



# Shopping Cart: Create an PROJ Order

## Use this Job Aid to:

- Learn how to place an order for capital projects in SAP, including acquiring new capital assets or making alterations to existing capital assets.

### BEFORE YOU BEGIN

You will need to know the vendor, WBS Element, Fund, and Project Manager for the job.

## Create a PROJ Order

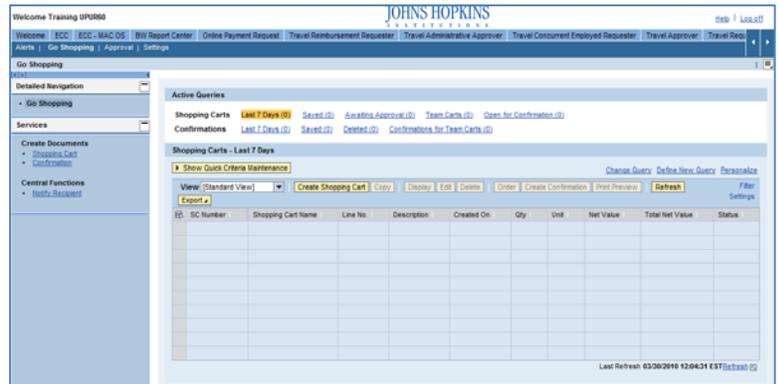
A PROJ order is a request for capital projects, including the acquisition or construction of a new capital asset; or the renovation, alteration, replacement of a major component system, or addition to an existing capital asset. Capital assets include acquisition or construction of a new building (or land improvements) at a cost of \$100,000 or more. Capital assets also include the renovation, alteration, replacement of a component system, or addition at a cost of \$100,000 or more, where the project extends the useful life, increases the capacity, or changes the use of the capital asset.

Renovation, alterations, replacements or additions are expensed as normal maintenance and are therefore not capitalized when the cost is less than \$100,000, or the cost is \$100,000 or more and the useful life is not extended, the capacity is not increased, or the use of the asset is not changed. The cost of a building includes all necessary expenditures to acquire or construct the building (or land improvements) for its intended use.

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

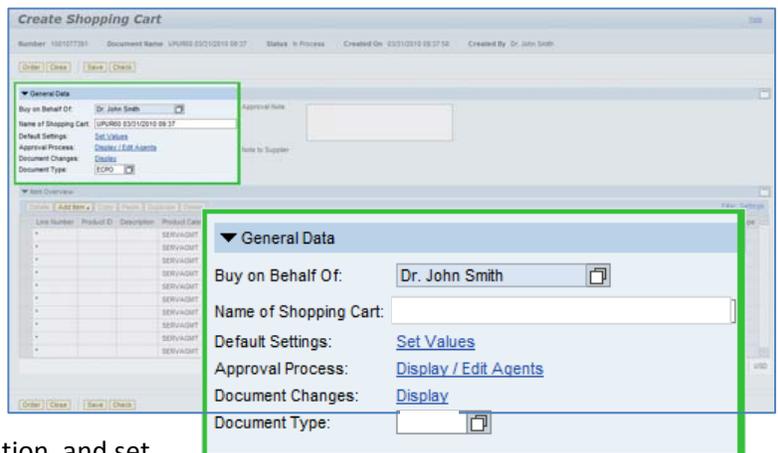
#### Helpful Hint

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 “Construction of Peds Unit.”
- 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.

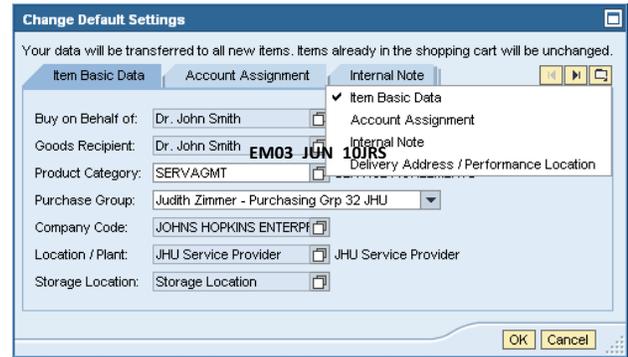


Note that even after you set the default values, you can still change individual items within the cart to different values. This feature can be a great time-saver for carts with multiple lines.

- Select the document type for your order. In this case, we'll change it to PROJ.

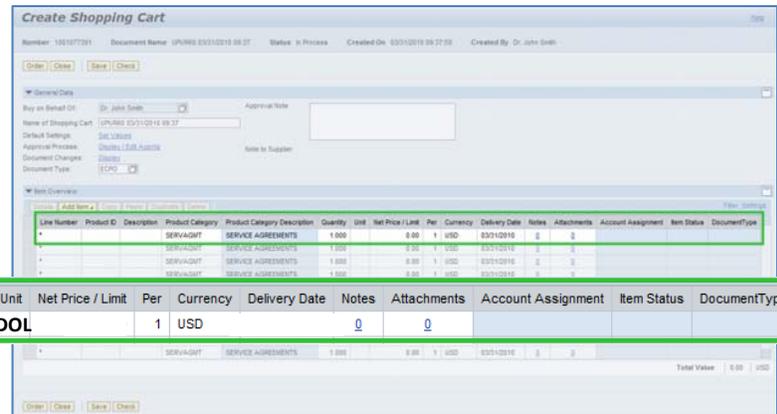
**Helpful Hint**

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.

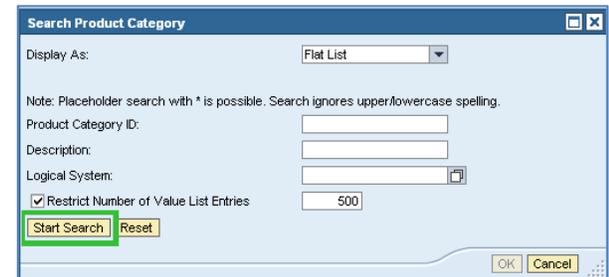
- Start with the "Description" field. In this case, we've entered "Construction" as the description.



Line Number	Product ID	Description	Product Category	Product Category Description	Quantity	Unit	Net Price / Limit	Per	Currency	Delivery Date	Notes	Attachments	Account Assignment	Item Status	DocumentType
*		Constr	SERVAGMT	SERVICE AGREEMENTS		DOL		1	USD						

- Next enter the "Product Category." For example, on many PROJ carts, you may use the category CONSTRCT & MAINT SRV. 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.



- Next, go back to the first line in the order and enter the "Quantity." For PROJ orders, the quantity is the total dollar value of the materials or services requested, or the total budgeted for the service. For example, you might enter 50,000.
- Enter the "Unit" next. For PROJ carts, the unit should be dollars, or DOL.
- Enter the "Price" in the Net Price/Limit field. For PROJ carts, the price should always be 1.00.
- Ignore the field that says "Per."
- The "Currency" for PROJ carts should always be USD.
- In the "Delivery Date" field, enter the date when the materials are expected to arrive or services are expected to occur.
- When you are all done, click "Enter" to apply your selections.

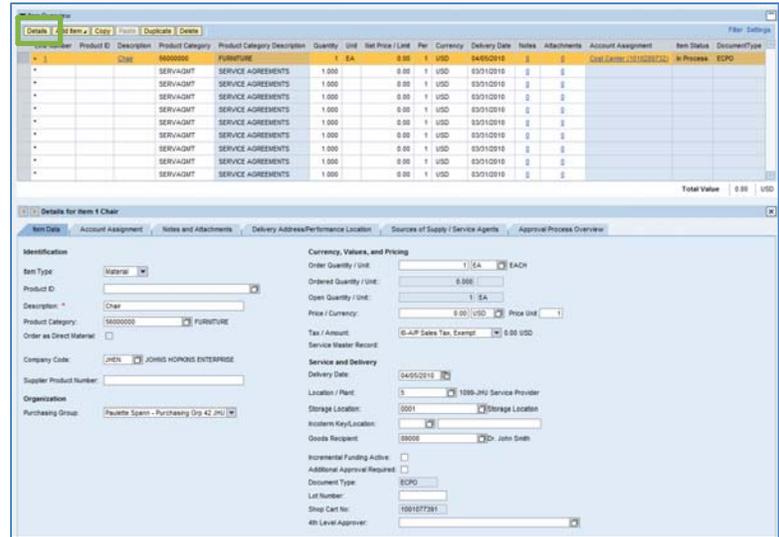
**Helpful Hint**

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.

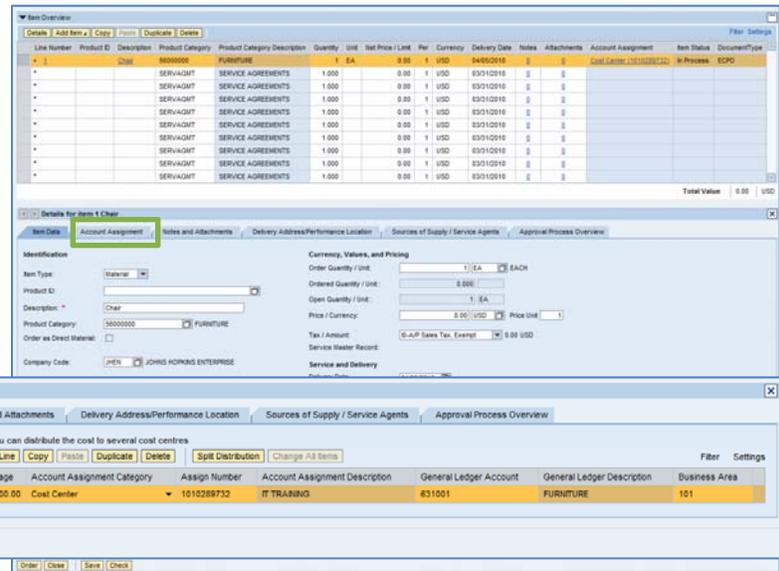
Helpful Hint

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.

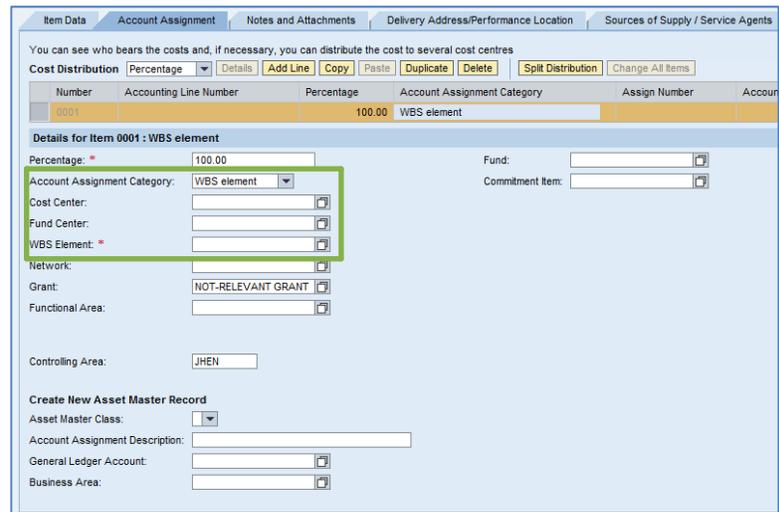


5. **Account Assignment.** After you click Enter, the “Details” button will become active. Click it to display the details for the first line in your order. Click on the tab labeled “Account Assignment.”

- Check the cost object in the “Account Assignment Category” field (this field could say Cost Center, Internal Order, or WBS Element). **A PROJ shopping cart always uses a WBS element number for cost assignment. It will not allow the assignment of a cost center or internal order for charging costs.**

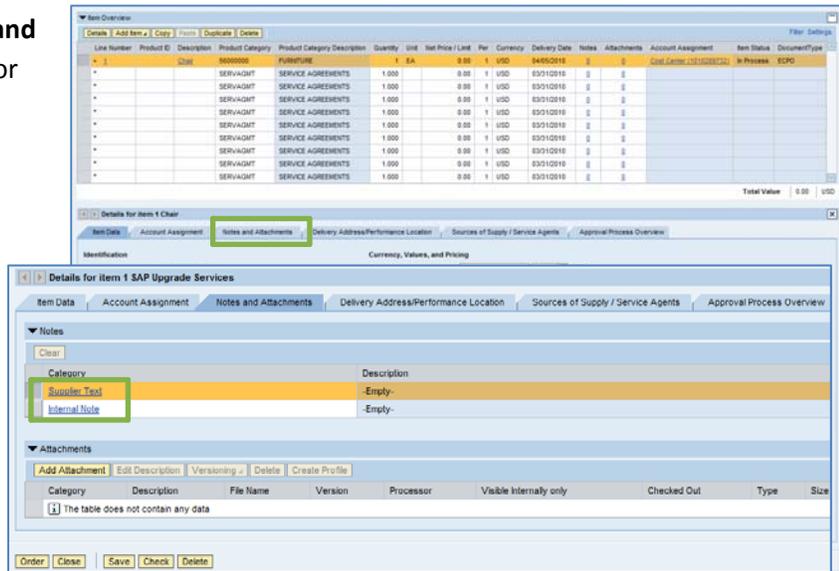


- Then, click the “Details” button to enter the fund information for the job.
- Enter the “Fund Center” (example: 1716560003).
- Next, enter the “WBS Element” (example: C.165.10.0003.2.01).



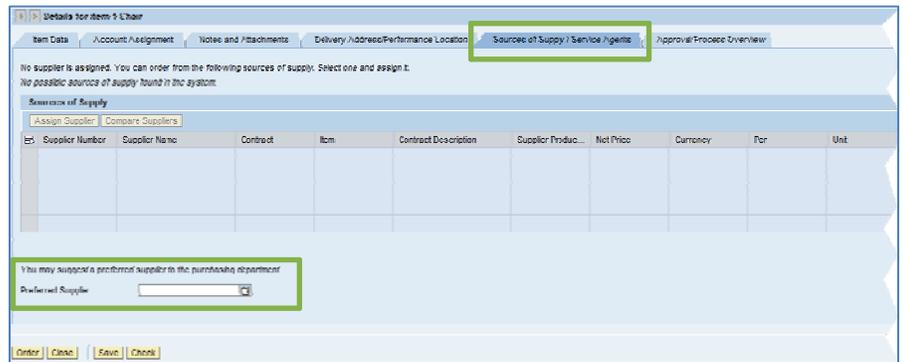
**6. Attach Notes and or Documents.** Click the “Notes and Attachments” tab to attach the project proposal and/or type any notes in this Shopping Cart.

- Click “Supplier Text” to add notes to the vendor, which will appear on the finished Purchase Order.
- Click “Internal Notes” to add notes that pertain to your order, but will not be seen by the vendor.



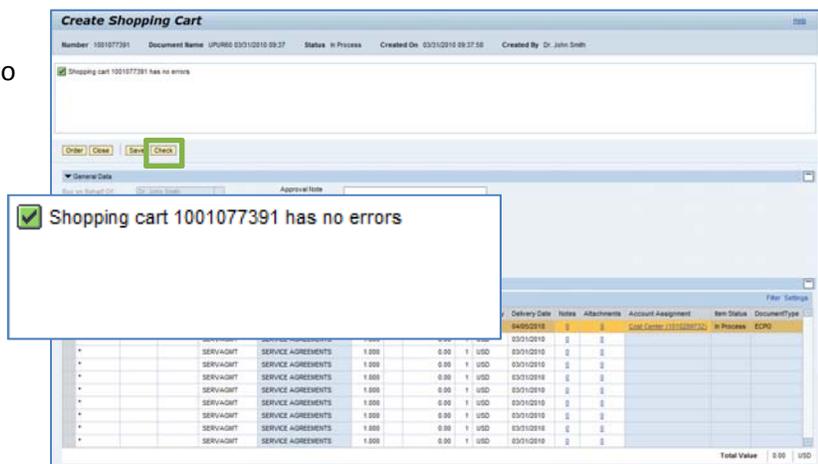
**7. Select a Supplier.** Next, click the tab labeled “Sources of Supply/Service Agents” (also under “Details”). This is where you’ll select the supplier for the equipment that you wish to order.

- Sources of Supply may appear in the fields under this tab.



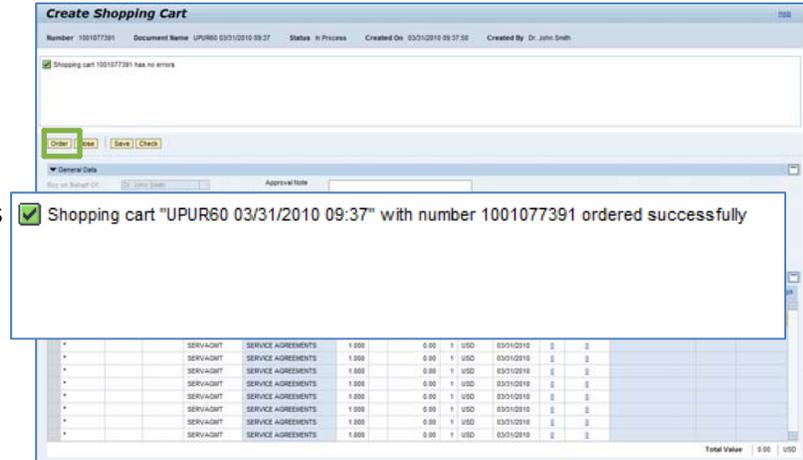
**8.** If no sources appear, or if you prefer a different supplier, click in the “Preferred Supplier” at the bottom of the screen. To search for a supplier, select the file folder icon to look it up in a list. If you’re not sure how to search for a supplier, there is a Job Aid called “Searching for a Vendor” that can help.

**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.

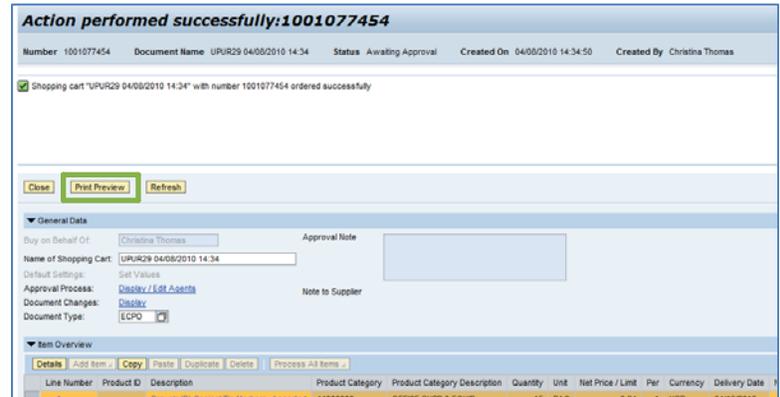


**10. Place the Order.** Once you have verified the order, click “Order.” You will see a message at the top of the screen that says “Actions performed successfully.”

- 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 wish to print a copy of your order 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 PROJ 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.”