State of Delaware

eMarketplace

Shopping Division Administrator Handbook

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1.0 Updating Division Support Contact Information

Division Administrators are responsible for the end users within the divisions they manage. The Division Administrators are the support contact for all users within the specified divisions, and users need to easily identify who to contact and how to get in touch with that person.

1.1 Updating Division Support Contact Information

- Go to **Site Configuration – Site Appearance and Behavior – Division Support Contact.**
- In the Message Board/Division Support tab the Division Admin will update his/her email and phone number for each division he/she manages.
- You must select a Division, and click override on both the email and phone fields and populate the support contact email address and phone number. Once you have populated the fields you must click the blue "Save" button.

**Note if you do not click Save the changes will not be saved.*
***You will be limited to the Divisions to which you as a Division Admin are assigned.*
****Note that Division Administrators must update the information for every division individually.*

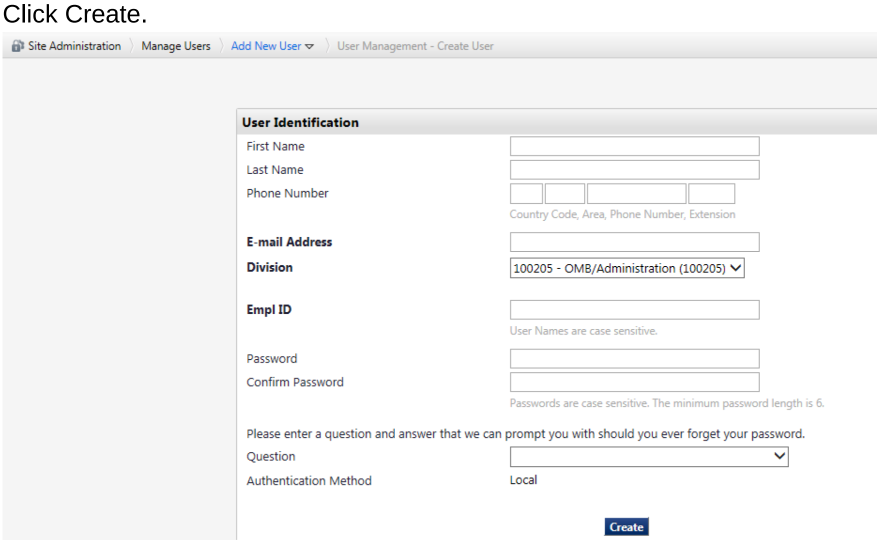
2.0 Managing Your Division's Users

Division Administrators have access to manage the users within their assigned Divisions. Users can be managed one by one or in bulk via an import.

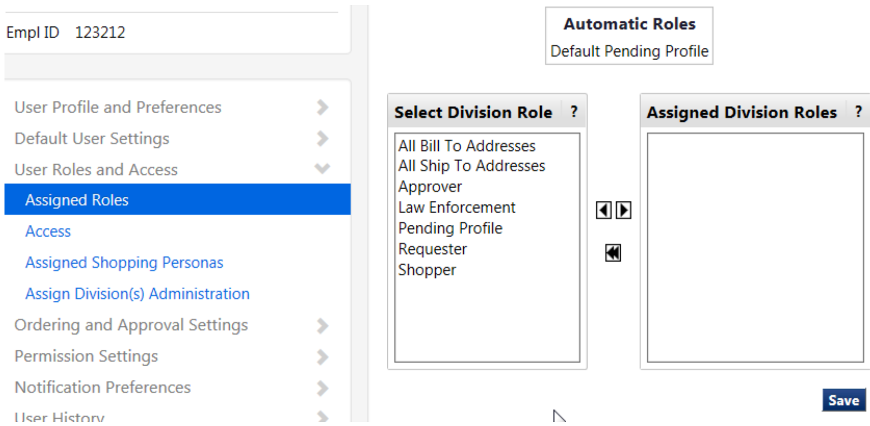
2.1 Creating a Single User

- Go to **Site Administration - Manage Users – Add a New User**.
- Enter in the required user information, including:
  - **First Name**
  - **Last Name**
  - **E-mail Address**
  - **Division***
  - **Empl ID**
  - **Password****

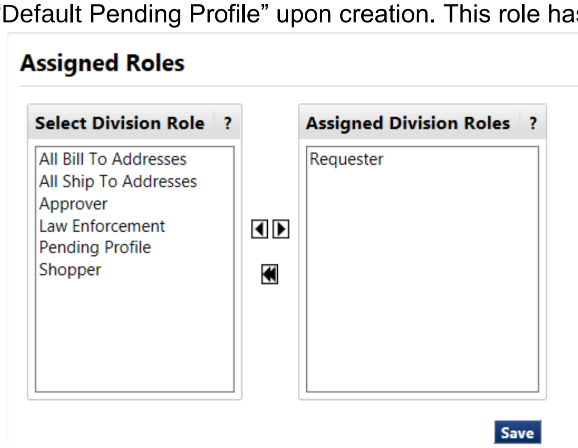
**You will be limited to the Divisions to which you as a Division Admin are assigned.*
***Note that users are forced to change their password when they first log into the SOD eMarketplace.*
Click Create.



- All users are initially assigned with 'Default Pending Profile' roles until updated by the Division Admin
- In order to update user's profile, from the User Profile page, go to **User Roles and Access – Assigned Roles**



- Assign the user their role(s) by clicking on the **role** in the **Select Division Role** and clicking the **right arrow** to move it to the **Assigned Division Roles** box. **Note:** a user will be given a default role of "Default Pending Profile" upon creation. This role has very limited access.



- Remember to click **Save** when done. When user is assigned a new role **Note:** a user can have multiple roles, although **they should never be both a Shopper and Requester**

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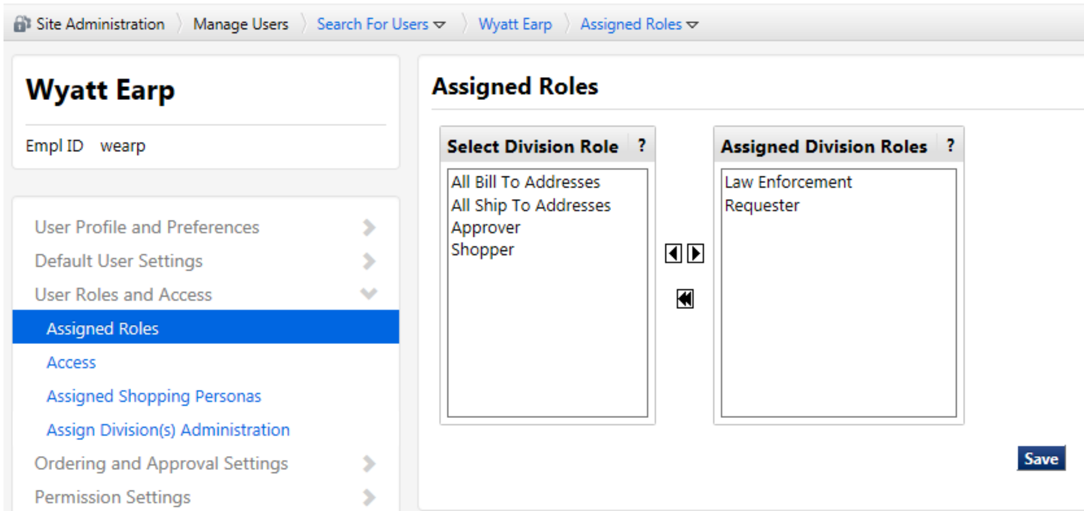


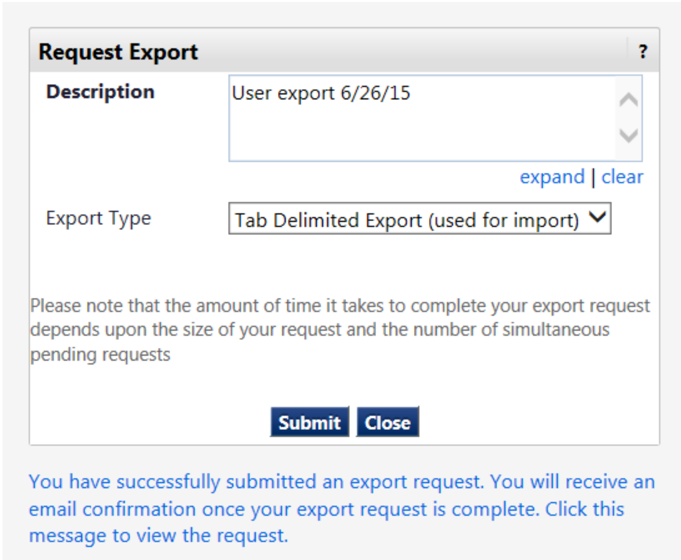
2.2 Updating a Single User

- Go to **Site Administration - Manage Users – Search for Users – User Management** and go to **the User Search area.**
- **Search for the user** that you wish to update. You can search by name, Empl ID, email address or Division. **Note:** You will be limited to the Divisions to which you as a Division Admin are assigned.
- All users are initially assigned with 'Pending Profile' roles until updated by the Division Admin
- Use the **menu options on the left** to access the different areas of the user's profile. For example:
- To change the **user's name, phone number, email address or Division**, go to **User's Name, Phone Number, Email, etc.**
- To update the **user's password**, go to **Change Password**
- To give the user default or favorite **Ship To and/or Bill To Addresses**, go to **Default User Settings – Default Addresses**
- To enter in the **user's credit card**, go to **Default User Settings – Payment Options**
- To **adjust user's role(s)**, go to **User Roles and Access – Assigned Roles**
- To adjust which ***eMarketplace* email notifications** are being sent to the user, go to **Notification Preferences**

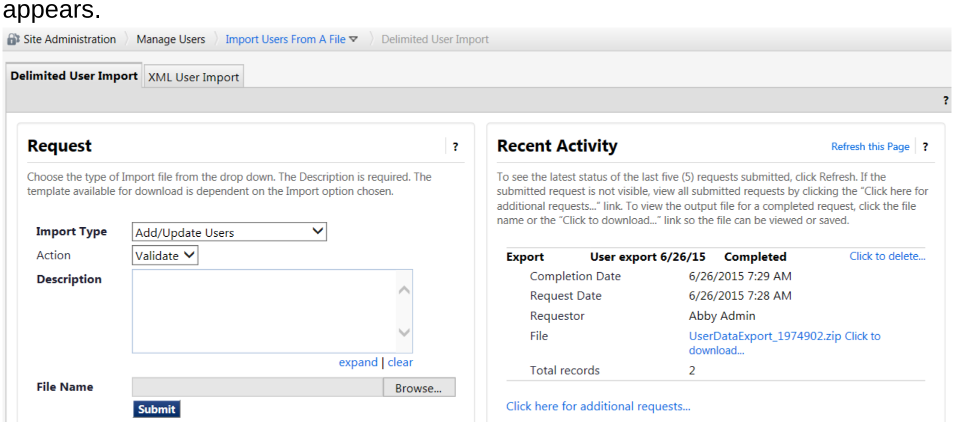
2.3 Updating Multiple Users via a User Import

- To **bulk load users via an import**, go to **Site Administration - Manage Users - Import Users from a File - Delimited User Import.**
- You can use the **Import Template** provided at the bottom of this page. The import is a text delimited file which can be opened and populated in Microsoft Excel. Remember to **save it as a .txt file prior to importing.**
- **Tip**: It may be easier to export a few users and use that export file to populate with the new users. That way you can see the formats of the various values. To do this:
- Go to **Site Administration - Manage Users - Search For Users - User Management - User Search**.
- Run the search with whatever filters you want and then click the **Export All Users or Export Selected Users** pulldown and click **Go.**

- Give the export request any name and select **Tab Delimited Export (used for import)** as the Export Type. Click **Submit**.



- Click the link at the bottom that says **"You have successfully submitted an export request. You will receive an email confirmation once your export request is complete. Click this message to view the request."** This will bring you to the export queue. Click **Refresh this Page** until the export appears.



- Click on the **newly created ZIP file**. Three files will be created. Open the largest file **(UserExportxxx.txt)**. Again, this will be a text file that can be opened and modified in Excel.
- When populating the **Import Spreadsheet**, at a minimum the following columns need to be populated:

	A	B	C	D	E	F	G	H	I	J	K	L	M	N
1	Username	First Name	Last Name	User Status	Email	Phone	Language	Country	Timezone	UI Style	Auth Method	Preferred Email Format	Business Unit Internal Name	Department Int
2	colleen.carter@bsd.k12.de.us	Colleen	Carter	ACTIVE	colleen.carter@bsd.k12.de.us	- - -					Local		100247	
3	natalie.curran@state.de.us	Natalie	Curran	ACTIVE	natalie.curran@state.de.us	- - -					Local		100247	
4	renee.elliott@colonial.k12.de.us	Renee	Elliott	ACTIVE	renee.elliott@colonial.k12.de.us	- - -					Local		100247	
5	gerard.gallagher@smyrna.k12.de.us	Jerry	Gallagher	ACTIVE	gerard.gallagher@smyrna.k12.de.us	- - -					Local		100247	

  - **Username (should be user's Empl ID)**
  - **First Name**
  - **Last Name**
  - **User Status (should be "ACTIVE")**
  - **Email**
  - **Business Unit Internal Name**
  - **Roles Action (should be "[REPLACE]")**

    [ADD] – Adds the value in the associated field to values that are already present for that field, if any. This is the default value provided in the Export format for Action fields.

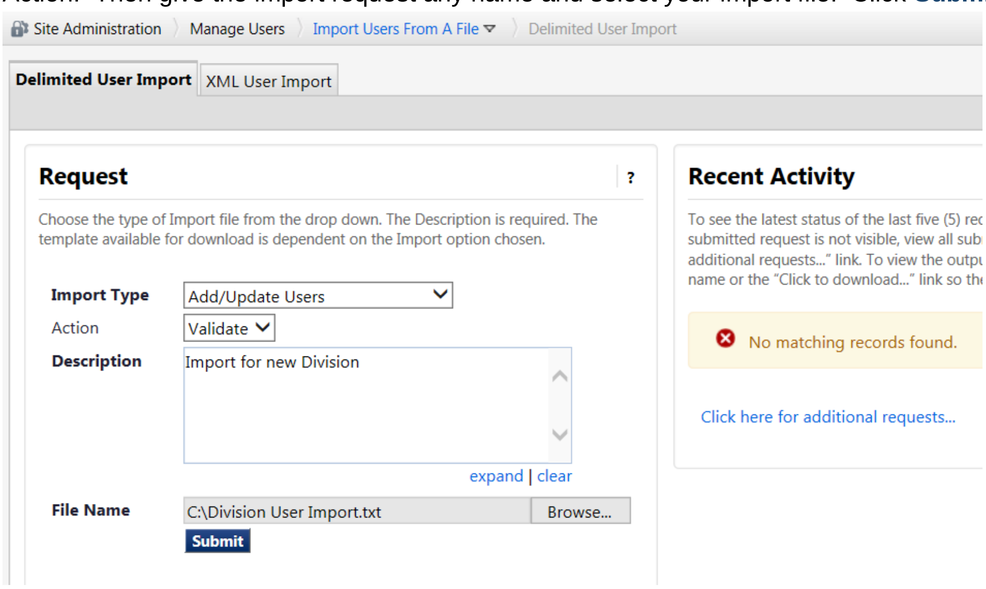
[REPLACE] – Replaces whatever value is currently present for that field with the associated value in the file. Example, if you are replacing users' role from 'Default Pending Profile' to 'Shopper'
[REMOVE] – Removes the value for the associated field as indicated in the file. If a field has multiple values, only the one specified will be removed.

- **Roles**

  Note: Roles - Roles for the user, as per the associated Roles Action column.
  For example, if you are replacing the 'Default Pending Profile' role for a user with 'Shopper', you would enter "Shopper" in this field, and [REPLACE] in the Roles Action field.
  A user can also be assigned more than one role. Use " | " (Pipe) in between role names. For example: Approver|All Ship To Addresses|Law Enforcement

O	P	Q
Position	Roles Acti	Roles
	[ADD]	Central Administrator|Approver|All Ship To Addresses|Law Enforcement|Requester

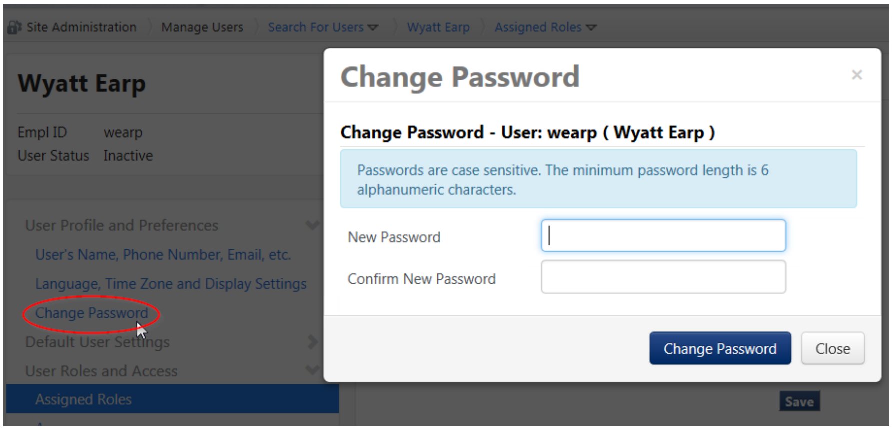
- Once populated, click **Save the import as a Text (Tab delimited) (*.txt)** file.
- To import the Division's users, go to **Site Administration - Manage Users - Import Users from a File - Delimited User Import**. Select **Add/Update Users** for the Import type and **Validate** as the Action. Then give the import request any name and select your import file. Click **Submit**.



- **Refresh** the Recent Activity area on the right until your import results appear. If there are errors open up that file to see what they are and correct. If there are no errors, Select **Import File** to import the Division's users.

2.4 Password Reset

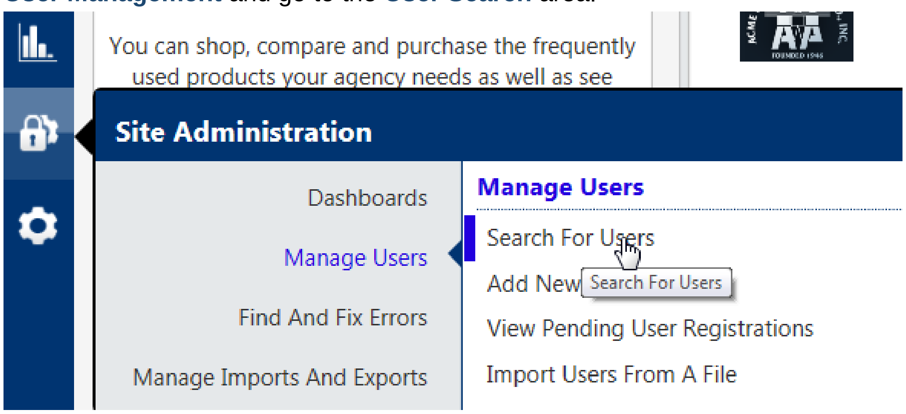
- To reset a user's password, go to **Site Administration - Manage Users – Search for Users – User Management** and go to the **User Search** area.
- **Search** for the user that you wish to update. You can search by **name, Empl ID, email address or Division**. **Note:** You will be limited to the Divisions to which you as a Division Admin are assigned.
- Go to **User Profile and Preferences – Change Password** on the left.



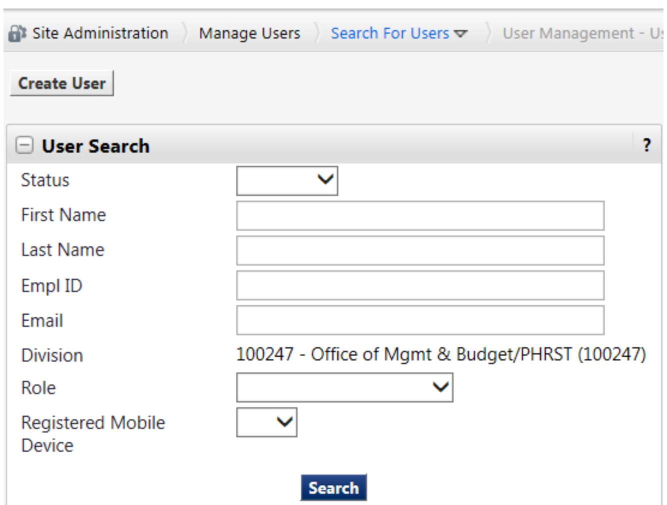
- Enter the new password twice and then click **Change Password**.

2.5 Inactivating a User

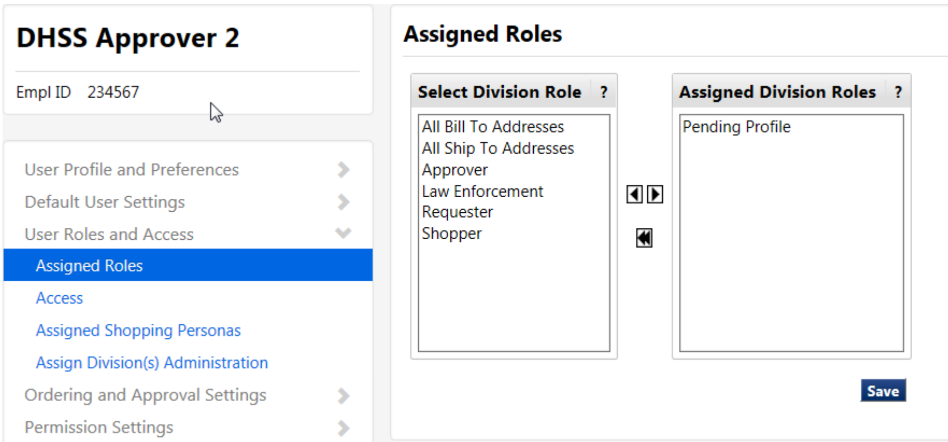
- To inactivate a user account, go to **Site Administration - Manage Users – Search for Users – User Management** and go to the **User Search** area.



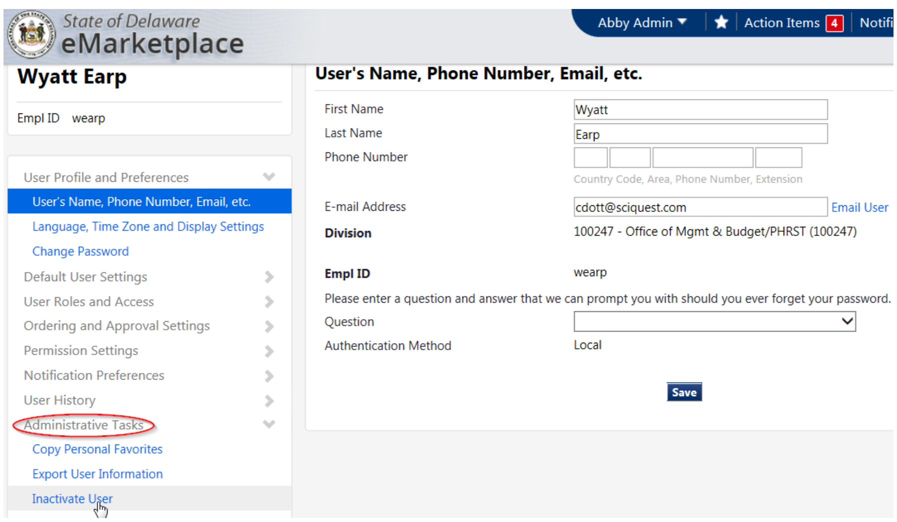
- **Search** for the user that you wish to update. You can search by **name, Empl ID, email address or Division**. **Note**: You will be limited to the Divisions to which you as a Division Admin are assigned.



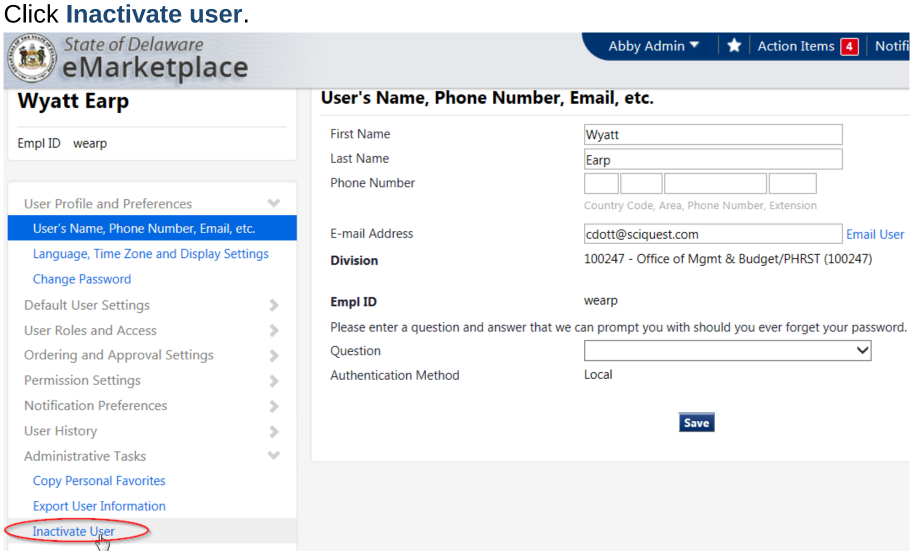
- Update the **User Role** to ‘Pending Profile’ before Inactivating User.



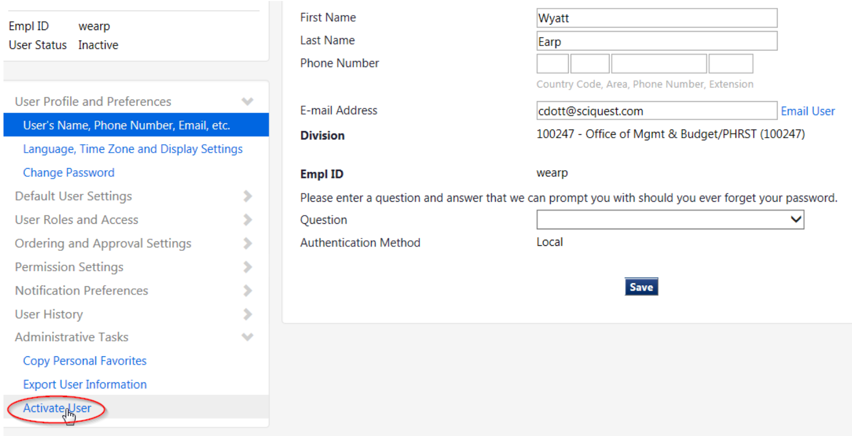
- Go to **Administrative Tasks** on the left.



- Click **Inactivate user**.



- **Note:** To **reactivate the user** simply click **Activate user**.

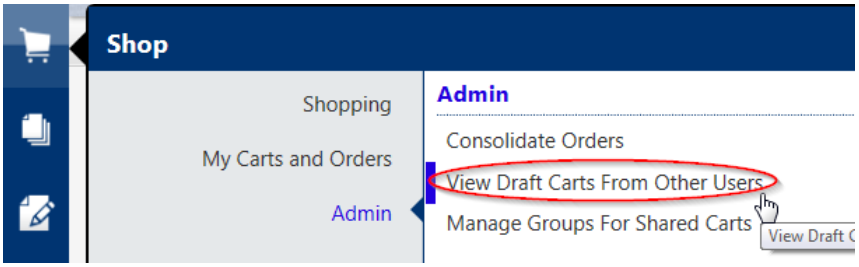


3.0 Accessing User Transactions

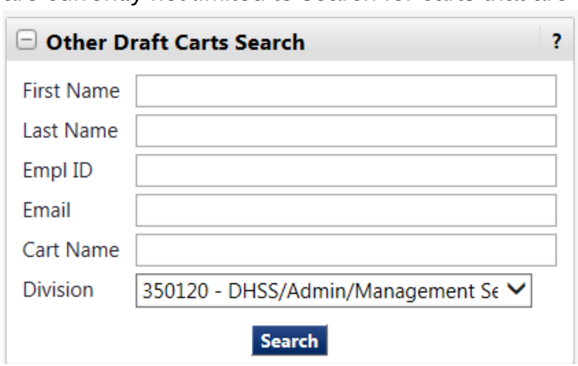
As a Division Administrator you have access to see the draft carts, Transactions and Orders for the users within your division. To do so follow these steps:

3.1 Carts

- Go to **Shop – Admin - View Draft Carts From Other Users - Other Draft Carts.**



- **Search** for the user whose draft carts you'd like to access. You can filter the result of carts by searching for user's First Name, Last Name, Empl ID, Email, Cart Name or by Division. Note that you are currently not limited to search for carts that are within your division only.

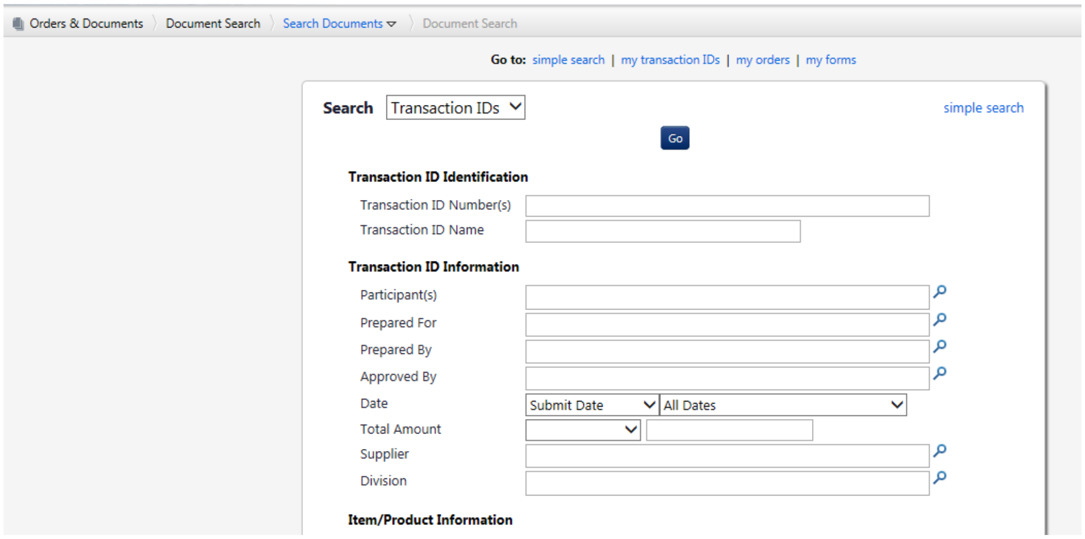


Note: there may be future enhancement to limit your view of carts to only the divisions that are assigned to you.

- Once you have your search results, you can click the **link** under **Shopping Cart Name** to see the details. **Note**: this is view-only.
- You can also click the **View Cart History** to see the history of the cart.

3.2 Transactions and Orders

- Go to **Orders & Documents - Document Search - Search Documents - Document Search**
- In the **Search** pulldown, click **Transaction IDs** or **Orders**.
- **Optional:** You can use the **Advanced Search link** in the GoTo area beneath the search bar to filter your search results.

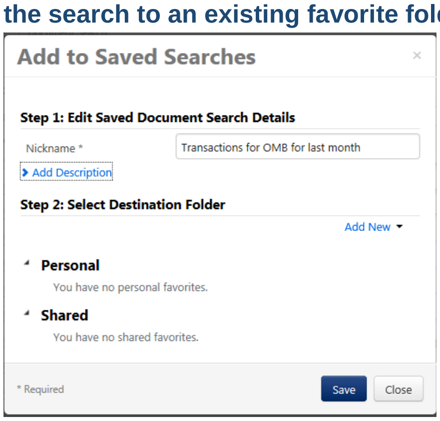


- Once you have **set your search filters** click **Go**.
- The Transactions that you are searching will appear. You can further filter them down with the filter options on the left.
- You can **open any of the Transactions** that you see and click the **History tab** to view its history.

3.3 Saving Your Searches

Once you're filtered down your search results you can **save this combination of search filters** so that you don't have to re-submit them in the future. To do this follow these steps:

- **Filter your search** so that you receive your desired results.
- Click the **Save Search** button.
- Under **Step 1: Edit Saved Document Search Details**, go to the **Nickname field** and give this search a **descriptive name**.
- **Optional:** Click **Add Description** if you'd like to give this search a description.
- Under **Step 2: Select Destination Folder** you need to specify where to store this search. Personal favorites can only be seen by you while Shared favorites can be seen by others. You can either **add the search to an existing favorite folder** or **create a new one to add it to**.

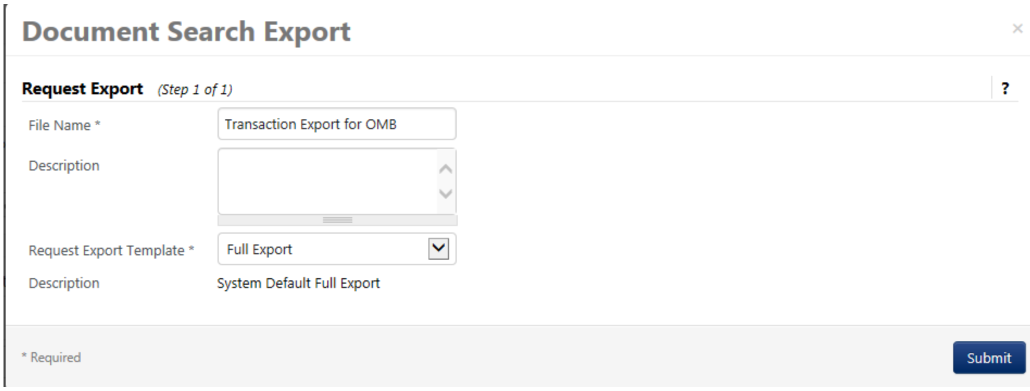


- To access saved searches, go to **Orders & Documents - Document Search - View Saved Searches.**

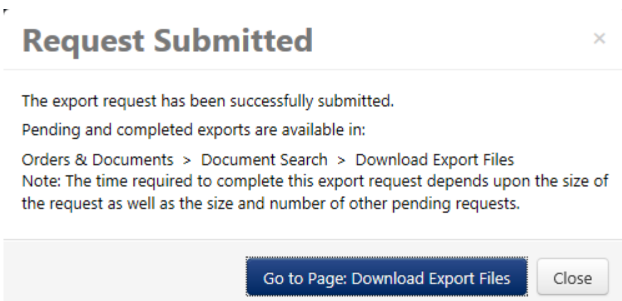
3.4 Exporting Search Results

Search results can be exported to Excel in order for you to analyze the documents further. With an export all fields in the Transaction and/or Order documents in your search results will appear in Excel.

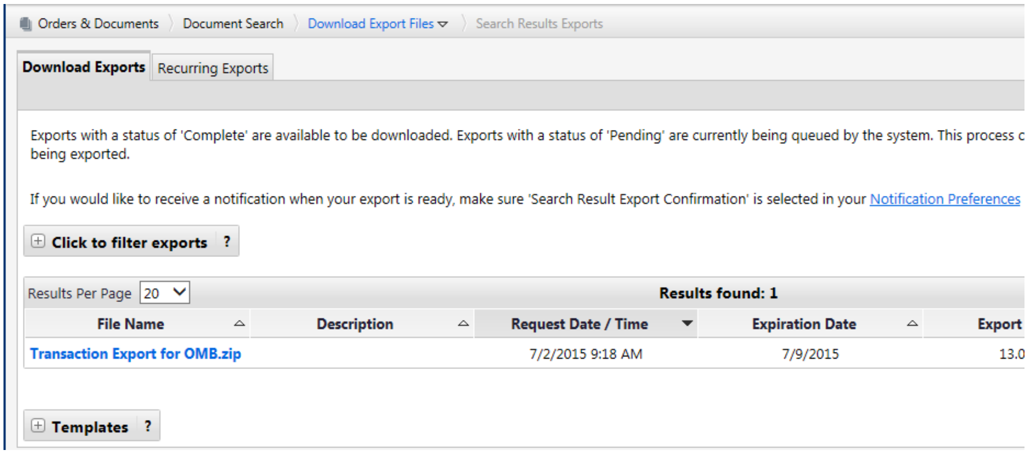
- If you'd like to export your search results, click the **Export Search** button on the left.
- In the pop-up box, give your export a **file name**, and **Description (optional)**. Select **Full Export** in the Request Export Template field.
- Click **Submit**.



- In the **Request Submitted** pop-up, click the **Go to Page: Download Export files** button. This will take you to the Download Exports page.



- Export files may take a couple of minutes to process. **Refresh** the screen until your export appears in the form of a **ZIP file**.



- Click **on and open the ZIP file**.
- You'll have a number of files within this ZIP file. Click on the **largest file to get the full export** of your search results to open it in Excel. This should contain every field in the documents.

4.0 Managing Division-Specific Workflow

There are certain Transaction approval steps that are Division-specific. These are managed by the Division Administrators. Currently, Division Administrators are limited to viewing of their own workflow rule, BUT, the setup of the Division-Specific Workflow Rule is not limited to the Divisions(s) that have been assigned to the Division Administrators.

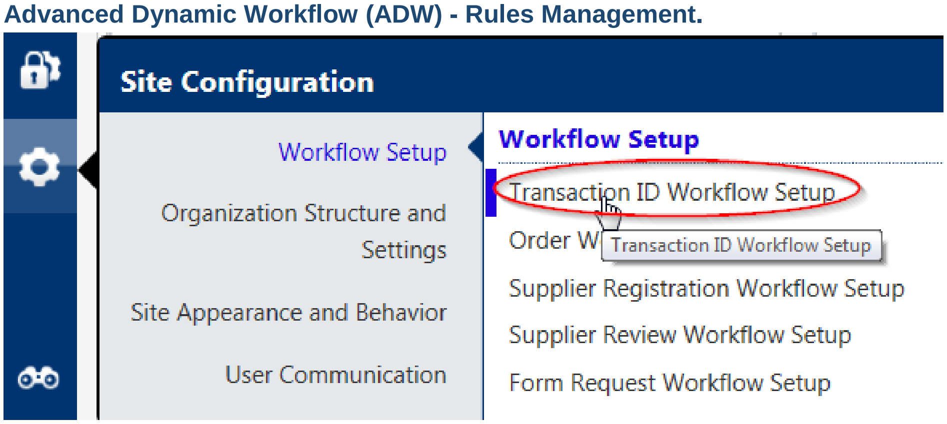
Please make sure to carefully select your division(s) by all DDS codes that apply to your Division(s) and Section(s). There may be future enhancement that will limit the list of 'Available Division(s)' to the Division(s) that are assigned to the Division Administrators.

Included in these optional Division-specific workflow steps are **Division Approval** and **Commodity Approval**. It is up to each Division whether or not to invoke these steps for their Division.

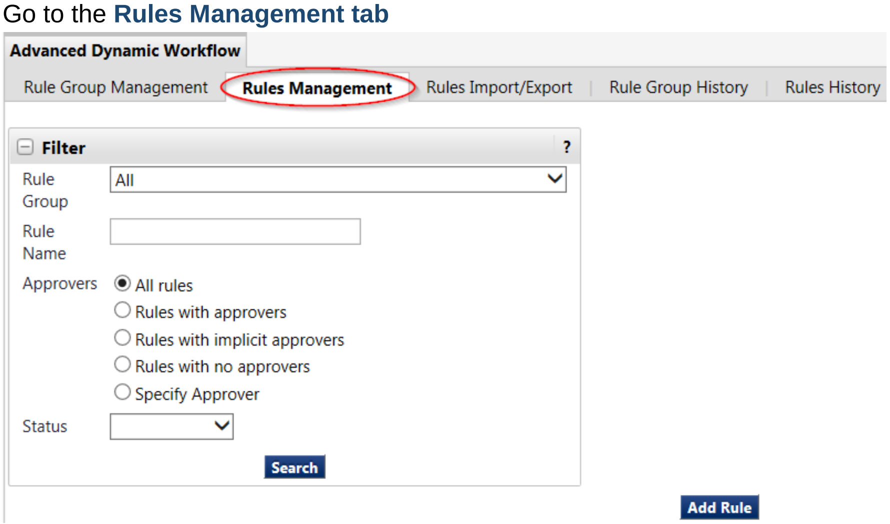
These workflow steps are managed via **Advanced Dynamic Workflow (ADW) rules**. These rules are triggered in **Transaction workflow** based on the conditions set by the Division Administrators in their assigned ADW rules.

To get to the **workflow management area** of the SOD eMarketplace:

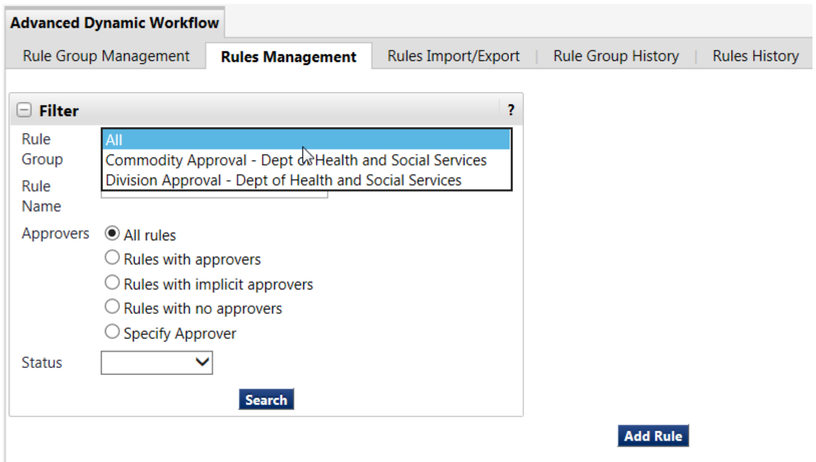
- Go to **Site Configuration - Workflow Setup - Transaction ID Workflow Setup - Transaction ID Advanced Dynamic Workflow (ADW) - Rules Management.**



- Go to the **Rules Management tab**

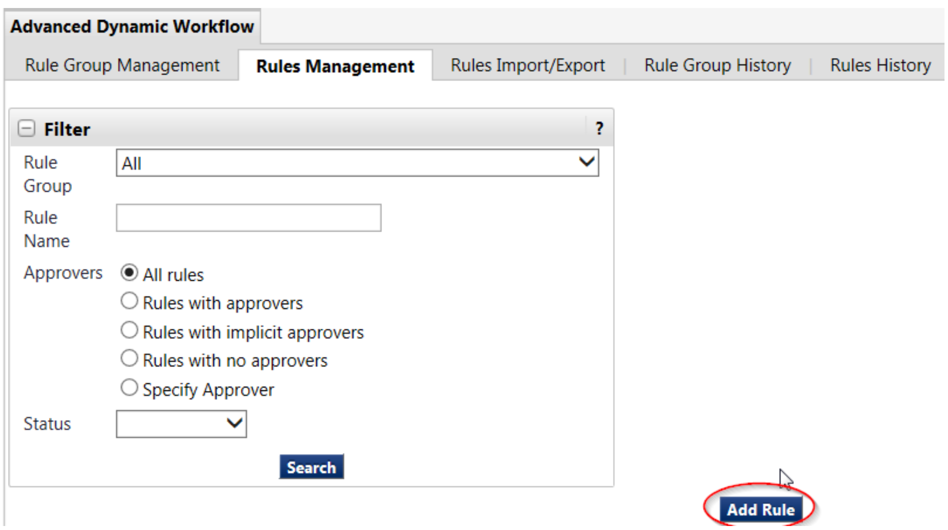


- **Search** for your Division-specific rules by filtering by Rule Group. **Note**: You are limited to seeing and updating only your Division-specific rules.

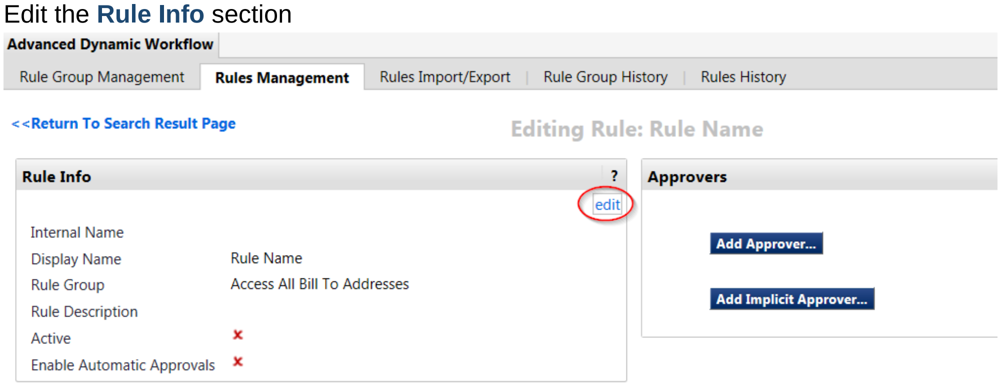


4.1 Creating a New ADW Rule

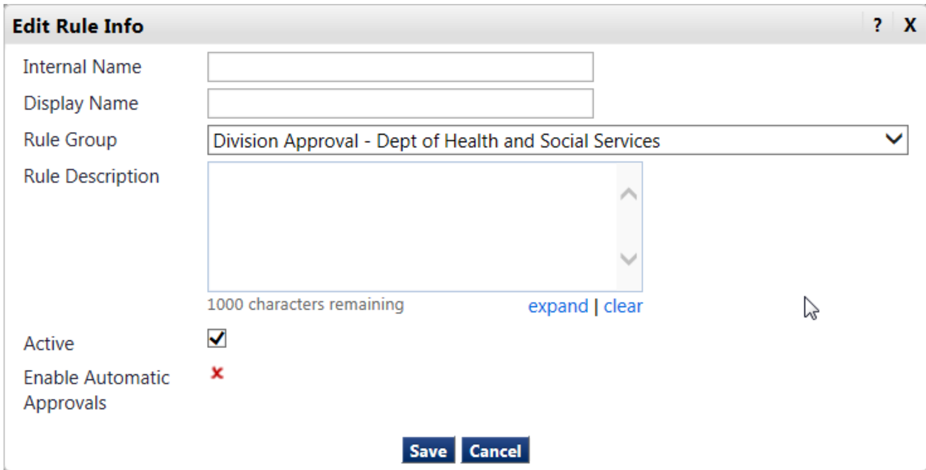
- Click the **Add Rule** button



- Edit the **Rule Info** section



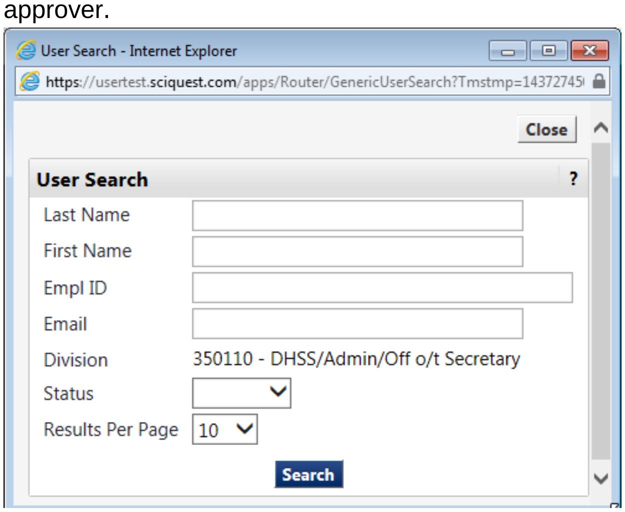
- Give the rule a **unique Internal Name** and **Display Name**. Select the **Rule Group** for the appropriate Division (e.g. “Division Approval – DHSS”). Click the **Active checkbox**.



Note: On the ‘Rule Group’ selection, Division Administrators are NOT limited to select Rule Group(s) that have been assigned to their Division(s). Please make sure to carefully select the Rule Group of your Division. There may be future enhancement that will limit the list of ‘Rule Group’ to the Division(s) that is assigned to the Division Administrators.

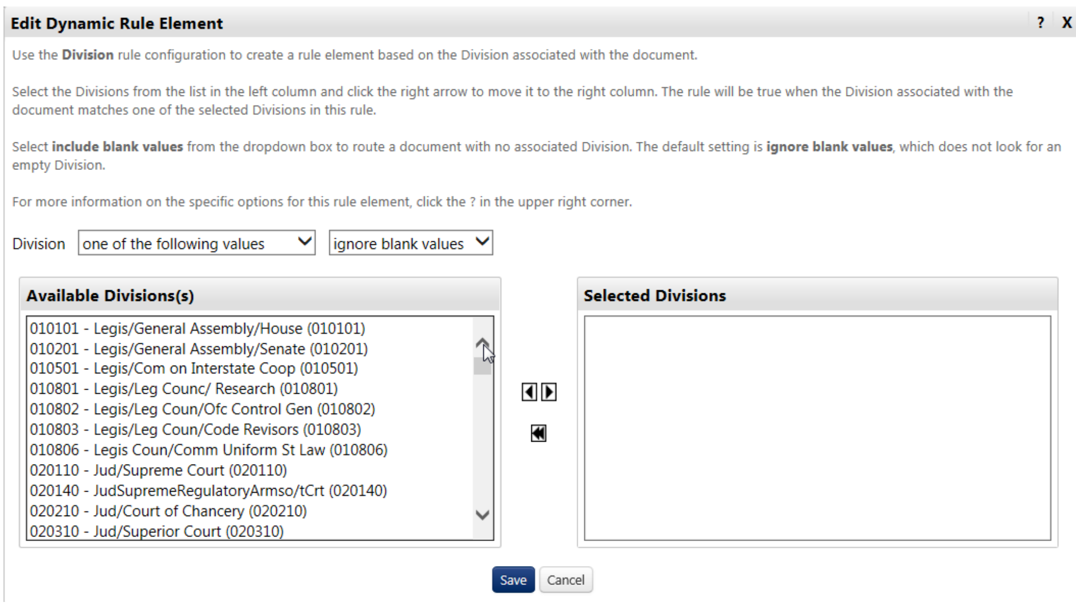
- In the **Approvers section**, click **Add Approver** to select the approver(s) for this rule.

- **Note** that you are limited to the Approvers that fall within your division and only users with Approver and Division Administrator role will be displayed in the search result and can be selected as an approver.



- In the **Document-Level Rules**, click **Add a new rule for a**, select **Division** and click **Go**.

- **Select** the Division(s) that this rule should apply to and use the **right arrow** to add them to the **Selected Divisions** area. Click **Save**.

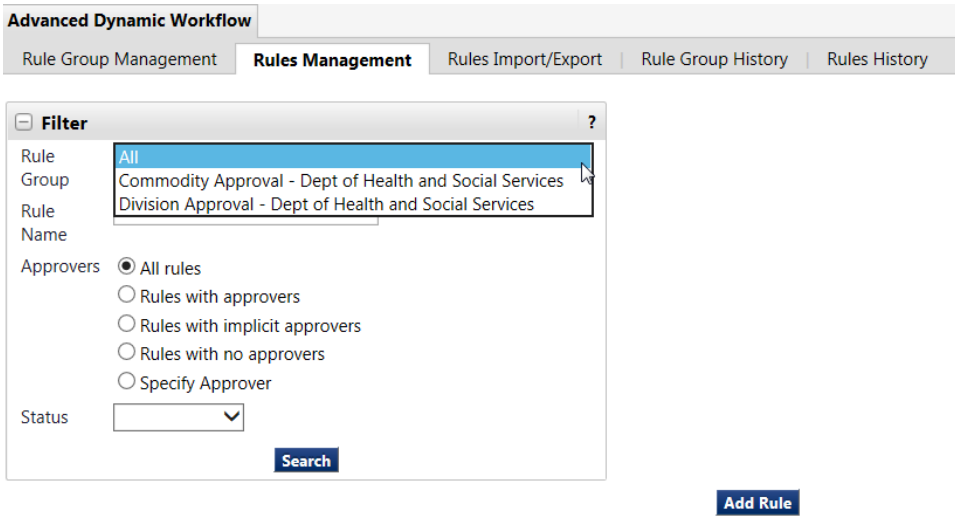


- Also in the **Document-Level Rules**, **add any other rules that apply**. For example, you can specify the Document Total Amount that should trigger this rule. When done, click **Save**.

Note: On the 'Available Division(s)', Division Administrators are NOT limited to select Division(s) that they are assigned to. Please make sure to carefully select your division(s) by all DDS codes that apply to your Division(s) and Section(s). There may be future enhancement that will limit the list of 'Available Division(s)' to the Division(s) that are assigned to the Division Administrators.

4.2 Updating an Existing ADW Rule

- Go to **Site Configuration - Workflow Setup - Transaction ID Workflow Setup - Transaction ID Advanced Dynamic Workflow (ADW) - Rules Management**.
- Go to the **Rules Management tab**.



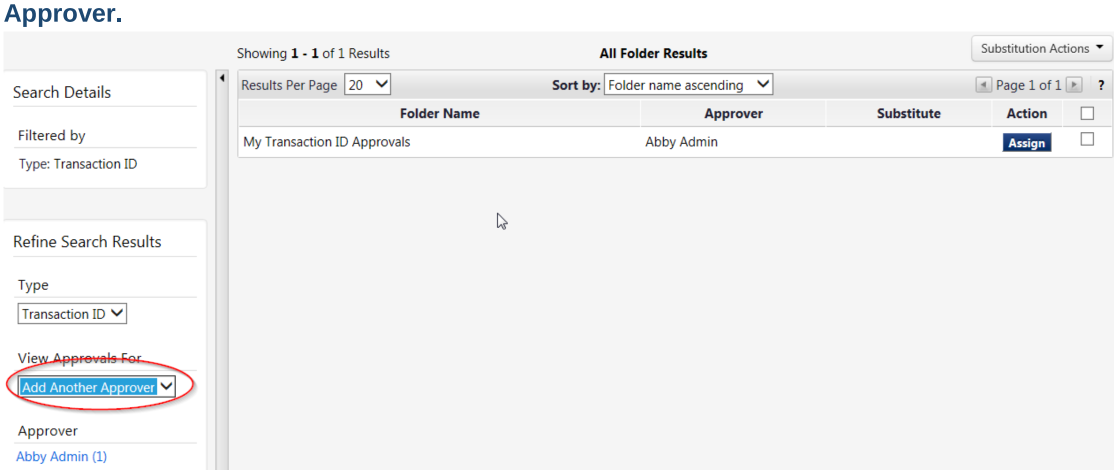
- **Search** for your Division-specific rules by filtering by **Rule Group**. **Note** you are limited to seeing and updating only your Division-specific rules.
- Once you find the rule that you want to update, click the **Edit** button associated to that rule on the right.
- Make any adjustment that you need by clicking **Edit** in the appropriate section, making your update and then clicking **Save**.

Note: On the 'Rule Group' selection, Division Administrators are NOT limited to select Rule Group(s) that have been assigned to their Division(s). Please make sure to carefully select the Rule Group of your Division. There may be future enhancement that will limit the list of 'Rule Group' to the Division(s) that is assigned to the Division Administrators.

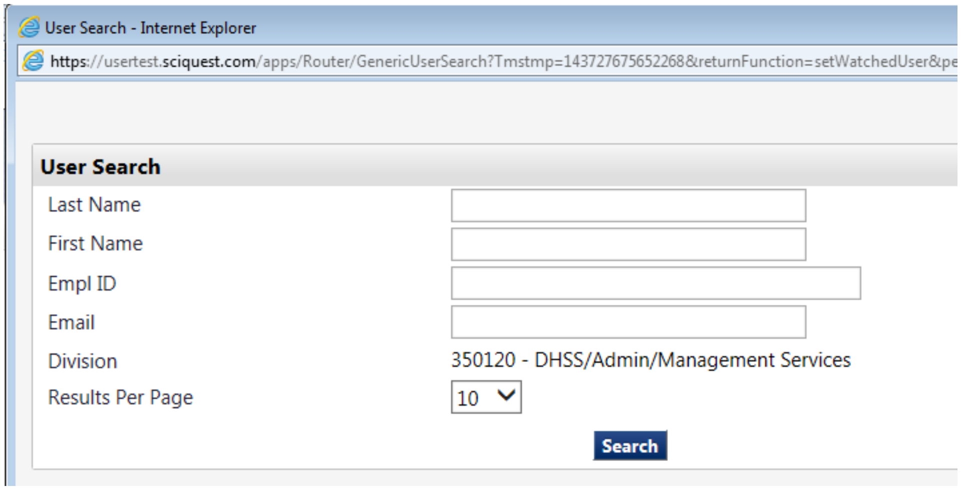
4.3 Assigning a Substitute for an Approver

Division Administrators have access to assign substitute approvers for any approver within their division. This would be done if an approver is out of the office for an extended period of time but has forgotten to assign themselves a substitute.

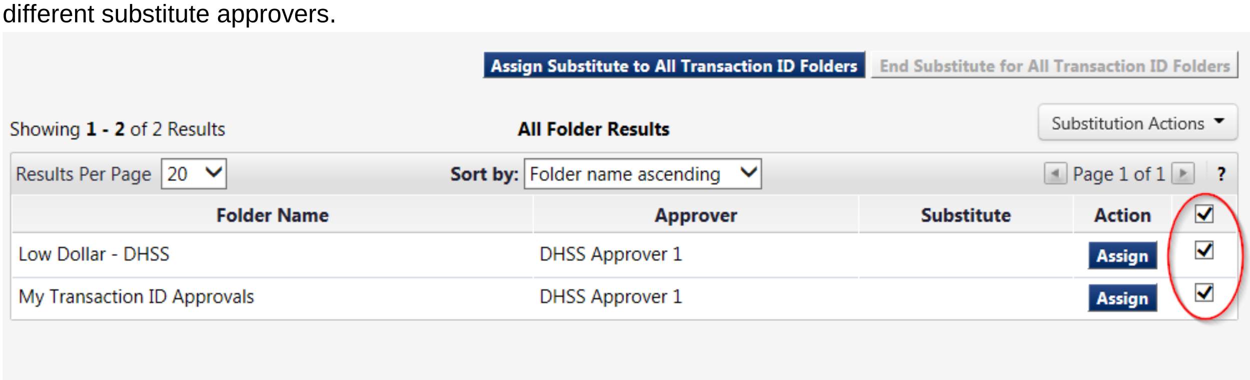
- Go to **Orders & Documents – Approvals - Assign Substitute Approvers**.
- On the left hand side, use the pull-down field called **View Approvals For** and select **Add Another Approver.**



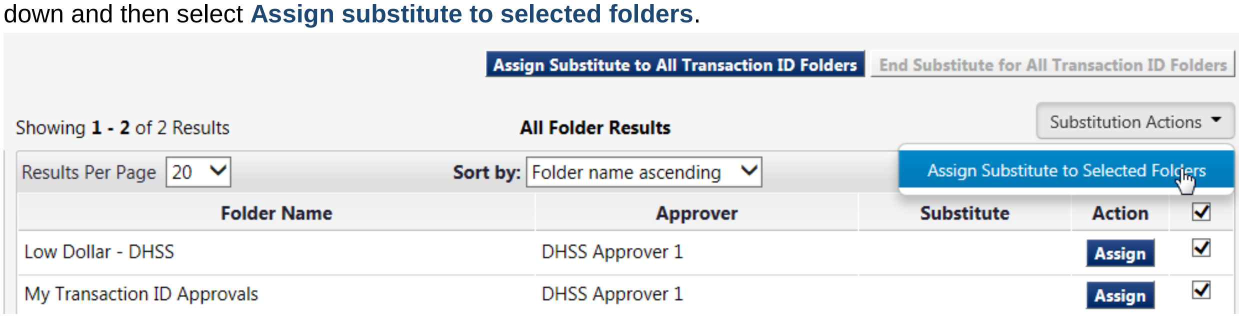
- **Search for the approver** for whom you'd like to assign a substitute. Once found **select that approver**. **Note** that you are limited to search and select from approvers within your division.



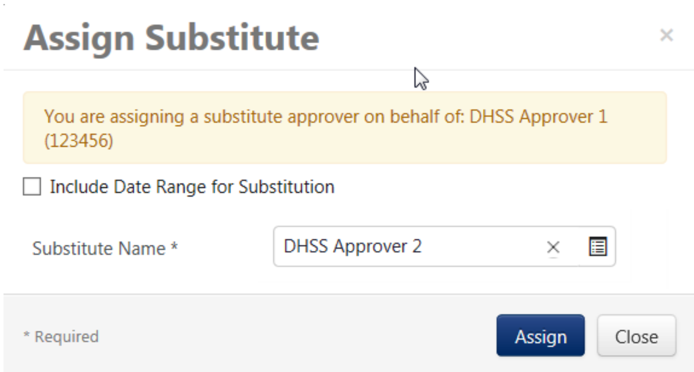
- Once selected, that **approvers workflow folders** will appear on the right. Each one represents a different condition for which they approve a Transaction.
- You can **assign all of their folders** to another approver at once by clicking the **checkbox on the right top** (see highlighted area below). Likewise, you can be specific and assign different folders to different substitute approvers.



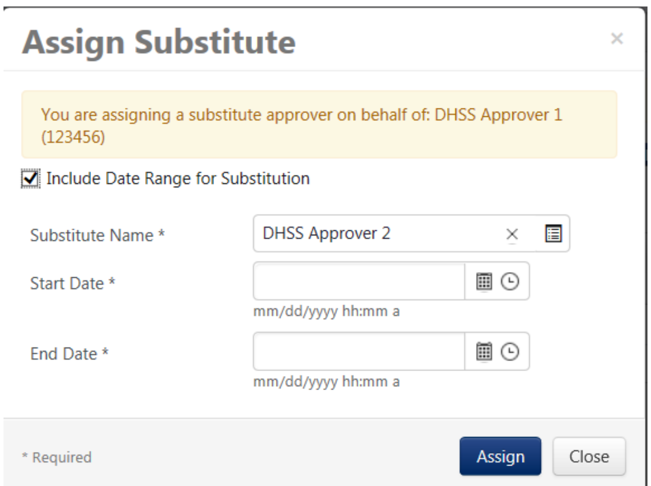
- Once you have the **appropriate workflow folders highlighted**, click the **Substitution Actions** pull-down and then select **Assign substitute to selected folders**.



- Start typing the name of the substitute approver; it should look up the name as you type.

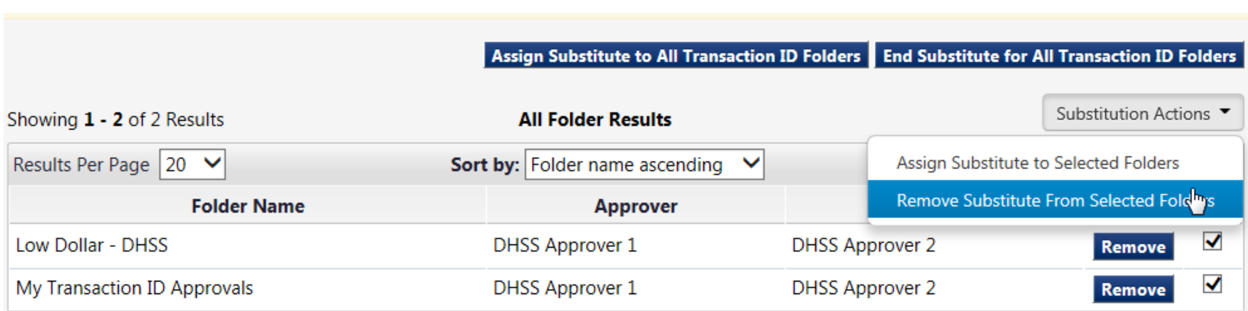


- If you want to **make a date range for this substitution**, click the **Include Date Range for Substitution** checkbox and enter the **start and end dates**.



- Click **Assign** when done.

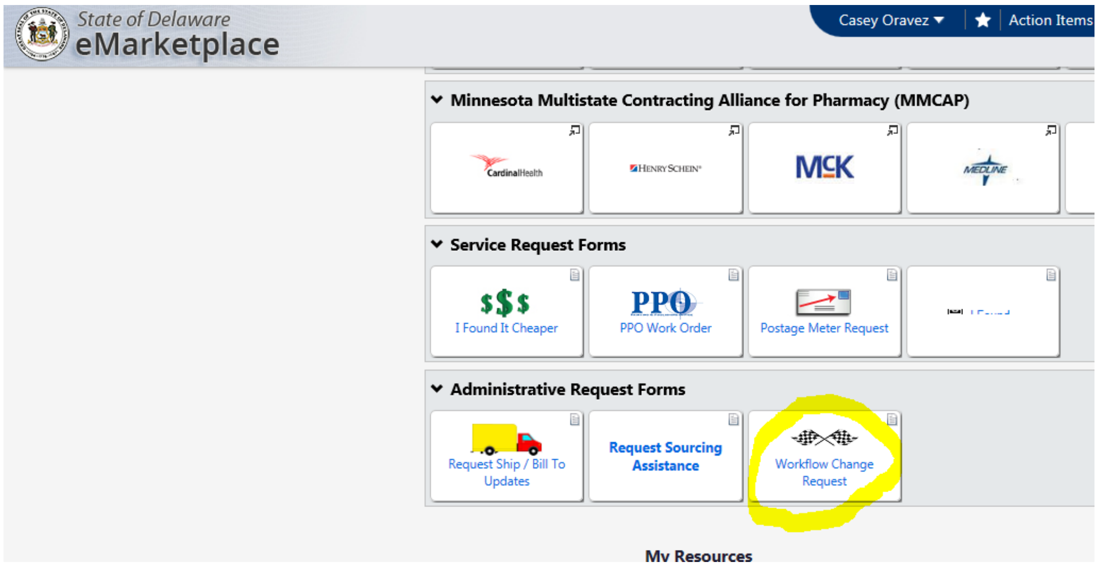
- To **end the substitution**, follow the same steps as above but in the **Substitution Options** pull-down you would then select **Remove substitute from selected folders**.



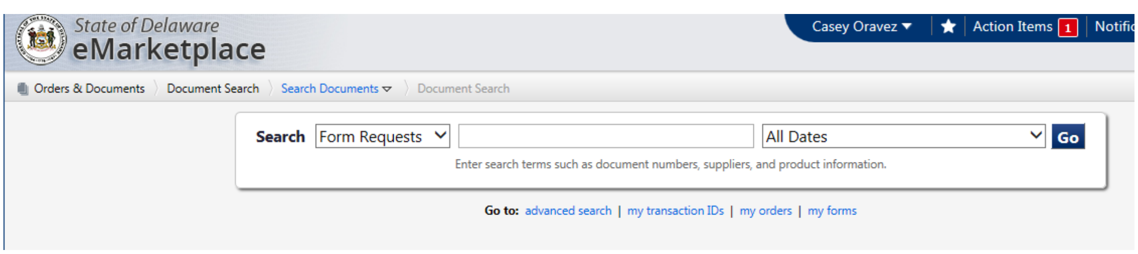
5.0 Requesting Other Workflow Changes

As a Division Administrator you may come across a situation where you need a workflow change that needs to be done by the SOD eMarketplace Central Administration team. To request such a change you can submit a **Workflow Change Request form** by following these steps:

From the SOD eMarketplace homepage and click the **Workflow Change Request** form in the Administrative Request Forms showcase.



- After reading the instructions, click **Next** on the Instructions screen.
- If you want to **rename your request** you can, otherwise **leave the Form Name as is**. Click **Next** on the Details screen.
- If you have any attachments you can attach them on the **Attachments screen**, then hit **Next**.
- In the **Questions page**, enter the **details for the workflow change** that you are requesting. Click **Next**.
- If you want to **see how the form will route** in workflow, click the **Form Approvals link** on the left.
- To submit the request, go to the **Review and Submit page** and click **Submit**.
- The form **will automatically route to the SOD eMarketplace Central Administration team** for review. If approved they will make the change to the workflow
- To **check the progress** of your form, go to **Orders & Documents - Document Search - Search Documents - Document Search** and search **Form Requests**.

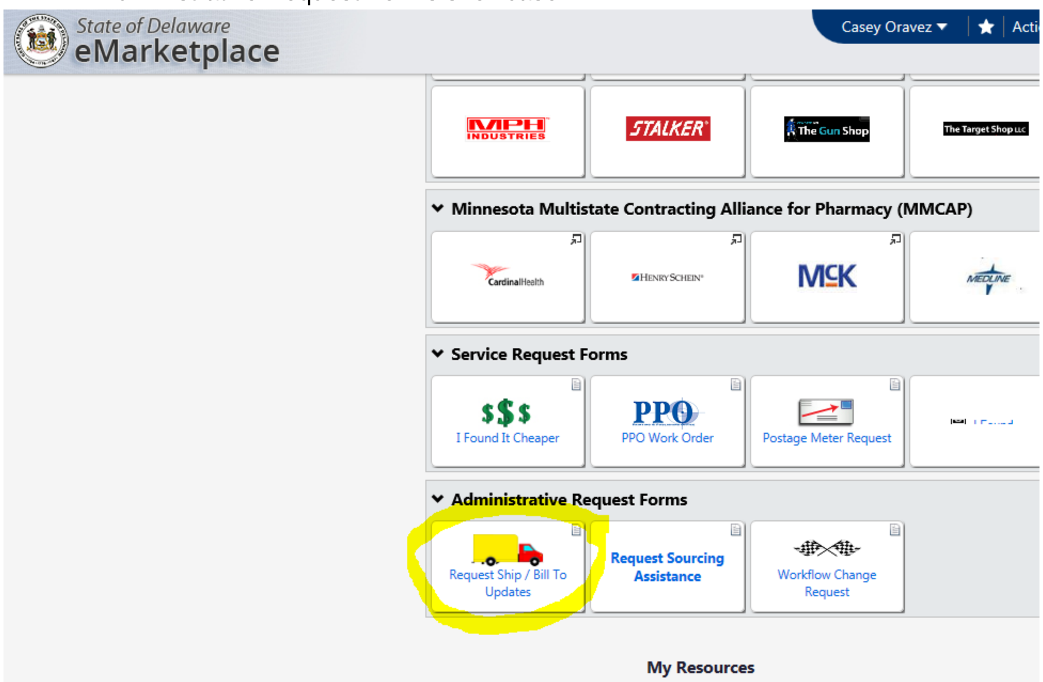


6.0 Requesting Address Additions and Changes

Ship To and **Bill To addresses** are maintained by the SOD eMarketplace Central Administration team. However, any end user can request an address addition or change. These requests are automatically routed through the user's Division Administrator for approval before routing to Central Administration where the change is made.

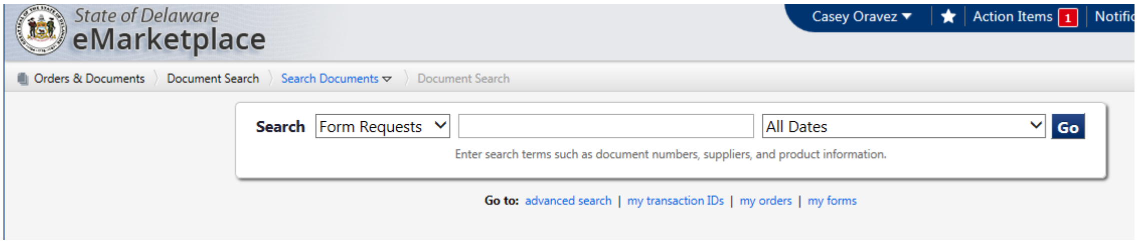
If a new address is needed or an existing address needs updating, users can submit a **Request Ship / Bill To Updates** form by doing the following:

- From the **SOD eMarketplace homepage** and click the **Request Ship /Bill To Updates** form in the Administrative Request Forms showcase.



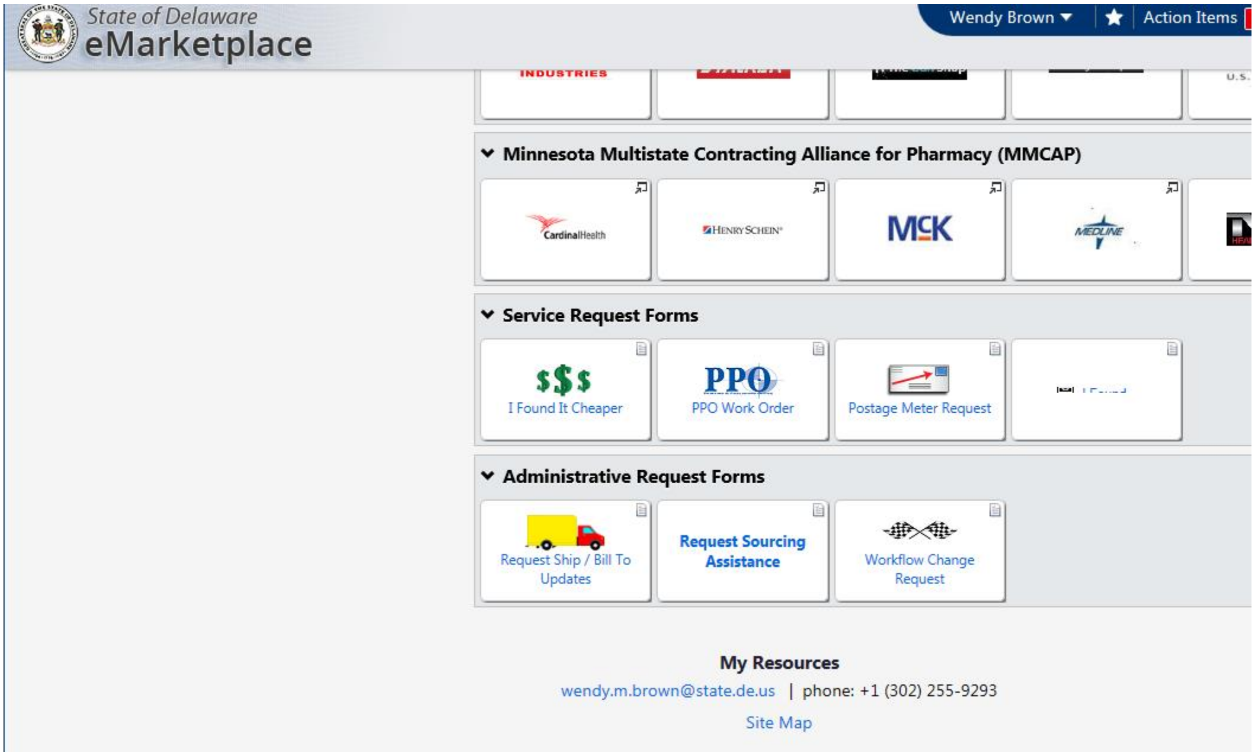
- After reading the instructions, click **Next** on the **Instructions screen**.
- If you want to **rename your request** you can, otherwise **leave the Form Name as is**. Click **Next** on the Details screen.
- If you have any **attachments** you can attach them on the **Attachments screen**, then hit **Next**.
- In the **Questions page**, enter the **new address** or **address change** information that you are requesting. Also add the **reason this change** is needed as well as the **urgency (if applicable)**. Click **Next**.
- If you want to **see how the form will route in workflow**, click the **Form Approvals link** on the left.
- To submit the request, go to the **Review and Submit page** and click **Submit**.
- The form **will automatically route to the user's Division Administrator for review and approval**. Once approved it **will route to the SOD eMarketplace Central Administration team** for entry into the system.

- To **check the progress of your form**, go to **Orders & Documents - Document Search - Search Documents - Document Search** and search **Form Requests**.


State of Delaware
eMarketplace
Casey Oravez
Action Items 1
Notific
Orders & Documents
Document Search
Search Documents
Document Search
Search
Form Requests
All Dates
Go
Enter search terms such as document numbers, suppliers, and product information.
Go to: advanced search | my transaction IDs | my orders | my forms

7.0 Updating the Resource Information for Your Division

Resource Information is the **email address** and **phone number** that appears in the **My Resources** area at the bottom of SOD eMarketplace homepage. This is **Division-specific** and should reflect the **Division Administrator's contact information** of the user's assigned Division.



Division Administrators have the ability to update this information for their assigned Divisions. Follow these steps to update your Division's Resource Information:

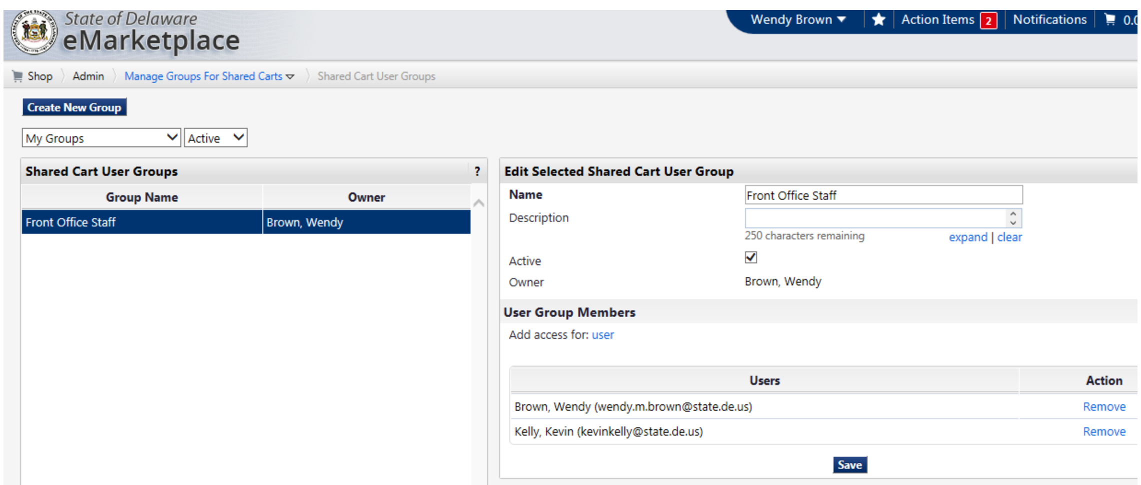
- Go to **Site Configuration - Site Appearance and Behavior - Organization Message and Site Logos - Message Board.**
- Go to the **Message Board tab**.
- On the left, click on the **Division** that you'd like to update. **Note** that you will only see and be able to update Divisions for which you are the Division Administrator.
- In the **Message and Resource Settings** area, click the **Override** box on the right to update the **Email and/or Phone fields**.
- When done, click **Save**.
- If you are the Division Administrator for more than one Division you will need to **do this for each of your Divisions.**

8.0 Setting Up and Managing Your Shared Cart Groups

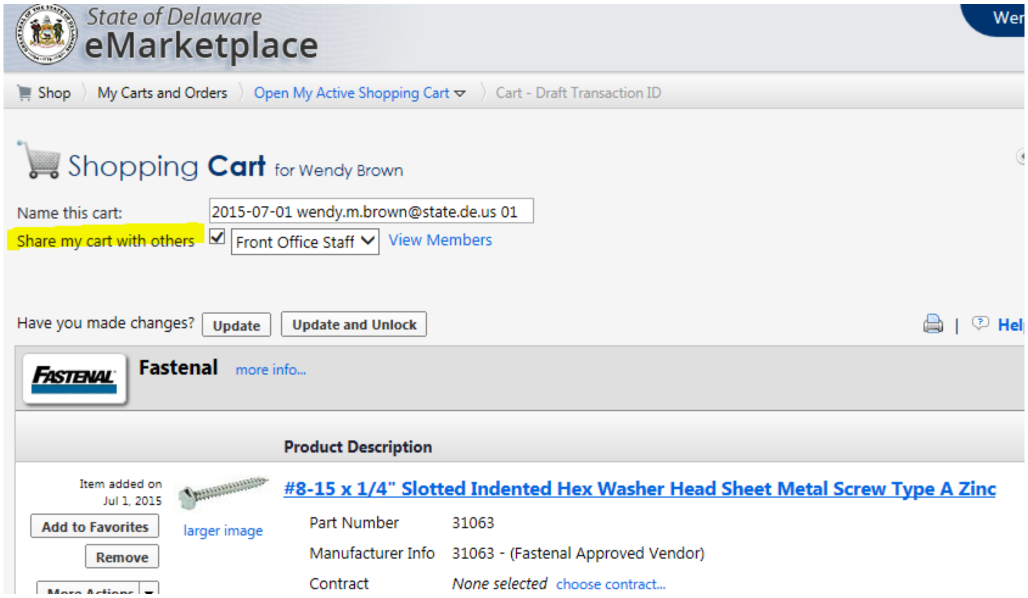
A **Shared Cart** is basically a shopping cart that can be shared and passed around a group of people. Each user can update the cart as they wish. When ready, the cart can be submitted, creating a Transaction and then an Order.

A group of users that can share a cart has to be created as a **Shared Cart Group**. Division Administrators have the ability to **create Shared Cart Groups** for the users in their assigned Divisions. To do so follow these steps:

- Go to **Shop – Admin - Manage Groups For Shared Carts - Shared Cart User Groups**.
- Click **Create New Group**
- Enter a **unique name for the group**.
- Enter a **description for the group** (optional).
- Make the **group active** by clicking the **Active checkbox**.
- To add users to the group, click "**user**" and then **search for** and **select the users**. **Note** that only users in your assigned Divisions will appear here.
- Click **Save** when done to create the Shared Cart Group.



- Once this is done, these users should see a field in their cart called **"Share my cart with others"**. When checked they will be able to select which Shared Cart Group they want to share with.
- Once the cart is updated by clicking the **Update**" button, the users in that group will be notified of the shared cart.

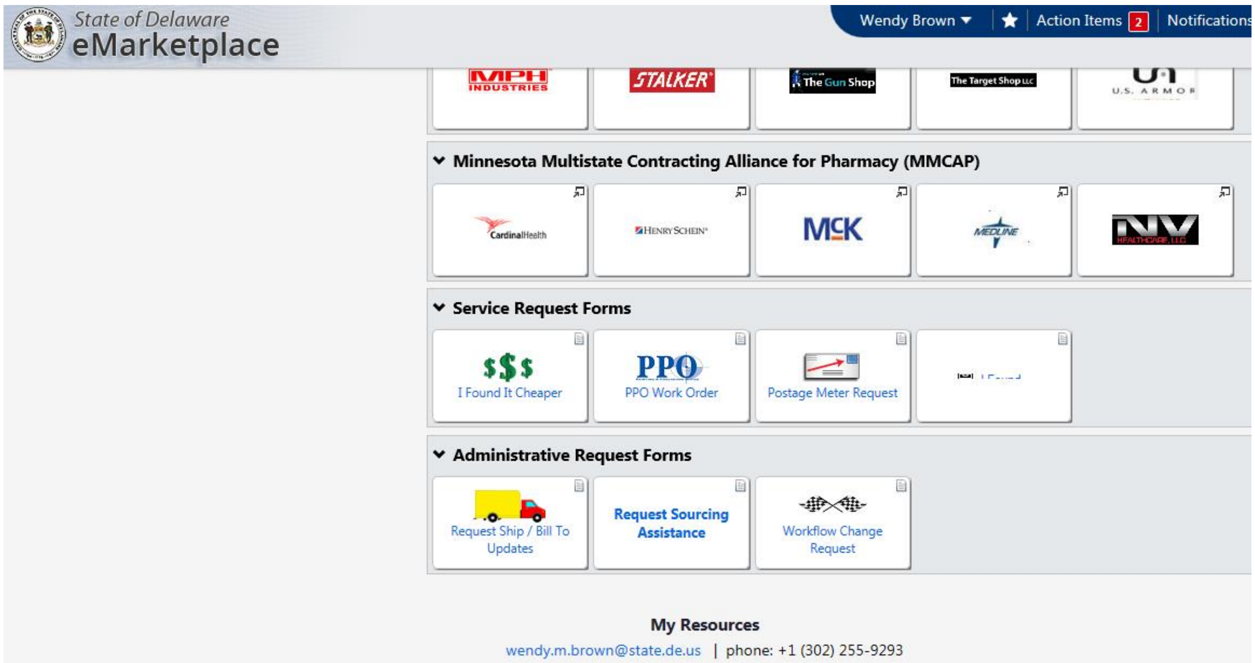

State of Delaware
eMarketplace
Shop
My Carts and Orders
Open My Active Shopping Cart
Cart - Draft Transaction ID
Shopping Cart for Wendy Brown
Name this cart:
2015-07-01 wendy.m.brown@state.de.us 01
Share my cart with others
Front Office Staff
View Members
Have you made changes?
Update
Update and Unlock
Fastenal
more info...
Product Description
Item added on Jul 1, 2015
Add to Favorites
Remove
larger image
#8-15 x 1/4" Slotted Indented Hex Washer Head Sheet Metal Screw Type A Zinc
Part Number
31063
Manufacturer Info
31063 - (Fastenal Approved Vendor)
Contract
None selected
choose contract...

9.0 Sourcing Assistance Requests

When a user needs assistance from a Sourcing Professional, he/she can create and submit a **Sourcing Assistance Request** form. An example of when this would be needed would be if the user is looking for an item that doesn't appear in the Shop at the Top search.

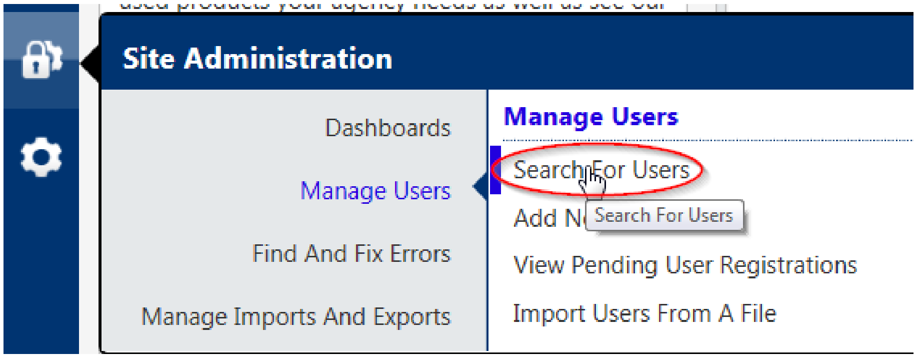
These Sourcing Assistance Request forms are routed automatically to the user's Division Administrator, who is then expected to assist the user.

For end users, the Sourcing Assistance Request form can be accessed via the **Request Sourcing Assistance link** in the SOD eMarketplace homepage in the Administrative Request Forms showcase.

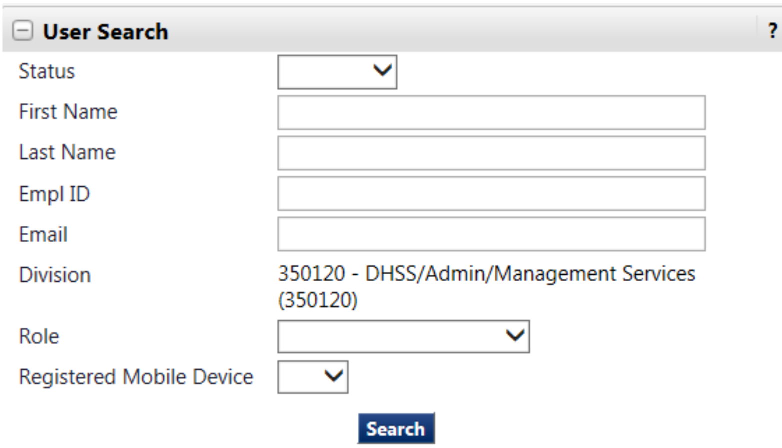


10.0 Division – User Administration

- To search for users within the same division, Go to **Site Administration - Manage Users – Search for Users – User Management** and go to **the User Search area.**

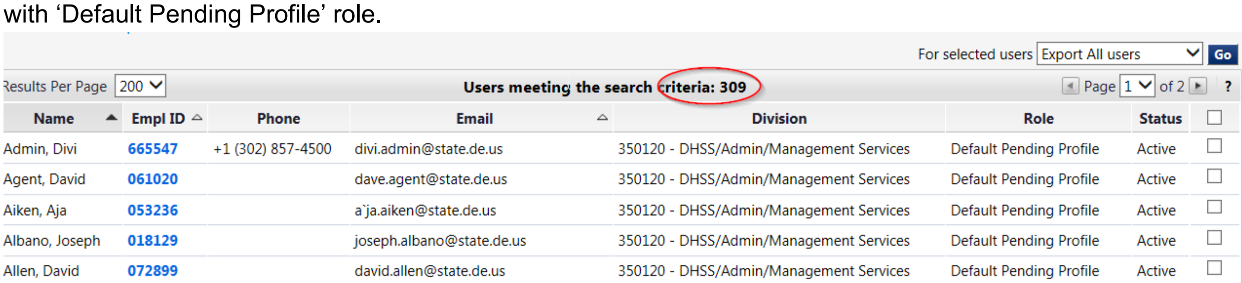


- You can search by name, Empl ID, email address or Division. **Note:** You will be limited to the Divisions to which you as a Division Admin are assigned. Example:



- You can search for users based on 'Role' as well. Example, search for users that are currently in 'Default Pending Profile' role. Select 'Default Pending Profile' from the 'Role' drop down list. Click 'Search'

- The search result page displays the number of users and the list of Users that are currently assigned with 'Default Pending Profile' role.



For selected users Export All users Go

Results Per Page 200 — Users meeting the search criteria: 309 — Page 1 of 2 ?

Name	Empl ID	Phone	Email	Division	Role	Status	
Admin, Divi	665547	+1 (302) 857-4500	divi.admin@state.de.us	350120 - DHSS/Admin/Management Services	Default Pending Profile	Active	
Agent, David	061020		dave.agent@state.de.us	350120 - DHSS/Admin/Management Services	Default Pending Profile	Active	
Aiken, Aja	053236		a'ja.aiken@state.de.us	350120 - DHSS/Admin/Management Services	Default Pending Profile	Active	
Albano, Joseph	018129		joseph.albano@state.de.us	350120 - DHSS/Admin/Management Services	Default Pending Profile	Active	
Allen, David	072899		david.allen@state.de.us	350120 - DHSS/Admin/Management Services	Default Pending Profile	Active	

- You can choose to export all users or select the list of users you would like to export. See section 2.3 for more information on user export and import.