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SC0100

Shopping Cart for Requestors

2013 / 2014



TABLE OF CONTENTS

SAP TRAINING PORTAL LINK..... 3

SUMMARY OF TRANSACTIONS COVERED..... 3

EXERCISE 1 – CREATE SHOPPING CART USING AN EXTERNAL CATALOG..... 4

EXERCISE 2 – CREATE SHOPPING CART – USING AN INTERNAL CATALOG..... 5

EXERCISE 3 – CREATE SHOPPING CART – GOODS < \$25,000 6

EXERCISE 4 – CREATE SHOPPING CART – GOODS > \$25,000 7

EXERCISE 5 – CREATE SHOPPING CART – PROFESSIONAL SERVICES < \$25,000..... 9

EXERCISE 6 – CREATE SHOPPING CART-PREPARED INSTRUCTIONAL MATERIAL (SUPPLEMENTAL SUPPLIES) 11

EXERCISE 7 – CREATE SHOPPING CART (FIXED ASSET ≥ \$5,000) 13

EXERCISE 8 – UPDATE A REJECTED SHOPPING CART 15

EXERCISE 9 – MODIFY A PURCHASE ORDER 16

EXERCISE 10 – CREATE A GOODS RECEIPT 18

EXERCISE 11 – COMPLETE FIXED ASSET INFORMATION 19

SAP Training Portal Link

The SAP training URL listed below is only available during training sessions and is only accessible inside the training network.

<http://saptp7-3d.lausd.net:50000/irj/portal>

Summary of Transactions Covered

Below is a list of all SRM transactions included in this course.

Exercise	Transaction
Ex. 1	Create Shopping Cart - Using an External Catalog
Ex. 2	Create Shopping Cart - Using an Internal Catalog
Ex. 3	Create Shopping Cart - Goods/Services < \$25,000
Ex. 4	Create Shopping Cart - Goods/Services > \$25,000
Ex. 5	Create Shopping Cart - Professional Services < \$25,000
Ex. 6	Create Shopping Cart - Prepared Instructional Material
Ex. 7	Create Shopping Cart - Fixed Asset \geq \$5,000
Ex. 8	Update Rejected Shopping Cart
Ex. 9	Modify Purchase Order
Ex. 10	Create Confirmation of Goods Receipt
Ex. 11	Complete Fixed Asset Information
Assessment & Evaluation	

Exercise 1 – Create Shopping Cart Using an External Catalog

Situation

Create a Shopping Cart to purchase Non-Instructional supplies/equipment from **Grainger** using their OCI catalog:

Order:

- **12 Packs Batteries, AA Alkaline, 24 PK (5LE23)**

Instructions

Use the Job Aid(s): from the BASE website: [*Create Shopping Cart - Using an External Catalog*] to complete the exercise.

Portal Navigation Path

Procurement/Contracts tab → Manage Shopping Carts → Create Shopping Cart

Step	Field	Value
1.	General Data: Name of shopping cart:	[your name] Ex. 1
2.	General Data: Default Settings	Click Set Values link
3.	Change Default Settings:	Click Account Assignment tab
4.	Account Assignment	Click Details button
5.	Cost Center	1812301
6.	Functional Area	1110-1000-14170
7.	Change Default Settings:	Click OK
8.	Item Overview:	Click Add Item button
9.	Grainger Catalog	Find item 5LE23 → Quantity 12 → Add to Requisition → Continue to Requisition Form → Continue → Submit Requisition
10.	Document Toolbar	Click Check button to validate data
11.	Certify order	Click Certification checkbox
12.	Submit order	Click Order button
13.	Close the Shopping Cart Document	Click the Close button

Notes:

Exercise 2 – Create Shopping Cart – Using an Internal Catalog

Situation

Create a Shopping Cart and order the following items using the **District’s General Stores Distribution Catalog**.

Order will be a regular delivery.

Order:

- **10 Cases of Made in USA PAPER BOND 8.5” X 11” WHITE 20# 10/CSE (Product ID# 6452141170)**

Instructions

Use the Job Aid(s): from the BASE Website: *[Create Shopping Cart]* to complete the exercise.

Portal Navigation Path

Procurement/Contracts tab → Manage Shopping Carts → Create Shopping Cart

Step	Field	Value
1.	General Data: Name of shopping cart	[your name] Ex. 2
2.	General Data: Default Settings	Click Set Values link
3.	Change Default Settings:	Click Account Assignment tab
4.	Account Assignment	Click Details button
5.	Cost Center	1812301
6.	Functional Area	1110-1000-14170
7.	Change Default Settings:	Click OK
8.	Item Overview:	Click Add Item button
9.	LAUSD Distribution Catalog	Find item → Quantity 10 → Add to Cart → Check Out
10.	Document Toolbar	Click Check button to validate data
11.	Certify order	Click Certification checkbox
12.	Submit order	Click Order button
13.	Close the Shopping Cart Document	Click the Close button

Notes:

Exercise 3 – Create Shopping Cart – Goods/Services < \$25,000

Situation

Create a Shopping Cart to order the following items from **Gopher**:

Order: 2 - Outdoor Batting Cage Frame (42-462) @ \$1899.00 ea.

Instructions

Use the Job Aid(s): from the BASE Website: *[Create Shopping Cart – Using a Preferred Vendor]* to complete the exercise.

Portal Navigation Path

Procurement/Contracts tab → Manage Shopping Carts → Create Shopping Cart

Step	Field	Value
1.	General Data: Name of shopping cart	[Your Name] Ex. 3
2.	General Data: Default Settings	Click Set Values link
3.	Change Default Settings:	Click Account Assignment tab
4.	Account Assignment	Click Details button
5.	Cost Center	1812301
6.	Functional Area	1110-1000-14170
7.	Change Default Settings:	Click OK
8.	Preferred Vendor	1000001985 (Gopher)
9.	Item Overview	Click Add Item button
10.	With Free Description: Description	Outdoor Batting Cage Frame
11.	Product Category	80510 (SPORTING GOODS)
12.	Quantity/Unit	2 / ea
13.	Net Price/Quantity	1899.00 / USD
14.	Delivery Date	[future date: two weeks from today]
15.	Add Item With Free Description window	Click Add to Item Overview button
16.	Item Overview	Click on Details button
17.	Item Data tab: Supplier Product Number:	42-462
18.	Document Toolbar	Click Check button to validate data
19.	Certify order	Click Certification checkbox
20.	Submit order	Click Order button
21.	Close the Shopping Cart Document	Click the Close button

Exercise 4 – Create Shopping Cart – Goods/Services > \$25,000

Situation

Create a Shopping Cart to order computer desks from **Office Depot**.

Order:

- **100 - Computer Desk Safeco Reversible-Top, 30"H x 47 1/2"W @ \$259.99 ea.**
- **100 – Computer Chairs @ \$39.99**
- **1 – Standard Shipping and Handling @ \$75.00**

Instructions

Use the Job Aid(s) from the BASE Website: *[Create Shopping Cart – No Vendor Selected]* to complete the exercise.

Portal Navigation Path

Procurement/Contracts tab → Manage Shopping Carts → Create Shopping Cart

Step	Field	Value
1.	General Data: Name of shopping cart	[your name] Ex. 4
2.	General Data: Default Settings	Click Set Values link
3.	Change Default Settings:	Click Account Assignment tab
4.	Account Assignment	Click Details button
5.	Cost Center	1812301
6.	Functional Area	1110-1000-14170
7.	Change Default Settings:	Click OK
8.	Preferred Vendor	1000003909 (Office Depot)
9.	Item Overview:	Click Add Item button
10.	With Free Description: Description	Computer Desk
11.	Product Category:	42500 (FURNITURE: OFFICE)
12.	Quantity/Unit:	100 / ea
13.	Net Price/Currency:	259.99 / USD
14.	Delivery Date:	[future date: two weeks from today]
15.	Add Item With Free Description window	Click Add to Item Overview button
16.	Item Overview	Click on Details button

Step	Field	Value
17.	Item Data	Click the Item Data tab
18.	Supplier Product Number	729112
19.	Manufacturer Part Number	SAF1931
20.	Add Supplier note	click Notes and Attachments tab
21.	Notes: Category	Click Supplier Text link
22.	Supplier Text:	Safeco Reversible-Top, 30"H x 47 1/2"W
23.	Item Overview:	Click Add Item button
24.	With Free Description: Description	Computer Chairs
25.	Product Category:	42500 (FURNITURE: OFFICE)
26.	Quantity/Unit:	100 / ea
27.	Net Price/Currency:	39.99 / USD
28.	Delivery Date:	[future date: two weeks from today]
29.	Add Item With Free Description window	Click Add to Item Overview button
30.	Item Overview	Click on Details button
31.	Item Data	Click the Item Data tab
32.	Supplier Product Number	812313
33.	Item Overview	Click Add Item button
34.	With Free Description: Description	Standard Shipping & Handling
35.	Product Category	99998 (SHIPPING/DELIVERY/FREIGHT CHARGE)
36.	Quantity/Unit	1 / ea
37.	Net Price/Quantity	75.00 / USD
38.	Delivery Date	[future date: two weeks from today]
39.	Add Item With Free Description window	Click Add to Item Overview button
40.	Supplier Text window	Click OK
41.	Document Toolbar	Click Check button to validate data
42.	Certify order	Click Certification checkbox
43.	Submit order	Click Order button
44.	Close the Shopping Cart Document	Click the Close button

Exercise 5 – Create Shopping Cart – Professional Services < \$25,000

Situation

Create a Shopping Cart to procure the following Professional Development Services from **Knowledge Network Solutions**:

Order:

- **Teachers Motivating and Engaging Students – Project Number: NA-22-37, Course No. 102683 Presented by Robert Marzono for \$10,000.**

Instructions

Use the Job Aid(s): from the BASE Website: *[Create Shopping Cart – Professional Services < \$25,000]* to complete the exercise.

Portal Navigation Path

Procurement/Contracts tab → Manage Shopping Carts → Create Shopping Cart

Step	Field	Value
1.	General Data: Name of shopping cart	[Your Name] Ex. 5
2.	General Data: Default Settings	Click Set Values link
3.	Change Default Settings:	Click Account Assignment tab
4.	Account Assignment	Click Details button
5.	Cost Center	1812301
6.	Functional Area	1110-1000-14170
7.	Change Default Settings:	Click OK
8.	Preferred Vendor:	100000784 (Knowledge Network Solutions)
9.	Item Overview	Click Add Item button
10.	With Free Description: Description	Teachers Motivating & Engaging Students
11.	Product Category:	96800 (Public Works and Related Services)
12.	Quantity/Unit:	10,000 / EA
13.	Net Price/Currency:	1.00 / USD
14.	Delivery Date	[future date: end of the fiscal year]
15.	Add Item With Free Description window	Click Add to Item Overview button
16.	Item Overview	Click on Details button
17.	Item Data tab: Supplier Product Number	Course No. 102683

Step	Field	Value
18.	Add Supplier note	click Notes and Attachments tab
19.	Notes: Category	Click Supplier Text link
20.	Supplier Text:	Project Number: NA-22-37,. Presented by Robert Marzono between 12/01/2013 – 06/30/2014.
21.	Supplier Text window	Click OK
22.	Document Toolbar	Click Check button to validate data
23.	Certify order	Click Certification checkbox
24.	Submit order	Click Order button
25.	Close the Shopping Cart Document	Click the Close button

Notes:

Exercise 6 – Create Shopping Cart-Prepared Instructional Material (Supplemental Supplies)

Situation

Create a Shopping Cart to purchase Prepared Instructional Material (supplemental supplies) from a Preferred Vendor:

Lakeshore Learning

Order:

- **2 – I CAN READ! READERS – COMPLETE SET (TT483) - \$349.00 ea.**

Instructions

Use the Job Aid(s) from the BASE Website: *[Shopping Cart - Prepared Instructional Material/Supplemental Supplies]* to complete the exercise.

Portal Navigation Path

Procurement/Contracts tab → Manage Shopping Carts → Create Shopping Cart

Step	Field	Value
1.	Name of Shopping Cart	[your name] Ex. 6
2.	General Data: Default Settings	Click Set Values link
3.	Change Default Settings:	Click Account Assignment tab
4.	Account Assignment	Click Details button
5.	Cost Center	1812301
6.	Functional Area	1110-1000-14170
7.	Change Default Settings:	Click OK
8.	Preferred Vendor:	100000536 (Lakeshore Learning)
9.	Item Overview	Click Add Item button
10.	Select With Free Description: Description	I CAN READ! READERS – COMPLETE SET
11.	Product Category	78500 (SCHOOL SUPPLIES)
12.	Quantity/ Unit	2 / ea
13.	Net Price/Currency	349.00 / USD

Step	Field	Value
14.	Delivery Date	[future date: two weeks from today]
15.	Add Item with Free Description window	Click the Add to Item Overview button
16.	Item Overview	Click Details button
17.	Item Data tab: Supplier Product Number	TT483
18.	Document Toolbar	Click Check button to validate data
19.	Certify order	Click Certification checkbox
20.	Submit order	Click Order button
21.	Close the Shopping Cart Document	Click the Close button

Notes:

Exercise 7 – Create Shopping Cart (Fixed Asset ≥ \$5,000)

Situation

Create a Shopping Cart to purchase the following asset using a Preferred Vendor, **Music Notes, LLC**:

Order:

- **Yamaha U1 48” Professional Collection Acoustic Upright Piano @ \$5,500.00 ea.**

Instructions

Use the Job Aid(s) from the BASE Website: *[Create Shopping Cart – Product Assets ≥ \$5,000]* to complete the exercise.

Portal Navigation Path

Procurement/Contracts tab → Manage Shopping Carts → Create Shopping Cart

Step	Field	Value
1.	Rename Shopping Cart	[Your Name] Ex. 7
2.	General Data: Default Settings	Click Set Values link
3.	Change Default Settings:	Click Account Assignment tab
4.	Account Assignment	Click Details button
5.	Cost Center	1812301
6.	Functional Area	1110-1000-14170
7.	Change Default Settings:	Click OK
8.	Preferred Vendor:	1000004107 (Music Notes, LLC.)
9.	Item Overview	Click Add Item button
10.	Select With Free Description: Description	Upright Piano
11.	Product Category	58000 (MUSICAL INSTRUMENT)
12.	Quantity/ Unit	1 / ea
13.	Net Price/Currency	5500.00 / USD
14.	Delivery Date	[future date: two weeks from today]
15.	Add Item with Free Description window	Click the Add to Item Overview button
16.	Check Funds Availability: Document Toolbar	Click Check button
17.	Item Overview	Click Details button
18.	Item Data tab: Supplier Product Number	Yamaha U1 48”
19.	Account Assignment	Click Account Assignment tab
20.	Accounting Line Details	Click Details button

Step	Field	Value
21.	Account Assignment Category	Select Asset
22.	Document Toolbar	Click Check button to validate data (check's funds availability)
23.	Add Supplier note	click Notes and Attachments tab
24.	Notes: Category	Click Supplier Text link
25.	Supplier Text:	Professional Collection Acoustic Upright Piano
26.	Supplier Text window	Click OK
27.	Document Toolbar	Click Check button to validate data
28.	Certify order	Click Certification checkbox
29.	Submit order	Click Order button
30.	Close the Shopping Cart Document	Click the Close button

Notes:



Exercise 8 – Update a Rejected Shopping Cart

Situation

A Shopping Cart has been rejected by the Site Administrator/Principal. Check the Universal Worklist to view the rejected cart, make the required edits and resubmit for approval (**use the Shopping Cart that was created in Exercise 2**):

Decrease the quantity to the following:

- **5 Cases of Bond Copy Paper, White**

Instructions

Use the Job Aid(s) from the BASE Website: [*Update a Rejected Shopping Cart*] to complete the exercise.

Portal Navigation Path

Home → Universal Worklist

Step	Field	Value
1.	Access the Universal Worklist	Click the Home tab
2.	Home tab:	Click Universal Worklist
3.	Refresh Worklist	Click Refresh  icon, far right
4.	Open Shopping Cart	Click on Accept Decision/Adjust Shopping Cart link
5.	Document Toolbar	Click the Edit Button
6.	Additional Information window	Click the OK button
7.	Item Overview: Quantity	5
8.	Document Toolbar	Click Check button to validate data
9.	Submit order	Click Proceed button
10.	Close the Shopping Cart Document	Click the Close button

Notes:

Exercise 9 – Modify a Purchase Order

Situation

Make the following modifications to a Purchase Order

Use the Shopping Cart that was created in Exercise 3.

Increase the quantity to the following:

- **Outdoor Batting Cage Frame (increase quantity to 4)**
- **ADD - Standard Shipping & Handling @ \$25.00 (product category 99998)**

Instructions

Use the Job Aid(s): from the BASE Website: [*Modify a Purchase Order*] to complete the exercise.

Portal Navigation Path

Procurement/Contracts tab → Manage Shopping Carts

Step	Field	Value
1.	Manage Shopping Cart	Open Shopping Cart created with exercise 3
2.	Related Documents	Click the Related Documents tab
3.	History: Purchase Order	Click the Document Number (PO) link
4.	Document Toolbar	Click the Edit button
5.	Item Overview (line 1): Quantity	4
6.	Description column	Standard Shipping & Handling
7.	Product Category column	99998 (SHIPPING/DELIVERY/FREIGHT CHARGE)
8.	Quantity/Unit columns	1 / ea
9.	Gross Price column	25.00
10.	Per column	1
11.	Delivery Date column	[future date: two weeks from today]
12.	Document Toolbar	Click Check button to validate data
13.	Item Overview	Click Details button
14.	Item Overview	Click Account Assignment tab
15.	Account Assignment tab	Click Details button
16.	Cost Center	1812301

Step	Field	Value
17.	Functional Area	1110-1000-14170
18.	Document Toolbar	Click Check button to validate data
19.	Submit order	Click Order button
20.	Close the Purchase Order	Click Close button

Notes:

Alert: The changes that you make to the PO will **not** show up on the Shopping Cart.

Exercise 10 – Create a Goods Receipt

Situation

A Shipment from Scholastic has arrived. Create a Goods Receipt to confirm that the goods have been received.

Use the Shopping Cart that was created with Exercise 7

Instructions

Use the Job Aid(s): from the Help Zone: [*Create Goods Receipt – One Shipment*] to complete the exercise.

Portal Navigation Path

Procurement/Contracts tab → Post, Change or View Goods Receipt

Step	Field	Value
1.	Manage Shopping Cart	Open Shopping Cart created with exercise 7
2.	Related Documents	Click the Related Documents tab
3.	History: Purchase Order	Write down or copy (Ctrl+c) PO number
4.	Close Shopping Cart	Click Close button
5.	Procurement/Contract tab	Click Goods Receipt link
6.	Goods Receipt: PO Number field	Enter or paste (Ctrl+v) the PO number
7.	Load PO Line Items	Click Execute  top left
8.	Quantity tab: Select Item	Click the Quantity tab
9.	Select Item	Click Item OK checkbox <input type="checkbox"/> Item OK
10.	Check the Goods Receipt	Click Check <input type="button" value="Hold"/> <input type="button" value="Check"/> <input type="button" value="Post"/>
11.	Document message:	<input checked="" type="checkbox"/> Document is O.K. , proceed
12.	Post Document	Click Post <input type="button" value="Hold"/> <input type="button" value="Check"/> <input type="button" value="Post"/>
13.	Verify Material Document #	<input checked="" type="checkbox"/> Material document
14.	Log off Goods Receipt	Click System menu, select Log off
15.	Close the Internet Explorer window	X-out of the window

****Alert:** After you post the Goods Receipt against the Purchase Order, the Shopping Cart may not be listed in the Manage Shopping Carts history. To include the completed Shopping Cart in the history, click on **Quick Criteria Maintenance** → Check mark **“Including Completed Shopping Carts”** → click **“Apply”** → Hide Quick Criteria Maintenance. The completed Shopping Cart should now be listed in the history.

Exercise 11 – Complete Fixed Asset Information

Situation

Complete the Asset Shell a fixed asset that was received.

Use the Shopping Cart that was created with Exercise 7

Instructions

Use the Job Aid(s): from the BASE Website: *[Complete Fixed Asset Information]* to complete the exercise.

Portal Navigation Path

Asset Management tab → Manage Master Data → Change Asset Master

Step	Field	Value
1.	Manage Shopping Cart	Open Shopping Cart created with exercise 7
2.	Item Overview	Click the Account Assignment tab
3.	Account Assignment tab	Write down or copy (Ctrl + c) the Assign (Asset) number
4.	Close Shopping Cart	Click Close button
5.	Funds Management	Click the Asset Management tab
6.	Manage Master Data	Click the Manage Master Data sub tab
7.	Asset Master Record	Click the Change Asset Master link
8.	Asset Class	Enter or paste (Ctrl + v) the Asset number
9.	Company Code	1000
10.	Asset Master Record	Press < Enter > key
11.	General tab, serial number	561248965
12.	Time-dependent tab: Room	13
13.	Allocations tab	Click Yes on Message window asking to overwrite time-dependent data.
14.	Allocations tab: Investment Reason	Click the field, then click the search icon 
15.	Reason for Investment window	Select 20 First Time Purchase
16.	Origin tab: Manufacturer	Yamaha
17.	Save Asset Master transaction	Click Save 
18.	Log off Asset	Click System menu, select Log off
19.	Close Internet Explorer window	X out of the window

To Apply for Access to SRM (Supplier Relationship Management)

Every employee authorized to purchase goods and services for their site, must submit a request for access to the application.

There are two ways to apply for SRM access:

1. BASE Training website – <http://basetraining.lausd.net> > SAP Access Form - All Other Roles
2. Legacy Replacement Program website - <http://lrpweb.lausd.net> > SAP Access Form - All Other Roles

To Install Citrix Receiver on your computer

In order to utilize the new features in SAP, you will need to install a software component, called Citrix Receiver, on your computer to allow you to connect to SAP. Citrix is a software application which allows the internet, your operating system, and SAP to work together. You will not be able to reconcile your P-Card without Citrix. Downloading this application will provide Mac users the ability to access these SAP features as well. You will only need to download the Citrix receiver **one time**.

Visit the Legacy Replacement Program website – <http://lrpweb.lausd.net> for step-by step instructions on how to install Citrix Receiver on your computer.

Download should take no more than 5 minutes with an average time of about 2 minutes. If you have questions, please call the [ITD Helpdesk at 213-241-5200](tel:213-241-5200). They are available Monday-Friday from 7:45 AM to 4:45 PM.

Procurement Customer Service Unit | https://psd.lausd.net/psb/psb_home.asp

Contact the Procurement Customer Service Unit for questions related to the Shopping Cart about processing purchases, posting a Goods Receipt, viewing the status of an order, etc...



Call: (562) 654-9009

Email: cs.stores@lausd.net

BASE Training Center Website | <http://basetraining.lausd.net>

The BASE Training Center will be the single point of access for SAP end-user documentation/materials. This website will make it easier for end users to access related business process materials.

The materials will include the following:

- Course Presentations
- Simulations
- Quick Reference Guides
- Job Aids



IT HelpDesk | <http://askitd.net/helpdesk>

Contact the IT HelpDesk about technical issues such as Single Sign-On, Hardware/Software, Network, etc...



Call: (213) 241-5200

Chat: <http://askitd.net/helpdesk/chat>

Create a Service Ticket: <https://itdscweb.lausd.net/sc/ess.do>