Creating a Sponsored Project Purchase Order (SPPO) - JHURA

An SPPO shopping cart is created as a free-text cart when an outside entity (subrecipient) is identified to perform a significant portion of work for an overall project.

There are two sources for outgoing funds:

1. **Sponsored** funding from outside of JHU
2. **Discretionary, Non-Sponsored** funding from within JHU

Subagreements from sponsored funds require a “96” internal order (IO) number, while subagreements from discretionary, non-sponsored funds require a cost center number beginning with a 1 or an IO number beginning with an 8.

**Before You Get Started**

Perform a vendor search in SAP to verify the subrecipient has a vendor record with a purchase order (PO) capable vendor number starting with a 1, and the subrecipient’s address of record in SAP matches the address on the subaward.

If the subrecipient doesn't have a vendor record, a PO capable vendor number, or the address details don’t match, DO NOT CREATE the Shopping Cart. Send a PaymentWorks invitation to the subrecipient. Once the subrecipient has an accurate record, you can create the Shopping Cart.
The steps that you need to follow to create an SPPO Shopping Cart depends on your division/school. The following flowcharts illustrate these steps.

1. The department submits a SWiFT record. The record routes to JHURA and SPH Finance.
2. Obtain the sponsored or discretionary, non-sponsored number.
   a. SPH Finance creates a sponsored 96 internal order number, and emails it to the department. The number is also available in the SWiFT record under the Finance tab.
   b. Obtain the discretionary, non-sponsored number from the departmental budget/finance manager.
3. The department creates an SPPO Shopping Cart.
4. The department enters the subrecipient’s SWiFT record number in the Name of Shopping Cart field in SAP.
5. The department submits the Shopping Cart into workflow approval.
6. The Shopping Cart is approved by the departmental cost object approver, and routed to JHURA.
7. The department emails the Shopping Cart number to the JHURA Current Owner assigned to the SWiFT record.
1. The department creates a “DRAFT” SWiFT record. **DO NOT** submit the SWiFT record until the Shopping Cart number is entered into SWiFT.

2. Obtain the sponsored or discretionary, non-sponsored number.
   a. Request a sponsored 96 internal order number from the WebForm system.
   b. Obtain the discretionary, non-sponsored number from the departmental budget/finance manager.

3. The department creates an SPPO Shopping Cart.

4. The department enters the subrecipient’s SWiFT record number in the *Name of Shopping Cart* field in SAP.

5. The department submits the Shopping Cart into workflow approval.

6. The Shopping Cart is approved by the departmental cost object approver, and routed to JHURA.

7. The department accesses the “DRAFT” SWiFT record, and adds the Shopping Cart number in the *Shopping Cart Number* field under the Basic Information tab.

8. The department submits the SWiFT record once all fields and tabs are complete.
1. The department creates a “DRAFT” SWiFT record. **DO NOT** submit the SWiFT record until BARA enters the Shopping Cart number into SWiFT.

2. Obtain the **sponsored** or **discretionary, non-sponsored** number.
   a. Assign the SWiFT record to your BARA contact person to issue a **sponsored** 96 internal order number using the **Change Requestor** option under the Action gear.
   b. Obtain the **non-sponsored, discretionary** number from the department budget/finance manager.

3. BARA reaches out the department to obtain the non-sponsored number.

4. BARA creates an SPPO Shopping Cart, and enters the subrecipient’s SWiFT record number in the **Name of Shopping Cart** field in SAP.

5. BARA submits the Shopping Cart into workflow approval, enters the Shopping Cart number in the SWiFT record, and routes the record back to the department using the **Change Requestor** option under the Action gear.

6. The department submits the SWiFT record once all fields and tabs are complete.

7. The Shopping Cart is approved by the departmental cost object approver and workflowed to JHURA.
1. JHURA approves the Shopping Cart, generates the purchase order, and executes the subaward.

2. The subrecipient performs the work.

3. The subrecipient sends in an invoice to the JHU department.

4. The invoice is reviewed to verify the work has been performed.

5. A **Goods Receipt Confirmation** is created in SAP by the department.

6. The invoice and **Subrecipient Payment and Performance Certification** are sent to: POExceptions@jhmi.edu.

7. Funds are released and the subrecipient is paid.

**Significant delays often result when Shopping Carts are not created in a timely manner, or when the department does not apply all levels of approval to the Shopping Cart.**

**Purchase orders cannot be created and subagreements cannot be fully executed until JHURA receives your Shopping Cart.**
Creating an SPPO Shopping Cart

Before you create the SPPO Shopping Cart:

- Perform a vendor search in SAP. Make sure the subrecipient has an accurate vendor record, and a vendor number that starts with a 1.
- Obtain the sponsored or discretionary, non-sponsored cost object and general ledger account number to charge.

Do not create the Shopping Cart until the subrecipient has a valid vendor number/record, and you have the sponsored or discretionary, non-sponsored cost object and general ledger account number to charge. These are key fields that must be filled in so the SPPO Shopping Cart can be submitted into workflow approval.

1. On the Shopping Cart home screen, click either the Shopping Cart or Create Shopping Cart link. The Create Shopping Cart screen displays.

Under the General Data section, define your cart level settings. Refer to the Defining Cart Level Settings job aid for more details.

2. Enter the subrecipient’s SWIFT record number in the Name of Shopping Cart field.
3. Click the **Set Values** link.

4. Under the Item Basic Data tab, enter **SPSA0000** (SUBAWARDS) in the Product Category field.

5. Under the Account Assignment tab, enter the **cost object type, number, and general ledger account number**.

6. Click the **OK** button.
7. Select **SPPO** as the document type - you must select SPPO so the cart is workflowed to JHURA for approval and PO creation.

8. Enter the **subrecipient’s vendor number** in the Shopping Cart Vendor field.

9. Enter the details of the subaward into the Item Overview grid, and then press the Enter key on your keyboard.

   - Enter `<**Subaward**>` into the Description field - **DO NOT PRESS THE ENTER KEY**
   - Enter the **total dollar value** of the subaward in the Quantity field - **DO NOT PRESS THE ENTER KEY**
   - Enter **DOL** (for dollar) into the Unit field - **DO NOT PRESS THE ENTER KEY**
   - Enter 1 into the Net Price/Limit field - **DO NOT PRESS THE ENTER KEY**
   - **DO NOT** enter a value in the Per field - It defaults to “1”
10. Scroll up to the top of the screen and click the **Check** button to verify that the cart has no errors.

11. Click the **Order** button to place the cart into workflow approval.

12. Click the **Close** button. The Shopping Cart home screen displays.

13. Click the **Refresh** link.