Establishing Shopping Cart Settings

Before you begin your first shopping cart, you must establish your default shopping cart settings. These are settings for your address, account information, etc., that will be used in each of your orders unless you change it for a specific order. If these settings are not entered correctly, SAP will not process your orders accurately (and in some cases, may not process them at all).

1. **Select Settings.** After you select the “Go Shopping” tab from the top line, select “Settings” from the next line to access the Settings screen.

2. **Personal Settings.** The “Personal Settings” window will appear. Click “Edit” so that you can enter data in the various fields. When the fields are “active” they will turn white and you will be able to type in them.

Use this Job Aid to:

- Learn how to establish shopping cart settings that will be used throughout your orders

**BEFORE YOU BEGIN**

You need to know the appropriate code for your delivery address.
3. **Personal Data.** In the section called “Personal Data,” there are two tabs: “Position” and “User Account.” The “Position” tab is where you will enter or update most of your personal information.

- Enter the “Form of Address” at the top of the “Personal Data” section. You may select Mr, Ms, Miss, Mrs, or Dr from this drop-down list.

- You may enter your “Academic Title” if you wish. Note that this field is optional.

- Enter your “Department Address Details,” including the building name, floor, and room number. Note that this should be the address where you want your purchases delivered.

- Enter your phone and fax number, along with your extension (if you have one). If you don’t have a fax or telephone extension(s), you may leave those fields blank. In these fields, enter numbers only, with no spaces, dashes, letters, or parenthesis.

4. **Account Assignment.** Look at the heading labeled “Attributes for Position Training 3” (your screen may have a slightly different label for this area). Click in the “Attribute” dropdown box and select “Account Assignment Category.”

- Select the primary account assignment you will use for your orders. In this case, we have selected “Cost Center.”
5. **Cost Center.** Click in the “Attribute” dropdown box again and select “Cost Center.” Then, in the field labeled “Logical System” and select “Back R/3” from the dropdown list.
   - When you select “Back R/3” the screen will change.
   - To add a default Cost Center, click “Add Line” and then type the “Value” of the cost center you want.
   - You may include multiple cost centers by adding additional lines. Note that you may only select one cost center at a time as your “Standard,” by clicking in the radio button on the left.

6. **Delivery Address.** Click in the “Attribute” dropdown box again and select “Delivery Address.” You **MUST** select the appropriate code for your delivery address, or your orders won’t arrive at the correct destination. Never add a new line.
   - If you don’t know the code, then you can search for the code that corresponds to your default building, room, and floor using this web address: [http://ssc.jhmi.edu/supplychain/shipto.html](http://ssc.jhmi.edu/supplychain/shipto.html).
   - If the end user wants a new delivery ship-to address added to the system, the user must submit an online form that is available on the Supply Chain Shared Services website at: [http://ssc.jhmi.edu/supplychain/forms/shipto_new.html](http://ssc.jhmi.edu/supplychain/forms/shipto_new.html).
7. **Plant.** Click in the “Attribute” dropdown box again and select “Plant.” The screen will update and you will see a new field called “Logical system.” Select “Back R/3*” from the dropdown list. The screen will update and you will see one or more service provider locations.

- Select the appropriate address, depending on the end-user delivery address.
- Health Systems users will be automatically defaulted to JHHS Hosted Catalogs. You should leave this as it is.
- If you are a University employee and do not need to purchase lab supplies, select “JHU Service Provider.”

8. **User Account.** Now that you’ve finished the “Position” tab, click the tab labeled “User Account.” This is where you’ll enter new information about your account.

- Most of the “Standard Settings” will have default values entered. You may change them here if necessary.
- The next section is called “My Procurement Substitutes.” Procurement Substitutes are people who work with you that you would like to have access to your shopping carts. For example, if you are out sick one day, a “Procurement Substitute” is a person who can create, edit, and delete carts for you while you are out. These people are also called “Team Members” in the Shopping Cart system.

- To add a “Procurement Substitute,” click in the field below the label “Name of Substitute” and then click on the file folder icon to bring up the User Account Search screen.

- To locate the correct person, search for their name by entering it with wildcard characters on both sides (example: *smith*) and click “Start Search.” When you see the person in the list, click on his or her name or select the gray box to the left of the name and then click “OK.” The window will close and the name of your substitute will be populated in the User Account tab.
• You will need to enter the dates when you wish the substitution to begin and end. For example, if you want to assign a substitute only while you are on vacation, you would enter your vacation dates in the fields labeled “Start Substitution On” and “End Substitution On.” If you want to assign an indefinite substitute, then put today’s date and a date far out into the future.

• Co-workers for which you serve as a Procurement Substitute are listed on the User Account page as well.

9. Check Your Settings. Your settings should now be complete. Click “Check” (either at the top or the bottom of the screen) to verify that your settings are complete and that no error messages appear at the top of the screen.

10. Close the Settings Window. Once you have checked your settings, click “Save” to save them, then click “Close” to close the Settings window.

• If you only click “Close” without saving your data, the updated settings will not be saved and you will need to enter them again.