Shopping Cart: Approve or Reject a Cart

Use this Job Aid to:
- Learn how to approve or reject an existing shopping cart

BEFORE YOU BEGIN
You need to have approver status, and you need to know the order number that you would like to approve.

Approving or Rejecting a Shopping Cart
Use the approval/rejection process to view, update, and/or approve a Shopping Cart. Once you have approved the cart, a Purchase Order will be created and the order will be sent to the vendor to be filled. Note that you need to have approver status to be able to approve or reject orders in SAP.

1. **Access the Approval Section.**
   There are two ways that you may access the Approval section:
   - Some of you may have an “Approver” tab at the top of your screen. If you do, simply click “Approver” and you will go to the Approval section.
   - If you do not have the “Approval” tab, then select the “Go Shopping” tab from the top line, and then select “Approval” from the next line to access the Approval section.
   - Note that you need to have approver status to gain access to carts using the Approval button.

2. **Refresh!** When you first get to the Approval screen, you won’t see any of the recent carts until you click “Refresh.” *You must click the Refresh button to see all of the orders that need to be approved!*
   - The “Refresh” button may be hidden under the drop-down menu on the right side of the screen. Click the icon to view the drop-down menu and then select “Refresh.”
3. **View Carts to Approve.** Once you have clicked “Refresh,” the list of carts that are ready to be approved will appear first in the “Alerts” tab. If you approve orders as they come in, then you can work directly from this tab.

- Shopping carts that are pending approval will appear in the “Tasks” tab if you don’t approve them the first time you see them.

4. **View Cart Detail.** If you wish, you may click on any cart in the list to view the cart’s details (to view details, you may also highlight the cart and then click the “Details” button). The “Approve Shopping Cart” screen will appear, showing all of the order information from the original cart.

- From this screen, you may adjust much of the cart’s order information as if it were a new cart. You may view the order information both in the “Item Overview” section, and also under the details section by clicking the “Details” button. If you do change any order information, remember to click “Check” to verify your changes and then “Submit” to resubmit the order.

- If you wish to approve or reject individual line items, click the radio buttons associated with each line within the “Item Overview” section of the cart.

- When you are ready to approve or reject the order as a whole, click “Close” to return to the Approval screen.

5. **Approve or Reject the Order.** Highlight the line of the order you want to approve or reject by clicking within the line or on the gray box to the left of the line. Then, click “Approve” or “Reject” at the bottom of the screen.

- You may wish to print a copy of the order for your files. You may do so by clicking “Print Preview” from this screen while the line is selected.

- If you wish to set a new resubmission date to delay approval of an order, click “Resubmit.” This will bring up a calendar and you may select a new date. The cart will not be displayed in your work list until the resubmission date arrives. Note that the delivery date within the cart must be adjusted so that it is after the date that the cart is to be resubmitted.
• Select the “Forward” button to forward the cart to one or more users. You will need to search for the name of an appropriate user and then click “Submit” to send the cart to his or her work list. Note that the search list includes all users, and not those with approver roles, so you will need to be able to identify an appropriate user from the list.

• After you have approved the order, the order’s “Status” will change to “In Progress” rather than “New.”

That’s it! You’re done with the approval process.

6. The Buyer’s Perspective. After an order has been approved, the order status in the buyer’s view will change from “Awaiting Approval” to “Follow-on Document Created.”

Always click “Refresh” when you get to the Shopping Cart Home Page to see the most up-to-date status. Orders are not updated until you click “Refresh.”

7. View the PO Number. To view the Purchase Order number, the buyer can click on the “Follow-on Document Created” link. This displays the shopping cart (as if you had selected “Display” or “Edit”) but defaults to the tab called “Related Documents” in the Details section of the order.

• The Shopping Cart Number is shown in the first line and always starts with a “1.”

• The Purchase Order Number is shown in the second line and always starts with a “2.” You may click on the Purchase Order Number to view the details of the order.
8. **Approve/Reject by Email.** In the future, SAP will automatically send you an email with the order information when an order requires your approval.

The email will offer three options:

- Select “**Log**” to log in to SAP and carry out the approval process online.
- Select “**Approve by e-mail**” to approve the order directly from this email. If you choose this option, the order will be removed from your task list and you will not need to do anything further regarding this order within SAP.
- Select “**Reject by e-mail**” to reject the order directly from the email. If you choose this option, you will not need to do anything further regarding this order.

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**Email Sample:**

From: Ines Owen [mailto:tnashekar@jhmi.edu]
Sent: Wednesday, April 28, 2010 10:50 AM
To: TRISCH Sadowski
Subject: Approve Shopping Cart 1001608953 with Value 10.00 USD

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1. The following requires processing:

Approve Shopping Cart 1001608953 with Value 10.00 USD

Click on the following link to log on to the system and carry out the approval online:

[**Log**]

To approve or reject directly from this e-mail, click on one of the following buttons (allow program to send e-mail in background):

[Approve by e-mail]  [Reject by e-mail]

Message from Approver:

2. Overview of Shopping Cart No. 1001608953, Test mail

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