**The Pennsylvania State University**



**SIMBA Hands-On Guide Alternative Format**

**PR11\_Shopping Cart - Limit Lines**



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# PR11\_Shopping Cart - Limit Lines

## Overview

**Transaction Description:**

This transaction is a standard shopping cart with expanded functionality

**Penn State Purpose:**

This transaction uses a shopping cart with not-to-exceed limit line items.

## Process Steps

1. The **Requisitioning** button is clicked.

2. The **Shopping Cart** button is clicked.

The shopping cart is named here.

3. **Training Cart - Limit Lines** is typed into the **Name of shopping cart** field.

The Line 1 Description is entered.

4. **Evergreen Bush** is typed into the **Description** field.

The Line 1 Product Category is entered. If needed, use the search function to select a Product Category.

5. **10150000** is typed into the **Product Category** field.

The Line 1 item Quantity is changed.

6. Type **50** into the **Quantity** field.

The Line 1 Unit of Measure is assigned. If unknown, the search function may be used to select a unit of measure.

7. **ea** is typed into the **Unit** field.

The Line 1 Net Price or Limit is entered.

8. **56.89** is typed into the **Net Price / Limit** field.

The Line 2 Description is entered.

9. **Taller Evergreen Bush** is typed into the **Description** field.

The Line 2 Product Category is entered. If unknown, the search function may be used to select a Product Category.

10. **10160000** is typed into the **Product Category** field.

11. Type **50** into the **Quantity** field.

The Line 2 Unit of Measure is entered.

12. **ea** is typed into the **Unit** field.

The Line 2 Net Price/Limit is entered.

13. **89.99** is typed into the **Net Price / Limit** field.

The Add Item button is clicked to select an option from the dropdown.

14. The **Add Item** button is clicked.

Limit Item is selected from the Add Item dropdown. This will prompt the Add Item as Limit Item window to appear.

15. The **Limit Item** menu item is clicked.

The Line 3 Limit Item Description is added.

16. **Installation** is typed into the **Description** field.

The Line 3 Limit Item’s Product Category is added. This can be directly typed into the field or selected from the search function.

17. **72102902** is typed into the **Product Category ID** field.

The Value Limit for the Line 3 Limit Line is entered. The value limit is the maximum amount that can be paid for the line item. Currency should always be USD.

18. **5000** is typed into the **Value Limit** field.

The Expected Value for Line 3 Limit Line is entered. The Expected Value is the amount we expect to pay for the goods or services, and this value encumbers funds. Generally the Value Limit and Expected Value are the same. Currency should always be USD.

19. **5000** is typed into the **Expected Value** field.

The Required End Date is entered. This can be directly typed into the field or chosen by using the calender icon.

20. **12/31/2020** is typed into the **End Date** field.

The Line 3 Limit Line Supplier is entered. If the Supplier number is unknown, the search function may be used to select it. This prompts the Search: Supplier window to appear.

21. The **Supplier** Possible Values button is clicked.

Within the Search: Supplier window, the various dropdowns and text fields may be used to narrow the Supplier search.

22. The dropdown is clicked.

23. The **Name 1/last name** menu item is clicked.

The Supplier Name is entered. Adding an asterisk at the beginning or ending of the text will widen the search and pull in any hits that contain the text.

24. **wheatfield\*** is typed into the **Search Terms** field.

25. The **Search** button is clicked.

The line item is chosen by selecting this box. The supplier will autopopulate into the Add Item as Limit Item window.

26. The line selection button is clicked.

27. The **OK** button is clicked.

The line item is selected to view, add, or edit various line item details, including budget and delivery information.

28. The line selection button is clicked.

29. The **Details** button is clicked.

 The Account Assignment tab is selected to add budgetary information for Line 1.

30. The **Account Assignment** button is clicked.

The Line 1 Account Assignment number is entered. This can be directly typed or chosen from the seach function.

31. **6752710002** is typed into the **Assign Number** field.

If the account assignment information is the same for another line, the Copy button may be used to copy the information to the clipboard. You will be able to paste the copied information into other line item details later.

32. The **Copy** button is clicked.

The right arrow is clicked to toggle to the Details for Item 2.

33. The **Next Item** button is clicked.

The Paste button is clicked to use the accounting information contained on the clipboard.

34. The **Paste** button is clicked.

The right arrow is clicked to toggle to Details for Item 3.

35. The **Next Item** button is clicked.

The Paste button is clicked to use the accounting information contained on the clipboard.

36. The **Paste** button is clicked.

Selecting Line 1 allows us to navigate back to Line 1 details.

37. The line selection button is clicked.

38. The **Delivery Address/Performance Location** button is clicked.

A Delivery Address/Performance Location address is searched for. This will prompt a Search: Name window to appear.

39. The Possible Values button is clicked.

The dropdown is changed to 'contains' to widen the search hits.

40. The dropdown is clicked.

41. The **contains** menu item is clicked.

The location text we want to search for is entered. Using an asterisk before or after the text widens the search hits.

42. **UP0316\*** is typed into the **Search Terms** field.

43. The **Search** button is clicked.

The Delivery Location line item is selected to autopopulate the delivery location back into Line 1’s details.

44. The line selection button is clicked.

The appropriate Care Of information is entered.

45. **John Doe** is typed into the **C/O** field.

The appropriate Phone Number/ Extension is entered.

46. **123-456-7890** is typed into the **Phone Number** field.

The appropriate Floor and Room Number information is entered.

47. **2** is typed into the **Floor** field.

48. **210B** is typed into the **Room** field.

The Sources of Supply/Service Agents tab may be used to suggest a source of supply.

49. The **Sources of Supply / Service Agents** button is clicked.

The Preferred Supplier number is entered. If unknown, the seach function may be used to choose a supplier.

50. **800003340** is typed into the **Preferred Supplier** field.

The right arrow is used to toggle to Details for Item 2.

51. The **Next Item** button is clicked.

The Preferred Supplier number is entered for Line 2.

52. **800003340** is typed into the **Preferred Supplier** field.

The Delivery Address/Performance Location tab is used to enter the Delivery Address/Performance Location for Line 2.

53. The **Delivery Address/Performance Location** button is clicked.

A Delivery Address/Performance Location address is selected by clicking on the search function. This will prompt a Search: Name window to appear.

54. The Possible Values button is clicked.

The Search Criteria dropdown is changed to 'contains.'

55. The dropdown is clicked.

56. The **contains**menu item is clicked.

The Location text we want to search for is entered. Using an asterisk before or after the text widens the search hits.

57. **UP0316\*** is typed into the **Search Terms** field.

58. The **Search** button is clicked.

The Delivery Location line item is selected to autopopulate the delivery location back into Line 2’s details.

59. The line selection button is clicked.

The appropriate Care Of information is entered.

60. **John Doe** is typed into the **C/O** field.

The appropriate Phone Number/Extension information is entered.

61. **123-456-7890** is typed into the **Phone Number** field.

The appropriate Floor/Room information is entered.

62. **2** is typed into the **Floor** field.

63. **210B** is typed into the **Room** field.

The Check button is clicked to refresh the system’s error messages and updates based on newly entered information. Note that entering the budget information successfully cleared all existing error messages and now displays a yellow warning message.

64. The **Check** button is clicked.

The Order button is clicked to order the shopping cart. Note the generated shopping cart number.

65. The **Order** button is clicked.

Back on the Active Queries Screen, Shopping Carts All is selected and Refresh is clicked to update the list of shopping carts.

66. The **Refresh** button is clicked.

To view the shopping cart, the blue shopping cart link is clicked.

67. The **1000001797** line item is clicked.

68. The **Display / Edit Agents** button is clicked.

The Approval Process Overview screen is displayed.

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