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Office of Shared Information Services

# eShop for Shoppers Training Manual

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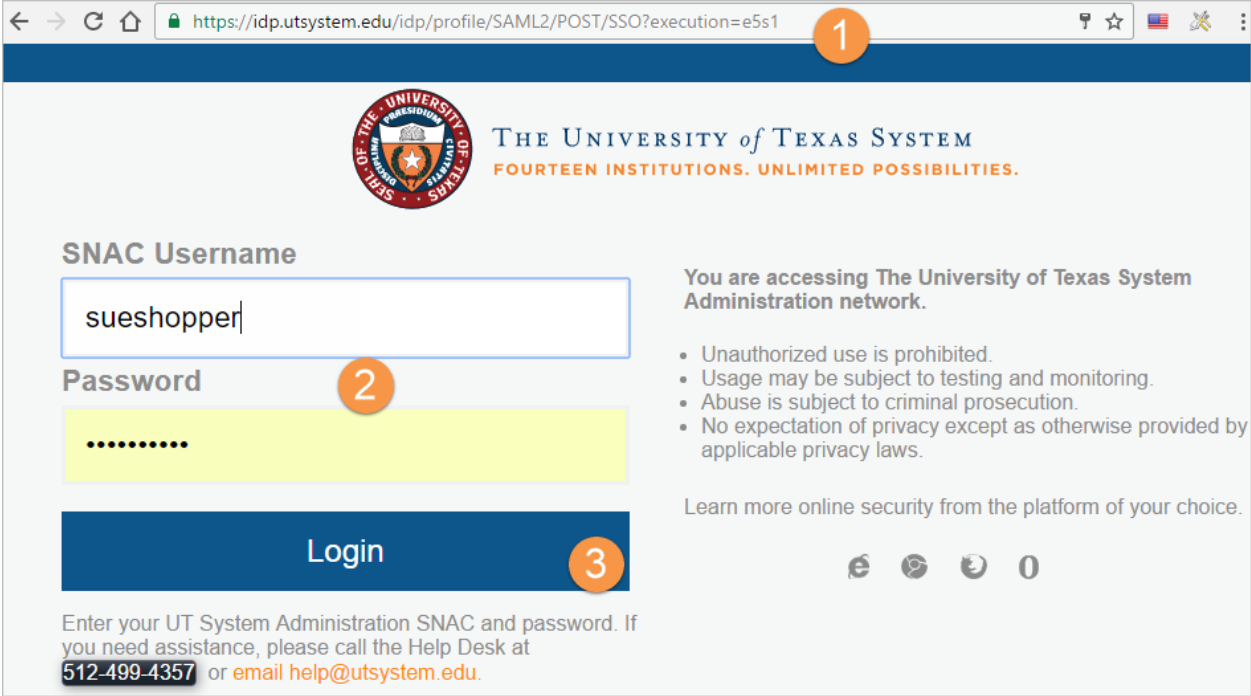
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## Overview

eShop is a role-based shopping tool that allows shoppers to take advantage of pre-negotiated contracts from well-known suppliers. Shoppers are able to search and shop the site for goods, knowing these have been pre-approved for the University. A Shopper is anyone on campus that does not have access to 'Create a Requisition' in PeopleSoft.

## Accessing eShop

1. Navigate to your eShop URL  
<https://solutions.scquest.com/apps/Router/SAMLAUTH/UTSystemSD>.
2. Enter Network ID and Password
3. Click Login

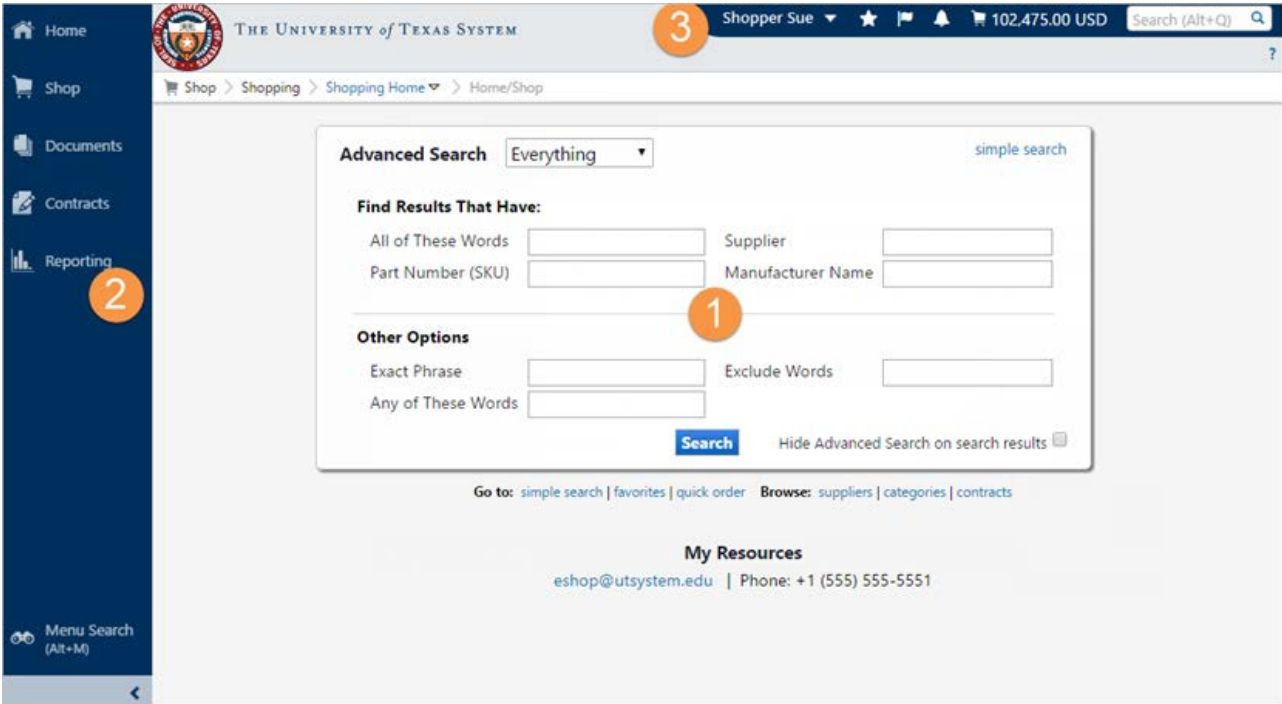


4. Begin creating a shopping cart

## Navigation

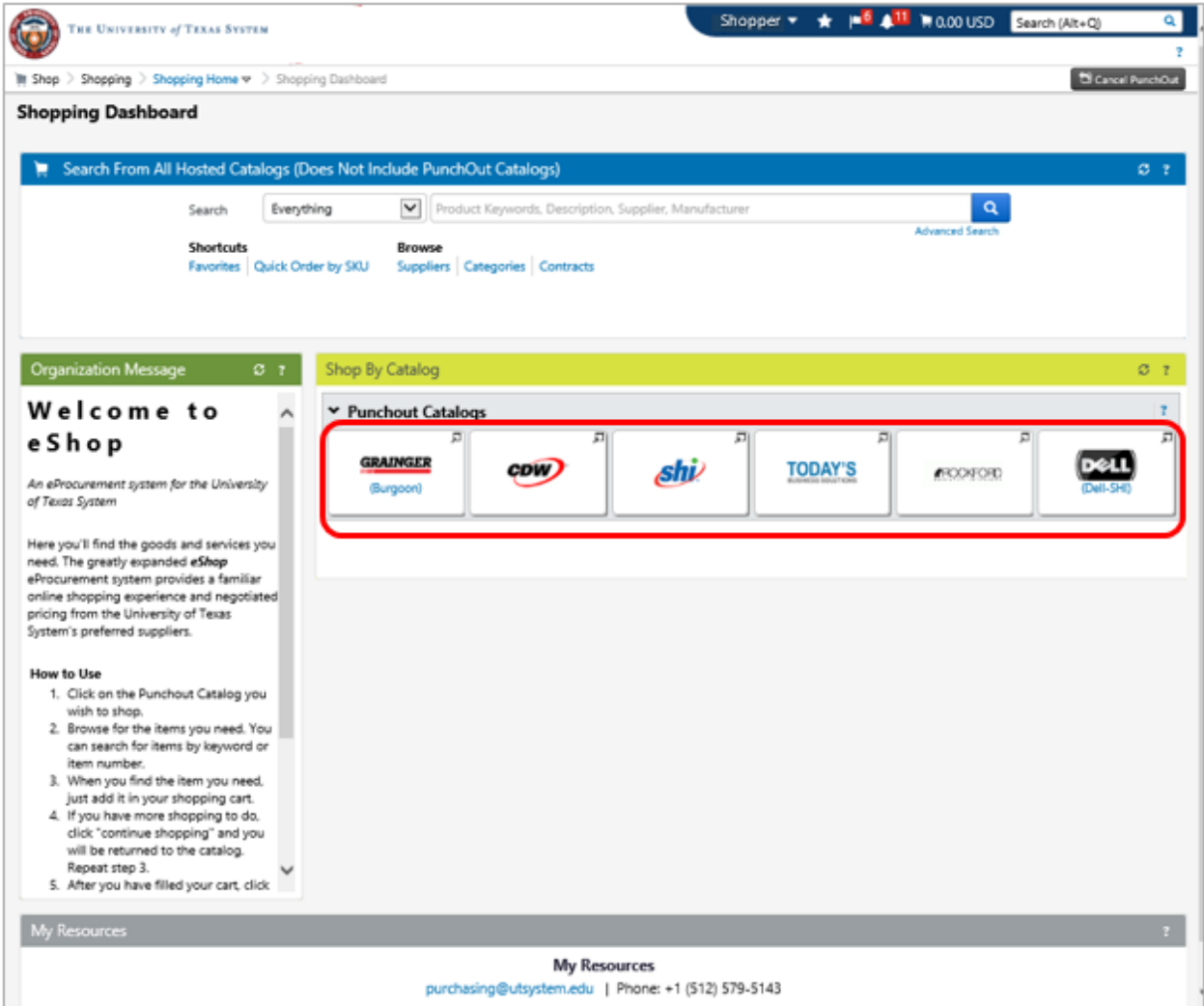
There are three main areas of eShop:

1. The Main Workspace - The main workspace is where one can manage the active eShop feature. It will always display breadcrumbs that show 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.



### 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 System.



### Completing a Cart

Once you have completed shopping and are viewing your cart, you can name the cart for future reference/searches. You can also modify the cart, empty the cart or provide various other actions by using the dropdown. If you make changes, click **Save** button.

The only way you, as a Shopper, are able to order items in your cart is to **Assign Cart** to a Requester (do *not* use the **Proceed to Checkout** button). The Requester will transfer the cart into PeopleSoft for processing.

The screenshot shows the 'Shopping Cart' interface for user Kyle Hayes. The cart contains 6 items for a total of 59.88 USD. A 'Proceed to Checkout' button is crossed out with a red 'X' and labeled 'Do not use'. The 'Assign Cart' button is visible. The cart name is '2017-05-17 shopper@utsyste' and the description is 'Sharpies for Office'. A dropdown menu for 'For selected line items' is open, showing options: 'Add to Favorites', 'Remove Selected Items', 'Remove All Items', 'Move to Another Cart', and 'Add to Draft Cart or Pending PR/PO'. The main table lists one item: 'Sharpie(R) Permanent Fine-Point Markers, Blue, Pack Of 12'. The table has columns for Product Description, Catalog No, Size / Packaging, Unit Price, Quantity, and Ext. Price. The subtotal is 59.88 USD. A note at the bottom states: '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.'

Product Description	Catalog No	Size / Packaging	Unit Price	Quantity	Ext. Price
1 Sharpie(R) Permanent Fine-Point Markers, Blue, Pack Of 12	451906	DZ	9.98	6	59.88 USD

### Assigning a Cart

Once you have selected your items and are in the active a cart:

1. Click on the **Assign Cart** button.
2. Select the requester whom you would like to assign the cart by either:
  - a. clicking the **Select from Profile Values** radio button and selecting the appropriate name from the **Select from profile values** dropdown

The screenshot shows a dialog box titled "Assign Cart" with a close button (X) in the top right corner. It features two radio buttons: "Select from profile values" (which is selected) and "Search for an assignee". Below the radio buttons is a dropdown menu labeled "Select from profile values" and a text input field labeled "Note To Assignee:". At the bottom right, there are two buttons: "Assign" and "Close".

- b. clicking the **Search for an assignee** radio button and click **search for an assignee**.

The screenshot shows the "Assign Cart" dialog box with the "Search for an assignee" radio button selected. The "Selected Assignee:" field is empty. The "Assign Cart To:" field contains a blue link that says "Search for an assignee". The "Note To Assignee:" field is empty. The "Assign" and "Close" buttons are at the bottom right.

This pop will display, to add criteria (such as last name) and click the **search** button.

The screenshot shows a "User Search" form with the following fields: "Last Name" (containing "requester"), "First Name", "User Name", "Business Unit" (set to "UT System Administration"), and "Results Per Page" (set to "10"). A blue "Search" button is at the bottom left.

Click the **select** link for the appropriate name, to return to the original screen.

Name ▲	User Name ▲	Email ▲	Action
requester, jane	6001013945@sad01	scross@utsystem.edu	[select]
Requester, Rachel	requester	fdgsqdemo+utsys1sq@mail.com	[select]

3. Click the **Assign** button.

You will get a confirmation that the cart was assigned successfully. Once assigned, the assignee receives an email notification.

## Editing a Cart

### Punch-out

Punch out items cannot be edited in the cart. It is required you punch out to that catalog again.

You do this by clicking the **modify items** link in the cart. This will take you back to your cart in the Punch-out site.

Cart Name	2017-05-17 shopper@utsyste
Description	Sharpies for Office
<b>Supplier / Line Item Details</b>	
<a href="#">Hide line details</a>	
<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: 5/17/2017 1:03:32 PM	
Line(s): 1	
<b>Product Description</b>	
<b>1</b>	<b>Sharpie(R) Permanent Fine-Point Markers, Blue, Pack Of 12</b> <a href="#">more info...</a>
Manufacturer Name	Sanford L.P.
Manufacturer Part Number	30003
Supplier Part Auxiliary ID	451906
<a href="#">more info...</a>	

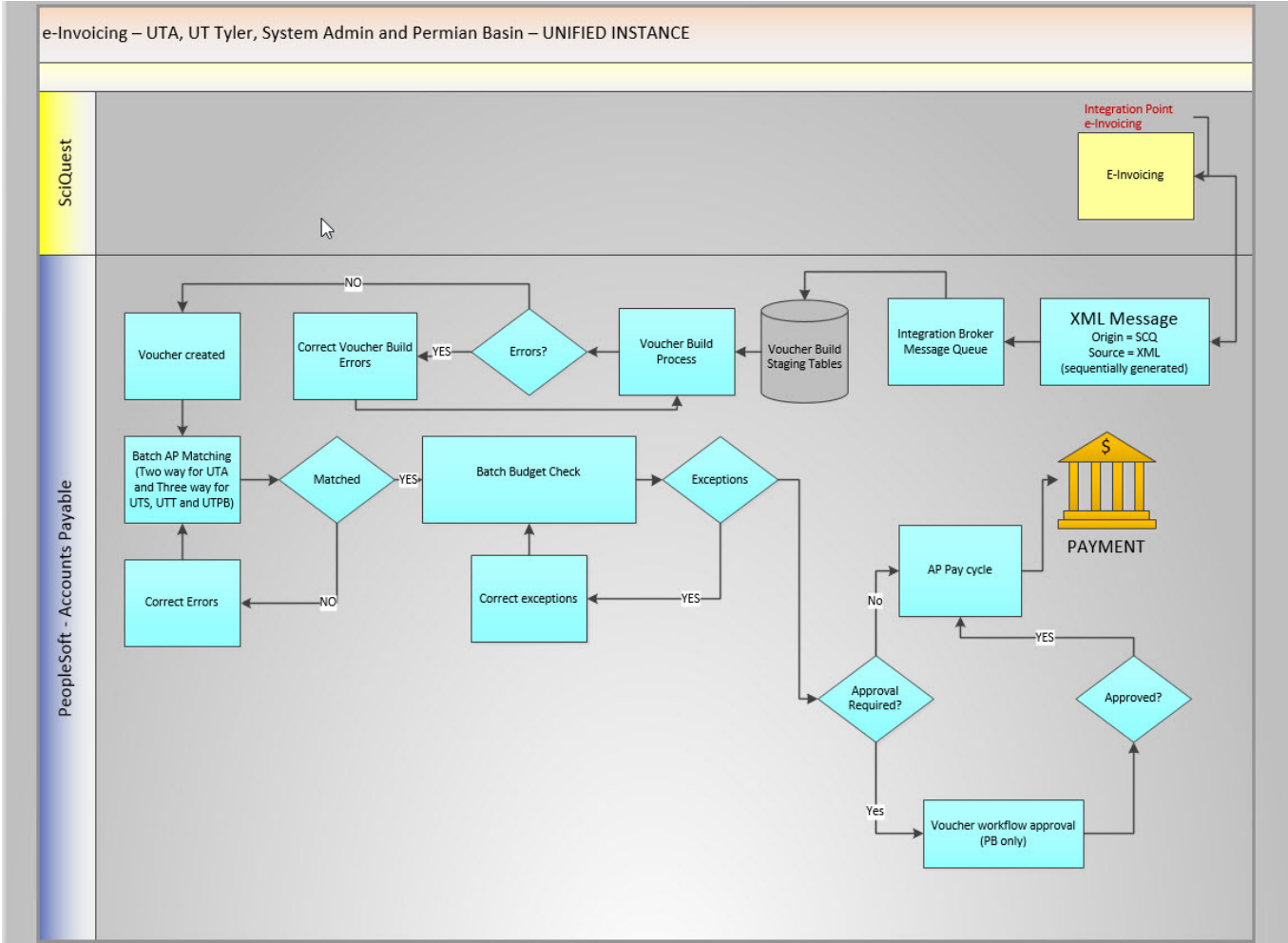
### Carts that have been returned to PeopleSoft

Once a cart becomes a PeopleSoft requisition, the eShop cart *is no longer* editable. It is recommended a requester cancel the requisition and create a new cart in eShop, with any changes that may need to be made. 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.



## Document Search

To look up any documents you have completed use Document Search. The Document Search provides the ability to search across carts, purchase orders and eInvoices 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 find out the status.

