



Shopping Cart: Create a CAPP Order

Use this Job Aid to:

- Learn how to order capital equipment 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 to.

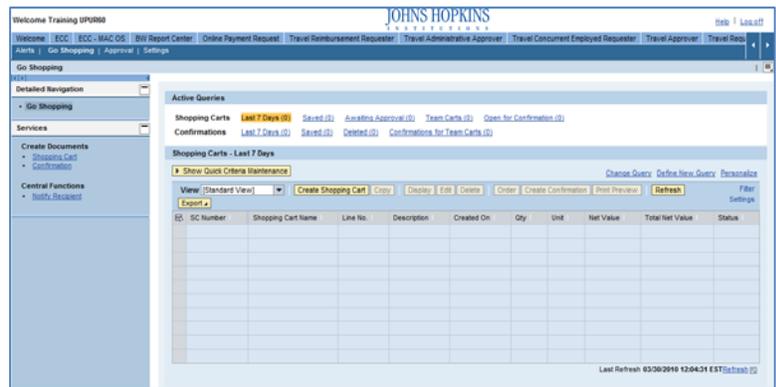
Create a CAPP Order

CAPP (Capital Expenditure Purchase Orders) orders are 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).

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

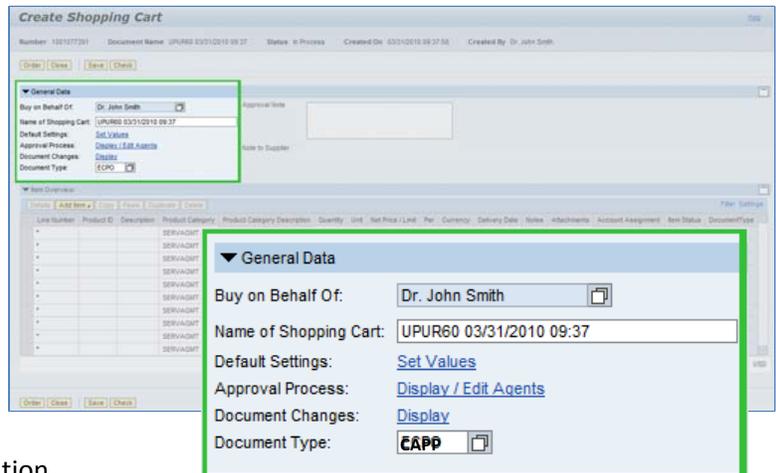
Helpful Hint

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.



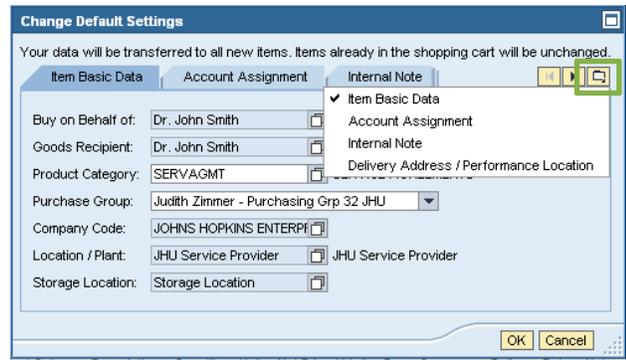
2. **Enter General Data.** The “Create Shopping Cart” screen will appear. Start your order in the “General Data” section of this screen.

- 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 “Lab Freezer.”
- 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. Note that even after you set the default values, you can still change individual items within the cart to different values. This feature can be a great time-saver for carts with multiple lines.
- Select the document type for your order. In this case, we’ll set it to CAPP.



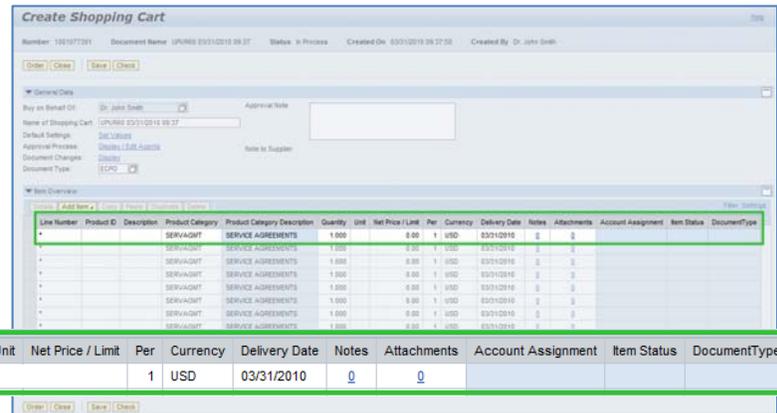
Helpful Hint

When the “Change Default Settings” dialog box appears, you won’t see all of the tabs that are available to you. Either 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.



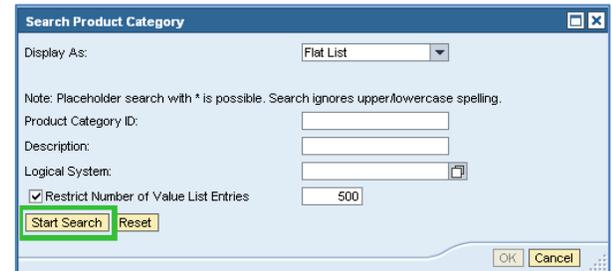
3. Enter Item Data. Go to the first line in the order and start entering the order information. You’ll work your way across the line for each item *before you press Enter*. Note that if you set up the default cart settings, much of this information will already be populated for you.

- Start with the “**Description**” field. If you are using a Jackson vendor, enter a stock number in this field.



- Next enter the “**Product Category.**” If you don’t know the category, click in the box that says “SERVAGMT,” then select the file folder icon  to search.

The “Search Product Category” dialog box will appear. The easiest way to search is to click “Start Search” and then select the appropriate category from the list.



- Enter the “**Quantity.**” In this case, we entered 1.
- Enter the “**Unit**” next. If you don’t know the appropriate unit to enter, select the file folder icon  to look it up in a list.
- Enter the “**Price**” in the Net Price/Limit field.
- Ignore the field that says “**Per.**”
- In you want to change the **Currency** or **Delivery Date**, do so now.
- When you are all done, click “**Enter**” to apply your selections.

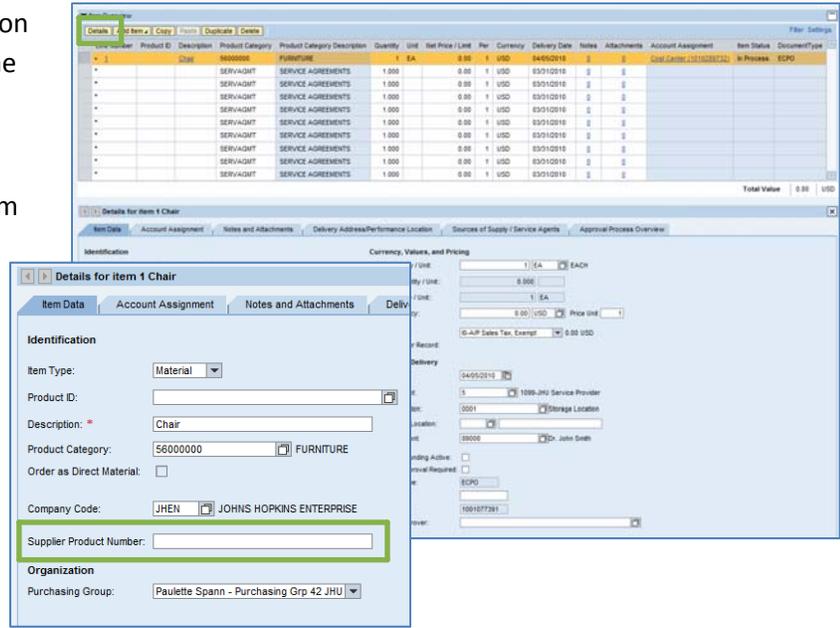
Helpful Hint!

Don’t forget to click “Enter” when you have completed the line. That’s the only way to make the order details appear!

4. Item Details. After you click Enter, the “**Details**” button will become active. Click it to display the details for the first line in your order. The first tab “**Item Data**” will automatically be displayed.

- If you know the catalog number (or product or item number), enter it in the field labeled “**Supplier Product Number.**”

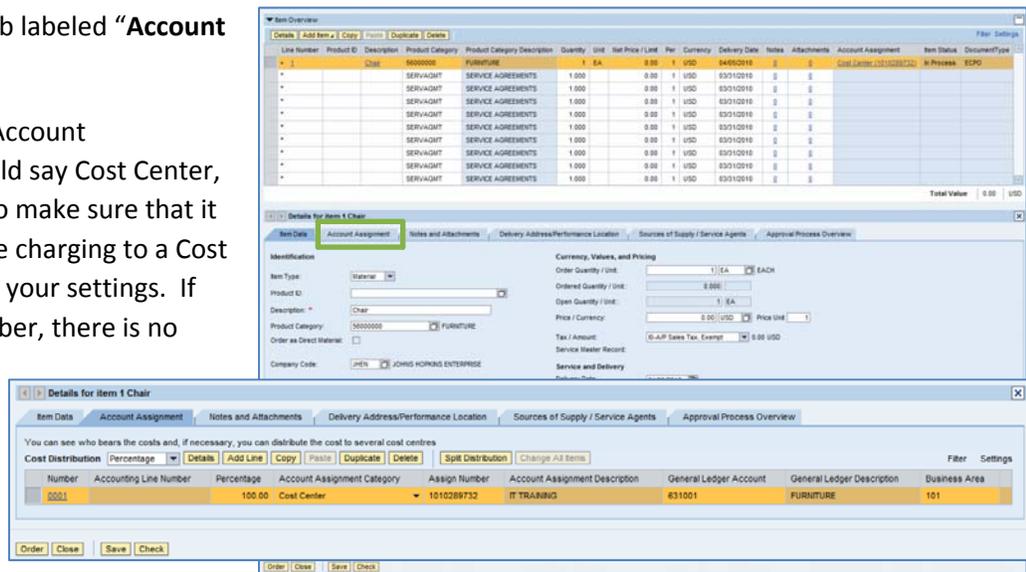
Helpful Hint *You can expect to see errors at the top of the screen! You will resolve them as you enter the details associated with this cart.*



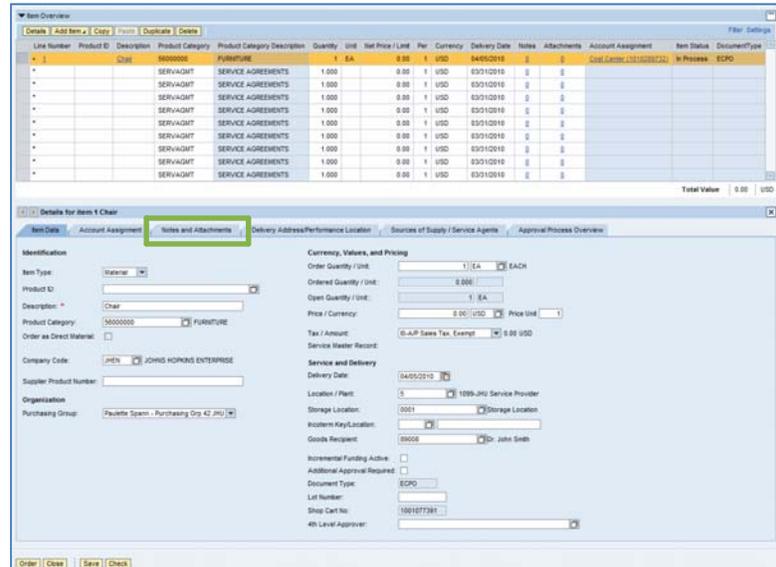
5. Account Assignment. Click on the tab labeled “**Account Assignment.**”

- Check the cost object under the “**Account Assignment**” header (this field could say Cost Center, Internal Order, or WBS Element) to make sure that it is correct for your order. If you are charging to a Cost Center, the value will default from your settings. If you are charging to an Order Number, there is no default and the Order Number must be entered.
- Click in the field under the header that says “**General Ledger Account.**” Verify which G/L account with your financial administrator, and then enter it in this field.

Helpful Hint *If you want to copy the G/L account number to all of the items in your cart, click “**Copy**” and “**Change All Items**” to apply the account number throughout the order.*

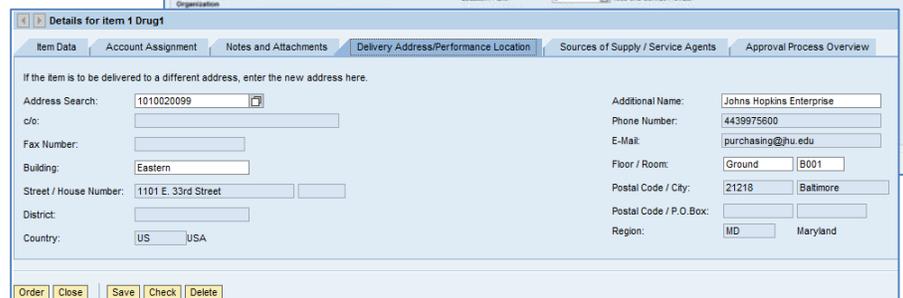
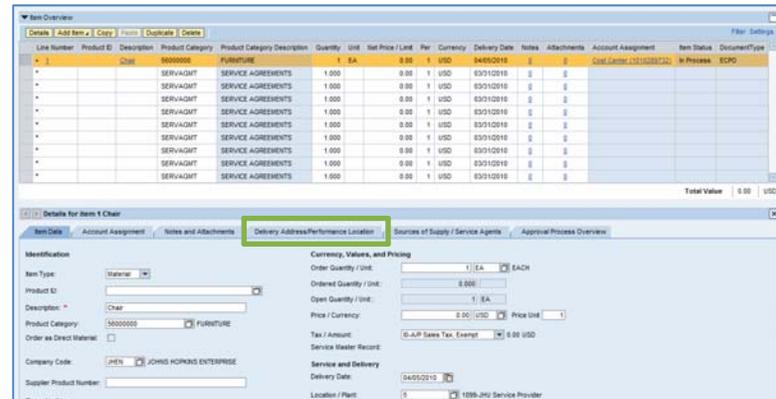


6. Attaching Documents. You may need to attach supporting documentation to your shopping cart order. For example, you may be required to attach the Request for Proposal document for some JHHS equipment purchases. Do so by clicking on the “Notes and Attachments” tab.

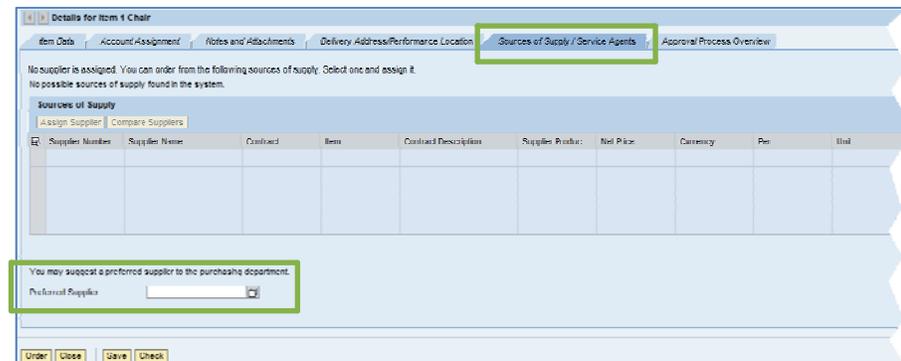


7. Confirm the Delivery Address. The delivery address established in your settings will be defaulted into your Shopping Cart. If you are creating a Shopping Cart for Johns Hopkins Home Care Group, and are drop-shipping the purchase to a patient, then you will need to enter the Delivery Address.

- If the Ship-To address is already in the system, you may locate it either by entering the number in the “Address Search” field or by clicking the file folder icon  to bring up the search window.
- If the Delivery Address is new, then enter the new address information in the fields below the Delivery Address tab.

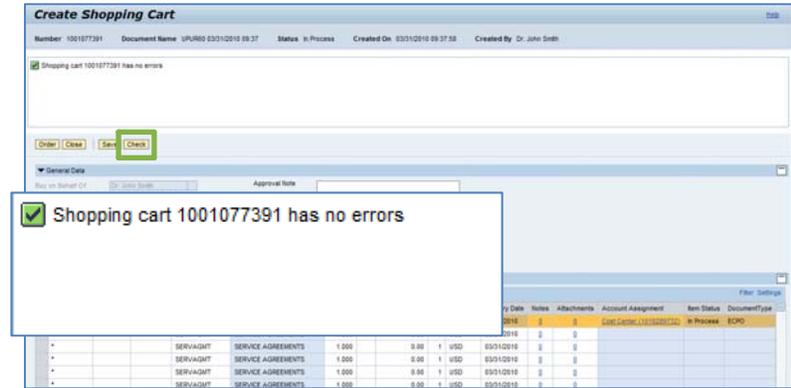


8. Select a Supplier. Next, click the tab labeled “Sources of Supply/Service Agents” (also under “Details”). Vendors for pharmaceuticals are listed and you may click on the appropriate vendor and then select “Assign Supplier.” If you’re not sure how to search for a supplier, there is a Job Aid called “Searching for a Vendor” that can help.



- If no sources appear, or if you prefer a different supplier, click in the “Preferred Supplier” at the bottom of the screen. To search for a supplier, select the file folder icon  to look it up in a list.

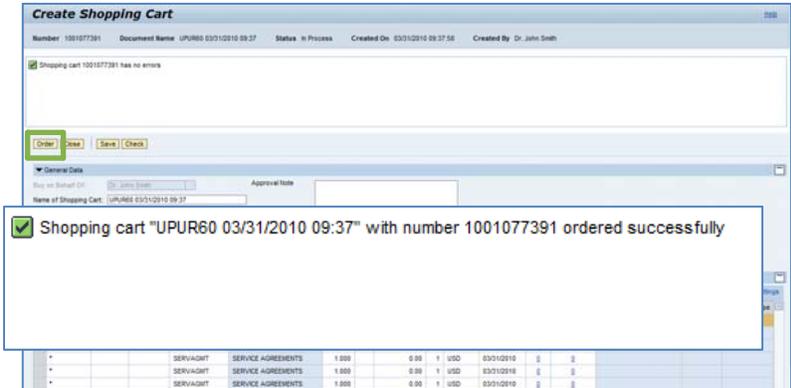
9. Check the Order. Your order is now complete. Click “Check” (either at the top or the bottom of the screen) to verify the order and make sure that no error messages appear at the top of the screen.



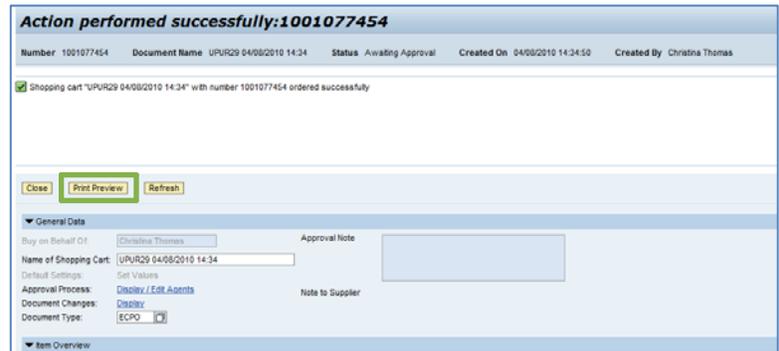
10. Place the Order. Once you have verified the order, click “Order.” You will see a message at the top of the screen that says “Actions performed successfully.”

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.

When your order is complete, click “Close” to return to the Shopping Cart Home Page.

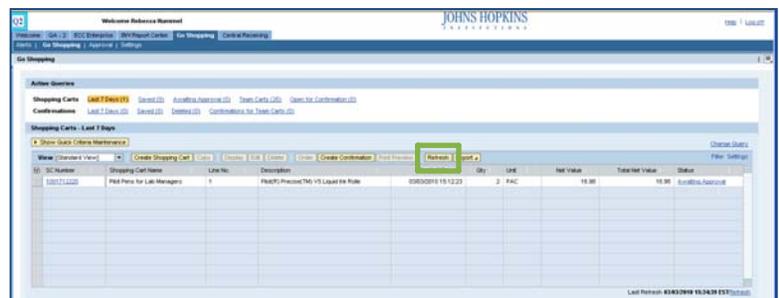


11. Print Preview. The “Print Preview” button will appear once you have placed the order. You may want to print a copy of your order just in case there is a problem finding the shopping cart later.



12. Refresh! On the Shopping Cart Home Page, click “Refresh.” This is necessary to see the new order in your queue.

You’re all done! Your CAPP order has been successfully entered in SAP.



Always click “Refresh” when you get to the Shopping Cart Home Page to see your most recent orders. They will not appear until you have clicked “Refresh.”