

Use this job aid to make any changes to a Shopping Cart that has an "Awaiting Approval" status.

If the Shopping Cart has an "Approved" status, please refer to the Modifying PO's job aid.

1. From the *Manage Shopping Carts* area, locate the Shopping Cart to be changed, and then click the Shopping Cart Number hyperlink to open and display.

Home	Human Resources	Systems	Proc	urement / Contracts	Asset Management	Reports					
Process Transactions											
Manage Shopping Carts											
Detailed M											
Detailed Na	avigation	_	Acti	ve Queries							
Manage Shopping Carts Maintain Service Entry Sheet			Shopping Carts All (3) Saved (0) Awaiting Approval (0)								
 Display in Post, Chai 	nge or View Goods F	Receipt/Iss	Shopping Carts - All								
 Manage P 	Manage Purchase Order			Show Quick Criteria Maintenance							
Services			V	iew: [Standard View]	Create Shopp	ing Cart Copy	/ Display Edit Delet	e Order Create			
Create Sho	pping Cart		5	Shopping Cart Number	Shopping Cart Name	Item Number	Item Name	Status			
Portal Favo	orites	Ē		100002418	Edit a Shopping Cart	1	Computer Desk w/Hutch	Awaiting Approval			
				100002418	Edit a Shopping Cart	2	65" Bookcase	Awaiting Approval			
				1000002418	Edit a Shopping Cart	3	Delivery Charge & Set-up	Awaiting Approval			

2. Click the Edit button on the document toolbar:

Display Shopping Cart:1000002418							
Number 1000002418 Document Name Edit a Shopping Cart Status Awaiting Approva							
Edit Close Print Preview Show my Tasks Refresh Copy							

3. A *Change* dialogue box will display notifying the user that the approval process may be restarted. Click the **Continue** button:







4. A system message will display, advising that the Shopping Cart document has been recalled and sent to the user's inbox (Universal Worklist). <u>Click the **Close** button to close the Shopping</u> <u>Cart</u>. This action will return the user to the *Manage Shopping Carts* area once more.

Change Shopping Cart and Order:	1000002418						
Number 1000002418 Document Name Edit a Shopping Cart	Status Awaiting Approval						
Document recalled; revision work item has been sent to your inbox							
Order Close Print Preview Save Check Delete							

5. Once again, click on the Shopping Cart Number hyperlink to open and display the Shopping Cart:

Home	Human Resources	Systems	Proc	urement / Contracts	Asset Management	Reports						
Proces	Process Transactions											
Manage	Manage Shopping Carts											
Detailed	I Navigation		Act	Active Queries								
 Manage Maintai Display 	Manage Shopping Carts Maintain Service Entry Sheet			Shopping Carts All (3) Saved (0) Awaiting Approval (0)								
 Display Post. C 	hange or View Goods F	Receipt/Iss	Shopping Carts - All									
 Manage 	e Purchase Order		Show Quick Criteria Maintenance									
Service	s		V	iew: [Standard View]	Create Shopp	ing Cart Copy	y Display Edit Delet	e Order Create				
Create S	hopping Cart		6	Shopping Cart Number	Shopping Cart Name	Item Number	Item Name	Status				
Portal E	avorites	Ē		<u>1000002418</u>	Edit a Shopping Cart	1	Computer Desk w/Hutch	Awaiting Approval				
· or carrie		E		100002418	Edit a Shopping Cart	2	65" Bookcase	Awaiting Approval				
				100002418	Edit a Shopping Cart	3	Delivery Charge & Set-up	Awaiting Approval				

6. A system message will display, notifying the user that there is an *open task*. Click the "*Show my Tasks*" button.

Display Shopping Cart:1000002418								
Number	1000002418	Document Name Edit a Shopping Cart	Status Awaiting Approval					
Vou hav	Vou have an open task for this document; choose "Show My Tasks"							
Close	Print Preview	Show my Tasks Refresh Copy						





7. A dialogue box will appear displaying the task under the Subject heading. Click the "Process Now" button.

Sele	ect a task to process the shopping cart		
M	y Tasks for This Document		
	Subject	From	*
	Revise Shopping Cart 1000002418 with Value 946.98 USD	04/07/2014 22:28:17	
		[Ŧ
		Process Now Cance	el
			,

- 8. The user can now make any desired changes to the Shopping Cart document. Examples include:
 - Add items
- Delete items
- Change funding
- Change delivery
- Change vendor
- Add notes & attachments
- Decrease/increase quantity •
- Change pricing •
- 9. After making the desired changes, click the **Check** button to validate the data and check for any errors or system messages. After correcting errors, or, if there are no errors, click the **Order** button to re-submit the Shopping Cart to the Site Administrator for approval.



Close the document after ordering.





The following steps illustrate <u>an alternate way</u> to make changes to Shopping Carts *through the Universal Worklist*.

1. Click the **Procurement/Contracts** tab:

COLOR COMPANY	🗧 Upcoming Dates - SAP NetWeaver Portal - Windows Internet Explorer provided by CITR!X								
💽 🔄 🗢 🚾 https://bts.lausd.net/iri/portal 🔎 🖌 🚰 🐓 🗶 🖅 Upcoming Dates - SAP NetW 🗙									
Welcom	e DIANA VASQUEZ								
Home	Financials/Budget	Human Re	sources	Time Reporting	Support	Asset Management	Procurement / Contracts	Re	
Home	Universal Worklist								
Upcomin	ng Dates								
		•							
Detailed	Navigation							0.1	
• Upcom	ing Dates		SAP	SAP is not supported by Internet Explorer 10 (IE 10). Downloading a Citi			Citri		
 About E 	About BTS						uow		
 ALERT - R/3 Logoff Procedure 									
 Tech St 	upport		Upcoming Time Entry Cut-Off Dates						

2. Click the Process Transaction sub-tab:

(é P	⊖ Procurement/Contracts - SAP NetWeaver Portal - Windows Internet Explorer provided by CITR!X								
C	🎯 💿 💌 https://bts.lausd.net/iri/portal 🔎 🔽 🔒 😚 🔀 🖅 Procurement/Contracts - SA 🗙								
v	Welcome DIANA VASQUEZ								
H	lome	Financials/Budget	Human Resources	Time Reporting	Support	Asset Management	Procurement / Contracts	F	
M	lanage	Master Data Prod	cess Transactions						
P	rocurer	ment/Contracts							
•	•		•						
D	etailed	Navigation							
•	Display Vendor Addresses								
P	ortal Fa	vorites							

3. Click the Manage Shopping Cars link:







4. Click the Shopping Cart Number link to open/display:

Shopping Carts - All								
Show Quick Criteria Maintenance								
View: [Standard View] 🔹 Create Shopping Cart Copy Display Edit Delete Order Create Confirmation Print Preview [
5	Shopping Cart Number	Shopping Cart Name	ltem Number	Item Name	Status	Item Status		
	<u>1000002554</u>	Lakeshore supplies	1	Construction Paper 9x12	Awaiting Approval	Awaiting Approval		
	<u>1000002554</u>	Lakeshore supplies	2	SuperBright Liquid Tempura Paint 1 Pint	Awaiting Approval	Awaiting Approval		
	<u>1000002554</u>	Lakeshore supplies	3	Safety Scissors	Awaiting Approval	Awaiting Approval		

5. Click the **Edit** button to unlock the Shopping Cart. Click the **Edit** button on the document toolbar:

Display Shopping Cart:1000002554	
Number 1000002554 Document Name Lakeshore supplies Status Awaiting Ap	proval
Edit Close Print Preview Show my Tasks Refresh Copy	

6. A *Change* dialogue box will display notifying the user that the approval process may be restarted. Click the **Continue** button:

Change	3
Document is in approval; if you continue, the approval process might be restarted	
	4

7. A system message will display, advising that the Shopping Cart document has been

"...recalled and sent to the user's inbox" (Universal Worklist). <u>Click the **Close** button to close</u> <u>the Shopping Cart</u>. This action will return the user to the *Manage Shopping Carts* area once more.

Char	nge Sho	pping Cart	and Orde	r:1000002554			
Number	1000002554	Document Name	Lakeshore supplies	Status Awaiting Approval			
Document recalled; revision work item has been sent to your inbox							
Order	Close	t Preview Save	Check Delete				







8. Click on the Home tab, then click the Universal Worklist sublink.

Home	Human Resources	Systems	Procurement / Contracts	Asset Management	Reports
Home	Universal Worklist				

9. Click the **Refresh** icon to refresh the list and view the most current list of tasks:

V The list of items shown here could be outdated. Waiting for update										
Tasks (17 / 17) Alerts Notifications SAPoffice Mails Tracking										
Show: New and In Progress Tasks (17 / 17) V All V										
5	Subject	-! From	Sent Date	Priority = 🕖	Due Date Status					
	Revise Shopping Cart 1000002554 with Value 186.76 USD	Test User 205, LAUSD Today		Medium	New					

Click on the Shopping Cart link to be revised.

- 10. Make desired changes to the Shopping Cart document. Examples include:
 - Add items
- Delete items
- Change funding
- Add notes & attachmentsDecrease/increase quantity
- Change deliveryChange vendor
- Change pricing
- 11. After making the desired changes, click the **Check** button to validate the data and check for any errors or system messages. After correcting errors, or, if there are no errors, click the **Order** button to re-submit the Shopping Cart to the Site Administrator for approval.

Order Close Print Preview	Save	Check [)elete
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Close the document after ordering.