

SAP FOR LIBRARIANS

GETTING STARTED

Prior to submitting orders in the SAP system, each librarian must complete the following steps to be granted rights within the SAP system.

1. Complete the online training SAP for Librarians, accessed through the Pathlore system.
2. Submit the completed SAP Access form to the User Support Help Desk, location #068.

Once you have received your user id and password, you may begin creating shopping carts in the SAP system.

INGRAM'S IPAGE

To order books through the SAP Shopping Cart you must first create your book list using the Ingram *ipage* website. Be sure to follow the *ipage* list naming convention illustrated below. Utilizing this naming convention will assist Ingram in properly processing your library book order.

3 Digit Loc. Code	Funding Source		List Description
Location Code	LR	Library regular budget	A word or two describing the order
	LS	Library state money	
	LB	Library bond (new/rebuilt)	
	LN	Non district or other funds	

Once the list is created, if you are ready to submit your order, click the **Price this List** button to obtain current book availability and pricing.

Note: Verify your order quantities and price your list before preparing your shopping cart. It is recommended that a list be priced within 24 hours of shopping cart submission.

SAP SHOPPING CART

The SAP Shopping Cart allows you to submit library book orders from previously created *ipage* book lists. The verified and priced book list is now ready to be submitted using the SAP system. To create an SAP Shopping Cart:

1. Select the **Shop** option from the **Work** tab.
2. Select **Shopping Cart (Requisition)** from the detailed navigation panel on the left side of the window.
3. Change any Cost Assignment (coding) within the **Default Settings for Items** section, if necessary.
4. Select the **Library Books** link from the **Add Items** section.

A new internet browser window opens.

5. Log in to Ingram's *ipage*.
6. Locate the desired book list.
7. Click the **Price this List** button if the list has not been recently priced.
8. Click the **SAP Transfer** button to transfer the list back to SAP.
9. Click **OK** to verify the list transfer.
10. Review the book list within the SAP Shopping Cart (**Items in Shopping Cart** section.)

IMPORTANT: Do NOT make any changes to the order once it has been transferred to the SAP Shopping Cart. Any corrections need to be completed in *ipage* and a new shopping cart created.

11. Scroll to the **Additional Specifications** section to rename the shopping cart. Rename the shopping cart to match the *ipage* list name.
12. Click the **Refresh** button.
13. Click the **Order** button to submit the order for approval.

CHECK STATUS

It is easy to verify the status of any shopping cart you have created. The Check Status transaction allows you to find if a shopping cart has been rejected, approved, or even deleted from the SAP system.

1. Select the **Shop** option from the **Work** tab.
 2. Select **Check Status**.
- All shopping carts created within the past seven (7) days will be displayed in the window.
3. Enter search criteria, such as date range, in the **Find Shopping Cart** section.
 4. Select **Extended Search** to apply additional search criteria.
 5. Click the **Start** button.
 6. Review list of shopping cart results.

To view specific details, print or even delete a shopping cart:

- ◆ Click the **Magnifying Glass** action button to open the shopping cart.
- ◆ Click the **Printer** action button to print the entire shopping cart.
- ◆ Click the **Trash Can** action button to delete a shopping cart. If the shopping cart has been approved and the P.O. generated, the shopping cart CANNOT be deleted.

SAP DESCRIBE REQUIREMENT

If a desired book(s) is not available through the SAP/Ingram Library Catalog, the librarian may make the purchase from another approved CCSD vendor. Before creating a Describe Requirement order you should have the following documentation available:

- ◆ Book list including ISBN#, title, author, copyright year, and publisher.
- ◆ Quote for book purchase from CCSD vendor, including name, address, and telephone number. This information may be included with the book list document.
- ◆ Document indicating processing instructions, and barcode ranges if necessary.

After gathering the necessary information you are ready to begin creating a Describe Requirement order.

1. Select the **Shop** option from the **Work** tab.
2. Select **Shopping Cart (Requisition)** from the detailed navigation panel on the left side of the window.
3. Change any Cost Assignment (coding) within the **Default Settings for Items** section, if necessary.
4. Select the **Describe Requirement** link from the **Add Items** section.

The Describe Requirement form will be displayed.

5. Complete the form as indicated in the table below:

Field Name	Information to include
Description	Book Library
Internal Note	Complete book title (if single book) Supplier name, address, phone, sales rep, Catalog name, page number Total books in order Quote number

Quantity/unit	If ordering a list: Quantity 1 Ordering single title: Quantity equals total number of copies you wish to order Unit: Activity Unit
Price/Currency	Total Cost of order, including any shipping and processing fees. Currency reflects United States Dollar
Category	Library Books
Required on	Do not change this field

6. Click the **Add to Shopping Cart** button. The item has been added to the **Items in Shopping Cart** section.

The quote, book list, and any processing instructions must be attached to the shopping cart.

IMPORTANT: Only PDF documents are to be attached to any SAP Shopping Cart. No other document type is acceptable. If you have questions regarding this standard, contact your buyer in the Purchasing Department.

7. Click the **Magnifying Glass** action button.
8. Scroll down and expand **Documents and Attachments**.
9. Enter the attachment description (quote name.)
10. Browse for quote location.
11. Click the **Add** button after each attachment has been located.
12. Scroll up to the **Item Details** heading and click the black **X**.

COMPLETE A DESCRIBE REQUIREMENT ORDER

After completing the describe requirement form, only one line will appear in the shopping cart. Attached to this shopping cart item should be all PDF documents needed for processing of the order. To complete the Describe Requirement order:

1. Change the shopping cart name to match the required Library Services naming convention. (See Ingram's *ipage* section.)
2. Add any **Notes to Approver** regarding this special library book purchase.
3. Click the **Refresh** button to save all changes to the shopping cart – this includes saving the attachments added to the order.
4. Click the **Order** button to submit the order for approval.

Note: Additional training for Library Book Describe Requirement orders can be found online at:
<http://erp.ccsd.net/training>