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PROCUREMENT AT JOHNS HOPKINS – THINGS YOU NEED TO KNOW

This section will familiarize you with how supplies and services are procured at Johns Hopkins using the SAP system’s Shopping Cart. First we’ll look at how the shopping cart fits into the Supply Chain picture along with Online Payment and Travel.

WORKFLOW: SHOPPING CARTS TO CONFIRMATIONS

Think of the SAP Shopping Cart as a requisition system. You are the requisitioner, and by ordering with the shopping cart you are requesting someone to buy the items for you. That “someone” is the Johns Hopkins Purchasing Department. The purchasing department orders the items listed in your shopping cart by sending a document called a Purchase Order (PO) to the vendor. The vendor responds by sending you the items, along with a bill (Invoice). This invoice references the PO number used to order the items. When the items are delivered to you, SAP must be notified, by confirming the receipt, so that the vendor is paid. Here is a graphic representation of this sequence.

THE THREE-WAY MATCH

In accounting, the three-way match refers to a procedure used when processing an invoice received from a vendor or supplier. The purpose of the three-way match is to avoid paying incorrect and perhaps fraudulent invoices.

Three-way refers to the three documents involved:

1. Vendor’s invoice which was received and will become part of an organization’s accounts payable if approved.
2. Purchase order that was prepared by the organization.
3. Receiving report that was prepared by the organization.

Match refers to the comparison of the quantities, price per unit, terms, etc. appearing on the vendor’s invoice to the information on the purchase order and to the quantities actually received. After the vendor’s invoice has been validated by the three-way match, it can be further processed for payment.
At Johns Hopkins, this receiving report is called a Goods Receipt, or a Confirmation of Goods Receipt (GR).

If you neglect to do a GR when your items are delivered, you might receive an email from the SAP system informing you of a problem with the invoice. If you get one of these emails, you need to go back and do a confirmation of goods receipt. Goods Receipts are discussed on page 24.

### GETTING READY TO ORDER

Before you open a new Shopping Cart screen it’s a good idea to be ready with a few important facts and numbers. For example:

- The number of the account you will use to pay for the order. This may be a Cost Center number or an Internal Order number (fund or grant), or a WBS number from a project plan.
- The General Ledger number which identifies how the item will be budgeted. For shopping carts, this is a six digit number starting with the number 6.
- The Product Category of the item. If you are signed on as a JHHS employee, the carts will default to PATIENT SUPP & DISP. JHU carts default to LAB SUPPLIES. If you’re ordering from Office Depot, you’ll need to change the product category to OFFICE SUPP & EQUIP.
- If you will be ordering items using information obtained from a vendor’s website or catalog, try to have the item’s description, catalog number, and price ready.

### SAP SHOPPING CART: PART OF HOPKINS SUPPLY CHAIN

The Johns Hopkins SAP Supply Chain system controls the flow of goods and services. The SAP Shopping Cart is the transaction which allows you to procure items by requesting the Purchasing Department to create a Purchase Order document to send to the vendor. The following table illustrates the differences.

<table>
<thead>
<tr>
<th>Transaction</th>
<th>Explanation</th>
<th>Primary Document</th>
</tr>
</thead>
<tbody>
<tr>
<td>Shopping Cart</td>
<td>The vendor requires a purchase order to before providing supplies.</td>
<td>Purchase Order (PO)</td>
</tr>
<tr>
<td>Online Payment Request</td>
<td>Hopkins does not require that a purchase order be created to provide these specific supplies (See the PO Exception list in the Appendix)</td>
<td>Vendor Invoice (for designated non-PO purchases)</td>
</tr>
<tr>
<td>Travel and Expense Reimbursement</td>
<td>Items are initially purchased using an individual’s personal funds</td>
<td>Employee Expense Receipt</td>
</tr>
</tbody>
</table>

### THE SHOPPING CART HOME SCREEN

The “Go Shopping” screen is your starting point and your control center. This is the screen you get when you click Go Shopping / Go Shopping in SAP. It’s sometimes called the Active Queries screen.

From this one screen you can create a new cart, check the status of carts, confirm, research, and more.
FEATURES OF THE GO SHOPPING SCREEN

1. The left-pointing triangle above the **Detailed Navigation** panel lets you close that section. This provides a wider view space for your cart list.

2. The **Detailed Navigation** panel has links to create carts and confirmations. Note that the main part of the screen also has buttons for these functions.

3. The **Active Queries** section lists a number of predefined (system) queries. Selecting one of these choices changes the list of items in the Shopping Carts view.

4. The **Show Quick Criteria Maintenance** button opens a list of fields to further modify the currently viewed query.

5. Click the **Create Shopping Cart** button to start a new cart.

6. The **Copy** button creates a new shopping cart containing all the items and information that were in the original cart. Item information can then be deleted or changed, and new information added. Note that this is similar in function to the Old Purchase Orders and Templates function in the previous version of Shopping Cart, but does not replace it.

7. The **Display** button opens a selected cart for viewing. If it’s a saved or unapproved cart, it may be edited. Note that clicking the Shopping Cart number does the same thing.

8. **Edit** opens a selected cart for editing, but only if the cart can be further edited at that point in the workflow. This does the same thing as clicking the **Display** button mentioned above, followed by the **Edit** button within the displayed cart.
9. **Delete** deletes a selected cart, but only if deletion is allowed at that point in the workflow. Important note: a deleted cart does not disappear from the list. It remains on the list of carts but the status of the cart is changed to Deleted.

10. The **Order** button puts a selected Saved cart into workflow.

11. The **Create Confirmation** button lets you go to the goods receipt screen for the selected cart.

12. **Print Preview** generates the standard shopping cart pdf file for the selected cart.

13. **Refresh** forces SAP to display the most up-to-date list of carts. You should click Refresh after every change in your shopping carts.

14. **Export** saves the shopping cart list as an Excel file.

15. Click the gray square on the left of a row in any list to select that row. In the Active Query views, the individual items in a cart are listed separately. If you select one item in the cart and then click an action button, that action will affect the whole cart.

16. Sort by any column in an Active Query view, by clicking in the blank space on the right of the column heading.

17. Click once on the underlined text in the status column to get more information. For example, if the status is *Follow-on Document Created*, you can click the text to move immediately to the Shopping Cart screen which displays the Purchase Order and other information.

18. Note: by default, the active query view displays the items in a cart on each row. Therefore a single cart may be represented by multiple rows.
QUICK CRITERIA MAINTENANCE

In the Go Shopping Screen, the system displays the last seven days of orders, by default.

To view older carts or to find specific carts, you can modify the search criteria for the Last 7 Days query. Do this by clicking on the Show Quick Criteria Maintenance button. This opens the criteria section, allowing you to change the timeframe.

Note that you can also search for shopping carts based on criteria such as the shopping cart name or number, the PO number, the items in the cart.

The Creation Date range feature allows you to search for carts created more than 12 months ago.

Clicking the Apply button at the bottom of the section makes it happen.

VERY IMPORTANT: Any changes you make to the criteria remain in effect until you manually change them back. Therefore, you may want to erase any entries in the fields, such as cart name, when you’re finished and click Apply again to set your criteria back to the default.

CREATING SHOPPING CARTS

This section describes three general kinds of shopping carts.

- HopkinsSelect eMarketplace carts which are used to order materials from the “online” or “punchout” vendors.

- JHHS Hosted Catalog carts which are used to order materials from vendors whose products are listed in the SAP “hosted catalog”. This includes items from the warehouse or MDC (Materials Distribution Center). Orders from the University Supply Store use the same technique.

- Free text carts which are used to order any item not available in eMarketplace or through the Hosted Catalog.
CREATING A FREE TEXT SHOPPING CART

In this example, the cart is for eight chairs from Douron, Inc. In the Douron catalog, they are listed as Bailey Task Chairs, Catalog # 1234, price $269.00 each.

1. In SAP, click the Go Shopping tab, then again click the Go Shopping tab on the next line.

2. In the Shopping Cart “home” screen, click the Create Shopping Cart button located along the top of the query view.

3. In the General Data section at the top of the screen, change the name of the cart, if desired.

4. Select the Shopping Cart Vendor, by first clicking on the white lookup box next to the Shopping Cart Vendor field.

5. This opens the vendor search screen. Click into the Vendor Name field and type *douron*. Make sure you put an asterisk before and after your search term.

Then click Start Search.
6. Click once on the vendor’s SAP number on the left of the results listing. This places the vendor number in the Shopping Cart Vendor field.

7. Click into the **Description** field in the **Item Overview** section. Enter the name of the item as it appears in the catalog or vendor’s listing.

8. Press Tab to move to the **Product Category** field, then click the search button.

9. Click **Start Search**.

10. Click the **Description** field header to sort.

11. Scroll down the list until you find the line for Furniture. Click once to select it.

12. Tab to the **Quantity** field and enter the number of items needed, if more than one. Next tab to, or click into, the **Unit** field. Either manually enter the unit abbreviation (EA for Each) or click the search button to view the list.
13. To view the list of units, click the **Start Search** button.

14. Select the EA unit and click OK.

15. Tab to, and enter the **Net Price** (cost) per USD.

16. Press the Enter key on the keyboard.

17. Click the **Details** button along the top of the item overview section.

18. In the **Item Data** section, enter the catalog number (or product or item #) in the field labeled **Supplier Product Number**.

19. Click the **Cost Assignment** tab.

20. As needed, enter GL # and any other cost assignment information.
21. Click the **Order** button to put the cart into workflow. Click **Check** to scan for errors. The **Save** button puts the cart on hold. The **Close** buttons allows you to exit the cart without saving.

22. After the cart is ordered, click the **Close** button to return to the Go Shopping screen.

### CREATING AN OFFICE DEPOT SHOPPING CART

1. In SAP, click the **Go Shopping** tab, then again click the **Go Shopping** tab on the next line.

2. In the Shopping Cart “home” screen, click the **Create Shopping Cart** button located along the top of the query view.

3. In the **General Data** section at the top of the screen, change the name of the cart, *if desired*.

4. Click **Set Values**, which is also in the **General Data** section.
5. Change the product category to Office Supplies.
   A quick way to do this is to type the number 44 followed by six zeros into the product category field.
   Or, click the search button next to the Product Category field.

6. Next, click **Start Search**.

7. To make it easier to find your category, sort the list in alphabetical order by click on the **Description** field.

8. Select the category OFFICE SUPP & EQUIP by clicking on the name once.

9. Click the Account Assignment tab.

10. Click into the General Ledger Account field and enter the number **633032**, then click the OK button. Note that JHU requisitioners should also enter the correct Internal Order number in the **Assign Number** field.
11. In the **Item Overview** section of the cart, click the **Add Item** button, then select **HopkinsSelect eMarketplace**.

12. Access the Office Depot site.

   In this example we will order dry-erase markers.

13. Click into the search field ① at the top of the screen.

14. **NOTE:** if you have questions about your Office Depot order, you can contact the Office Depot representatives ② listed at the home screen.

15. In the search field ①, enter the item name or number, then click the Go button ②.
16. Select the category of product, if necessary.

17. When you find the item(s) you want, enter the quantity in the QTY field, then click the red Add to Cart button.

18. When ready, click the Checkout button.
19. Click the Continue button.

20. Click Transfer Item to SAP Cart.

21. Click the Order button when ready.

22. Click Close to exit the shopping cart.

CREATING A BLANKET SHOPPING CART (BLPO)

WHY USE A BLANKET PO?

A Blanket Shopping Cart is used when a vendor provides services periodically for a defined time period. The blanket purchase order number can be referenced over and over by the vendor when issuing invoices. Because of this, the requisitioner does not have to create a unique shopping cart for each invoice, saving time for the requisitioner and the vendor, and making it easier to track activity for that service.
HOW BLANKET SHOPPING CARTS ARE SET UP

A key difference between a BLPO and other types of carts is the way in which the quantity field is used. For example, with a regular ECPO cart, if you’re buying a single item priced at $432.19, you would set the quantity at 1, the unit as EA and the price as 432.19. Simple. The Item Overview row for that item would look like this:

But with a blanket shopping cart you should NOT do it this way. Instead, the quantity field should be the total amount of the blanket, the unit should be DOL (dollar) and the Net Price / Limit should be 1. The item overview row would then look like this:

It’s very important to set up your BLPO with the total price in the Quantity field and the unit as DOL. This is because when the invoices for the PO come in, a Goods Receipt can be confirmed for the amount of the invoice, thereby decrementing the total quantity in the PO.

In some cases, the blanket shopping cart may be set up using units of time. For example, if the agreement is for $600 per month for 1 year, you could set up the cart this way:

HOW TO CREATE THE BLPO CART

Consider this scenario: the office in which you work has a waiting room area, open to the public, containing a large aquarium with tropical fish. The aquarium is serviced by a local pet shop on a regular basis – usually every two weeks, or as needed. After each service, the vendor sends an invoice for labor and materials. The invoice amounts may vary from visit to visit.

After researching last year’s expenditures for this charge, you estimate that the cost this year for caring for the aquarium will likely be about $2500. To set this up, you’ll create a BLPO shopping cart. Follow these steps.

1. In SAP, click the Go Shopping tab, then again click the Go Shopping tab on the next line.
2. In the Shopping Cart “home” screen, click the Create Shopping Cart button located along the top of the query view.

3. In the General Data section at the top of the screen, change the name of the cart, if desired.

4. Set values for Default Settings, as needed.

5. Change the product category to Service Agreements by entering SERVAGMT in the Product Category field.

6. Click the Account Assignment tab.
7. Click into the General Ledger Account field and enter the number **640312**, then click the OK button. This is the GL# for maintenance services. If your department prefers to use a different GL#, then use that one.

(Note that JHU requisitioners should also enter the correct Internal Order number in the **Assign Number** field.)

8. In the Vendor search window, enter the search criteria for the name of the vendor in the **Vendor Name** field ①. Remember to put an asterisk before and after your search term. Then click the **Start Search** ② button. To select the vendor, click once on the BusPartner number ③.

The vendor should then appear in your shopping cart.

9. Click into the **Description** field in the **Item Overview** section. Enter an appropriate description for the line item.

10. Move to the **Quantity** field ① and enter the dollar amount of the service contract. In the **Unit** field ② enter dol. In the **Net Price / Limit** field ③ enter 1.

   Think of it this way: you’re buying 2,500 DOLs worth of service at 1 USD per DOL.

11. Press the Enter key on the keyboard.

12. If necessary, attach any attachments or notes to the cart.

13. When ready, click Order, then click Close.

**CONFIRMING A BLPO INVOICE FOR PAYMENT**

Once the cart is approved and the purchase order created, the vendor will be able to invoice you using that PO number.
Following this same aquarium scenario, let’s say that the technicians come in, work on the aquarium, and then send a bill to Accounts Payable for $210.00. Soon thereafter, you will receive an email from SAP with the subject beginning with words Quantity Discrepancy. This will indicate that the invoice has come in and that you need to confirm that you received the services. To do that, refer to the following instructions.

When the vendor sends the bill (invoice) to the Accounts Payable department, the PO number corresponding to the shopping cart you created is referenced. SAP will not “cut a check” to pay the bill unless it knows that the goods or services have, in fact, been received. Instead, it waits a certain number of days after which the system notifies you of the invoice. You will receive an email that will look something like this. Notice the Subject text “Overdue Notice Due to Goods Receipt Issue”.

Near the bottom of the email, there will be a section which tells you the amount of the Invoice.

To confirm the amount, open SAP and select the tab labeled ECC Inbox. This is located on the same row of tabs as Go Shopping.

This will open the Business Workplace.

Click the item labeled Inbox on the left side of the screen to expand that section.
Then click Workflow.

On the right side of the screen, you should now see a list of your open workflow items.

Double click on the item to open it.

Scroll down to the area below the main body of the work item to where you will see several alternative action boxes. The first of these is labeled “Enter a Goods Receipt.” In this section, enter the amount of the invoice in the Quantity field, then click the Submit button. The vendor will receive payment for that amount.

**CLOSING A BLPO**

When the blanket shopping cart is finally paid-in-full, you should contact the Supply Chain Shared Services to close the order and release any left-over, encumbered funds. Before doing this, make very sure that the vendor has been paid and all items have been received. Supply Chain should not close a PO or remove the encumbrances if the vendor was not paid and is expecting payment for goods or services. Once a PO is closed, invoices cannot be posted to the order.
Send an email to SupplyChain@jhmi.edu for JHHS, or to purchasing@jhu.edu for JHU, so that the Shopping Cart and/or PO can be closed:

1. Purchase Order / Shopping Cart number
2. Vendor Name and vendor number
3. Information that NO further confirmations or invoices are expected
4. Reason why the encumbrance needs to be removed

Important notes about closing a BLPO:

- If the PO is old and was replaced by a new PO, it is necessary to ensure that the vendor is aware that the new PO number must be referenced on all future invoices. The old PO number must be closed and can no longer be used.
- It is important to include the new PO number in the email request to JHHS Supply Chain so that a notice can be added to the old PO number to cross-reference the new, replacement PO (200xxxxxxx). In the new PO, the information that it supersedes the old PO number (200xxxxxxx) needs to be added.
- If the PO is old and not expected to be paid, it is necessary to contact the vendor and verify that they will not submit future invoices for that PO. Provide JHHS Supply Chain with the name of the contacted employee representing the vendor.

ORDERING FROM THE JHHS HOSTED CATALOG

The JHHS Hosted Catalog is one of the options on the “Add Item” button. The hosted catalog has primarily clinical and lab supplies. The best way to order from the Hosted Catalog is by number. If you know the Product ID number (think of this as the warehouse item number) you can order very quickly by simply entering the number and pressing enter.

Note that for JHU requisitioners, the University Supply Stores is analogous to the Hosted Catalog and works the same way.

1. In SAP, click the Go Shopping tab, then again click the Go Shopping tab on the next line.
2. In the Shopping Cart “home” screen, click the **Create Shopping Cart** button located along the top of the query view.

3. In the **General Data** section at the top of the screen, change the name of the cart, if desired.

4. Enter the three Product ID numbers in the Product ID field by clicking into each field and entering the number.

5. Press the Enter key when you’ve entered all the numbers.

6. Click **Order** to complete the order.

---

**HOW TO REORDER A SHOPPING CART**
Use these steps whenever you need to order something that you’ve already ordered. The copy command creates a brand new shopping cart with all of the items from the copied cart already filled in.

1. First, find the old cart. In the Active Queries screen (get there by clicking Go Shopping/Go Shopping), find the shopping cart you used to order the items the last time. If necessary, use the Quick Criteria Maintenance tool to search.

2. Select the cart by clicking the gray selection box to the left of any of the items in the cart.

3. Click the Copy button.

4. A new shopping cart screen opens with all of the information from the old cart already filled in. You can now change the information as needed.
5. When ready, click Order.

Note that the new shopping cart does not overwrite or replace the original cart.

CONFIRMATION OF GOODS RECEIPTS

Here are some important points to consider concerning goods receipts.

- When goods or services are ordered using the SAP Shopping Cart, a purchase order is created either by
  - a purchaser in the Hopkins Purchasing department, or
  - automatically by the computer, if the vendor is an eMarketPlace vendor.
- A purchase order implies that the vendor will be paid only when the goods are received by the requisitioner.
- In some cases, this goods receipt is done automatically (for example in the case of an Office Depot order).
- Note that the action of confirming that your order has been received has several names here at Johns Hopkins:
  - “Goods Receipt”, “Issuing a Goods Receipt”, etc.
  - “Confirmation”, “Confirmation of Goods Receipt”, etc.
  - “GR”, abbreviated in the SAP system.
- If the requisitioner was supposed to confirm the receipt of goods, but neglected to do so, the SAP system sends an email to him or her stating that there is a “quantity discrepancy” in a particular order. If you receive such a message it means you MUST go back to SAP and perform the GR.
- These quantity discrepancy messages are sent to the requisitioner after about a week. If a GR is still not done, SAP sends a second message to the approver.
- A GR can be done “proactively” or “reactively”. Reactively is when you get the quantity discrepancy email and go back to do the GR. Proactively is when you do the GR as soon as the order is delivered. Note that if you do the GR proactively, you will not get the dreaded “Quantity Discrepancy” email.

MULTIPLE WAYS TO DO A GOODS RECEIPT

There are several ways in SAP to do a goods receipts. You can:

- Do it from the Go Shopping tab (proactive).
- Use the ECC Inbox (reactive).
• Use the Central Receiving tab, if you have one.

DO ALL ORDERS HAVE TO BE CONFIRMED?

No.

Office Depot orders do NOT have to be confirmed. For SOM requisitioners, orders under $2500, do not have to be confirmed. Service contracts (Blanket Purchase Orders), do have to be confirmed, even if they are under $2500. However, there are exceptions and the exceptions have exceptions, so try to be aware of the rules as they apply to you.

CONFIRMING FROM THE ACTIVE QUERIES SCREEN

Follow these general steps to confirm the receipt of goods ordered through the SAP Shopping Cart.

6. In the Shopping Cart Home Screen, select the cart you want to confirm by clicking the gray box to the left of the SC Number. Then click the Create Confirmation button.

   If the Create Confirmation button remains grayed out when you select the cart, it may be that the confirmation has already been done. To verify, open the cart and examine the Related Documents tab.

7. In the header part of the confirmation screen enter the Confirmation Name, if desired. Enter the vendor’s invoice number in the Reference Document field.

8. In the Item Overview section, use the Confirm Quantity field to enter the number of items to confirm for each row.

   Alternatively, you can click the Copy All Outstanding Quantities button to automatically insert all of the outstanding (not yet confirmed) quantities into the Confirm Quantity field. Saves time.
9. When ready, click the **Confirm** button.

10. Click the **Close** button to return to the start screen.

**CONFIRMING FROM WITHIN THE ECC INBOX**

Explanation: This is usually the “reactive” approach to doing a GR. You’ve received the dreaded “Quantity Discrepancy” email, so you react to it by going to your ECC Inbox to find the problem.

1. In SAP click the tab for the ECC Inbox.

2. Double click the Inbox on the left of the screen.

3. Click the Workflow selection.

4. On the right of the screen, you should see the item or items listed which require your attention. Double click on the line in question to open it.

5. Scroll to the bottom of the screen to see the various options. The first option is the Confirm Goods Receipt. In the box, enter the quantity, then click Submit.
CONFIRMING FROM THE CENTRAL RECEIVING TAB

Not everyone has the Central Receiving role. If you don’t have it, you might consider requesting it because it allows you to do a GR for Shopping Carts other than your own.

1. Click the Central Receiving tab in SAP.

2. Open the Quick Criteria Maintenance section.

3. Enter the purchase order number, and the timeframe, click Apply.

4. When the cart appears on the list, select it and click the Create Confirmation button.

CONFIRMING A BLANKET PO

Service contracts and other BLPO carts are set up differently from standard “goods” orders in that the quantity field is the dollar amount of the contract. This is done so that when an invoice comes in, the GR can be done for the “quantity” of dollars that we’re being billed. Confusing, but it works.
1. In Go Shopping, select the cart to be confirmed, then click Create Confirmation.

2. In the confirmation screen, enter the amount of the current invoice in the Confirm Quantity field.

3. Enter a confirmation name, reference document, and click the Confirm button. The vendor will get a check for only the amount you entered in the Confirm Quantity field.

APPROVING A SHOPPING CART

1. Click Approval in the submenu of the Go Shopping tab in the portal.

2. Select the cart you want to approve by clicking the gray box to the left of the Subject message. Then click the Approve button.
ENTERING YOUR SHOPPING CART SETTINGS

Before you order items with the Shopping Cart, make sure your settings are correctly filled in. Note that these instructions are divided into sections. JHHS (Health System) and JHU (University) employees may do different sections, and some sections are done by both groups.

PERSONAL AND POSITION SETTINGS (JHHS & JHU)

1. Access SAP, click the Go Shopping Tab, then click the Settings tab.

2. Click Edit.

3. Update the Form of Address field.

4. Enter your building, floor, room, and phone number in the Department Address Details section.

SETTING YOUR COST CENTER NUMBER (JHHS ONLY)

SETTING YOUR COST ASSIGNMENT CATEGORY TO INTERNAL ORDER (JHU ONLY)
1. Click the attribute dropdown list and select Cost Center* from the list.

2. In the Standard column, click the dropdown button for Logical system and select Back R/3.

3. Click Add Line.

4. Enter your Cost Center number in the Value field①. Click the Standard button②.

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SETTING YOUR DELIVERY ADDRESS (JHHS & JHU)
1. For this setting you should research what your “address code” is before you start. You can find this list on the Shared Services website (ssc.jhu.edu). Go to Supply Chain, then Training and Support.

2. Some addresses have multiple codes. 600 North Wolfe, for example, has many. To find which code to use, refer to the list on the Shared Services website.

3. Click the Attribute dropdown, and select Delivery Address from the list.

4. To find your location, use the vertical scroll bar until you see your street address.

5. When you find the street address and the code value for your location, click the dot in the Standard column for your location.

APPENDIX
6. When finished, click **Save**, then **Close**.

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**GENERAL LEDGER ACCOUNT NUMBERS**

The following table lists a few of the more commonly used G/L numbers. You should consult your department’s finance staff to make sure you use the correct general ledger account.

<table>
<thead>
<tr>
<th>A selection of commonly used General Ledger accounts</th>
</tr>
</thead>
<tbody>
<tr>
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**NON PURCHASE ORDER RELATED TRANSACTIONS**

Purchase orders are not required for the following types of transactions. Therefore, do not use Shopping Cart for these types of purchases. The Online Payment Request and PCard should be used for these transactions. Contact Accounts Payable Shared Services for additional information.

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<tr>
<th>Non PO Transaction</th>
<th>Description/Examples</th>
<th>Payment Method</th>
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<tr>
<td>Payment of Advertising Costs</td>
<td>Payments for any advertising on behalf of the University or Health System. These can be made to newspapers, trade periodicals, radio and TV stations etc. The creation of Marketing literature or media would also fall under this item as well. These can be payments to Advertising Agencies, production facilities or Market research companies.</td>
<td>PCard</td>
</tr>
<tr>
<td>Non PO Transaction</td>
<td>Description/Examples</td>
<td>Payment Method</td>
</tr>
<tr>
<td>------------------------------------------------</td>
<td>--------------------------------------------------------------------------------------</td>
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</tr>
<tr>
<td>Honoraria Payments</td>
<td>Any payment made to guest speakers or visiting faculty. Stipend payments for research fellows may fall under this item as well as One-time lump sum fellowship payment to U.S. post doctoral fellows and students not on payroll. International recipients need to be processed through payroll. See Tax Guide for further information.</td>
<td>Online Check Request</td>
</tr>
<tr>
<td>Payments to JHU Independent Contractors for less than $5,000</td>
<td>Should be used when a project is for a short duration, the services are less than $5,000, and when no intellectual property, computer software or web pages are expected to be produced. See Independent Contractor Policies and Procedures for more information. <strong>JHU ONLY</strong></td>
<td>Online Check Request (JHU ONLY)</td>
</tr>
<tr>
<td>Prepayment of seminar, workshop or conference registrations</td>
<td>These payments are to be made directly to Conference Vendors or Hotels in advance of attendance. These expenses are not paid by the attendee or traveler.</td>
<td>PCard</td>
</tr>
<tr>
<td>Revenue Refund Payments</td>
<td>Any patient, student, insurance, subscription or related refund of revenue of any type.</td>
<td>Online Check Request</td>
</tr>
<tr>
<td>Payments to Government or Regulating Agencies for Licensing and filing</td>
<td>Examples include any payments to Government Agencies (Federal, State and Local) for building permits, motor vehicle registrations, applications for Foreign Visas, state licensing boards.</td>
<td>PCard</td>
</tr>
<tr>
<td>Payments to Attorneys CPA and Consulting firms</td>
<td>Any payments to said firms. Examples would be PWC, KPMG, Bearing Point or Piper Rudnick.</td>
<td>Online Check Request</td>
</tr>
<tr>
<td>Payments for Gifts or Awards for Employee Appreciation or Recognition</td>
<td>Payments for gift cards, grocery certificates, trophies, plaques or similar items. These are usually given around holiday times or for other various occasions for employee appreciation. Amounts are usually $25 or less. Please note: Any gift is considered taxable to the recipient, and payroll must receive recipient information for purpose of update to W2 wages.</td>
<td>Online Check Request</td>
</tr>
<tr>
<td>Payments for Real Estate transactions</td>
<td>Any payment made for Real Estate purchases, include closing costs. Real Estate auction transactions are also accepted.</td>
<td>Online Check Request</td>
</tr>
<tr>
<td>Payments for Real Estate leases or rentals</td>
<td>Payments made to Property managers or management companies for University or Health Systems occupied space.</td>
<td>Online Check Request</td>
</tr>
<tr>
<td>Payments to Insurance or Investment firms and other fringe benefit payments</td>
<td>Any payments made to these firms can include payment initiated by benefits from payroll deductions, (EHIP, 403b, Cigna) or to Investment Managers who manage University or Health System Endowment assets or general investment/asset management for the University or Health System. Payments to Colleges and Universities for tuition benefits fall under this category.</td>
<td>Online Check Request</td>
</tr>
<tr>
<td>Tax Payments</td>
<td>Payments will include: payroll tax, property tax, sales tax, garnishments, liens, 1099 or 1042 related taxes.</td>
<td>Online Check Request</td>
</tr>
<tr>
<td>Payments for Institutional or Employee reimbursed Dues and Subscriptions</td>
<td>Any association dues or subscription paid on behalf of an employee or an Institution. Employee examples are payments to AICPA, NACUBO. Institutional examples are COGR and MICUA.</td>
<td>PCard</td>
</tr>
<tr>
<td>Royalties</td>
<td>Any payments for royalties of intellectual property, copyrights, patents, etc. to firms or individuals.</td>
<td>Online Check Request</td>
</tr>
<tr>
<td>Utilities-Oil, Water, Gas, Steam, Electricity, Telephone</td>
<td>Any payments to Utility companies such as BGE, Verizon, Pepco, Baltimore City and Amerada Hess.</td>
<td>Online Check Request</td>
</tr>
<tr>
<td>Payments to Express Shipping and Mail vendors</td>
<td>Any payments for express mail or courier services. Payments to FedEx, UPS, Maryland Messenger and USPS fall under this category.</td>
<td>PCard</td>
</tr>
<tr>
<td>Payments for catering other miscellaneous food purchases</td>
<td>Any planned or unplanned food expenses for meetings or business related events not incurred during travel. Examples in this category include payments to Jay's Catering, Eddie's of Roland Park, Curran’s Deli, The Johns Hopkins Club etc.</td>
<td>PCard (if individual invoice &lt;$2,500)</td>
</tr>
<tr>
<td>Debt Payments</td>
<td>Any payment of University or Health System debt servicing.</td>
<td>Online Check Request</td>
</tr>
<tr>
<td>Postage</td>
<td>Payments made to the USPS, Pitney Bowes or other independent mail vendor for postage on meter machines or bulk mail servicing vendors.</td>
<td>PCard or Online Check Request</td>
</tr>
<tr>
<td>Special Events/Entertainment</td>
<td>Any payments for Sporting events or Special events planned and hosted for Students, guests, donors or Trustees.</td>
<td>PCard</td>
</tr>
<tr>
<td>Payments for Library Books, Journals, Periodicals</td>
<td>Payments for books, trade publications or periodicals on renewed or purchased on an individual or annual basis.</td>
<td>PCard</td>
</tr>
<tr>
<td>Payments to Travel Agencies and Relocation Vendors</td>
<td>Payment made for any travel related service to include tickets, hotel accommodations and car rentals. These payments are made directly to the Agency and are not paid by or to the traveler. Vendors are World Travel Service, Carlson Wagonlit or Expedia. Payments to vendors for Faculty or staff relocation expenses are also accepted as a non-PO payment. Please note: Certain relocation expenses are be taxable and Payroll needs to be notified of such expenses.</td>
<td>Online Check Request</td>
</tr>
</tbody>
</table>
### Non PO Transaction

| Temporary Employment Agencies | Payments made to vendors secure temporary short time help. Vendor payments include Kelly Services, AccountTemps, Nursebase, Robert Half etc. | Online Check Request |
| Payments to Study Participants | Any payment made to individuals who participate in JHU or JHHS research studies. | Online Check Request |
| Payments for software licenses and software <$2,500 | Any payment made to companies for software licensing. Examples can include Hyperion, Microsoft and SAP. | Online Check Request |
| Recycling Services | Paper shredding and removal vendors | PCard |
| Laboratory Gases | Examples of vendors would be Airgas, Roberts Oxygen, Cryogas | Online Check Request |
| Mat/Uniform cleaning and laundry services | Examples of vendors would be Cintas and Lord Baltimore | PCard (<$2,500) or Online Check Request |

### SHOPPING CART DOCUMENT TYPES

| ANPO | Animal Purchase Order | Procurement of live animals. JHU only. |
| BLPO | Blanket Purchase Order | Release purchase orders for materials and services over specified time period with pre-determined spending. |
| CAPP | Capital Expenditure Purchase Order | 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). |
| DRUG | Pharmaceutical Purchase Order | Purchase order for the procurement of pharmaceuticals. This document type is available to specific departments only. |
| DSPO | Disaster Purchase Order | Purchase orders for the procurement of designated disaster supplies. These types are available to specific departments only. |
| ECOPO | Electronic Commerce Purchase Order | Purchase orders that do not require a customized document type. Purchase orders created for certain commodities (materials and services with predefined delivery schedules. Default document type. |
| ECDP | Inventory Replenishment Purchase Order | Purchase Order created by supply stores supervisors to order product from vendors to replenish supply store inventories. This document type is available to specific departments only. |
| EMPO | Emergency Purchase Order | Request for materials or services that are time sensitive or mission critical outside of Purchasing Shared Services normal operating hours. This document type is available to select users only. The Shopping Cart Reference field completed by the SRM Requisitioner must contain the abbreviation EM, the Purchase Order (PO) date, and the initials of the creator. This field can contain no space characters. Example: EM01_JAN_06JRS (EM; the PO date of Jan. 1st, 2006; and the initials of the creator, John Robert Smith) |
| IMPO | Implant Purchase Order | Instantaneous purchase of devices implanted during medical procedures. JHHS only. |
| LVPO | Low Value Purchase Order | Expense purchases under $2,500 for items other than restricted commodities. These requisitions automatically create POs without any approvals or Purchasing Department intervention. Once a Purchase Order number has been generated, Requisitioners call the order into the vendor. The vendor WILL NOT receive a Purchase Order from the SRM system. Hopkins eMarketplace cannot be used with this document type. JHU only |
| MXPO | Maximo Purchase Order | Purchase orders used by Facilities departments to interface to the Maximo system. |
| PROJ | Project Purchase Order | Purchase orders for construction or other projects utilizing WBS elements. |
| RAPD | Radioactive Purchase Order | Procurement of radioactive materials. The RADIOACTIVE product category must be chosen when using this document type. |
| SPPO | Sponsored Project Purchase Order | Procurement for sub-awards or subcontracts. Any sponsored award received by Hopkins is either a grant or a contract (defined by the terms of the award). When the prime award is a CONTRACT, any subrecipient in the prime award would be a subcontract. All others would be subawards. 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. JHU only. |
RESOURCES


2. Supply Chain Shared Services:  http://ssc.jhmi.edu  . For a wealth of information about procurement at Hopkins, go to this URL, then select from one of the choices shown here.

3. SAP@Hopkins:  www.sapathopkins.org  . This is a “blog” style website maintained by the EBS team. This is a group within the IT department who manage SAP at Hopkins. They put out very informative monthly newsletters and other articles about SAP.

4. Training
   ● JHHS Training, Workshops, Coaching, Support: call 410-735-7065 (Including SOM, DOM)
   ● JHU Training, Classroom Courses: use the Knowledge Network, or contact Kathy Ruth, 443-997-6453 (Including SOM, DOM)

Instructor’s contact info:
John Tetreault
Phone: 410-735-7544
Email: jtetrea1@jhmi.edu