners should also enter the correct Internal Order number in the **Assign Number** field.)

8. In the Vendor search window, enter the search criteria for the name of the vendor in the **Vendor Name** field ①. Remember to put an asterisk before and after your search term. Then click the **Start Search** ② button. To select the vendor, click once on the BusPartner number ③.



The vendor should then appear in your shopping cart.

9. Click into the **Description** field in the **Item Overview** section. Enter an appropriate description for the line item.

10. Move to the **Quantity** field ①and enter the dollar amount of the service contract. In the **Unit** field ② enter dol. In the **Net Price / Limit** field ③ enter 1.

Think of it this way: you're buying 2,500 DOLs worth of service at 1 USD per DOL.

11. Press the Enter key on the keyboard.

12. If necessary, attach any attachments or notes to the cart.
13. When ready, click Order, then click Close.

CONFIRMATION OF GOODS RECEIPTS

A purchase order implies that the vendor will be paid only when the goods are received by the requisitioner.

- In some cases, this goods receipt is done automatically (for example in the case of an Office Depot order).
- Note that the action of confirming that your order has been received has several names here at Johns Hopkins:
    - "Goods Receipt", "Issuing a Goods Receipt", etc.
    - "Confirmation", "Confirmation of Goods Receipt", etc.
    - "GR", abbreviated in the SAP system.
- If the requisitioner was supposed to confirm the receipt of goods, but neglected to do so, the SAP system sends an email to him or her stating that there is a "quantity discrepancy" in a particular order. If you receive such a message it means you MUST go back to SAP and perform the GR.
- These quantity discrepancy messages are sent to the requisitioner after about a week. If a GR is still not done, SAP sends a second message to the approver.
- A GR can be done "proactively" or "reactively". Reactively is when you get the quantity discrepancy email and go back to do the GR. Proactively is when you do the GR as soon as the order is delivered. Note that if you do the GR proactively, you will not get a "Quantity Discrepancy" email.

There are several ways in SAP to do a goods receipts. You can:

- Do it from the Go Shopping tab (proactive).
- Use the ECC Inbox (reactive).
- Use the Central Receiving tab, if you have one.

Do all orders have to be confirmed? No:

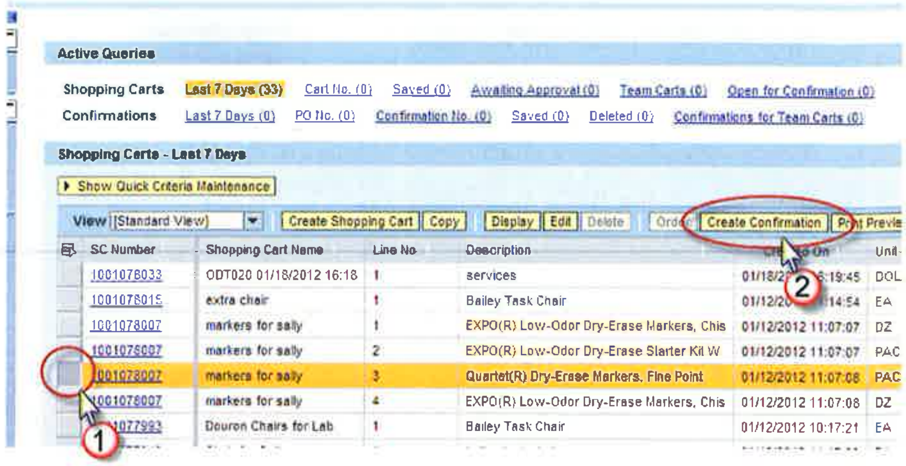
Office Depot orders do NOT have to be confirmed. For SOM requisitioners, orders under $2500, do not have to be confirmed.

Service contracts (Blanket Purchase Orders), do have to be confirmed, even if they are under $2500.

CONFIRMING FROM THE GO SHOPPING HOME SCREEN

Follow these general steps to confirm the receipt of goods ordered through the SAP Shopping Cart.

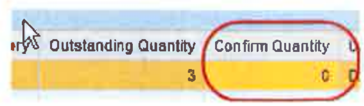
14. In the Shopping Cart Home Screen, select the cart you want to confirm by clicking the gray box① to the left of the **SC Number**. Then click the **Create Confirmation** button②.

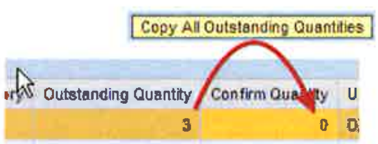


If the Create Confirmation button remains grayed out when you select the cart, it may be that the confirmation has already been done. To verify, open the cart and examine the Related Documents tab.

15. In the header part of the confirmation screen enter the **Confirmation Name**, if desired. Enter the vendor's invoice number in the **Reference Document** field.

16. In the **Item Overview section**, use the **Confirm Quantity** field to enter the number of items to confirm for each row.





Alternatively, you can click the **Copy All Outstanding Quantities** button to automatically insert all of the outstanding (not yet confirmed) quantities into the **Confirm Quantity** field. Saves time.

17. When ready, click the **Confirm**

button.

18. Click the **Close** button to return to the start

screen.

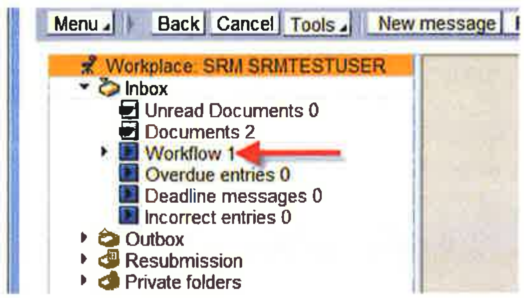
CONFIRMING FROM WITHIN THE ECC INBOX

Explanation: This is usually the "reactive" approach to doing a GR. You've received the dreaded "Quantity Discrepancy" email, so you react to it by going to your ECC Inbox to find the problem

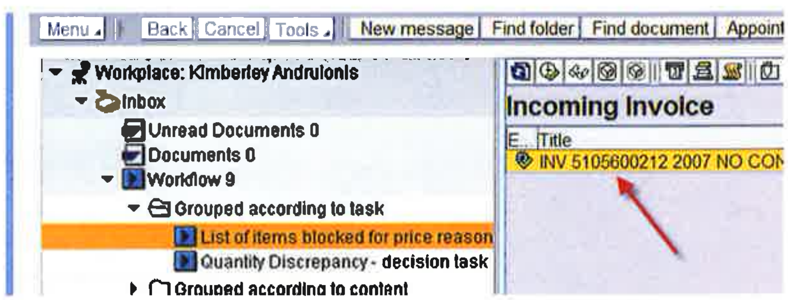
1. In SAP click the tab for the ECC Inbox.

2. Double click the Inbox on the left of the screen.

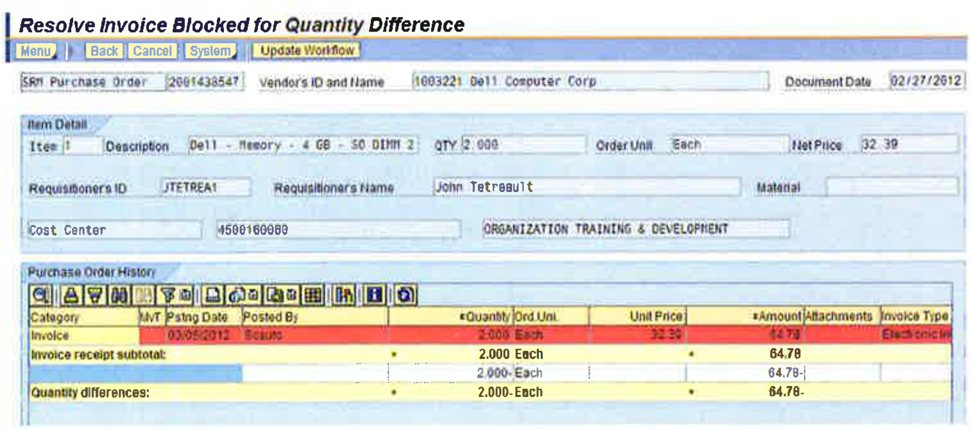
3. Click Workflow.



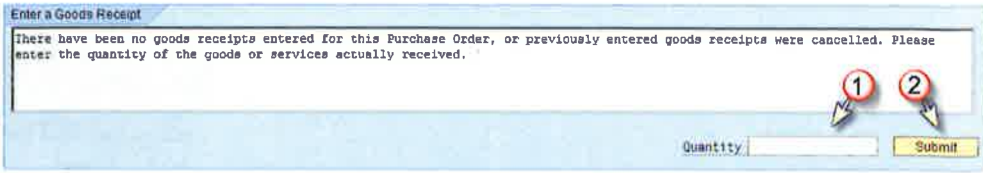
4. On the right of the screen, you should see the item or items listed which require your attention. Double click on the line in question to open it.



5. The next screen displays the details of the PO as well as the Purchase Order History. In that section, the Invoice Receipt subtotal should equal the Goods Receipt subtotal. If no GR has been done that line will be absent. The Quantity differences line should be the amount you must confirm.



6. Scroll to the area below that section to see the various options. The first option is the Confirm Goods Receipt. In the box, enter the quantity, then click Submit.



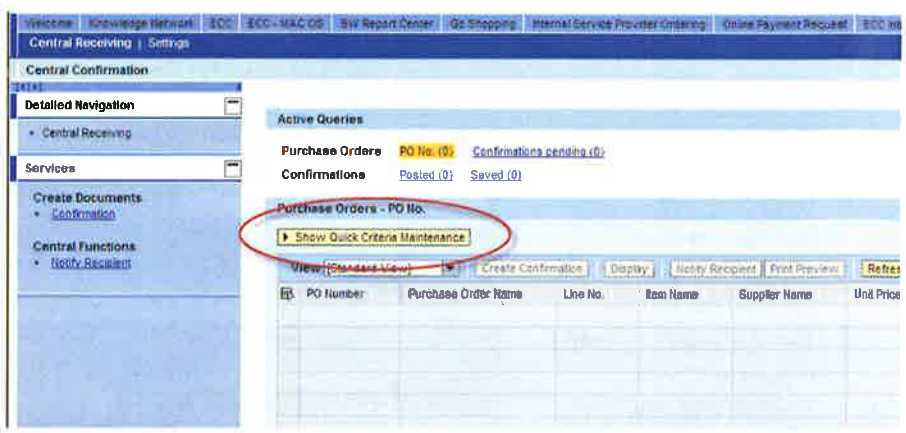
7. At the top of the screen, click the Update Workflow button, then exit out of the ECC Inbox.

CONFIRMING FROM THE CENTRAL RECEIVING TAB

Not everyone has the Central Receiving role. If you don't have it, you might consider requesting it because it allows you to do a GR for Shopping Carts other than your own.

1. Click the Central Receiving tab in SAP.

2. Open the Quick Criteria Maintenance section.



3. Enter the purchase order number, and the timeframe, click Apply.

4. When the cart appears on the list, select it and click the Create Confirmation button.

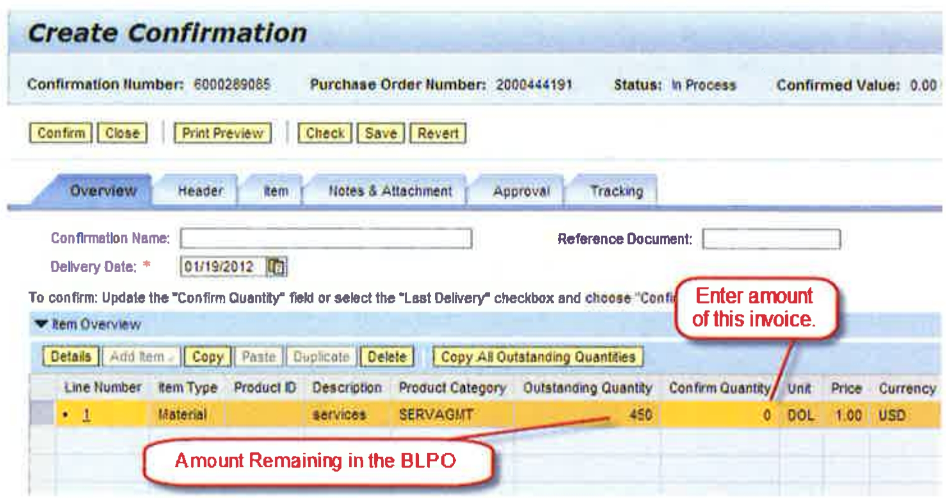
CONFIRMING A BLANKET PO

Service contracts and other BLPO carts are set up differently from standard "goods" orders. With Blanket purchase orders and service contracts, the invoices are not usually for the full amount of the PO.

In a BLPO, the quantity field is often filled in with the full dollar amount of the PO. Or the invoice may be for the monthly charge where the shopping cart's unit of measure is "Month". Whatever way the cart is set up we need to confirm only the amount for that invoice and not for the full amount of the purchase order.

1. In the Go Shopping home screen , select the cart to be confirmed, then click Create Confirmation.

2. In the confirmation screen, enter the amount of the current invoice in the Confirm Quantity field.

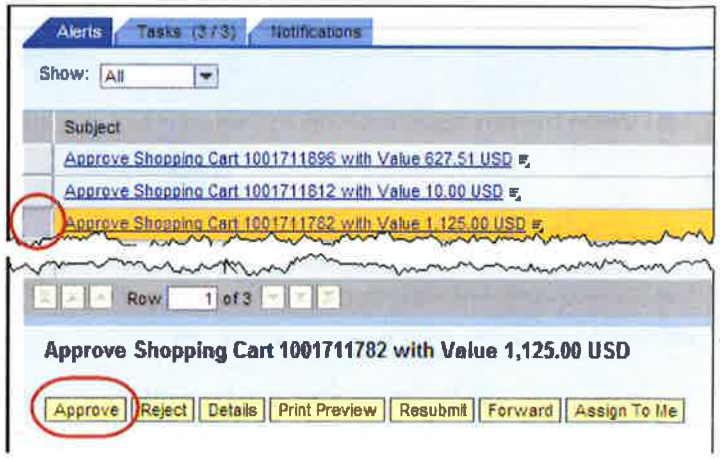


3. Enter a confirmation name, reference document, and click the Confirm button. The vendor will receive payment for only the amount you entered in the Confirm Quantity field.

APPROVING A SHOPPING CART

4. Click **Approval** in the submenu of the **Go Shopping** tab in the portal.

5. Select the cart you want to approve by clicking the gray box to the left of the Subject message. Then click the **Approve** button.

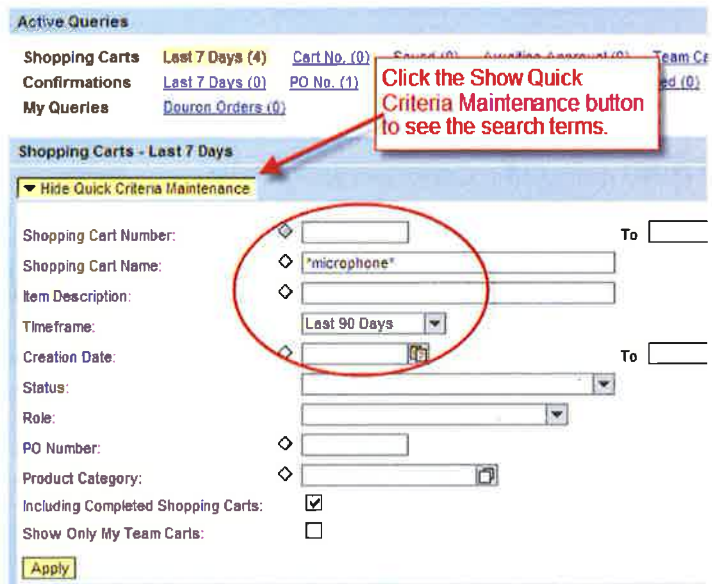


USEFUL SHOPPING CART TECHNIQUES AND TRICKS

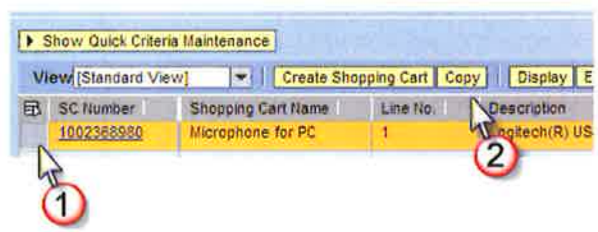
REORDERING A SHOPPING CART

Use these steps whenever you need to reorder something that you've ordered previously. The copy command creates a brand new shopping cart with all of the items from the copied cart already filled in.

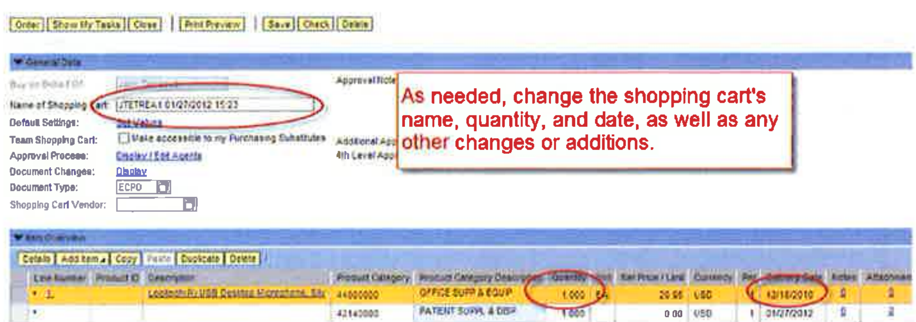
1. First, find the old cart. In the Active Queries screen (get there by clicking Go Shopping/Go Shopping), find the shopping cart you used to order the items the last time. If necessary, use the Quick Criteria Maintenance tool to search.



2. Select the cart by clicking the gray selection box to the left of any of the items in the cart. ①
3. Click the Copy button. ②

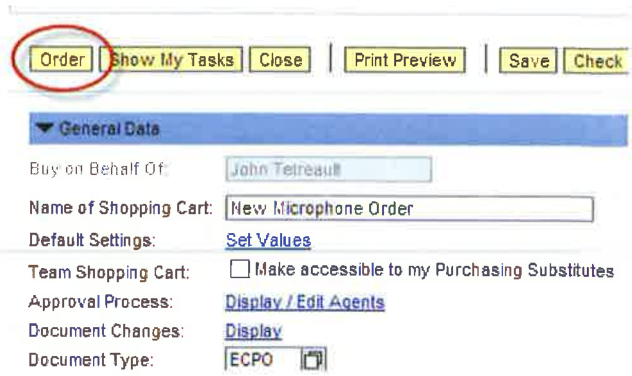


4. A new shopping cart screen opens with all of the information from the old cart already filled in. You can now change the information as needed.



5. When ready, click Order.

   Note that the new shopping cart does not overwrite or replace the original cart.



FIXING ACCOUNT ASSIGNMENT ERRORS

If you forget Acct Assignment this is great

Use this technique to fix a shopping cart that has multiple account assignment errors. This may happen when you forget to enter the G/L number in the default settings area before you go to Office Depot.

The method utilizes the system clipboard to set account assignment Values for all items in the cart at once.

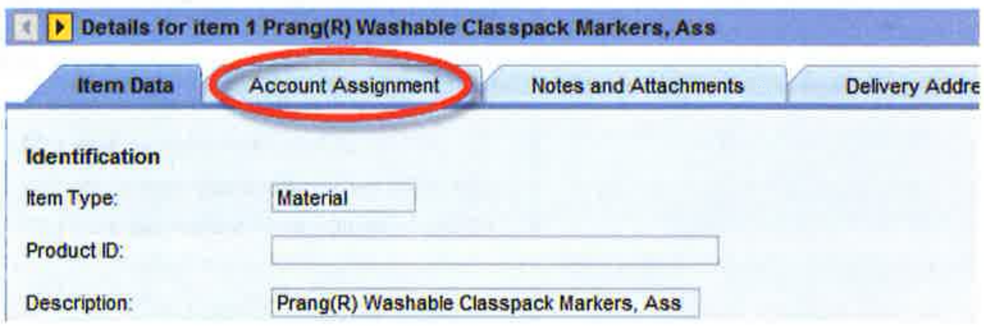
Share w/ Brenda

1. Make sure that the first line on the Item Overview section is highlighted in orange. If it is not, then click once on the small gray box at the left of the first row.

2. Click the Details button.

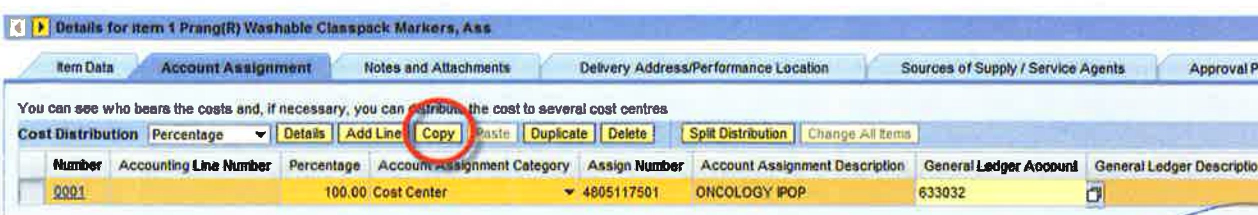
3. The details section will probably open in the Item Data tab.

   Click the **Account Assignment** tab. You may need to scroll down to see the account assignment table.

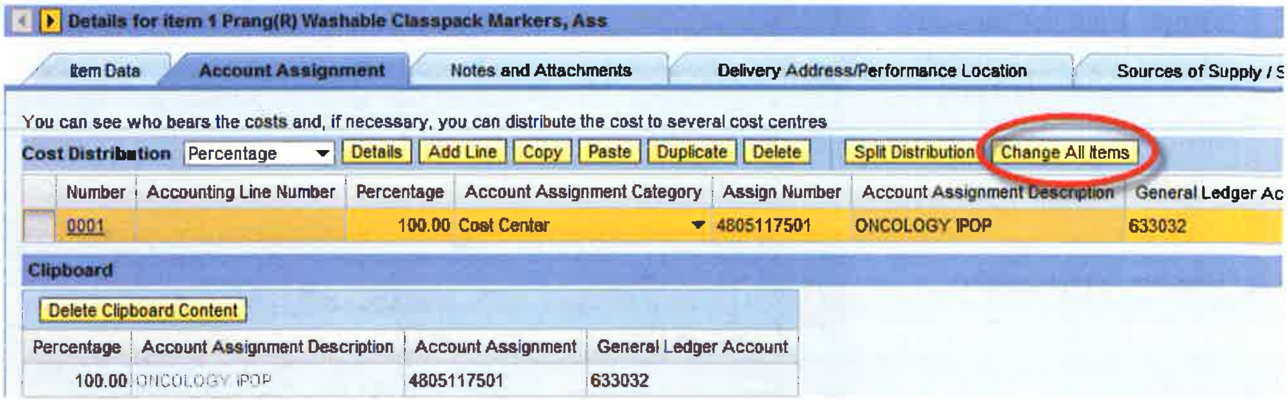


4. Enter the correct General Ledger Account number and/or Assign Number, as needed, to correct the error.

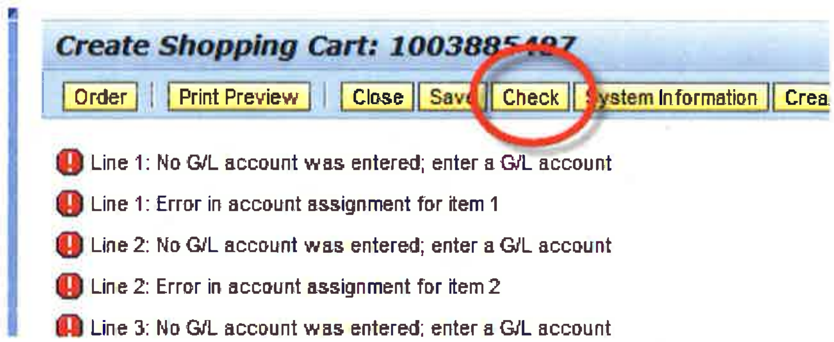
5. When ready, click the **Copy** button above the Account Assignment row. This action copies the assignment information into a "clipboard" section below the Account Assignment row.



6. Finally, click the **Change All Items** button. This action copies the correct account information into the remaining rows.



7. Click **Check** to verify the shopping cart has no errors.



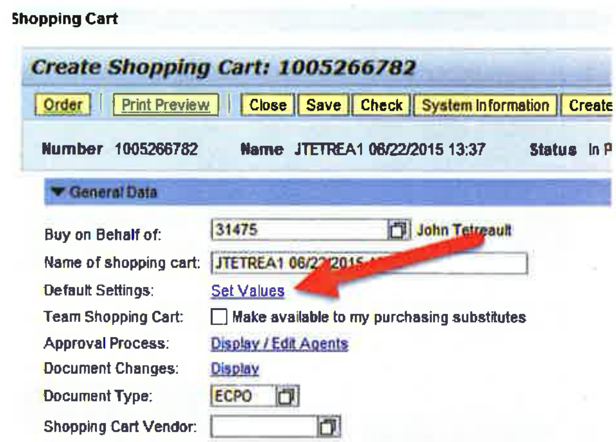
8. The message should then say:

CHANGING THE DELIVERY ADDRESS FOR A SHOPPING CART

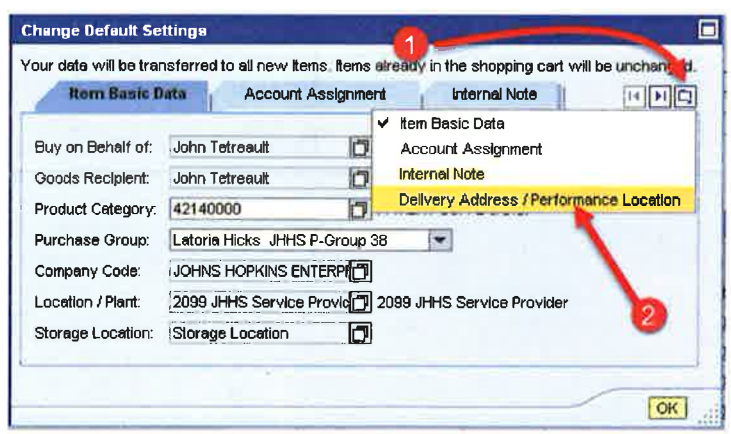
By default, items will be delivered to the address you set up in your personal settings, when you first started using Shopping Cart.

But you can override those settings by changing the delivery address for a individual cart or even for an item in the cart. Follow the steps below to change the delivery location for a cart. Important note: you must do this procedure BEFORE you add any line items to the cart.

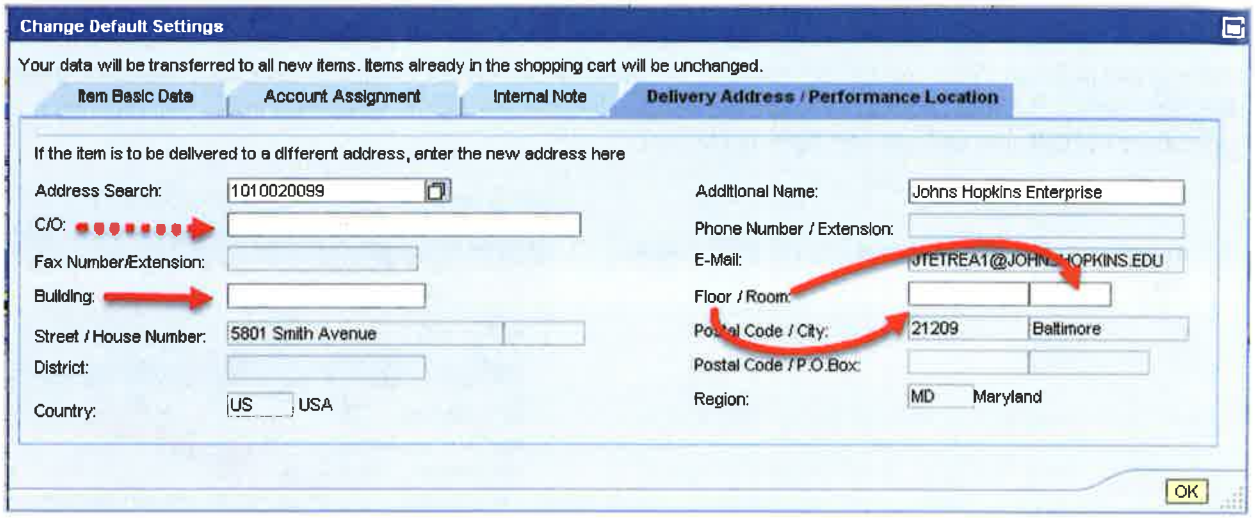
1. In a new shopping cart screen, click the Set Values link.



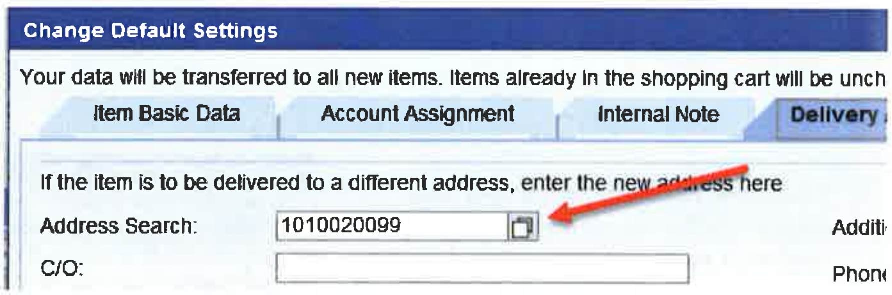
2. Then click the navigation button in the upper right corner and select Delivery Address / Performance Location from the menu.



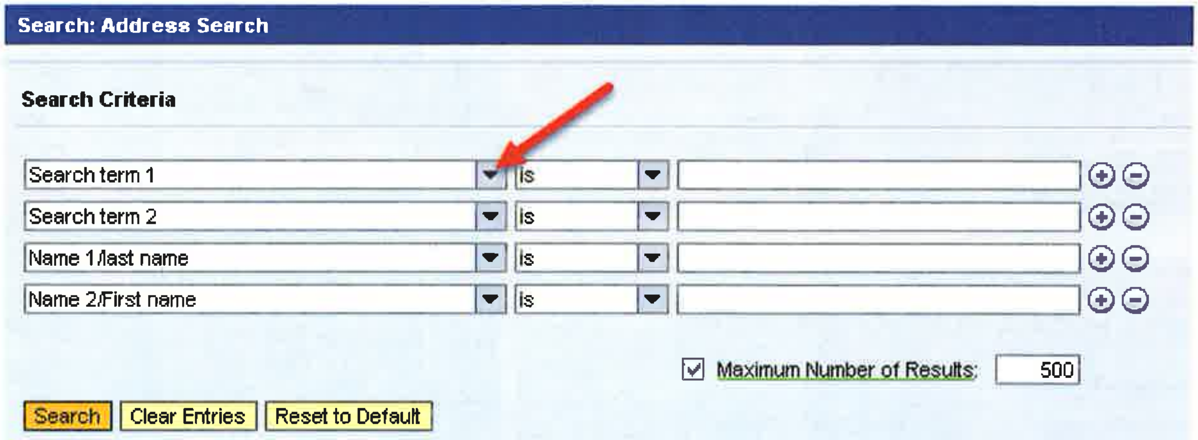
3. **Important Note**: If the new address has the same street address as your default, then all you need to do is enter the Building name, the Floor number, and the room number. Optionally, you can enter text into the C/O field as well. But if the new address has a different street, city, etc. then you must do an address search, as described in the next step.



4. To do an address search, click the white lookup button next to the Address Search field.

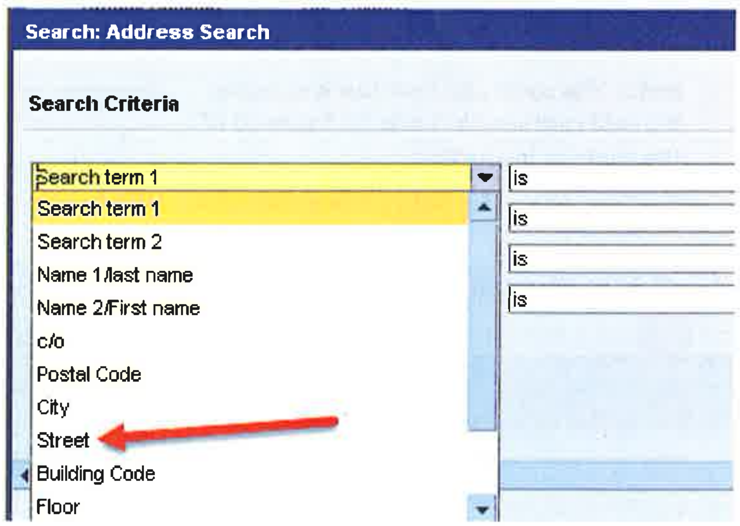


5. In the Search: Address Search box, you'll see several rows of search parameters. Click the dropdown next to the first one (Search term 1), as shown in the graphic below.



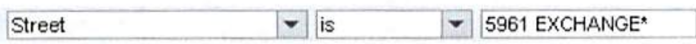
6. Select from the list of search fields. For this, I recommend searching in the Street field.

   For this example, I want to change the delivery to Eldersburg, MD. The street address is 5961 Exchange Drive.

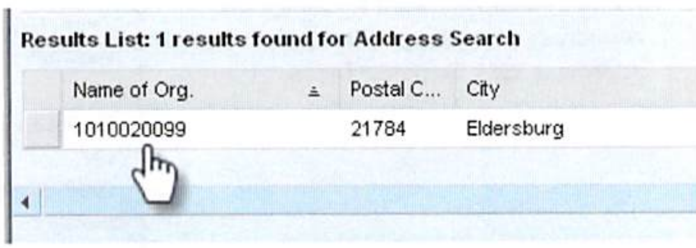


7. Change the middle parameter to "contains" instead of "is" and in the third column enter the text 5961 Exchange. Then click the Search button.

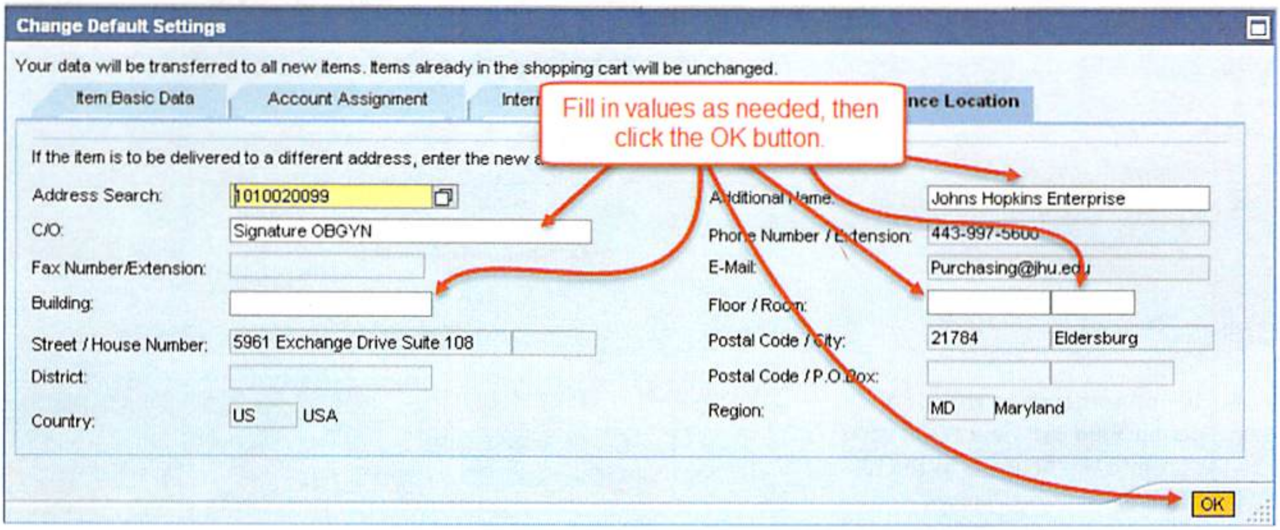
Note: You could also do it this way, using the wild card search character * instead of the contains instruction.



8. Click the "Name of Org." number to select it.



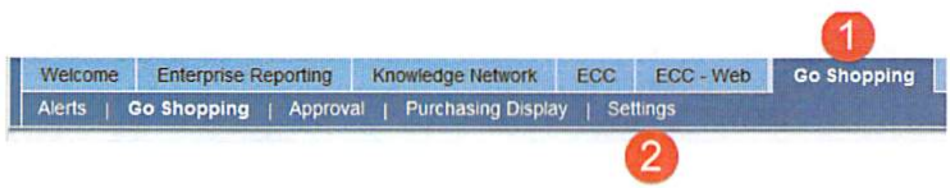
9. When you return to the address tab, fill in the blank fields as necessary, then click the OK button.



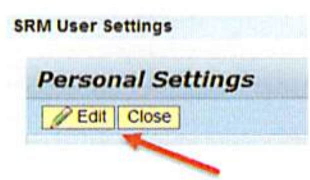
USING TEAM SHOPPING CARTS

A "team" is a group of users who have access to each other's shopping carts. Teams are set up by the individuals themselves, using the Personal Settings screen. Follow these steps to create and maintain a team of purchasing substitutes.

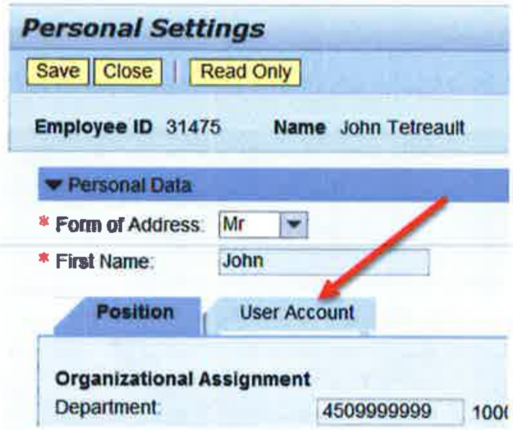
1. At the SAP portal screen, click the **Go Shopping** Tab, then click the **Settings** tab.



2. In the upper left corner of the Personal Settings screen, click Edit.



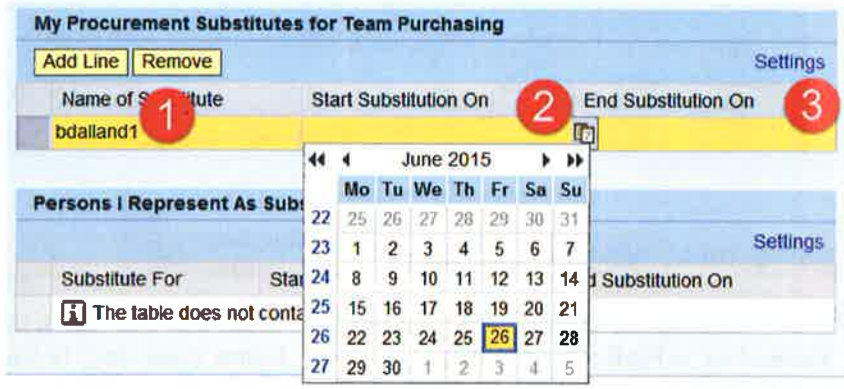
3. Next, click the User Account tab.



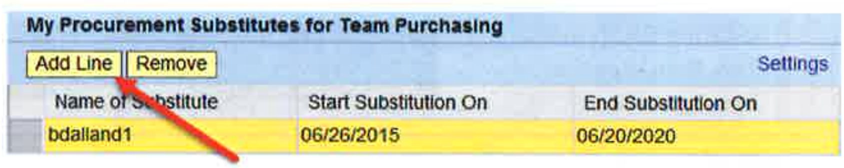
4. To add someone to the list of people who can view YOUR carts, click into the first row of the table labeled, My Procurement Substitutes for Team Purchasing.

   You can enter the JHED ID of the person 1 or use the lookup button to search by last name, first name.

   On that same row, enter the start 2 and end dates 3 of the time period you want to grant substitute status.



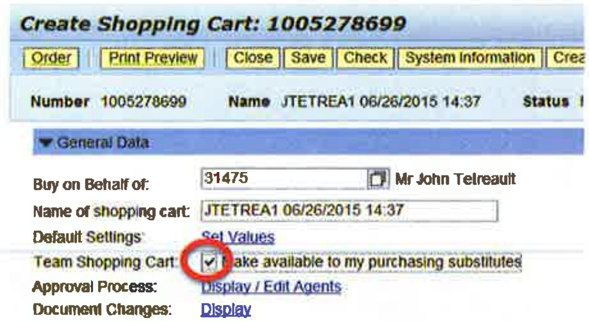
5. To add more substitutes to your team, click the Add Line button and repeat as needed.



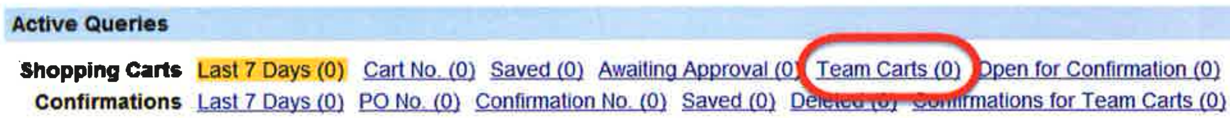
6. When finished, click Save in the upper left corner of the window.

IMPORTANT NOTES:

- The other members of your team must repeat this process in their own settings to give you access to their carts.
- Whenever you create a new cart you must flag it as a team cart in the General Data section of the cart, in order for the rest of the team to see it.



- To view carts made by other members of the team, use the Team Carts link in the Go Shopping screen.



ENTERING YOUR SHOPPING CART SETTINGS

Before you can use the Shopping Cart, you MUST enter your personal settings. Follow these step-by-step instructions to do that.

PERSONAL AND POSITION SETTINGS (JHHS & JHU)

1. At the SAP portal screen, click the **Go Shopping** Tab, then click the **Settings** tab.

2. Click **Edit.**

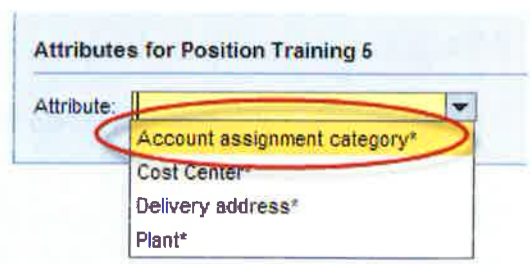
3. Using the drop-down button, select a value for the **Form of Address** field.

4. Enter your building, floor, room, and phone number in the **Department Address Details** section.

SETTING YOUR ACCOUNT ASSIGNMENT CATEGORY (JHU ONLY)

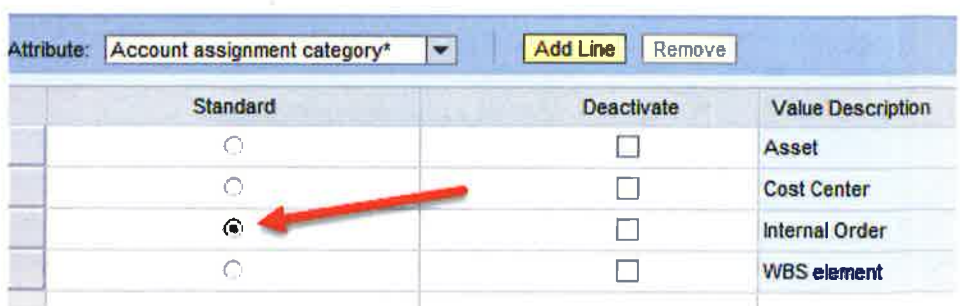
- JHHS uses Cost Center (usually) as the Account Assignment Category. The Shopping Cart system defaults to Cost Center, so if you're a JHHS employee, skip this part and go to step 7.
- JHU (School of Medicine) usually uses Internal Order to identify fund accounts and grants. If you're a JHU employee, continute to Step 5 below.

5. In the Attribute dropdown list, select **Account Assignment category.**



6. In the **Standard** column, put a dot in the row for **Internal Order**.

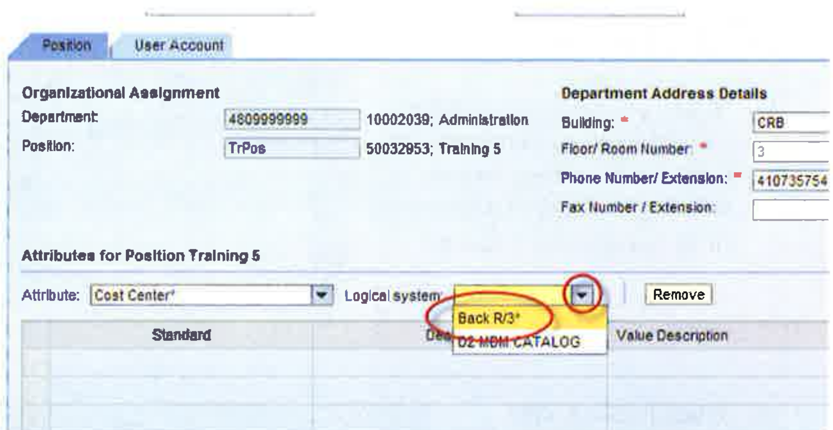
If you're JHU, skip to step 11.



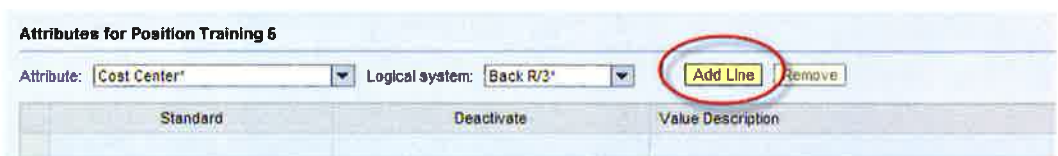
SETTING YOUR COST CENTER NUMBER (JHHS ONLY)

7. Click the attribute dropdown button and select **Cost Center*** from the list.

8. On the next screen, click the dropdown button for **Logical system** and select **Back R/3**.



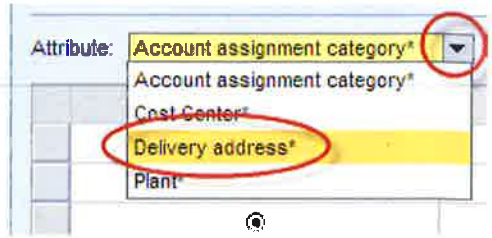
9. Click **Add Line**.



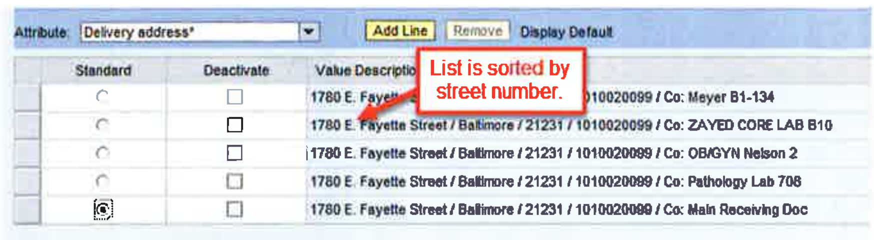
10. Enter your Cost Center number in the Value field ①. Click the Standard button②.

SETTING YOUR DELIVERY ADDRESS (JHHS & JHU)

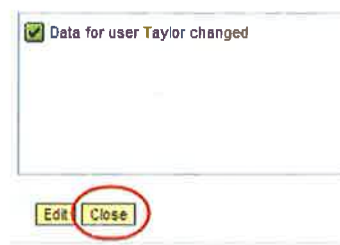
11. Click the **Attribute** dropdown, and select **Delivery Address** from the list.



12. To find your location, use the vertical scroll bar until you see your street address. In the Standard column, click into the circle next to your address.



13. When finished, click **Save**, then **Close**.



APPENDIX

GENERAL LEDGER ACCOUNT NUMBERS

The following table lists a few of the more commonly used G/L number. You should consult your department's finance staff to make sure you use the correct general ledger account.

A selection of commonly used General Ledger accounts

ANIMAL PROCUREMENT	633034	LINENS	633025
BEVERAGES	633005	MEDSURG SUP & EQ (M)	630062
CHEMICALS	630031	NEEDLES/SYRINGES (M)	630028
CLEANING SUPPLIES	633028	NONCAPITAL EQUIPMENT	631002
COMP SOFTWARE	631004	NONCAPITAL MED EQUIP	634006
CULTURE MEDIA	630042	NONCAPITAL PC PURCHA	631003
DRUGS PHARMACEUTICAL	630014	NON-MED SUP & EQ	633001
EVENTS/GIFTS/AWARDS	641508	OFFICE SUPPLIES	633032
EXPENDIBLE SUPPLIES	633002	OTHER CLINICAL SUP	632201
FACILITY MAINT & REP	637004	OTHER INSTRUCT SUP	632001
FURNITURE	631001	OTHER RESRCH SUP	632101
GLASSWARE/PLASTICWAR	630069	PAPER SUPPLIES	633011
INSTRUMENT REPAIRS	637014	PAT MED EQ NONBILL	630064
INSTRUMENTS (M)	630026	PUBS/JOURNALS/SUBSC	633037
JHU ONLY EQUIP > 5K	631113	REAGENTS (NM)	630024
LAB MATERIAL & SUPPL	633024	UNIFORMS/SHOES	633003

NON PURCHASE ORDER RELATED TRANSACTIONS

Purchase orders are not required for the following types of transactions. Therefore, do not use Shopping Cart for these types of purchases. Online Payment or PCard should be used instead. Contact Accounts Payable Shared Services for additional information.

Non PO Transaction	Description/Examples	Payment Method
Payment of Advertising Costs	Payments for any advertising on behalf of the University or Health System. These can be made to newspapers, trade periodicals, radio and TV stations etc. The creation of Marketing literature or media would also fall under this item as well. These can be payments to Advertising Agencies, production facilities or Market research companies.	PCard
Honoraria Payments	Any payment made to guest speakers or visiting faculty. Stipend payments for research fellows may fall under this item as well as One-time lump sum fellowship payment to U.S. post doctoral fellows and students not on payroll. International recipients need to be processed through payroll. See Tax Guide for further information.	Online Check Request

Non PO Transaction	Description/Examples	Payment Method
Payments to JHU Independent Contractors for less than $5,000	Should be used when a project is for a short duration, the services are less than $5,000, and when no intellectual property, computer software or web pages are expected to be produced. See Independent Contractor Policies and Procedures for more information. JHU ONLY	Online Check Request (JHU ONLY)
Prepayment of seminar, workshop or conference registrations	These payment are to be made directly to Conference Vendors or Hotels in advance of attendance. These expenses are not paid by the attendee or traveler.	PCard
Revenue Refund Payments	Any patient, student, insurance, subscription or related refund of revenue of any type.	Online Check Request
Payments to Government or Regulating Agencies for Licensing and filing	Examples include any payments to Government Agencies(Federal, State and Local) for building permits, motor vehicle registrations, applications for Foreign Visas, state licensing boards.	PCard
Payments to Attorneys CPA and Consulting firms	Any payments to said firms. Examples would be PWC, KPMG, Bearing Point or Piper Rudnick.	Online Check Request
Payments for Gifts or Awards for Employee Appreciation or Recognition	Payments for gift cards, grocery certificates, trophies, plaques or similar items. These are usually given around holiday times or for other various occasions for employee appreciation. Amounts are usually $25 or less. Please note: Any gift is considered taxable to the recipient, and payroll must receive recipient information for purpose of update to W2 wages.	Online Check Request
Payments for Real Estate transactions	Any payment made for Real Estate purchases, include closing costs. Real Estate auction transactions are also accepted.	Online Check Request
Payments for Real Estate leases or rentals	Payments made to Property managers or management companies for University or Health Systems occupied space.	Online Check Request
Payments to Insurance or Investment firms and other fringe benefit payments	Any payments made to these firms can include payment initiated by benefits from payroll deductions, (EHP, 403b, Cigna) or to Investment Managers who manage University or Health System Endowment assets or general investment/asset management for the University or Health System. Payments to Colleges and Universities for tuition benefits fall under this category.	Online Check Request
Tax Payments	Payments will include: payroll tax, property tax, sales tax, garnishments, liens, 1099 or 1042 related taxes.	Online Check Request
Payments for Institutional or Employee reimbursed Dues and Subscriptions	Any association dues or subscription paid on behalf of an employee or an Institution. Employee examples are payments to AICPA, NACUBO. Institutional examples are COGR and MICUA.	PCard

Non PO Transaction	Description/Examples	Payment Method
Royalties	Any payments for royalties of intellectual property, copyrights, patents, etc. to firms or individuals.	Online Check Request
Utilities-Oil, Water, Gas, Steam, Electricity, Telephone	Any payments to Utility companies such as BGE, Verizon, Pepco, Baltimore City and Amerada Hess.	Online Check Request
Payments to Express Shipping and Mail vendors	Any payments for express mail or courier services. Payments to FedEx, UPS, Maryland Messenger and USPS fall under this category.	PCard
Payments for catering other miscellaneous food purchases	Any planned or unplanned food expenses for meetings or business related events not incurred during travel. Examples in this category include payments to Jay's Catering, Eddie's of Roland Park, Curran's Deli, The Johns Hopkins Club etc.	PCard (if individual invoice <$2,500)
Debt Payments	Any payment of University or Health System debt servicing.	Online Check Request
Postage	Payments made to the USPS, Pitney Bowes or other independent mail vendor for postage on meter machines or bulk mail servicing vendors.	PCard or Online Check Request
Special Events/Entertainment	Any payments for Sporting events or Special events planned and hosted for Students, guests, donors or Trustees.	PCard
Payments for Library Books, Journals, Periodicals	Payments for books, trade publications or periodicals on renewed or purchased on an individual or annual basis.	PCard
Payments to Travel Agencies and Relocation Vendors	Payment made for any travel related service to include tickets, hotel accommodations and car rentals. These payments are made directly to the Agency and are not paid by or to the traveler. Vendors are World Travel Service, Carlson Wagonlit or Expedia. Payments to vendors for Faculty or staff relocation expenses are also accepted as a non-PO payment. Please note: Certain relocation expenses are be taxable and Payroll needs to be notified of such expenses.	Online Check Request
Temporary Employment Agencies	Payments made to vendors secure temporary short time help. Vendor payments include Kelly Services, AccountTemps, Nursebase, Robert Half etc.	Online Check Request
Payments to Study Participants	Any payment made to individuals who participate in JHU or JHHS research studies.	Online Check Request
Payments for software licenses and software <$2,500	Any payment made to companies for software licensing. Examples can include Hyperion, Microsoft and SAP.	Online Check Request
Recycling Services	Paper shredding and removal vendors	PCard

Non PO Transaction	Description/Examples	Payment Method
Laboratory Gases	Examples of vendors would be Airgas, Roberts Oxygen, Cryogas	Online Check Request
Mat/uniform cleaning and laundry services	Examples of vendors would be Cintas and Lord Baltimore	PCard (<$2,500) or Online Check Request

SHOPPING CART DOCUMENT TYPES

ANPO Animal Purchase Order	Procurement of live animals. JHU only.
BLPO Blanket Purchase Order	Release purchase orders for materials and services over specified time period with pre-determined spending.
CAPP Capital Expenditure Purchase Order	Purchase orders for material and services that meet the capital expenditure threshold. These include component part purchases at JHU. Johns Hopkins Homecare Group has specific policies for example, all patient equipment. All JHHS equipment lease/rental and consignment, with the exception of copier rental/lease. WBS elements cannot be used on a CAPP (use PROJ document type).
DRUG Pharmaceutical Purchase Order	Purchase order for the procurement of pharmaceuticals. This document type is available to specific departments only.
DSPO Disaster Purchase Order	Purchase orders for the procurement of designated disaster supplies. These types are available to specific departments only.
ECPO Electronic Commerce Purchase Order	Purchase orders that do not require a customized document type. Purchase orders created for certain commodities (materials and services with predefined delivery schedules. Default document type.
ECDP Inventory Replenishment Purchase Order	Purchase Order created by supply store staff to order product from vendors to replenish supply store inventories. This document type is available to specific departments only.
EMPO Emergency Purchase Order	Request for materials or services that are time sensitive or mission critical outside of Purchasing Shared Services normal operating hours. This document type is available to select users only. The Shopping Cart Reference field completed by the SRM Requisitioner must contain the abbreviation EM, the Purchase Order (PO) date, and the initials of the creator.This field can contain no space characters. Example: EM01_JAN_06JRS (EM; the PO date of Jan. 1st, 2006; and the initials of the creator, John Robert Smith)

IMPO Implant Purchase Order	Instantaneous purchase of devices implanted during medical procedures. JHHS only.
LEAS Leases	Request for Lease agreement - Very Limited Use
LVPO Low Value Purchase Order	Expense purchases under $2,500 for items other than restricted commodities. These requisitions automatically create POs without any approvals or Purchasing Department intervention. Once a Purchase Order number has been generated, Requisitioners call the order into the vendor. The vendor WILL NOT receive a Purchase Order from the SRM system. Hopkins eMarketplace cannot be used with this document type. JHU only
MXPO Maximo Purchase Order	Purchase orders used by Facilities departments to interface to the Maximo system.
PROJ Project Purchase Order	Purchase orders for construction or other projects utilizing WBS elements.
RADP Radioactive Purchase Order	Procurement of radioactive materials. The RADIOACTIVE product category must be chosen when using this document type.
SERV Service Contracts	Request for the purchase of a Service - From Maintaince Service to IT related service agreements to Equipment service - Contract is Required
SORD Special Order Patient Item	Request for custom patient care items - at the point of use - Example Custom Brace where the vendor comes in to measure the patient - and PO is issued.
SPPO Sponsored Project Purchase Order	Procurement for sub-awards or subcontracts. Any sponsored award received by Hopkins is either a grant or a contract (defined by the terms of the award). When the prime award is a CONTRACT, any subrecipient in the prime award would be a subcontract. All others would be subawards. The SUBAWARD or SUBCONTRACT product category must be chosen when using this document type. The vendor WILL NOT receive a Purchase Order from the SRM system. JHU only.

RESOURCES

1. Supply Chain Shared Services: http://ssc.jhmi.edu . For a wealth of information about procurement at Hopkins, go to this URL, then select from one of the choices shown here.

2. SAP@Hopkins: www.sapathopkins.org. This is a "blog" style website maintained by the EBS team. EBS (Enterprise Business Systems) is a group within the IT department who manage SAP at Hopkins. They put out very imformative monthly newsletters and other articles about SAP.

3. Training
   - JHHS Training, Workshops, Coaching, Support: call 410-735-7065 (Including SOM, DOM)
   - JHU Training, Classroom Courses: use the Knowledge Network, or contact Kathy Ruth, 443-997-6453 (Including SOM, DOM)

<u>**Instructor contact information:**</u>
John Tetreault
JTETREA1@JHMI.EDU