



Shopping Cart: Create a SPPO Order

Use this Job Aid to:

- Learn how to create a Sponsored Projects Sub-Award or Sub-Contract through SAP utilizing an Internal Order as the funding source.

BEFORE YOU BEGIN


Make sure your settings are correct. Before you start the cart, you will need to know what you are ordering, the vendor, the account assignment, and the General Ledger (G/L) account to charge to.

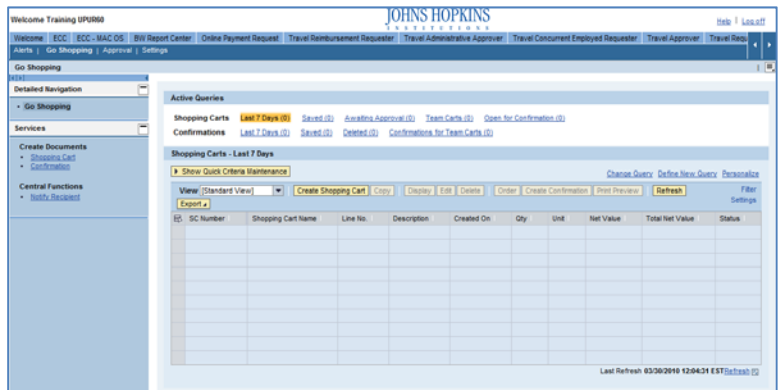
Create a SPPO Order

Use a SPPO Shopping Cart to create a Sponsored Projects Sub-Award or Sub-Contract utilizing an Internal Order as the funding source. An SPPO shopping cart, once approved, becomes an SPPO purchase order. 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. Each time a service is received and invoiced by the vendor, a confirmation is done for the dollar amount charged for that instance of the service. This in turn is decremented from the available funds assigned to the purchase order. Note that this cart type is for **JHU only**.

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

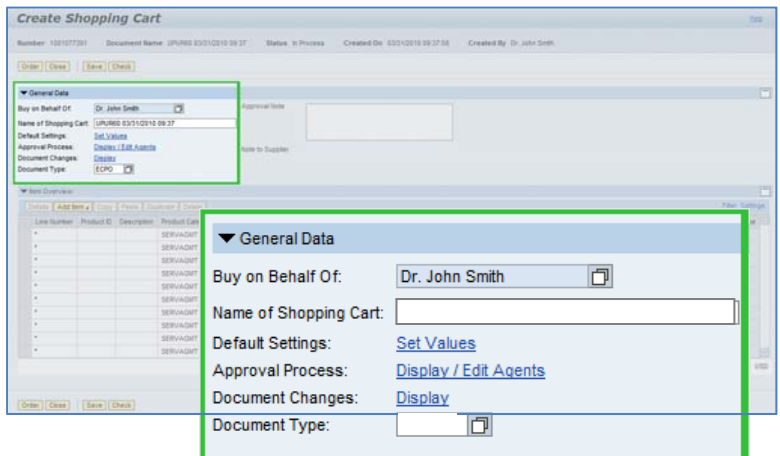
Helpful Hint

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.



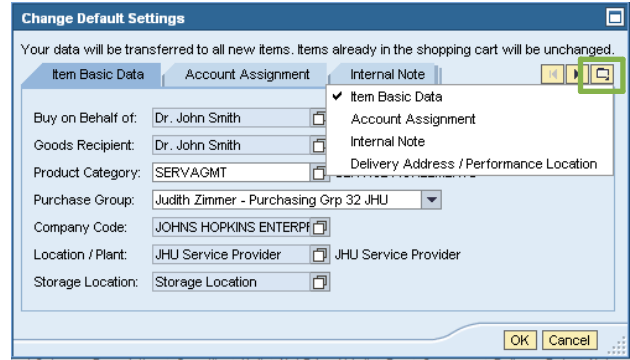
- 2. Enter General Data.** The “Create Shopping Cart” screen will appear. Start your order in the “General Data” section of this screen.

- You may wish 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 “ETI Technologies.”
- 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 for the cart here, and it will populate on 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 SPPO.



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.

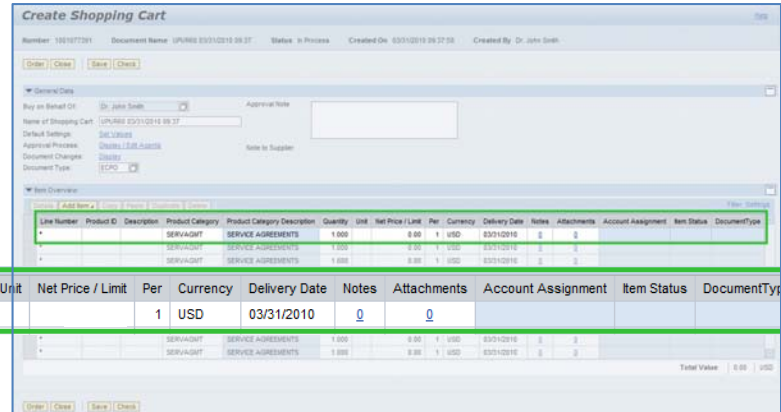


3. Enter Item Data. Go to the first line in the order and start entering the order information. You’ll work your way across the line for each item before you press Enter.

- Start with the “**Description**” field and enter text that identifies an activity or phase in the contract.

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
*		Sub						1	USD	03/31/2010					

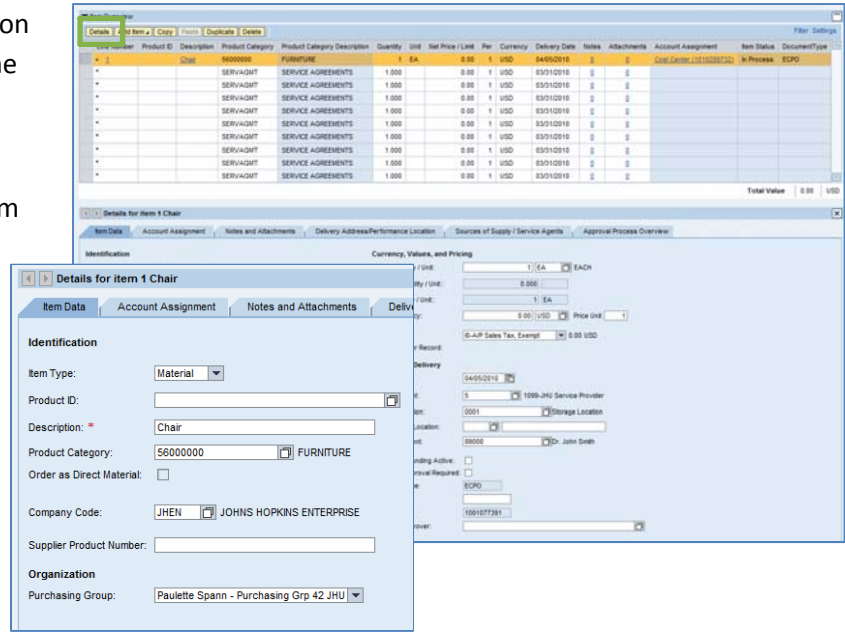
- Next enter the “**Product Category.**” For SPPO orders, you should enter SUBAWARDS for the product category.
- Enter the “**Quantity.**” For SPPO carts, enter the total dollar value of the materials or services requested, or the total budgeted for the service.
- Enter the “**Unit**” next. If you don’t know the appropriate unit to enter, select the file folder icon  to look it up in a list.
- You may not know the “**Price**” per unit. If so, just enter 1.00. This allows the vendor to invoice you incrementally as services are provided.
- The “**Delivery Date**” is when the service is expected to end.
- When you are all done, click “**Enter**” to apply your selections.



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

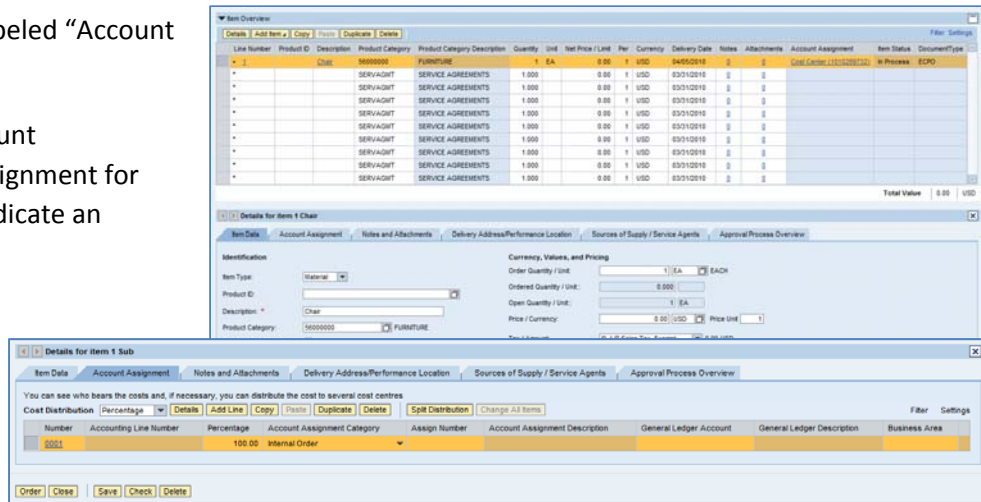
4. Item Details. After you click Enter, the “Details” button will become active. Click it to display the details for the first line in your order. The first tab “Item Data” will automatically be displayed.

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



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

- Check the cost object under the “Account Assignment” header. The Account Assignment for Sponsored Projects purchases must indicate an Internal Order.
- Click under the header that says “Assign Number” to enter the Internal Order number. Internal Orders for Sponsored Projects are 8 digits long and begin with the number “96.”




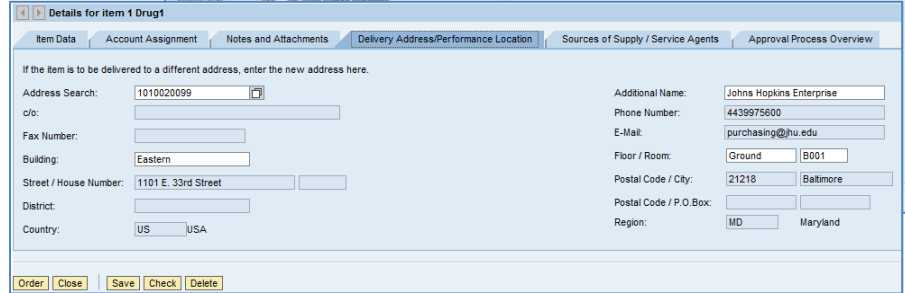
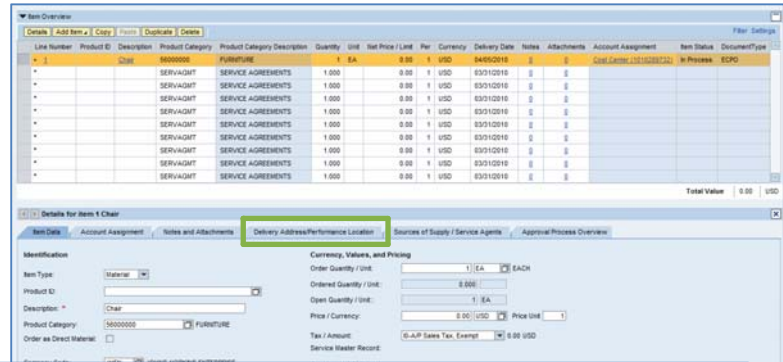
- Click in the field under the header that says “General Ledger Account” and enter the G/L number. The G/L number Sponsored Projects must be 642410.

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.

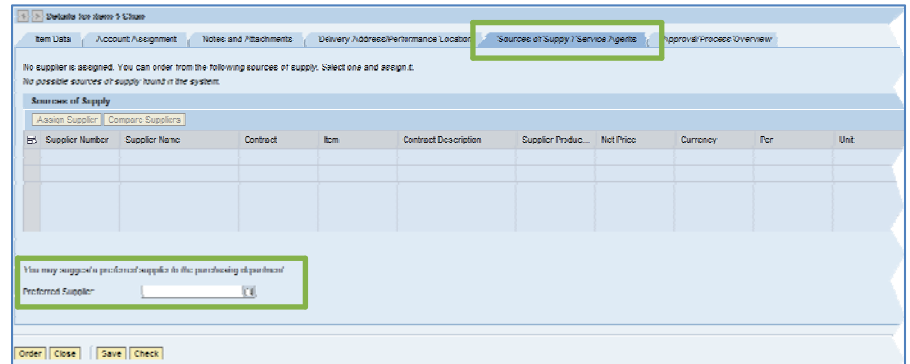
6. Confirm the Delivery Address. The delivery address established in your settings will be defaulted into your Shopping Cart.

- 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.

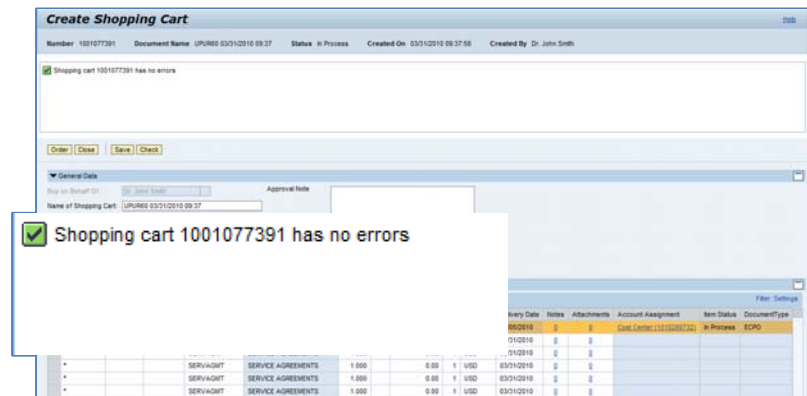


7. Select a Supplier. Next, click the tab labeled “Sources of Supply/Service Agents” (also under “Details”). For SPPO carts, the system displays a list of established vendors to choose from.

- If you select a vendor from the established list, just click the vendor name and then select “Assign Supplier.” For established vendors, the PO is automatically approved.
- If you do not select a vendor from the list, you can enter a Preferred Vendor.
- If you do not select either a vendor from the list or a Preferred Vendor, Purchasing will complete this data for you.



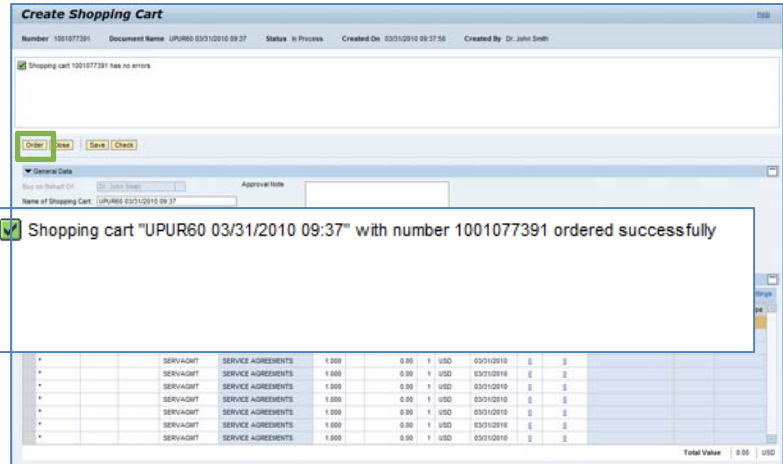
8. Check the Order. Your order is now complete. Click “Check” (either at the top or the bottom of the screen) to verify the order and make sure that no error messages appear at the top of the screen.



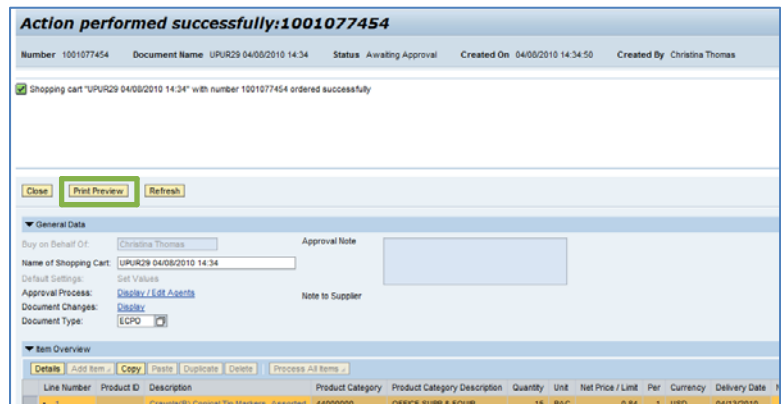
9. Place the Order. Once you have verified the order, click “Order.” You will see a message at the top of the screen that says “Actions performed successfully.”

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.

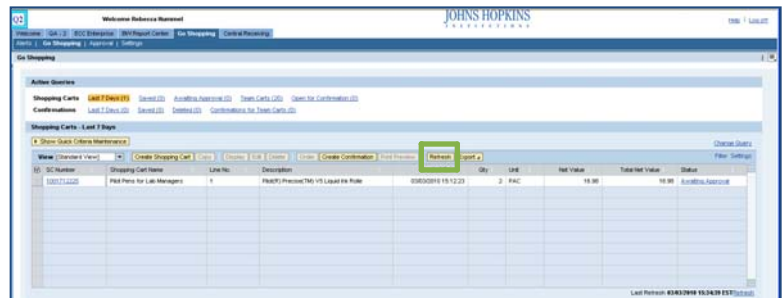


10. Print Preview. The “Print Preview” button will appear once you have placed the order. Always print a copy of your order just in case there is a problem finding the shopping cart later.



11. 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 SPPO 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.”