



The University of Texas at Tyler

Tyler • Longview • Palestine • Houston

# eSHOP for Requesters Training Manual

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## Overview

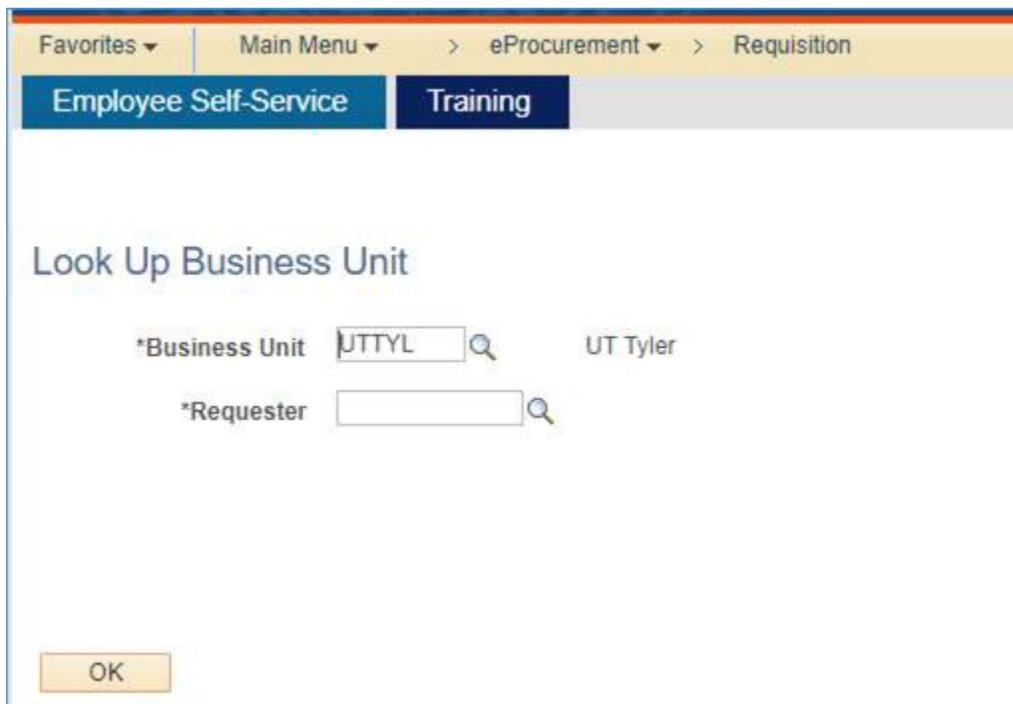
eSHOP is a role based shopping tool that allows users to take advantage of pre-negotiated contracts from well-known suppliers. As a requester, you are responsible for creating, reviewing, editing and submitting carts to become formal requisitions for approval in UT Share/PeopleSoft.

Requesters are users who have the authority to create requisitions in UT Share/PeopleSoft.

## Accessing eSHOP

If a user has a requester role, they will access the eSHOP from a link within UT Share/PeopleSoft. Requesters login to UT Share/PeopleSoft and navigate to **Requisition**, where there will be a link to eSHOP under the web tab.

1. Login to UT Share/PeopleSoft
2. Navigate to create requisition (**Navigation: Main Menu > eProcurement > Requisition**)



The screenshot shows a web browser window with a breadcrumb trail: Favorites > Main Menu > eProcurement > Requisition. Below the breadcrumb, there are two tabs: 'Employee Self-Service' and 'Training'. The main content area is titled 'Look Up Business Unit'. It contains two search fields: '\*Business Unit' with the value 'UTTYL' and a magnifying glass icon, and '\*Requester' with an empty field and a magnifying glass icon. To the right of the '\*Business Unit' field, the text 'UT Tyler' is displayed. At the bottom left of the dialog, there is an 'OK' button.

3. Enter Business Unit or Accept Default
4. Enter Requester
5. Click OK

On the resulting screen:

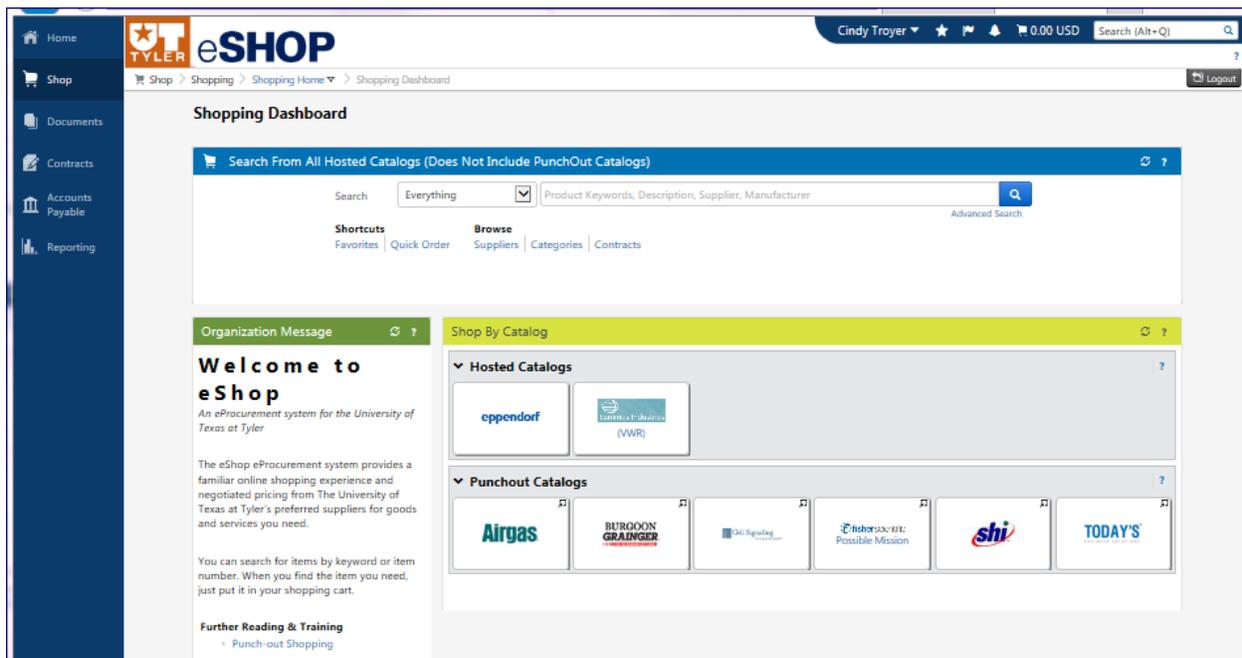
6. Click on **Request Options** drop down box
7. Click **Web** tab link
8. Punch-out to eSHOP by clicking **eSHOP Portal** link

The screenshot displays the eSHOP interface for creating a requisition. At the top, there is a navigation bar with 'Favorites', 'Main Menu', 'eProcurement', and 'Requisition'. Below this, there are tabs for 'Employee Self-Service' and 'Training'. The main heading is 'Create Requisition' with a help icon. A welcome message for 'Sheila Kay Darcey' is visible, along with a 'Home' link and a search bar. The 'Request Options' dropdown menu is open, showing 'All Request Options', 'Special Requests', and 'Web'. Under 'Web', the 'SciQuest eShop Portal' link is highlighted. To the right, there is a 'Special Requests' section with a description and an 'Item Details' section with a label '\*Item Description'.

## Navigation

There are three main areas of the eSHOP screen:

1. The Main Workspace - The main workspace is where one can manage the active eSHOP feature. It will always display breadcrumbs that tell the navigation path to the page the user is accessing.
2. The side Navigation Menu - Most areas of eSHOP can be accessed from the side navigation menu. When a user rolls over the main menu icons, slide-out sub-menus display. In general, menus are grouped by related tasks. For example, shopping tasks are grouped in the **Shop** menu.
3. The Top Banner - The top banner contains access points to the user profile, bookmarks, assigned actions items and available notifications. In addition, users can access a quick view of their active shopping cart and perform a quick search of the site.



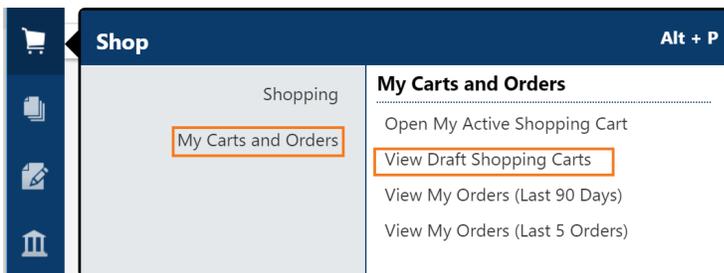
## Creating a Cart

There are two ways to shop in eSHOP:

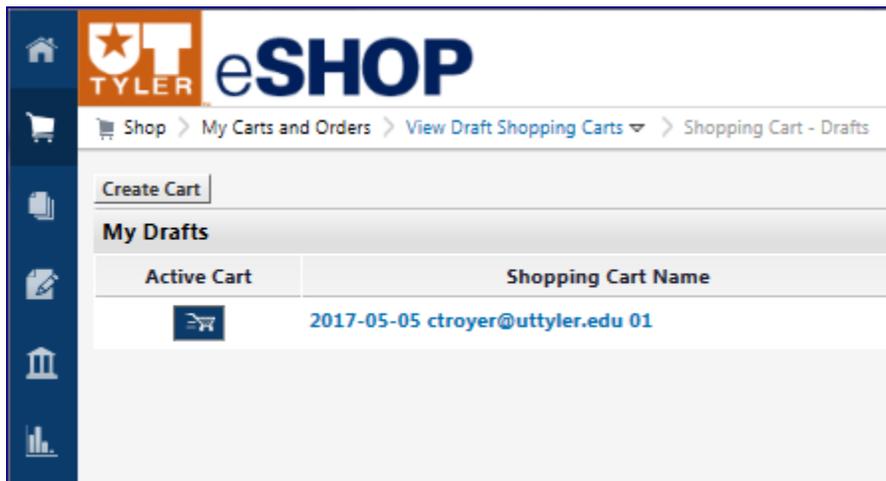
1. **Punch-Out Catalog:** A Punch-out is a website where the shopper is redirected to the supplier's site. A cart is created on that site. Then the shopper is redirected back to eSHOP with their selected merchandise.
2. **Hosted Catalog:** A Hosted Catalog is a supplier catalog that is embedded in eSHOP. The catalog is hosted by eSHOP, and can be searched by various criteria. Users can search for an item across all hosted suppliers, allowing users to comparison shop.

When comparative shopping your results will come from among hosted catalogs, not punch outs.

Users will create a cart in eSHOP using one of these methods. They can have multiple carts in process at the same time. To access your carts, click on the **Shop** menu, from the slide out menu select **My Carts and Orders**, and click **View Draft Shopping Carts**.



To create a new cart, click on the “**create cart**” button or simply start choosing items when searching and they will be added to an active cart that will show a summary in your top banner.

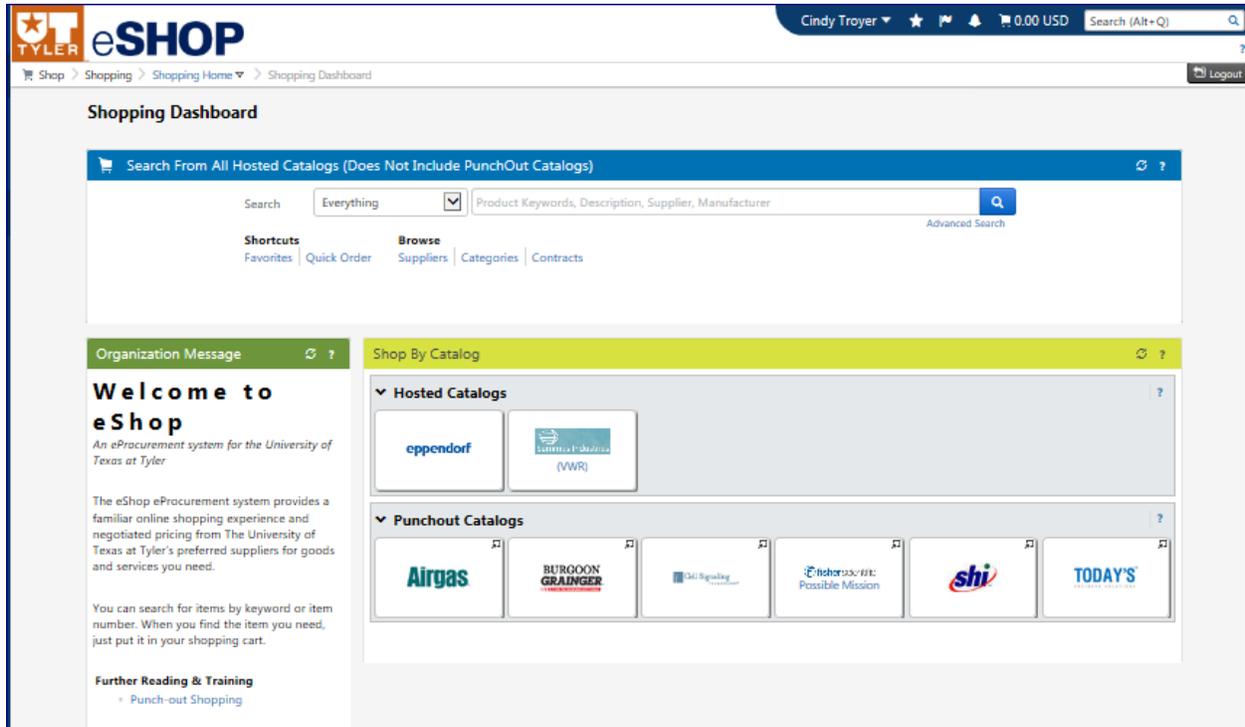


It is very important to remember to select from one vendor catalog at a time and complete the process entirely with that vendor.

Since a cart may eventually become a UT Tyler requisition and purchase order, the rule to remember is **One Cart – One Vendor – One Requisition.** \*

## Ordering from a Punch-Out Catalog

Punch-out catalogs are external links to a supplier's website. Click on the Vendor Icon in the Punch-out Catalog section of the Shopping Dashboard. This will take you to the vendor's website for UT Tyler.



**Note:** Each vendor's website will be specific to that vendor. Follow the directions on each website to search, select and order products. Each vendor will have some form of checkout that enables users to return to eSHOP. The Shopping Cart Page will appear when you return to eSHOP.

## Ordering from a Hosted Catalog

1. Search for items in the hosted catalog by using the simple search displayed below or by clicking on the advanced search.

Example: Battery

Search results can be sorted by price, supplier, part number, etc. Choose the sort method using the **Sort by** dropdown. Users can also filter results by keyword, product flag, supplier, category, packaging, etc.

Shop > Shopping > Shopping Home > Product Search - All

Shop Everything battery Go

Go to: advanced search | favorites | quick order by SKU Browse: suppliers | categories | contracts

Results for: Everything : battery

Showing 1 - 20 of 49 Results Compare Selected: 0

Add Keywords ?

Filter Results ?

By Supplier

- Millipore Corp (18)
- Summus VWR (31)

By Category

- Adapters or connectors or fittings for pharmaceutical filter housings (7)
- Air Sampling Equipment (2)
- Battery Chargers and Accessories (1)
- Filtration Apparatus Accessories (2)
- Laboratory balances (22) more...

By Packaging UOM

- EA (49)

By Result Type

- Products (49)

By Manufacturer

- BIOEXPRESS (2)
- EMD Millipore Corporation (18)
- OHAUS SCALE CORP (28)
- PRIVATE LABEL - VWR (1)

Results Per Page: 20

Sort by: Best Match

- Best Match
- Part Number
- Description
- Size
- Packaging UOM
- Supplier
- Price: Low to High
- Price: High to Low

Image	Product Name	Part Number	Manufacturer Info	Price	UOM	Buttons
no image available	Milliflex PLUS Printer Battery 1/Pk from Millipore Corp	MXPPBAT01	MM_NF-MXPPBAT01 - (EMD Millipore Corp)	130.00 USD	EA	1 Add to Cart add favorite   compare 1 item added, view cart.
no image available	PLC battery; 1 each from Millipore Corp	CMP0415	MM_NF-CMP0415 - (EMD Millipore Corp)	141.00 USD	EA	1 Add to Cart add favorite   compare
no image available	Replacement Battery 6V NiMH 2200mAH, 1 ea from Millipore Corp	MERSBAT01	MM_NF-MERSBAT01 - (EMD Millipore Corporation)	48.41 USD	EA	1 Add to Cart add favorite   compare
no image available	Cent M1 PCL Battery and Media Memory Card from Millipore Corp	CMP1415	MM_NF-CMP1415 - (EMD Millipore Corp)	281.00 USD	EA	1 Add to Cart add favorite   compare
no image available	NovaSeal Battery chargers 220-240 V European plug from Millipore Corp	NM0027	MM_NF-NM0027 - (EMD Millipore Corporation)	328.00 USD	EA	1 Add to Cart add favorite   compare

2. Change the quantity if needed.
3. Click the **Add to Cart** button.
4. Click **View Cart** to proceed.

## Co-Mingled Carts

While eSHOP does allow you to enter items from more than one vendor supplier in the same cart, a co-mingled cart cannot be processed into a Requisition.

## Completing a Cart

While viewing a cart, users can name the cart for future reference or future searches. They can also modify the cart, empty the cart or take various other actions by using the dropdown. If you make changes, click the **Save** button. Requesters can submit their orders or orders assigned to them by a shopper for processing UT Share/PeopleSoft and for budget authority approval.

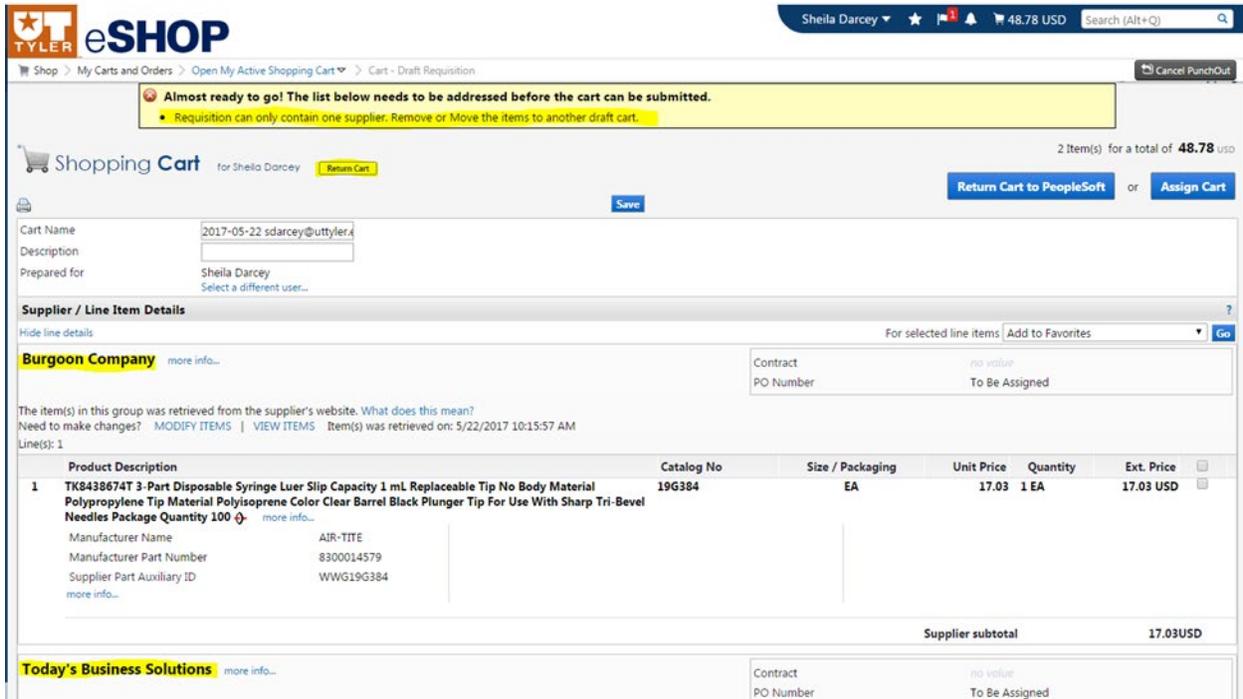
The screenshot displays the 'Shopping Cart' interface. At the top, it shows the breadcrumb 'Shop > My Carts and Orders > Open My Active Shopping Cart > Cart - Draft Requisition'. The cart contains 2 items for a total of 91.91 USD. The cart name is 'Cart 12345' and the description is 'Extra Batteries'. The prepared for user is 'Sam Shopper'. Below this, the 'Supplier / Line Item Details' section shows two items from 'Millipore Corp'. Item 1 is a 'Replacement Battery 6V NiMH 2200mAH, 1 ea' with a unit price of 48.41. Item 2 is a 'Battery Chaer' with a unit price of 43.50. A dropdown menu is open over the first item, listing actions such as 'Add to Favorites', 'Remove Selected Items', 'Remove All Items', 'Move to Another Cart', 'Add to Draft Cart or Pending PR/PO', and 'Line Item History'. The bottom of the cart shows a subtotal of 91.91 and a total of 91.91 USD.

\*Remember the rule from page 4 - **One Cart – One Vendor – One Requisition?**

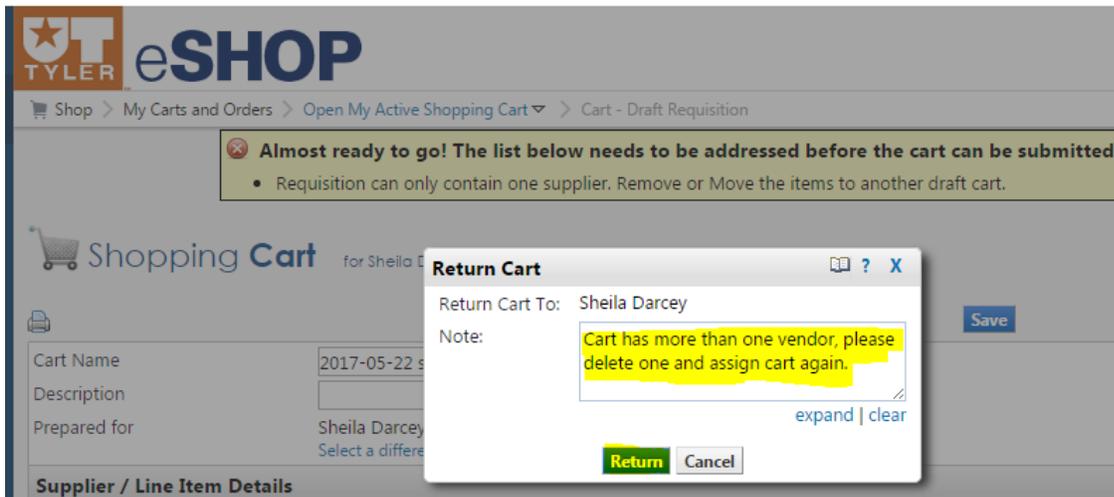
If you or your Shopper inadvertently did select from more than one vendor during the shopping experience and before processing the cart through UT Share/PeopleSoft, you can fix the problem by deleting all but ONE vendor from your unprocessed cart.

Return the cart to the Shopper for him/her to Delete all but ONE of the vendors from the unprocessed cart.

- Select **Return Cart**.



- Make a note why the cart is being returned to the Shopper.
- Click the **Return** button.



**Shopping Cart Information**

**Congratulations! Your cart has been returned back to the original creator.**

You included the following note:

Cart has more than one vendor, please delete one and assign cart again.

Requisition status	Cart
Cart name	2017-05-22 sdarcey@uttyler.edu 01
Requisition total	48.78 USD
Number of line items	2

What would you like to do next? Here are links to some common actions.

- [Search for another item](#)
- [Check the status of an order](#)
- [Return to your home page](#)
- [Create new draft cart](#)

Or, the Requester can delete all but one of the vendors from the unprocessed cart.

- Select the vendor you want to delete.
- Select **Remove Selected Items** in drop down box.
- Click the **Go** button.

**Supplier / Line Item Details**

For selected line items: **Remove Selected Items** **Go**

**Burgoon Company** [more info...](#)

The item(s) in this group was retrieved from the supplier's website. [What does this mean?](#)  
 Need to make changes? [MODIFY ITEMS](#) | [VIEW ITEMS](#) Item(s) was retrieved on: 5/22/2017 8:56:57 AM

Line(s)	Product Description	Catalog No	Size / Packaging	Unit Price	Quantity	Ext. Price	
1	TK8434690T Double Coated Tape Material Polyester Clear Shape Continuous Roll Width 1 In. Length 36 yd. Thickness 6.9 mil Liner Color White Adhesion Strength 61 oz.in. High Strength Acrylic Adhesive Performance Temp. Up to 180 Degrees F Standards ASTM D33 <a href="#">more</a>	24A689	EA	51.49	1 EA	51.49 USD	<input checked="" type="checkbox"/>
						Supplier subtotal	51.49USD
<b>Today's Business Solutions</b> <a href="#">more info...</a>							
The item(s) in this group was retrieved from the supplier's website. <a href="#">What does this mean?</a> Need to make changes? <a href="#">MODIFY ITEMS</a>   <a href="#">VIEW ITEMS</a> Item(s) was retrieved on: 5/22/2017 8:55:50 AM							
2	Office Depot(R) Brand Pink Bevel Erasers, Small, Box Of 36 <a href="#">more info...</a>	139720	BX	4.74	BX	4.74 USD	<input type="checkbox"/>
						Supplier subtotal	4.74USD
						Subtotal	56.23
						Total	56.23 USD

Shipping, Handling, and Tax charges are calculated and charged by each supplier. The values shown here are for estimation purposes, budget checking, and workflow approvals.

[Save](#) [Proceed to Checkout](#) or [Assign Cart](#)

- Click the **Save** button.
- Then click the **Return Cart to PeopleSoft** button.

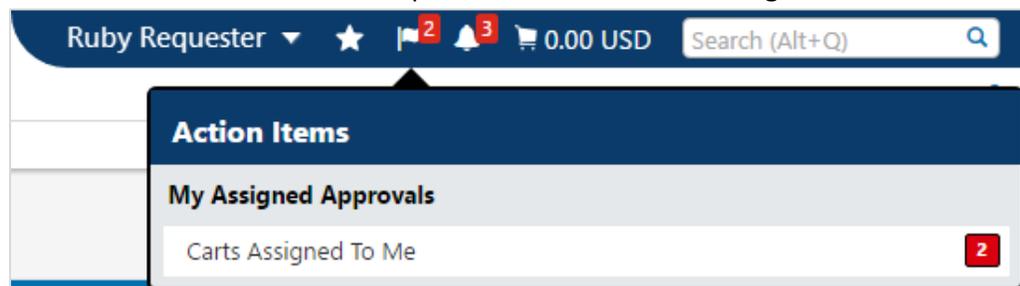
The screenshot shows the eSHOP interface for a user named Sheila Darcey. The top navigation bar includes the Tyler eSHOP logo, the user's name, a search bar, and a cart icon showing 1 item for a total of 22.99 USD. Below the navigation bar, there are buttons for 'Return Cart', 'Return Cart to PeopleSoft', and 'Assign Cart'. The main content area displays the cart details, including the cart name, description, and prepared for user. A table lists the items in the cart, with one item: Kimberly-Clark Zip-Half Pack Facial Tissue, 125 Sheets Per Box, Case Of 12 Boxes. The table includes columns for Product Description, Catalog No, Size / Packaging, Unit Price, Quantity, and Ext. Price. The subtotal is 22.99 USD. At the bottom, there are buttons for 'Save', 'Return Cart to PeopleSoft', and 'Assign Cart'.

## Carts Assigned to Me

Shoppers use the assign cart function to submit orders for review, completion, and validation.

1. Once the shopper's cart is submitted, the requester should receive an email if the notification listed above is enabled. There are three ways that a requester can find about any orders requiring review:

- a. Click on the **Action Items** in the top banner and select **Carts assigned to me**.



- b. Navigate to **Shop > My Carts and Orders > View Draft Shopping Carts**. A section on the page shows **Drafts Assigned To Me**.

The screenshot shows the 'View Draft Shopping Carts' page. At the top, there are navigation links: Shop > My Carts and Orders > View Draft Shopping Carts > Shopping Cart - Drafts. There is a 'Cancel PunchOut' button in the top right. Below the navigation, there are buttons for 'Create Cart' and 'Assign Substitute'. The main content is divided into two sections: 'My Drafts' and 'Drafts Assigned To Me'. Each section contains a table with columns for 'Active Cart', 'Shopping Cart Name', 'Date Created', 'Total', and 'Delete'.

My Drafts				
Active Cart	Shopping Cart Name	Date Created	Total	Delete
	2017-02-28 6001125331@SAD01 01	2/28/2017	6,300.00 USD	<a href="#">Delete</a>

Drafts Assigned To Me				
Active Cart	Shopping Cart Name	Date Created	Total	Delete
	2017-03-24 shwilson@utsystem.edu 01	3/24/2017	10,500.00 USD	<a href="#">Delete</a>
	2017-03-24 shwilson@utsystem.edu 01	3/24/2017	103.00 USD	<a href="#">Delete</a>

- c. Click on the **Notifications** in the top banner and select a notification.

The screenshot shows the top banner of the eSHOP interface. It includes the user name 'Ruby Requester', a star icon, a notification bell icon with a red '3', a shopping cart icon with a red '2', and the text '0.00 USD'. There is a search bar with the text 'Search (Alt+Q)'. A dropdown menu titled 'Notifications' is open, showing two notifications under the heading 'Shopping, Carts & Requisitions'. Each notification reads 'A Cart Has Been Assigned' followed by the date 'Mar 24' and the shopping cart name '2017-03-24 shwilson@utsystem.edu 01, Assigned To...'. There is a close button (X) for each notification. At the bottom of the dropdown, there is a link that says 'Click here to see all notifications'.

- Click on the shopping cart name to review the order. Once all required fields are completed and the order reviewed, it can be Returned to UT Share/PeopleSoft. Standard cart changes – such as removing and adding line items, and changing quantities is allowed.
- The requestor can now **Return the Cart for UT Share/PeopleSoft** processing. Also, the requester has the option to **Return Cart** back to the shopper. This is important if you need more information from the shopper. The two “Return Cart” buttons have been highlighted below.

Shop > My Carts and Orders > Open My Active Shopping Cart > Cart - Draft Requisition Cancel PunchOut

[Continue Shopping](#)  
2 Item(s) for a total of **10,500.00** USD

**Shopping Cart** [Return Cart](#) [Save](#) [Return Cart to PeopleSoft](#) or [Assign Cart](#)

Cart Name: 2017-03-24 shwilson@utsyster  
 Description:   
 Prepared for: Sam Shopper  
 Select a different user...

**Supplier / Line Item Details** For selected line items [Add to Favorites](#) [Go](#)

Hide line details [more info...](#)

**Eppendorf North America, Inc.** [more info...](#)

Contract: no value  
 PO Number: To Be Assigned

Product Description	Catalog No	Size / Packaging	Unit Price	Quantity	Ext. Price
<b>1 Eppendorf Mastercycler nexus X2e thermal cycler, 120 V, 50/60 Hz (needs to be connected to Mastercycler nexus main unit)</b> <a href="#">more info...</a> Manufacturer Name: Eppendorf Manufacturer Part Number: 633900024 More Information URL: <a href="https://online-shop.eppendorf.us...">https://online-shop.eppendorf.us...</a> UNSPSC: 41102421 <a href="#">more info...</a>	633900024	EA	4,875.00	1 EA	4,875.00 USD

Menu Search (Alt+M)

## Editing a Cart

### Hosted vs. Punch-Out

Depending on what type of catalog an item is selected from, there are differences in how you can edit a cart in eSHOP. When adding items to the cart from a hosted catalog, you can edit these items in eSHOP directly from the cart.

Punch-Out items cannot be edited in the cart. You must punch out to that catalog again. You do this by clicking the **modify items** link in the cart.

The screenshot shows the 'Shopping Cart' page for a 'Draft Requisition'. The cart name is 'Cart 12345' and the description is 'Extra Batteries'. The user 'Sam Shopper' prepared the cart. Under 'Supplier / Line Item Details', the supplier is 'SHI'. A message box states: 'The item(s) in this group was retrieved from the supplier's website. What does this mean? Need to make changes? [MODIFY ITEMS](#) | [VIEW ITEMS](#) Item(s) was retrieved on: 3/23/2017 4:42:12 PM'. Below this, a table lists the product description for line 1: 'HP Color LaserJet Pro M252dw - printer - color - laser'.

Shop	>	My Carts and Orders	>	Open My Active Shopping Cart	>	Cart - Draft Requisition
<b>Shopping Cart</b>						
Cart Name	Cart 12345					
Description	Extra Batteries					
Prepared for	Sam Shopper <a href="#">Select a different user...</a>					
<b>Supplier / Line Item Details</b>						
<a href="#">Hide line details</a>						
SHI <a href="#">more info...</a>						
The item(s) in this group was retrieved from the supplier's website. What does this mean? Need to make changes? <a href="#">MODIFY ITEMS</a>   <a href="#">VIEW ITEMS</a> Item(s) was retrieved on: 3/23/2017 4:42:12 PM						
Line(s): 1, 2						
<b>Product Description</b>						
1	HP Color LaserJet Pro M252dw - printer - color - laser <a href="#">more info...</a>					
Manufacturer HP, Inc. Name						

### Carts that have been returned to UT Share/PeopleSoft

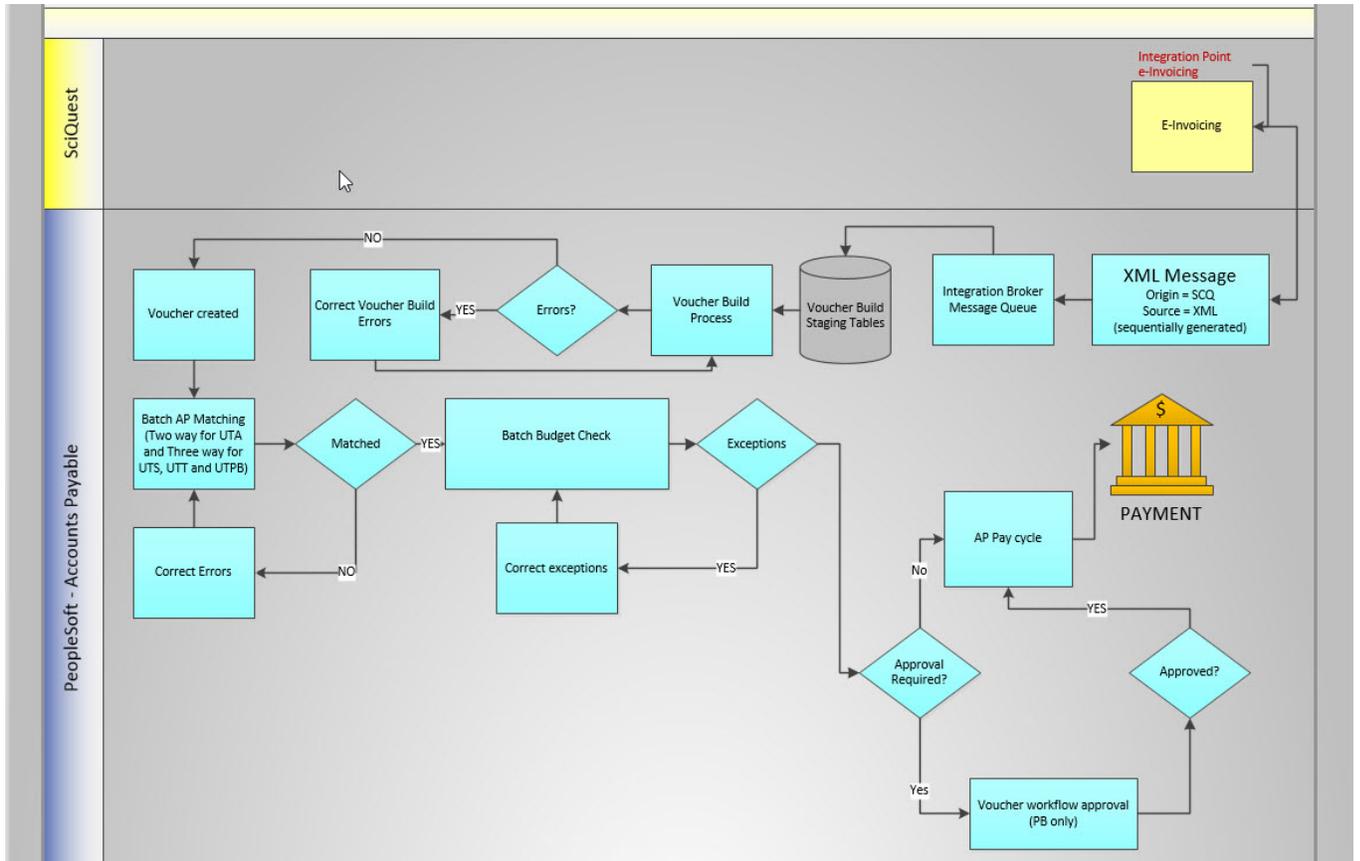
Once a cart becomes a UT Share/PeopleSoft Requisition, the eSHOP cart is no longer editable.

If the order must be changed or corrected, it is recommended that the Requester cancel the requisition and recreate it in eSHOP, making the necessary changes. If the cart was assigned, the Requestor will need to notify the Shopper that the cart number has changed.

## eSHOP Invoices

Invoicing in eSHOP is an automated process for eSHOP purchase orders. The vendor electronically sends an Invoice directly to UT Share/PeopleSoft.

After the goods have been manually Received in UT Share/PeopleSoft, the Voucher will automatically be created. If there are no Budget Checking errors and no Matching errors, the Voucher will automatically be approved.



## Document Search

To look up any documents you have completed use the **Document Search** function. Click on the **Documents** icon in the left-side navigation bar then select the type of search you are interested in.

**Document Search** provides the ability to search across carts, purchase orders and e-Invoices to view the document histories all at the same time. When doing this, users will be presented with search options that span across multiple document types. Document searches are used to not only tell about “past” orders, but to access carts in process to determine the status.

