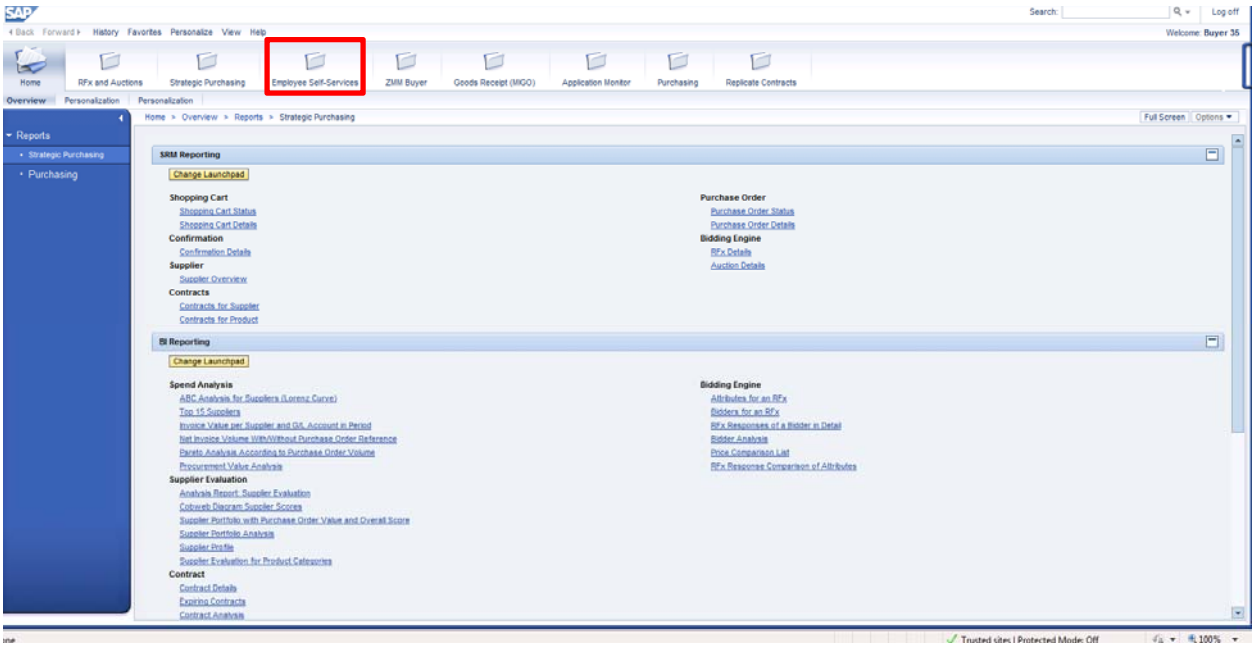
Create a Shopping Cart Using the NIGP Search

Exercise 2

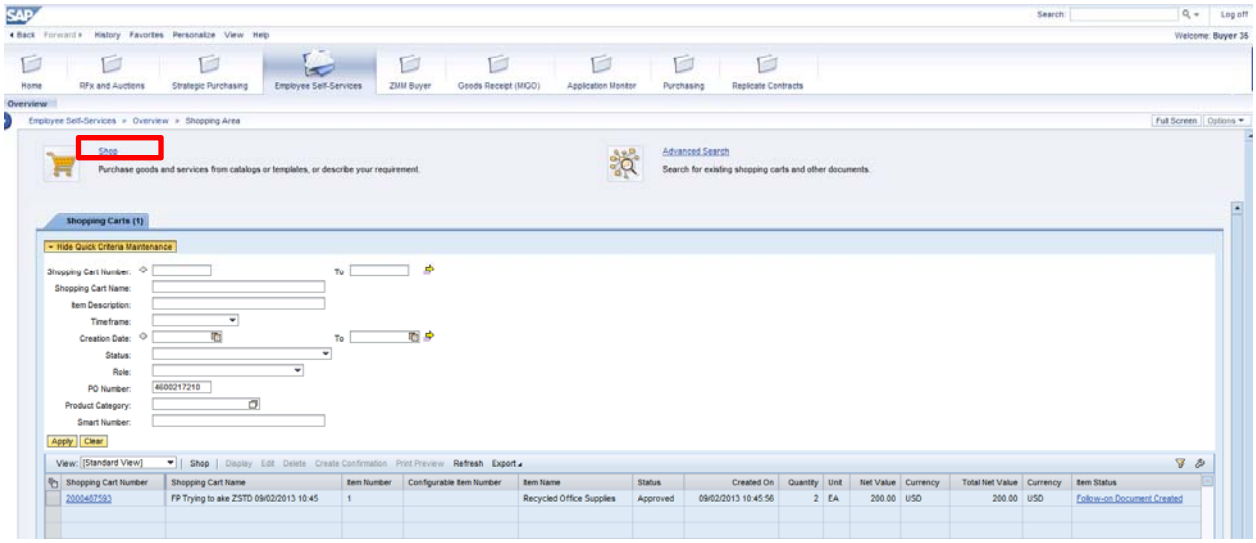
Exercise 2: Create a Shopping Cart Using the NIGP Search (Non-Contract)

Create shopping cart for a non-contract using NIGP/Contract Search. In this exercise, we will be requesting a Snowplow Auxiliary Lamp.

1. Select “Employee Self-Services.”

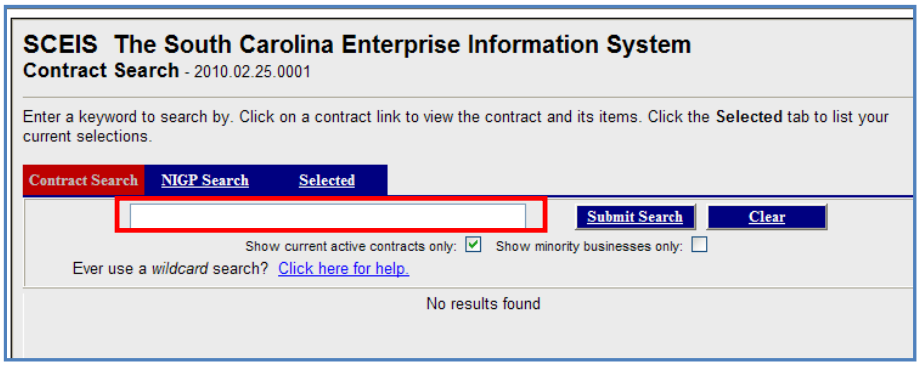


2. From the “Employee Self Services” screen, click “Shop.”

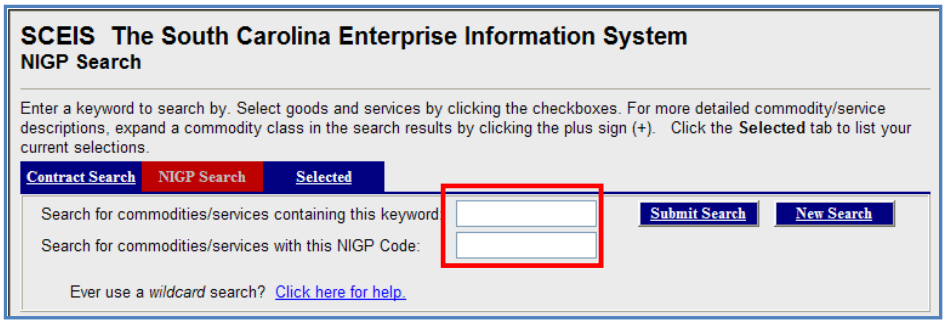


3. Select “NIGP/Contract Search.”

4. In the next window, type in search criteria for “*gummed paper*” under the Contract Search Tab. Then click Submit Search. This is to verify the item is or is not on contract. Always use “Contract Search” as your first option.

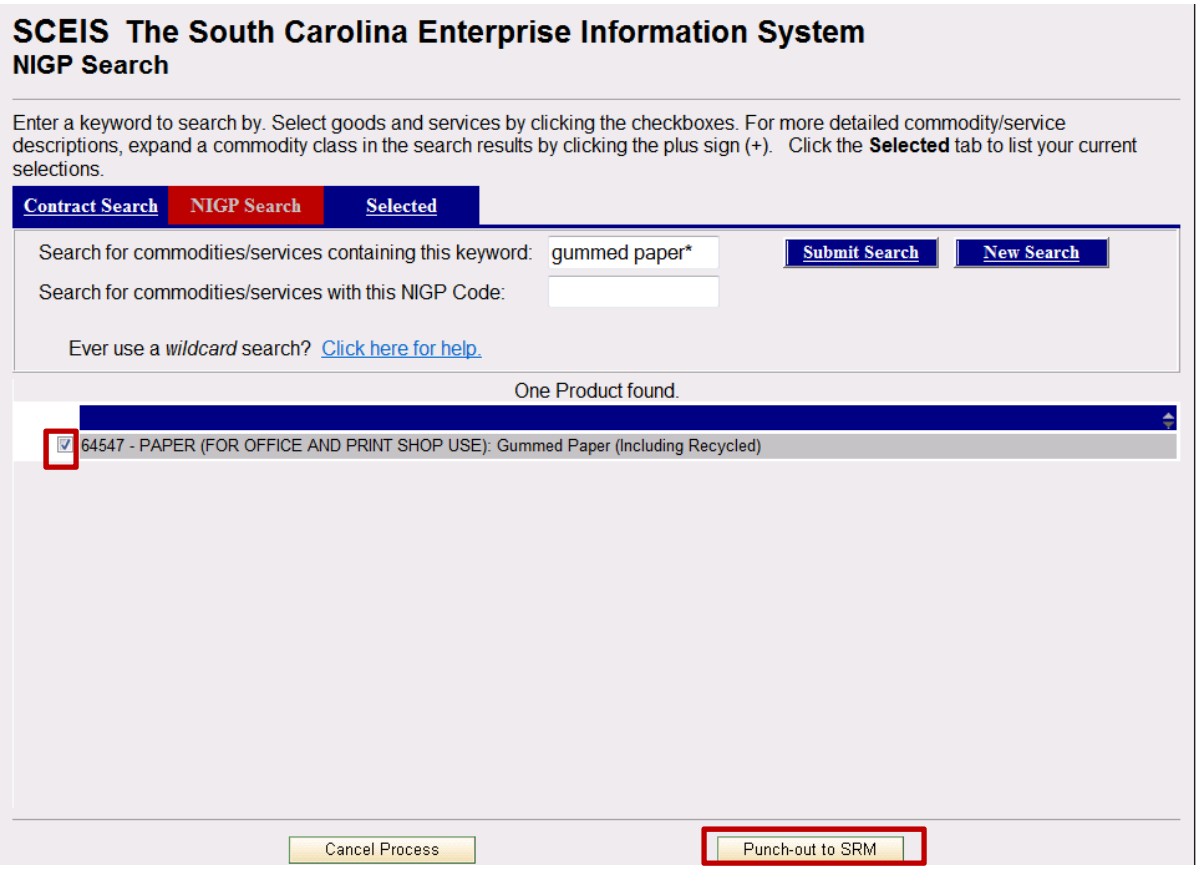


5. If the description is not found using the “Contract” tab, use the “NIGP Search” tab. Enter “*gummed paper*” in the box “Search for commodities/services containing this keyword.”



6. Click Submit Search

7. Choose the appropriate 5 digit Material Group number (64547) from the search results by placing a check mark in the box by the correct Material Group.



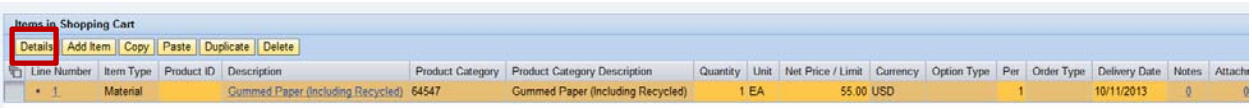
8. Click **Punch-out to SRM**. This will bring you back to the Shopping Cart in SRM.

Shop in Three Steps: Step 2 Shopping Cart (1 item)

9. Enter Quantity (1), Net Price/Limit ($55.00), Delivery Date (Current Date + 1 week), change the Account Assignment Type to Cost Center and add your agency "Account Assignment Number". **ENTER.**

Product Category Description	Quantity	Unit	Net Price / Limit	Currency	Option Type	Per	Order Type	Delivery Date	Notes	Attachments	Account Assignment Type	Account Assignment Number
Gummed Paper (Including Recycled)	1	EA	55.00	USD		1		10/14/2013	0	0	Cost Center	N040421010

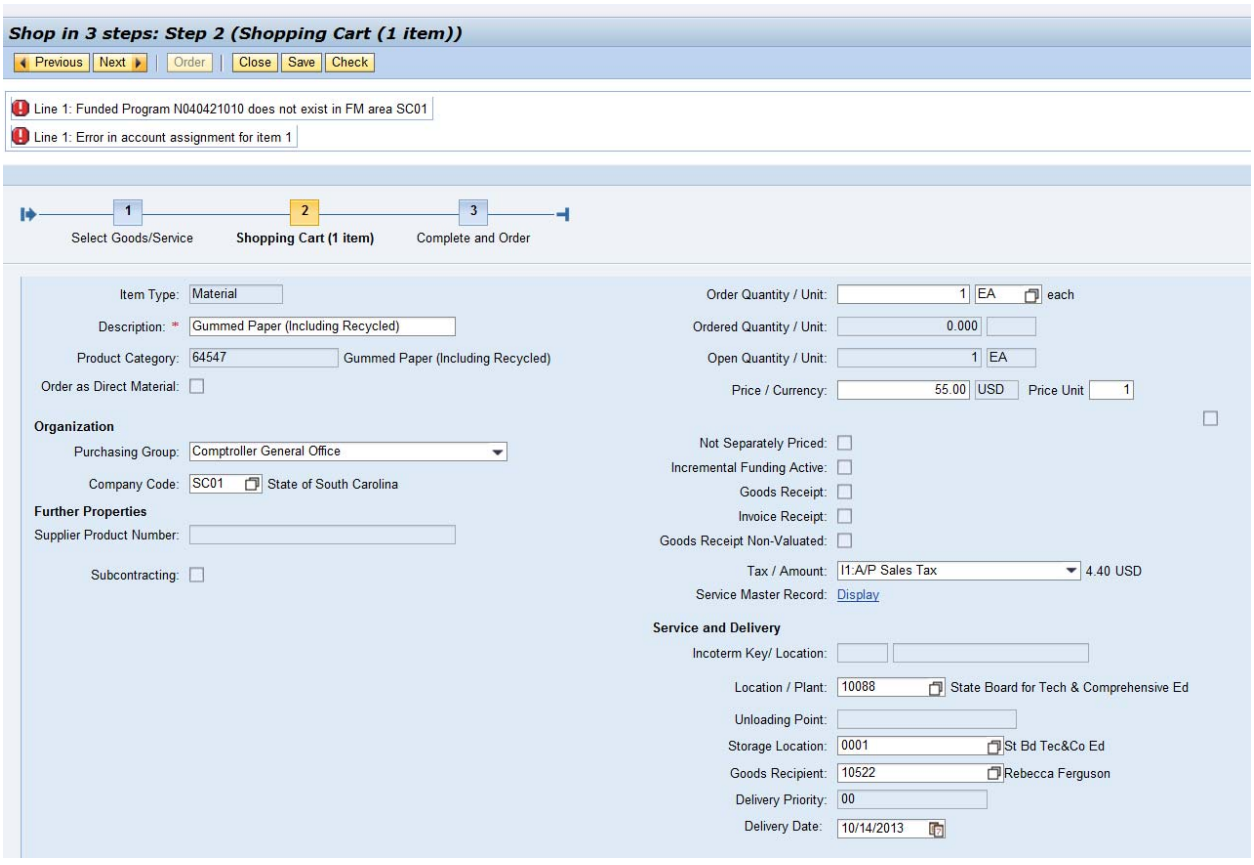
Click on the “Details” button found under the “Items in Shopping Cart” (shown below)



10. Complete and verify the ***Item Data section.***

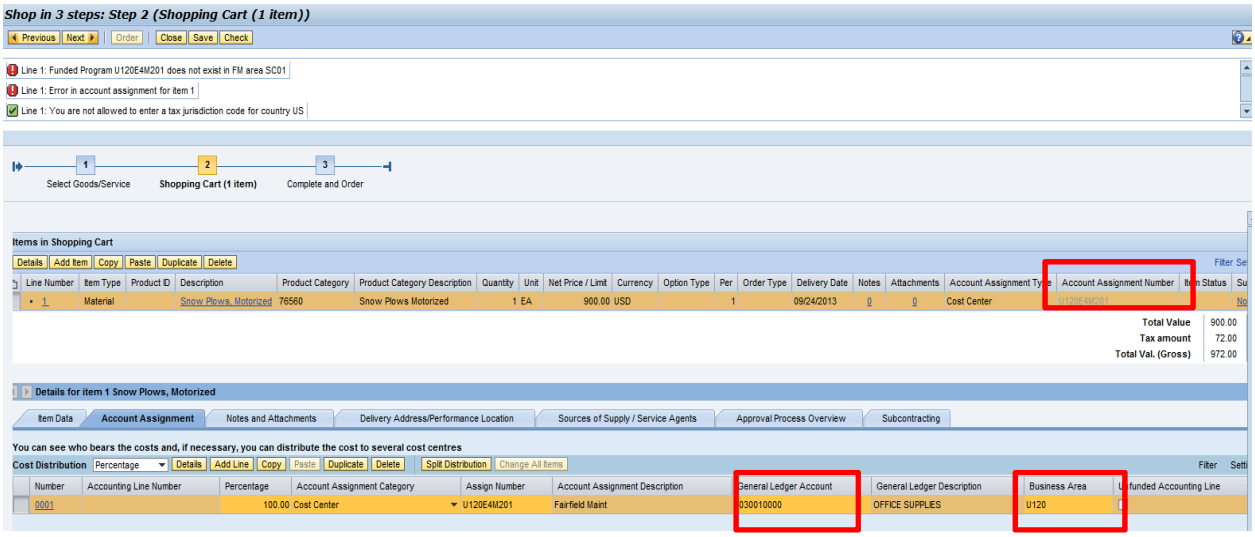
a) You may need to update the Description Field to reflect what you are purchasing. In this example, change to ***Gummed Paper (including Recycled), RED.***

b) Verify the Purchasing Group, Company Code SC01, Quantity (1), Price Currency (55.00), Price Unit (1), Tax/Amount (I1 A/P Sales Tax), your agency’s Location/Plant, Storage Location, Goods Recipient (your name) and Delivery Date.

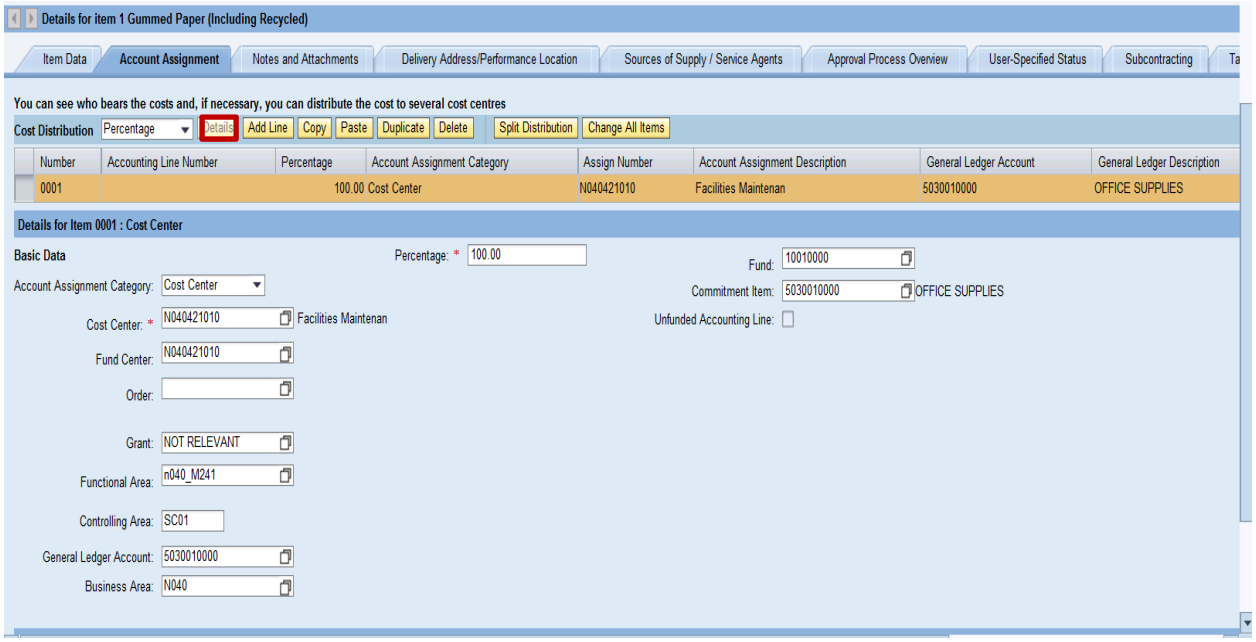


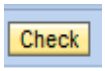
- Note: Disregard any funding error messages. They should disappear as the Shopping Cart is completed.

11. Under the ***Account Assignment Tab***, The General Ledger Account and the General Ledger Description are mapped to the Product Category (NIGP) number and are defaulted. Enter the cost center number in the “Assign Number” field. Press the “Enter” key on your keyboard. The Business area field will automatically populate.



12. Complete the Cost Assignment Section by clicking “Details.” The “Details” button is located directly below the Account Assignment Tab (highlighted below).
13. Note the Cost Center and G/L are carried over to this screen and the Fund Center and Commitment Item have populated. Enter your agency’s **Fund, Functional Area and use** “**Not Relevant**” as the **Grant.**

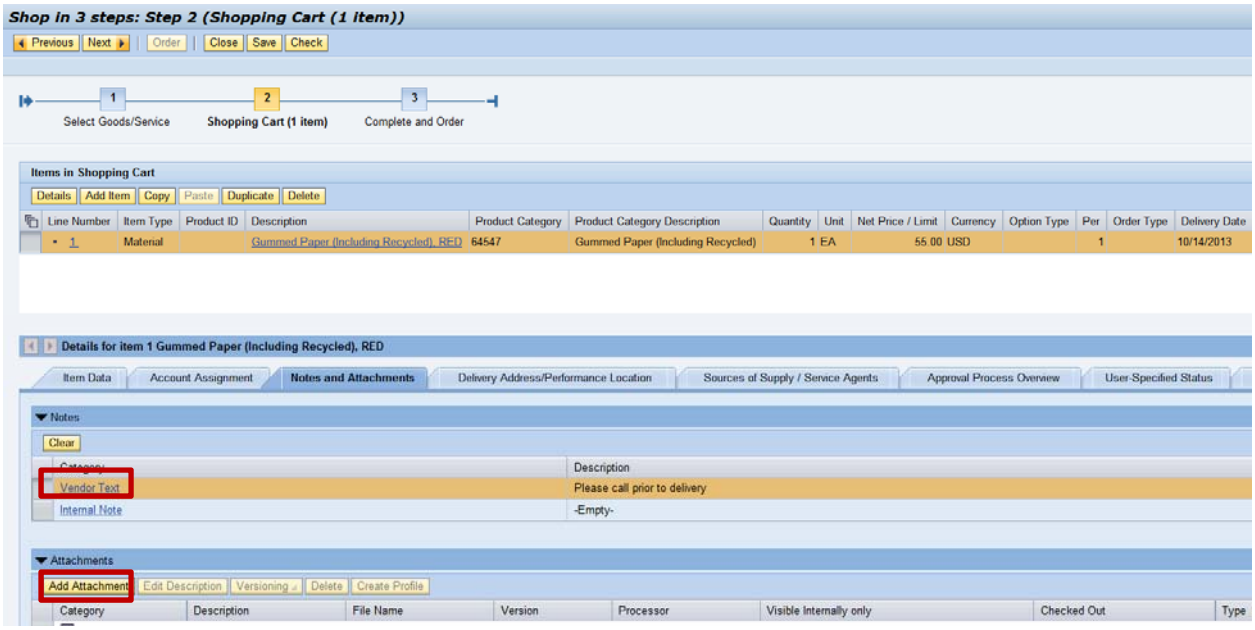


14. Click 

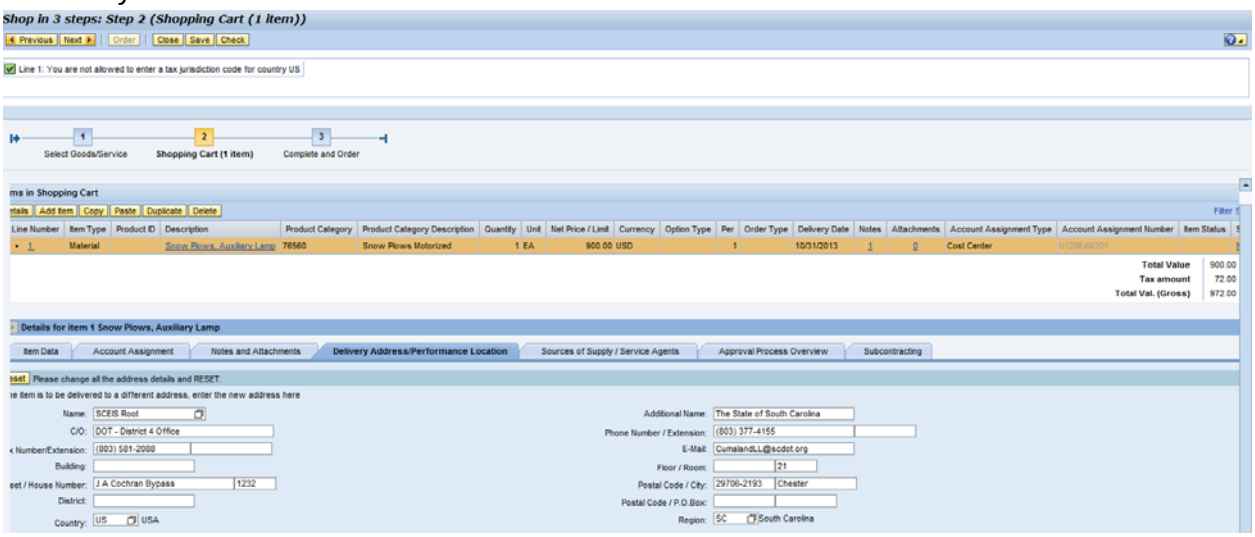
at top of screen to check for any Account Assignment errors.

15. Complete ***Notes and Attachments*** Section. Enter "***Please call prior to delivery***" in the "Notes" Section, Category: **Vendor Text**. *NOTE: "Vendor Text" is a note to the vendor that will print on the Purchase Order.*

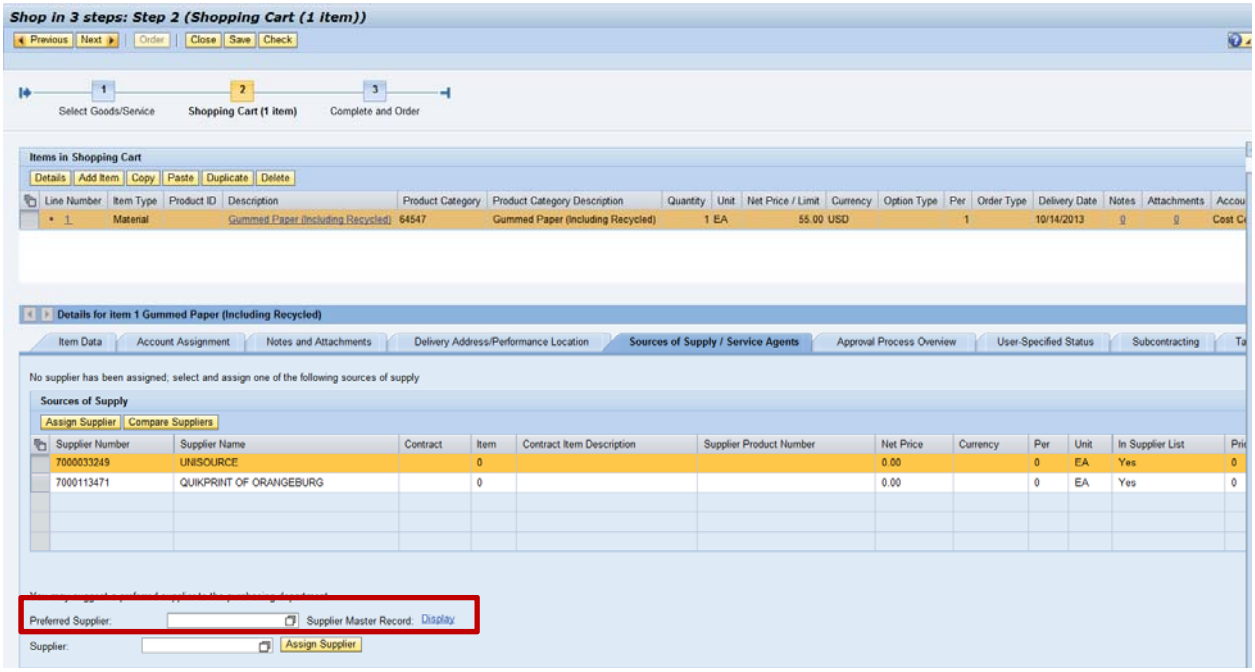
Note: An attachment may be added in the "Attachments" section.



16. Verify the ***Delivery Address/Performance Location*** is correct. This information defaults from your User ID.

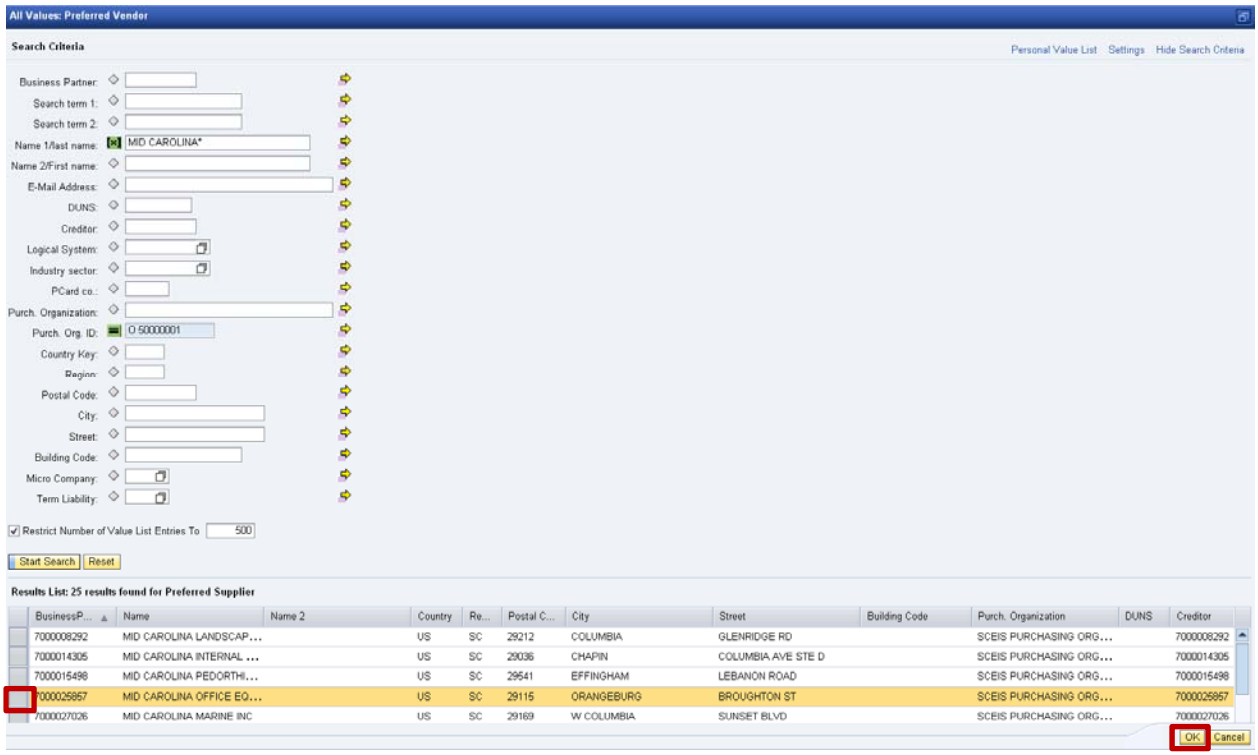


17. Complete "***Sources of Supply/Service Agents***" Tab. Click the Preferred Supplier dropdown to select your vendor from the "Search Criteria."



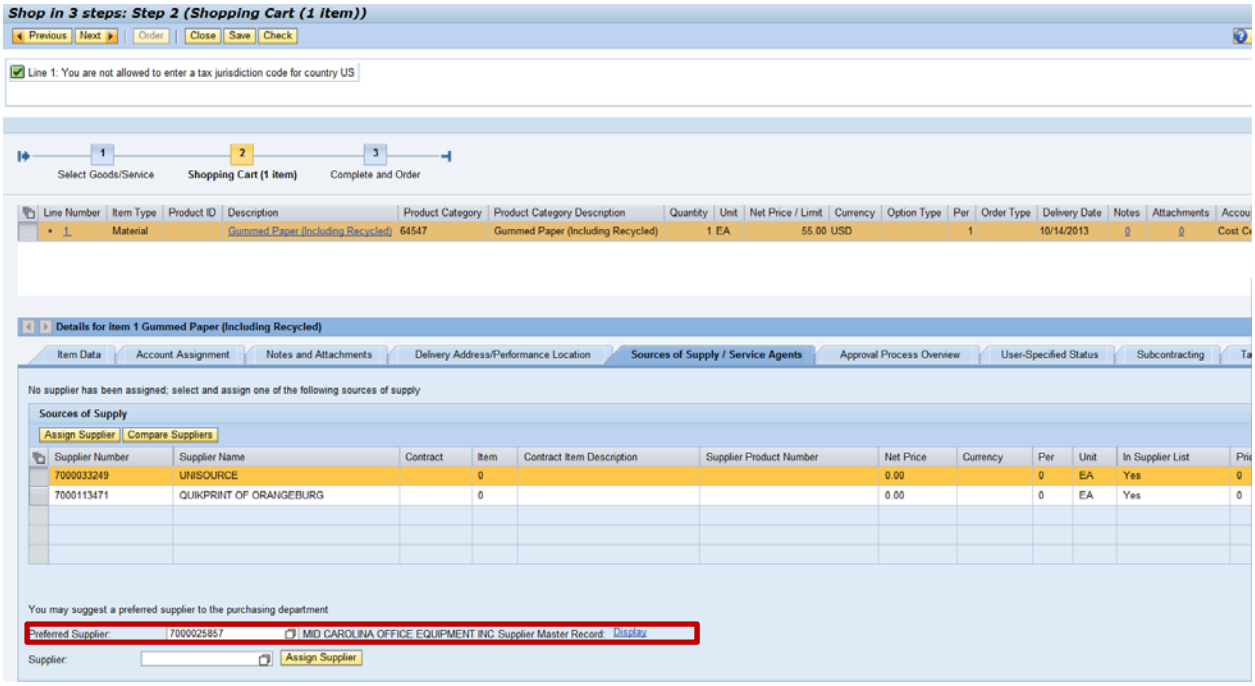
18. Enter the vendor name in the Name 1/last name field. In this example, enter "**MID CAROLINA*.**" Uncheck the "Restrict Number of Value List Entries" and click Start Search

19. Highlight the chosen Supplier by clicking on the box to the far left of the supplier. In this scenario we used Vendor number 7000025857.

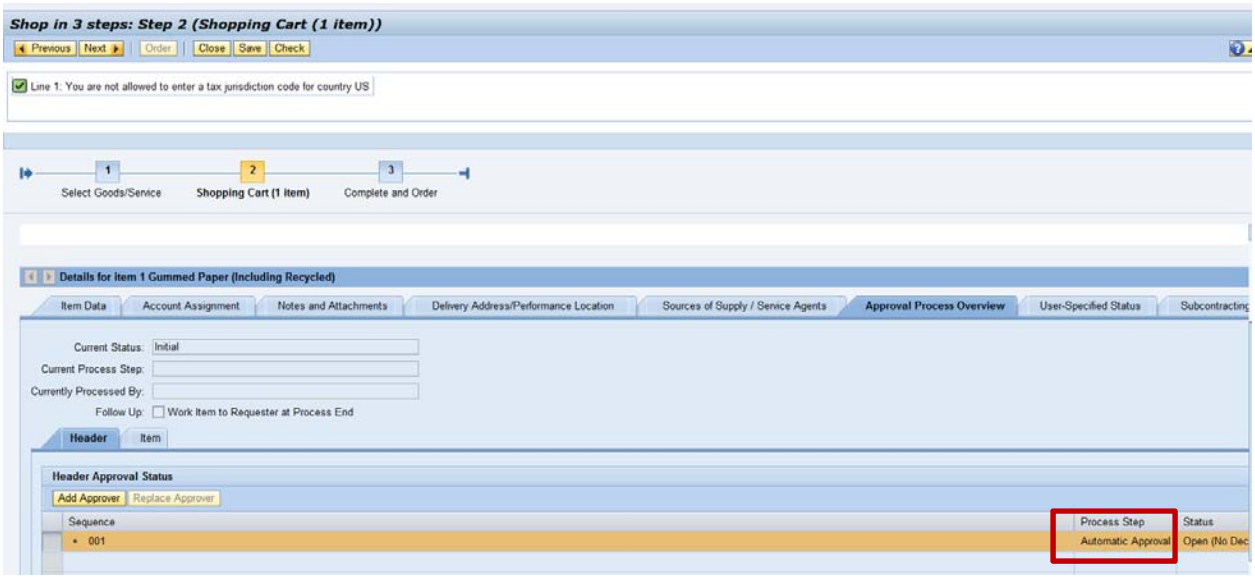


20. Click OK.

Note: The Supplier you have chosen is now listed as your "Preferred Supplier."



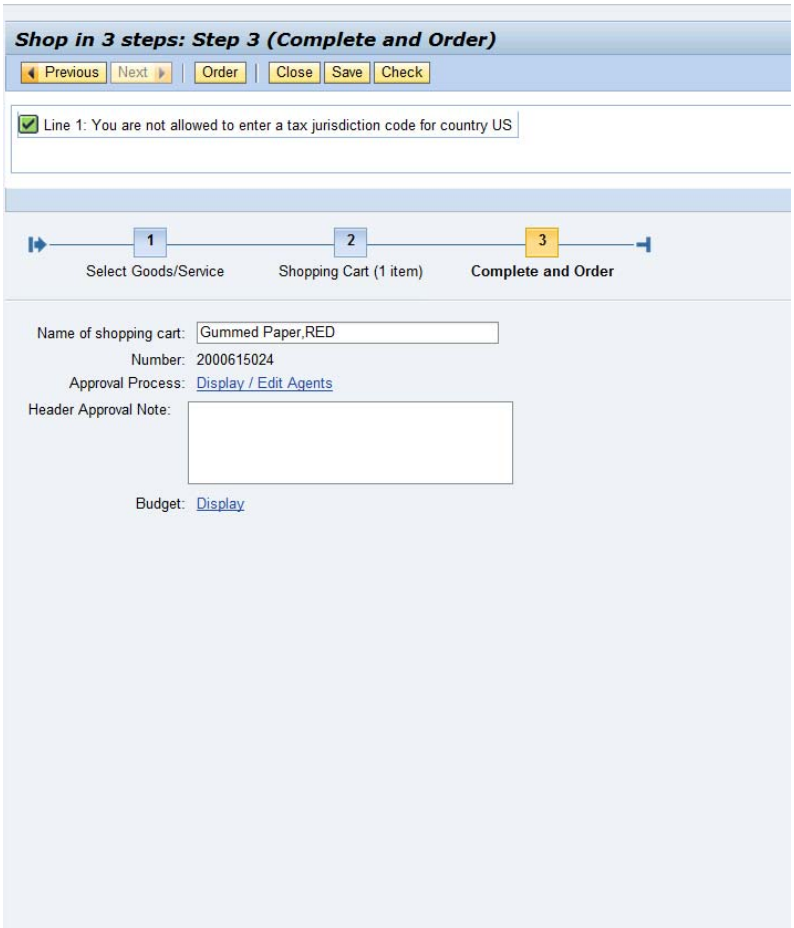
21. Proceed to the "***Approval Process Overview***" Tab. Note the "Process Step." This Shopping Cart Creator has approval authority under $2500. The example in this scenario is under $2500, thus is automatically approved.



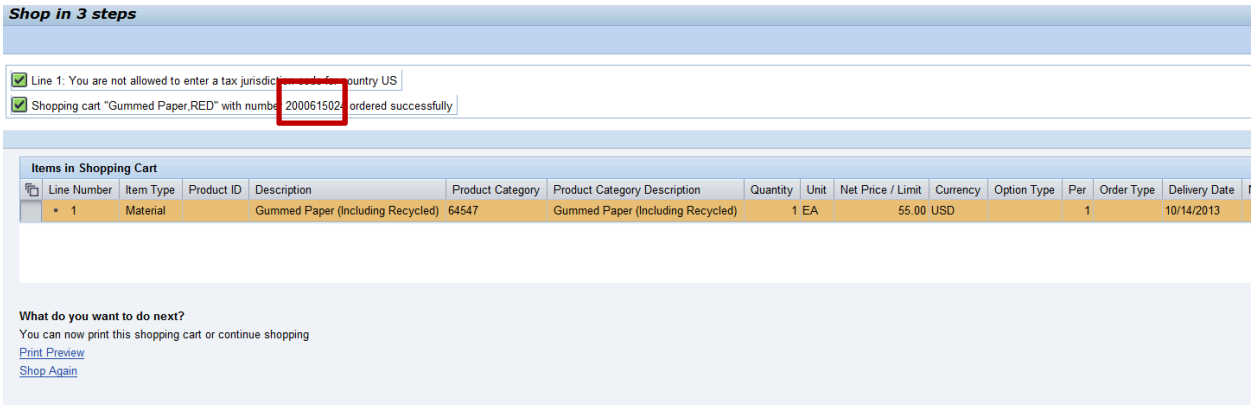
Click Check at the top of the screen to verify all information is correct. Once all is "green," click on the Next button also located at the top of the screen. This takes you to "Shop in 3 steps: Step 3 (Complete and Order) screen."

22. Name your Shopping Cart.

23. Once the Shopping Cart has been named, click the Order button found at the top of the screen.



You have successfully created a Shopping Cart! Note the Shopping Cart Number at top of screen.



Enter Shopping Cart Number: _____