State of Delaware eMarketplace User Handbook

Table of Contents

Please note that there may be topics discussed within this handbook that are not identified in the Table of Contents. (For example: Address selections) If you have a question about a topic not listed please try a keyword search. If you do not find an answer within this handbook, please send your question to emarketplace@state.de.us and someone from Government Support Services, Contracting with contact you with guidance.

Understanding User Roles

Following are the definitions of the user roles available in the SOD eMarketplace. Roles consist of a set of permissions which allow users to do (or not do) specific things in the eMarketplace. Note that a user could be assigned multiple roles*.

Default Pending Profile:

- Users with this role can log into the SOD eMarketplace and can search contracts.
- Users with this role cannot view enabled vendor stickers nor items available under the vendor stickers.
    - *If you are out of the office for a period of time, such as Medical Leave, a PHRST update may kick a Shopper/Requester/Approver/Admin role back to Default Pending Profile.*

Shopper:

- Users with this role can search, filter and compare products as well as create carts.
- Users with this role cannot submit carts; instead **they have to assign their carts** to a Requester.

Requester:

- Users with this role can search filter, compare products and create carts, similar to a Shopper. But, a Requester can submit carts to the vendor(s).
- Users with this role can also submit carts that were assigned to them by a Shopper.

  NOTE: Users with this role cannot also have a Shopper role assigned to them. The system will default to the lower access level, meaning the user will not be able to submit the cart.

Approver:

- This role is only required if a Division level workflow rule is established, requiring additional approval levels.
- Approvers are managed within the Transaction workflow rules, so that when a cart is submitted (becoming a Transaction) the workflow knows which approver(s) to send the Transaction to.

  NOTE: Users with this role cannot also have a Shopper role assigned to them. The system will default to the lower access level, meaning the user will not be able to submit the cart.

Division Administrator:

- Users with this role were identified by their Agency as the administrator of one or more Divisions for the eMarketplace system.
- Users with this role can assign roles to users within their Division(s) fence.
- Division Administrators manage users, Division-specific workflow, run reports, and view draft carts within their fence.

Central Administrator:

- Users with this role manage the eMarketplace at a high level.

  Examples would be assigning Division Administrators, managing some ad-hoc role requests, managing non-Division-specific workflow, managing Bill and Ship To addresses, updating the homepage and message area and setting up Divisions.
- Users with this role can assign roles to users Statewide.

Law Enforcement:

- This role is an add-on permission which gives users access to order law enforcement products such as ammunition.
- Can be assigned at Division and/or Central Administrator level.

MMCAP:

- This role is an add-on permission which gives users access to order pharmaceutical and other medical products.
- Does require additional permissions. Contact a Central Administrator for additional information.
- Can ONLY be assigned at Central Administrator level (GSS).

Understanding Vendor Enablement

Vendors are enabled in different ways. To better understand how the system works, below you will find some definitions associated with the vendor enablements and their impact on your shopping experience.

NOTE: It is important to understand that only those vendors awarded a contract through Government Support Services for a commodity contract are being enabled at this time. But, not all commodity contracts have been enabled.

Hosted Catalog: The vendor's catalog is housed within eMarketplace. This allows for comparison shopping amongst enabled vendors. *Instructions contained within this User Handbook focuses on the Hosted Catalogs. Differences may occur when shopping a punch-out enabled vendor.*

Punch-Out Catalog: The vendor's catalog is housed on a vendor owned website. To shop the vendor you will need to click their sticker to be redirected to the vendor's site. Once you have filled your cart and proceeded to checkout you will be redirected back into eMarketplace to complete the transaction. While this maintains a shopping experience you are familiar with for this specific vendor, you currently lose the comparison shopping capability offered by the hosted catalogs. *You <u>will not</u> see these offerings when you "search at the top".*

Order Delivery, Fax: Once you "submit" your order to the vendor, the order is received on the vendor's side as a fax order. This requires the vendor to manually key the order into their system.

Order Delivery, CXML: Once you "submit" your order to the vendor, the order is received on the vendor's side electronically, mapping the order into the vendor's system. The vendor does not have to manually key the order into their system. *Please note, with this method there may be occasions where you run across a price discrepancy based on how the vendor has applied their catalog discount in their system. If you run across this issue you will want to reach out to the point of contact identified on the contract for the company. It is recommended that you do not call any generic 1-800 number for contract assistance.*

Sign-In

The Sign-in page for the SOD eMarketplace can be accessed here: https://solutions.sciquest.com/apps/Router/Login?OrgName=StateofDelaware&URL=. You will be asked to sign in using your Empl ID # and your designated password (or default, if it is your first sign in).

If this is your first time signing in you will be asked to accept the Terms of Use and to select a new password.

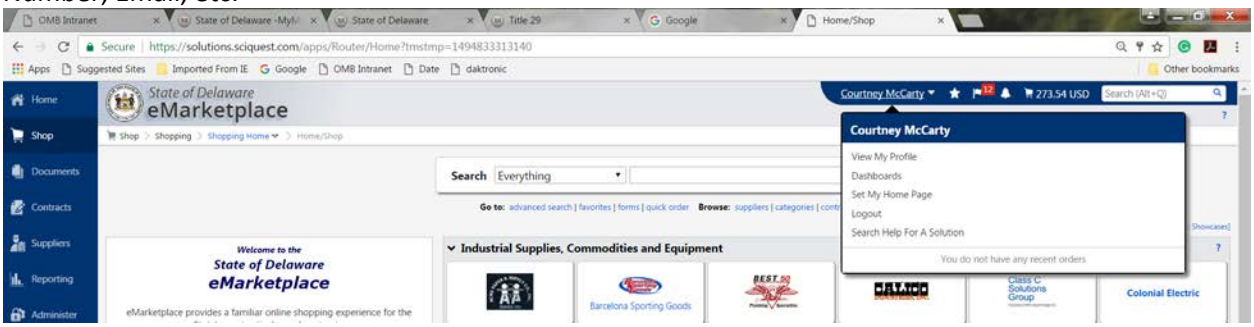
If you have successfully signed in and see a blank screen, your role is currently Default Pending Profile. Contact your Division Administrator for role assignment or update.

At first sign-in it is recommended that you View Your Profile to ensure the information in your profile is complete and accurate.

View My Profile

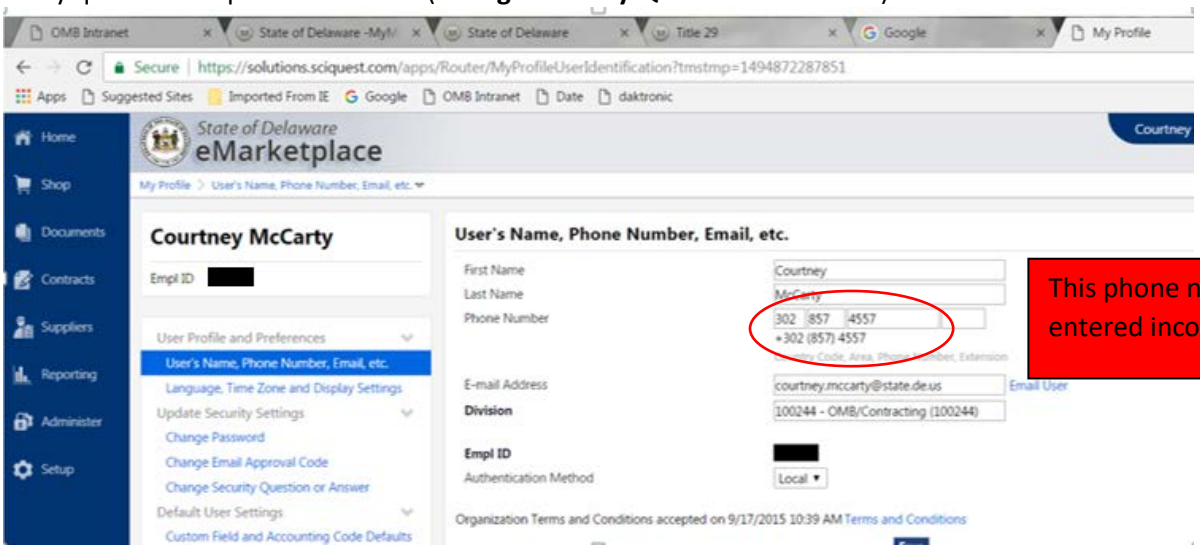
As mentioned in Sign-In, you want to verify the details in your profile are accurate. This information will carry over from the order to the vendor, so it's important the information is complete and accurate, should there be questions about your order. This is also the perfect time to set up a security question, in case you forget your password at a later date.

To "View My Profile" you will want to click on your name which is found in the blue box in the top right corner. From here select **View My Profile**. You will see a screen that shows your User Name, Phone Number, Email, etc.



Where the phone number is entered you will find four (4) field boxes. The first box should have a "1", the second box "302". The third box will be your 7 digit phone number and the last box is for your extension, if applicable.

From the Side bar menu, under **Update Security Settings** you can change your password and add a security question for password resets (**Change Security Question or Answer**).



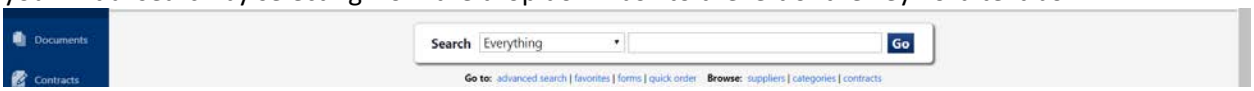
Shopping

Shop

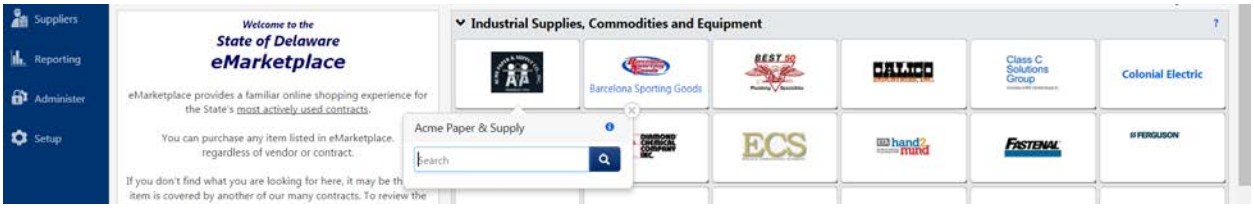
You have options when it comes to how you "shop" or build your cart. A couple things to keep in mind before you start shopping:

- Only central contracts managed by Government Support Services are being enabled in eMarketplace for shopping. Not all commodities have been loaded into the system, so you may have to refer to MyMarketplace.Delaware.gov for other commodity items.
- The item descriptions in the system, were identified by the enabled vendor. This means you may get some search results that don't make sense.

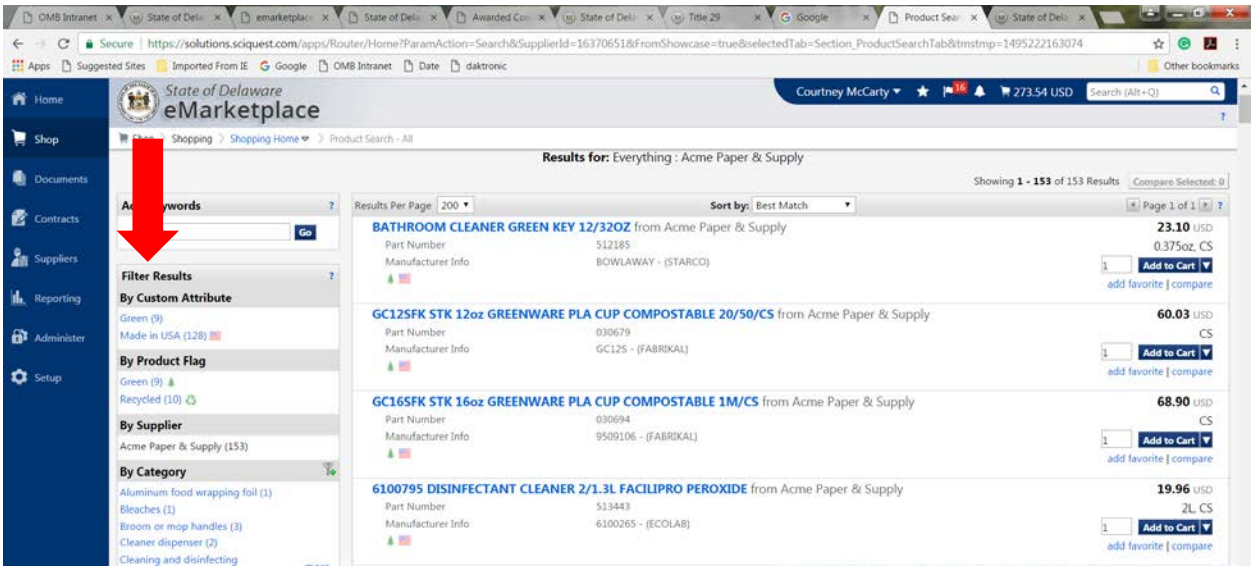
You can shop at the top…please note that when you shop at the top, search results will show all enabled vendors with "hosted" catalogs. Relevant products offered by enabled vendors with "punch-out" catalogs will not show. You will have to click on their sticker to view their products. You can narrow your initial search by selecting from the drop down box to the left of the keyword text box.



You can shop by vendor… keyword search in the box or click on the magnifying glass for a list of all their offered products. NOTE: If you click on a vendor who has a punch out catalog, it will direct you to that vendor's website where you can search their products.



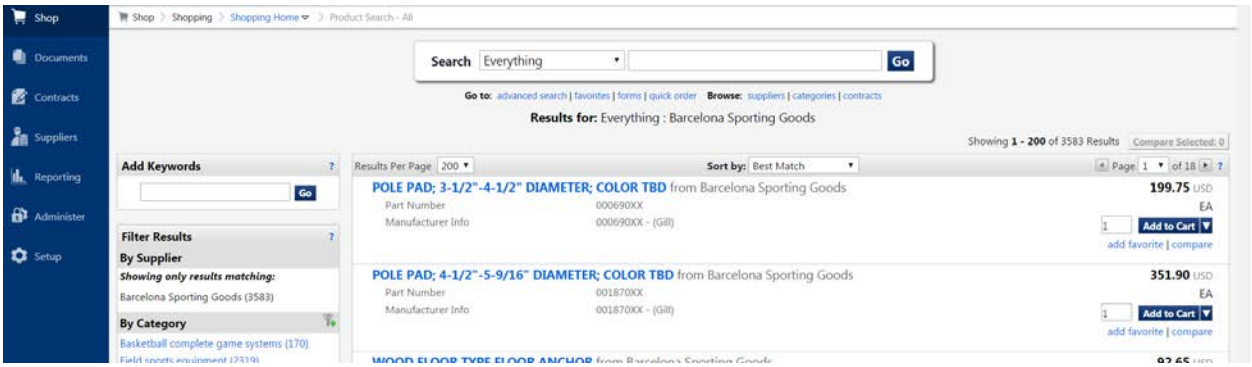
You can narrow down searches, shop at the top or by vendor, Filtering Results by: Custom Attributes, Product Flags, Supplier, Category, UOM, Manufacturer, etc.



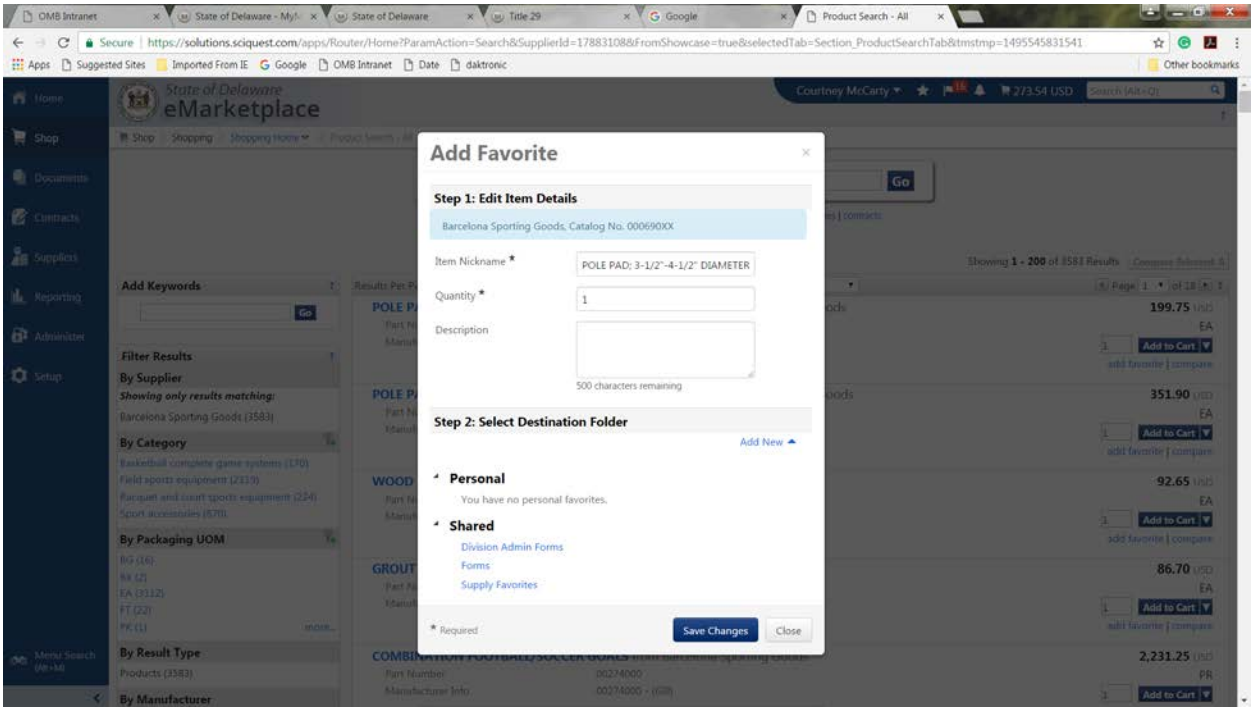
Favorites - Adding

Items that you frequently purchase can be saved as “favorites”. There are a couple of ways to add items to your Favorites…

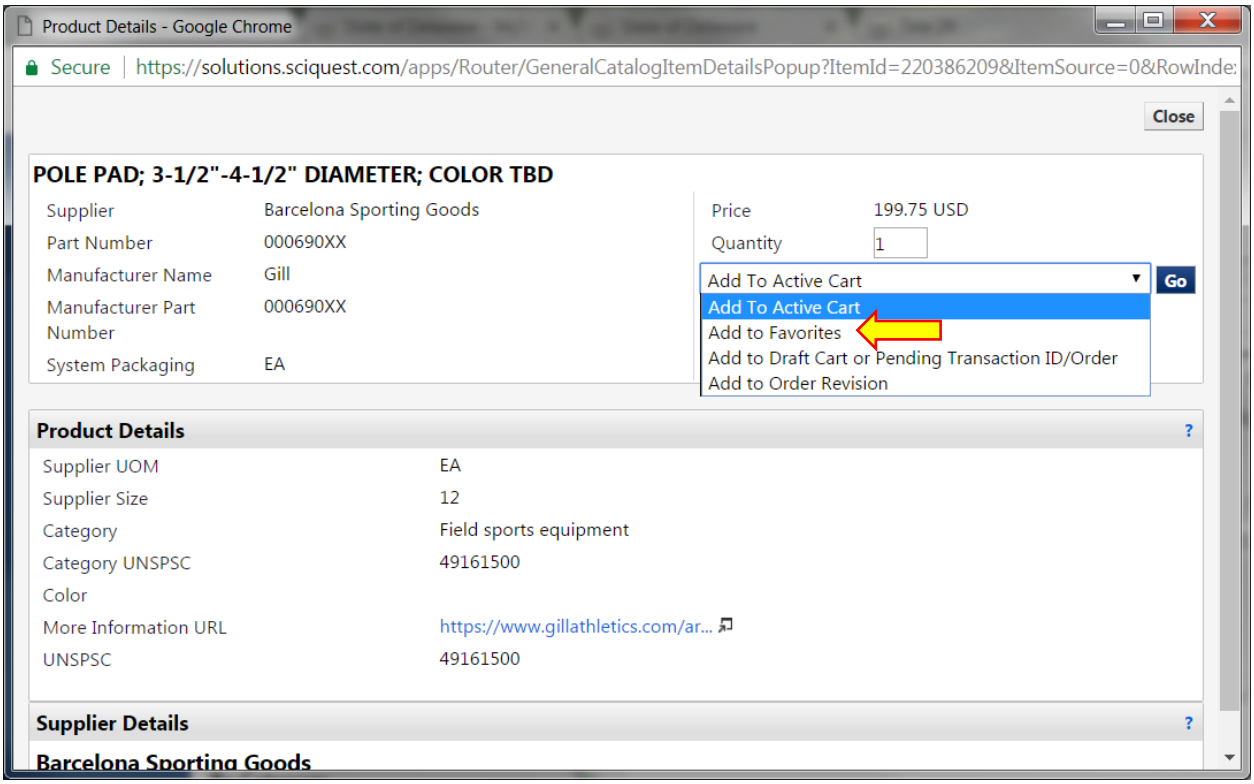
From the Search…



Identify the product and click **add favorite** then click **Save Changes**. You can give the item a nickname and identify a “favorite” UOM and select the folder for the item to be saved.



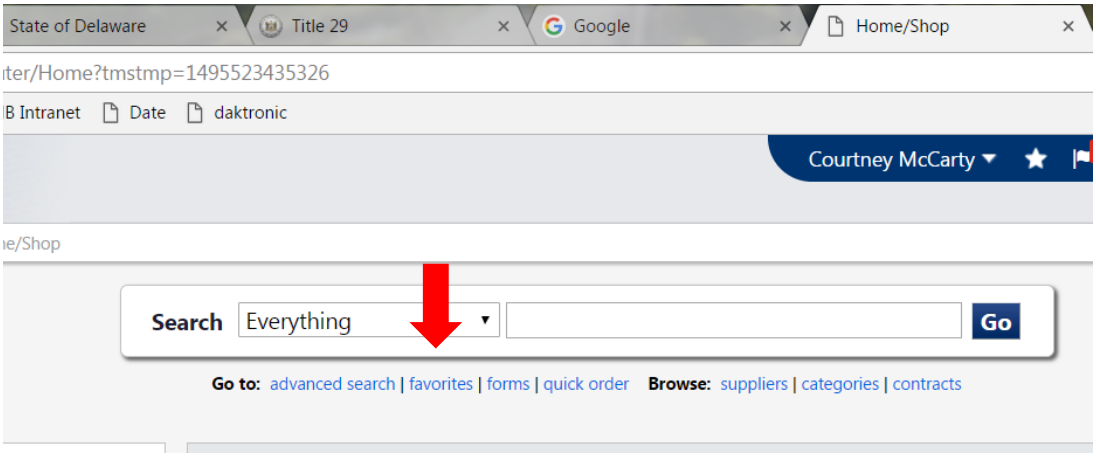
From the Product Details…



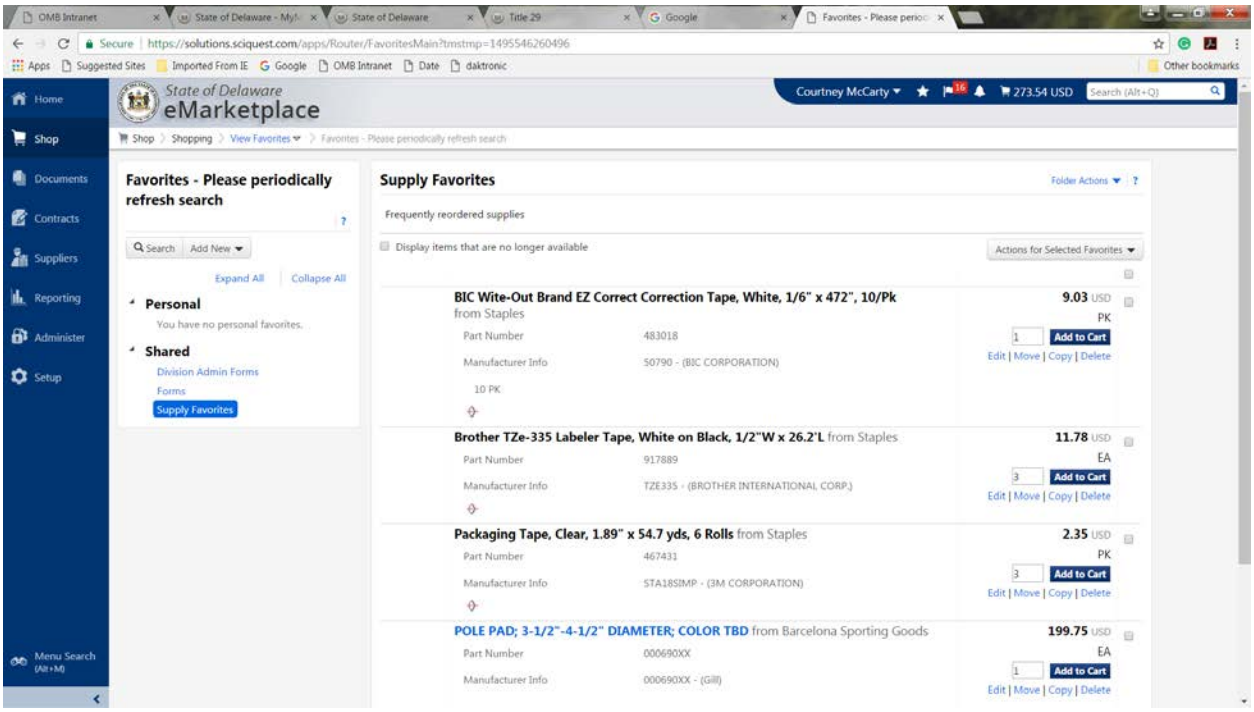
Select **Add to Favorites** and click **Go**. A screen similar to the one under the "From the Search" section will pop up for you to change the nickname, identify a favorite UOM and folder the item is to be saved to.

Favorites - Accessing

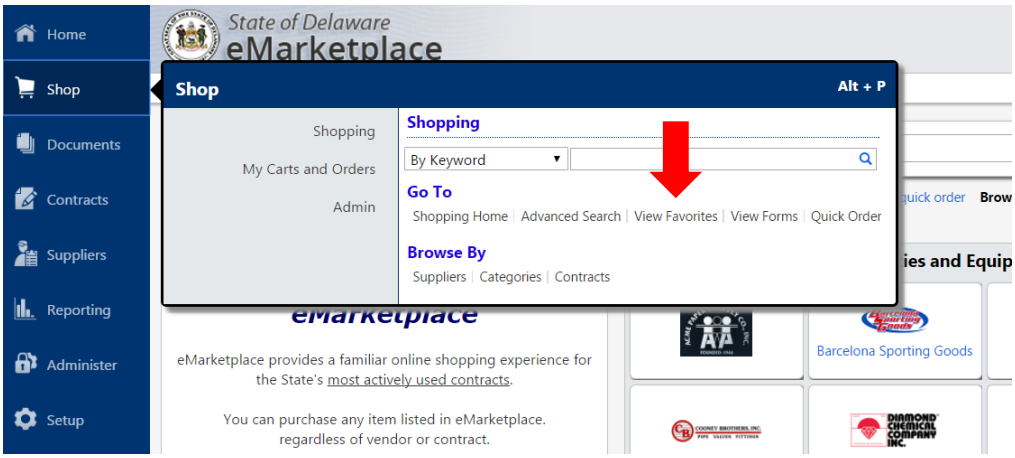
From the home screen, you can select “favorites” located under the search at the top bar.



You can update the quantities and “add to cart” all items you need to add to your order.



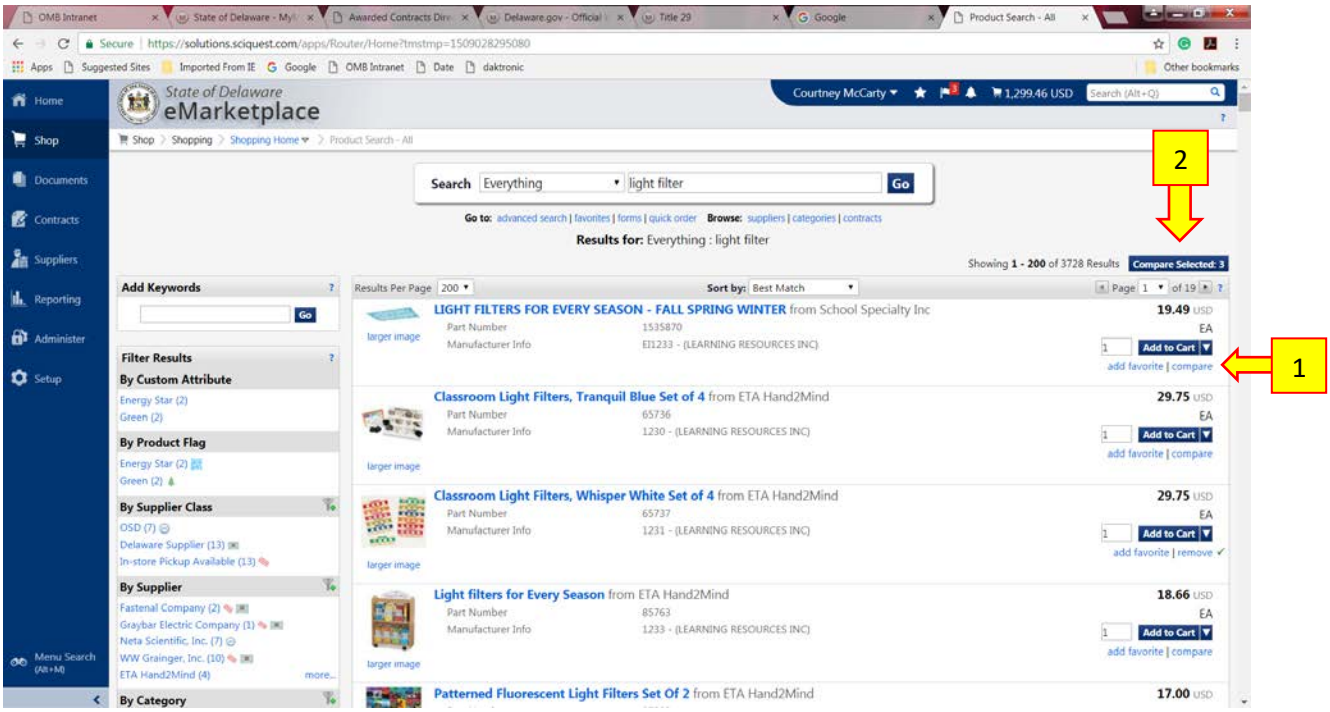
You can also access your favorites from the side bar menu… **Shop**, **Shopping**, **View Favorites**



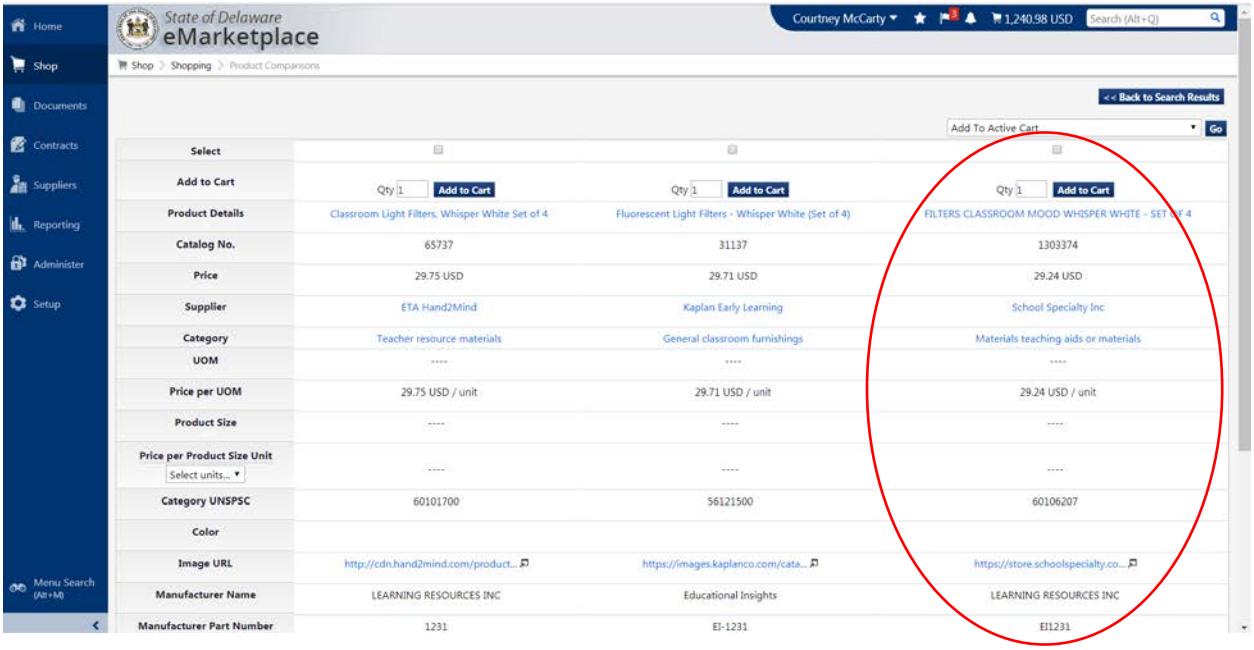
Comparing Items

Let's say you are in need of a light filter for a fluorescent light fixture. You search eMarketplace and have a few hits that come back. You can select a few items and then compare to see how they look side by side.

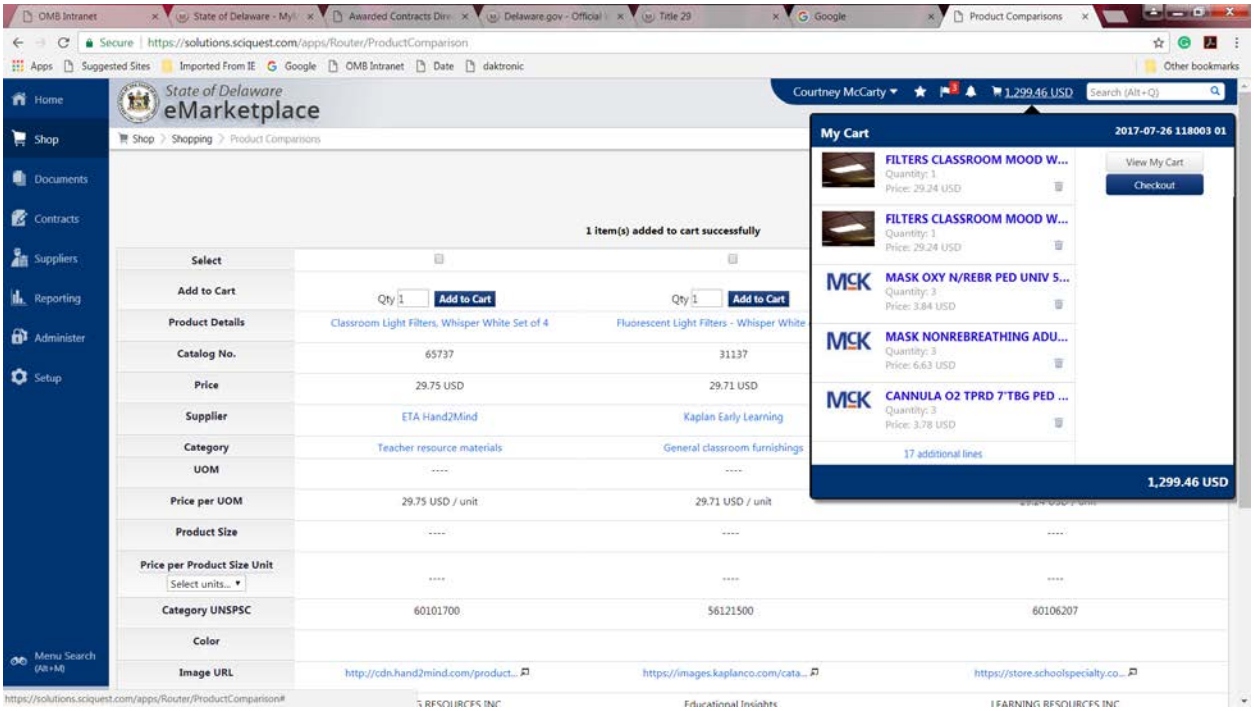
You begin by clicking **compare** for the items you want to compare. After selecting the items you will click on **Compare Selected: X** at the top of the page.



In this scenario you find the same product being offered by three vendors. You can see that the Manufacturer Part number is the same across all three suppliers so it's simply a matter of adding the lowest cost item to your cart.

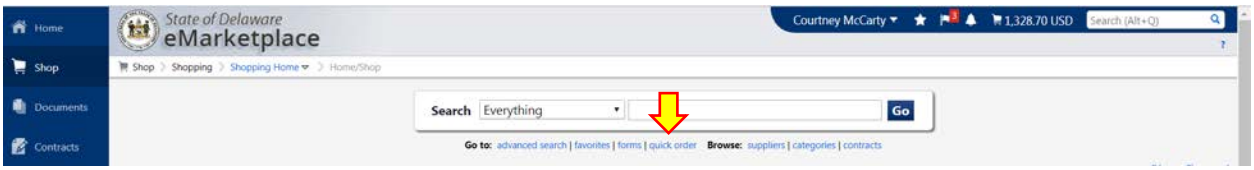


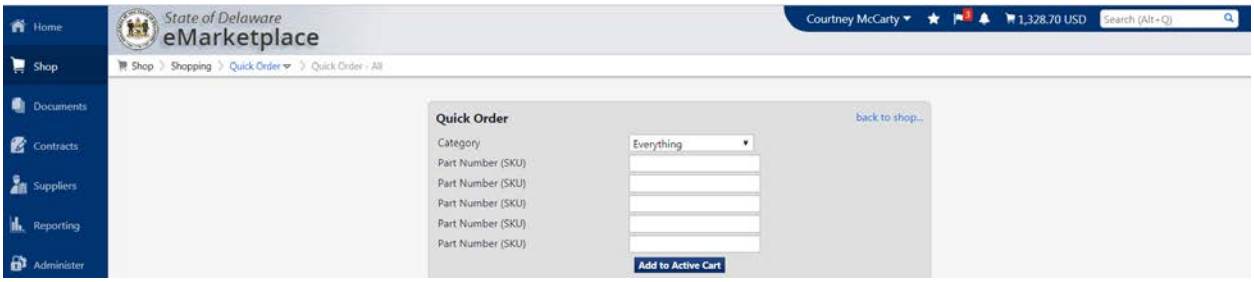
You can add the item to your cart by simply clicking **Add to Cart** or you can check the box above the item and then click **Go** to **Add to Active Cart**.



Quick Order

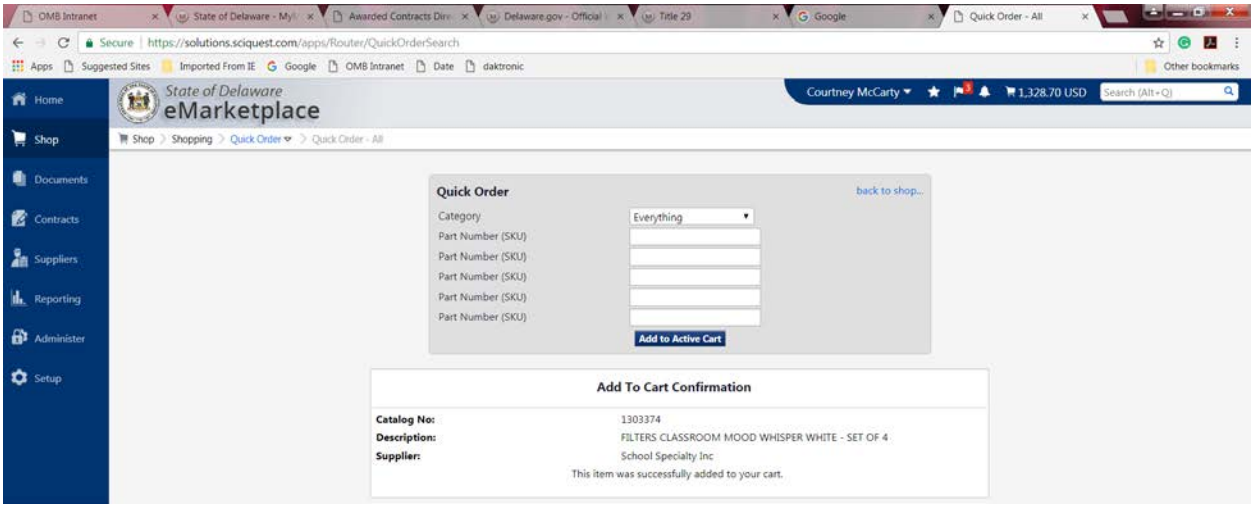
If you know your item #s you can use the Quick Order to add items to your cart quickly. You will start by clicking on **quick order** under the search bar.



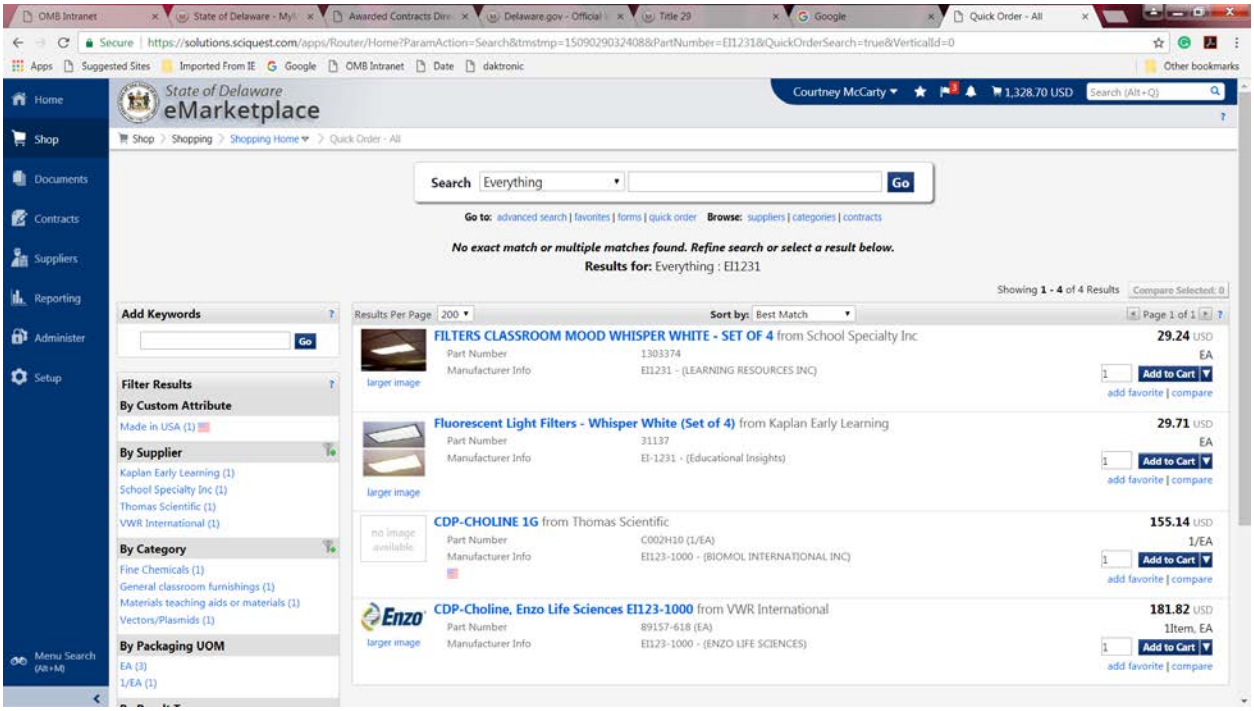


After entering the Part Numbers you can click **Add to Active Cart**. One of two things will happen…

Only one item found with that Part Number: You will see the following… (Please note, in this case you are not able to update a quantity. You will have to go to your cart to make the update.)



If multiple items found with that Part Number: You will see the following…



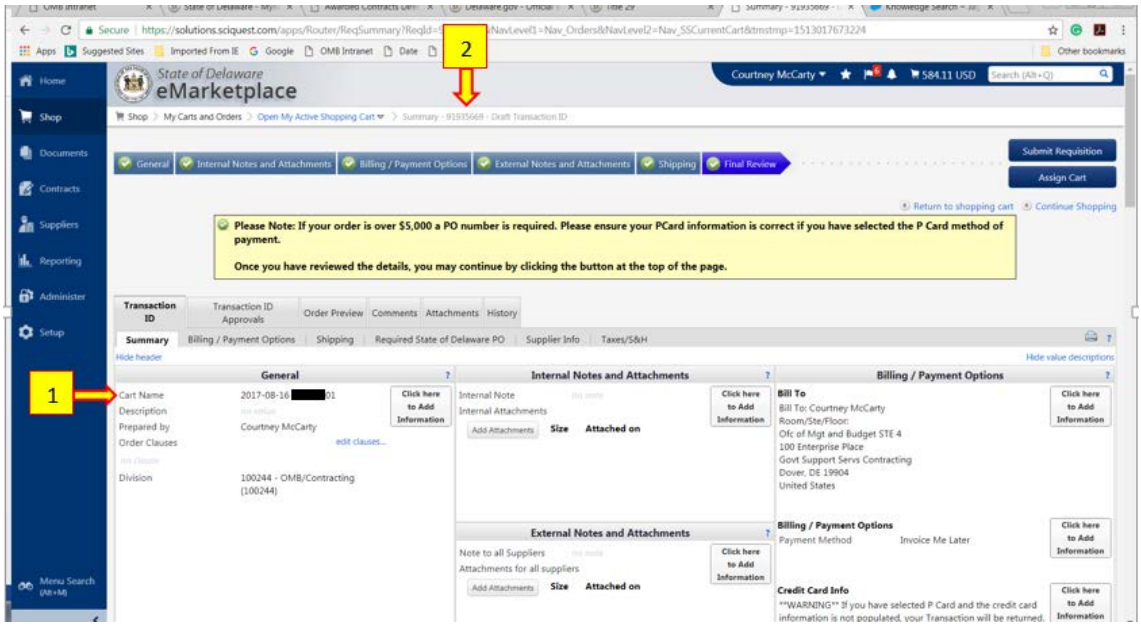
In this case you will update the quantity for the item you want then **Add to Cart**.

Carts

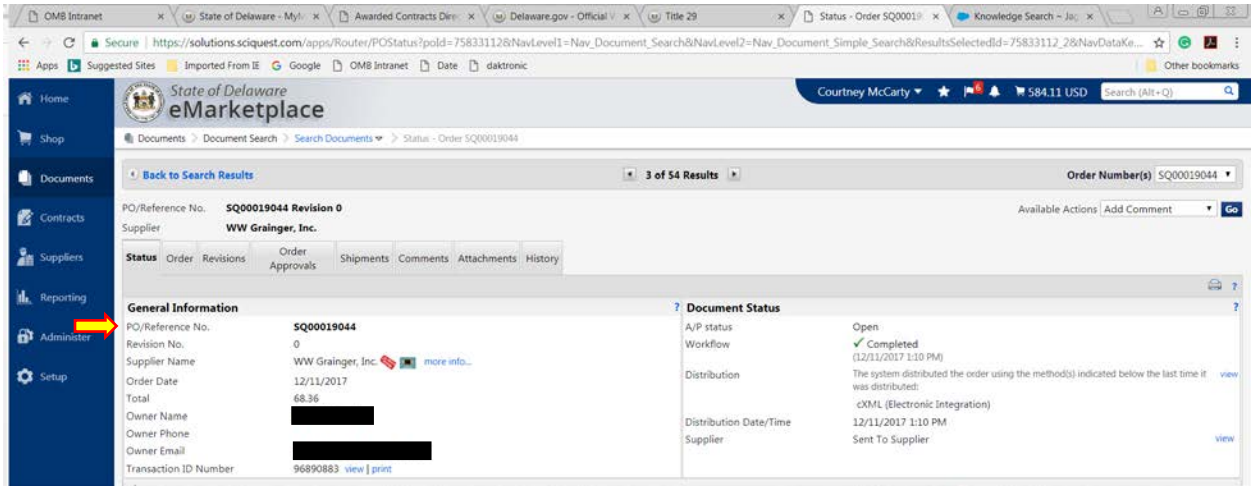
I've built my cart and ready to submit my order. Based on my profile role, what can I expect to happen?

Cart Numbering

When you create a draft cart, your cart will be assigned a **cart name**. The default name for the cart will be year-month-day employee id ## (for example: 2017-08-16 123456 01). This is a field you can change by clicking on **Click here to Add Information** (for example: December Janitorial order). Your draft cart will also be assigned a draft **Transaction ID**. This can be found in the bread crumbs line at the top of the screen.

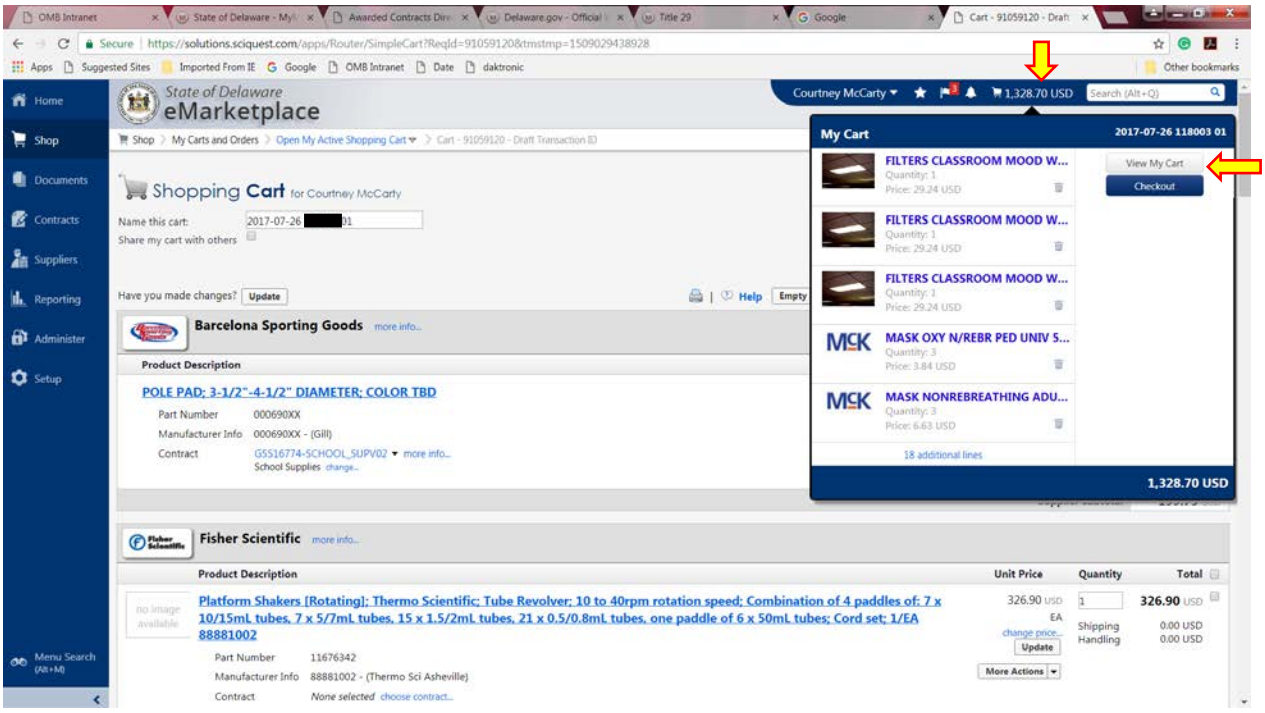


Once your order has been successfully submitted it will an **PO/Reference No.** that starts with SQ.



Order Review

Let's start by clicking on the **shopping cart** in the blue box on the top right hand side of the screen and selecting **View My Cart**.

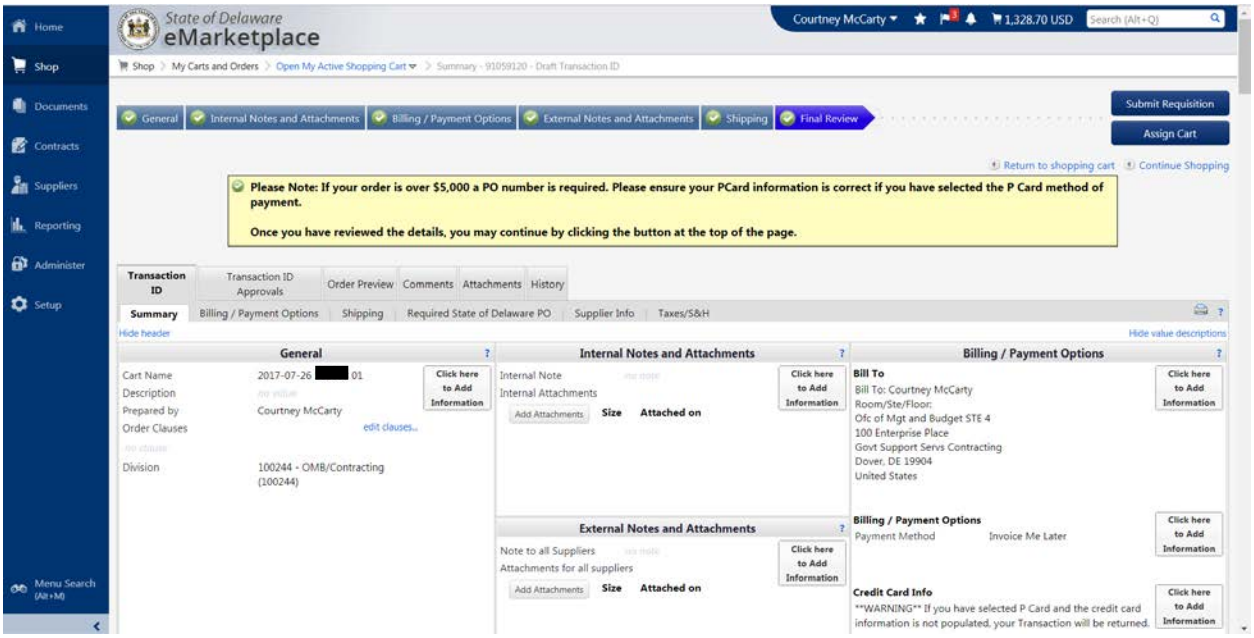


Here you can view the items in our cart, you can modify quantities, delete items, etc. Once you have reviewed the order and are ready to move forward you can click **Proceed to Checkout**.

Review your Cart

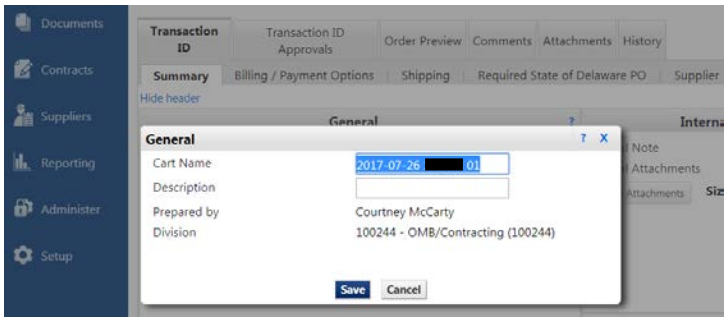
*When checking out, it is important to remain on the **Summary** tab. "Bouncing" between the tabs will cause frustration and confusion.*

The first time you checkout, the Bill To and Ship To address boxes will be blank. The directions below will walk you through adding the address and saving it as a default so you do not have to populate these fields with each order.

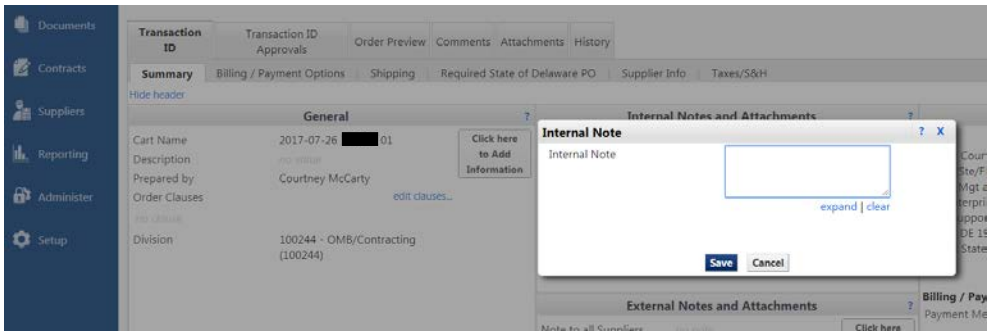


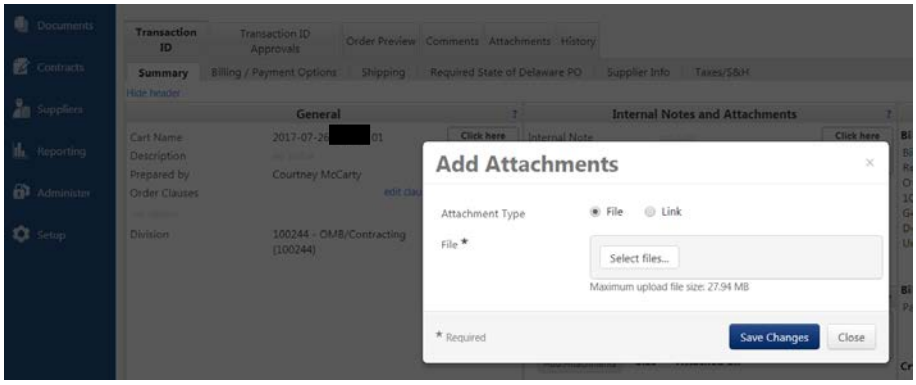
Now, let's work your way through each block…

- **General**: If you **Click here to Add Information**, you can change the Cart Name and add a Description.



- **Internal Notes and Attachments**: If you **Click here to Add Information**, you can add a note that would be visible internally (Approver, etc.) You can also add an attachment, such as a requisition.
- **External Notes and Attachments**: If you **Click here to Add Information**, you can add a note that would be visible to the vendor. You can also add an attachment, such as a requisition. (For example: you can order a week's worth of milk and notate in this section what should come on Monday, Wednesday, Friday.)



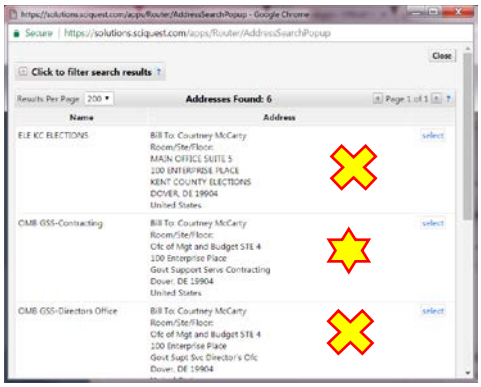


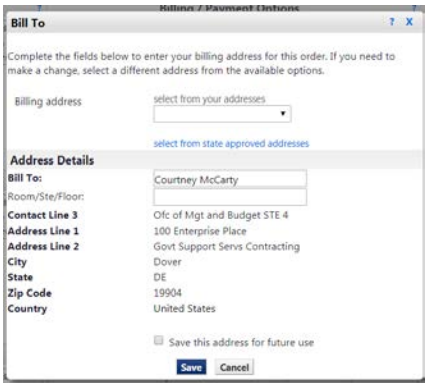
(Screenshots for Internal and External Notes and Attachments are very similar.)

- **Billing/Payment Options**: In this section you are going to **Click here to Add Information** three times, at least the first time.
  - **Bill To:** The first **Click here to Add Information** you are going to select our Bill To Address. The first time you are going to **select from state approved addresses**, then keyword search the address. Addresses were initially loaded as they appeared in FSF. In some cases Street can be shown as Street, St, St. It is recommended you don't type the address completely. In the example *100 Enterprise* was used for the search. In the screen shot below, you will see a name for each address option I received. Most addresses with start with an agency description.

    NOTE: *If you work within DSCYF you will want to choose an address that starts with CYF, not ELE. If you choose an address outside your organization your cart will be rejected.*

    Once you click select the address will populate (2nd screenshot). You can check the box next to **Save this address for future use** and then check the box next to **Check this box to make this the default address in the future**. Once you are done you can click **Save**. Please note the person creating the cart is the name that will populate in the Bill To field. You can change this field, if you wish. You can also use the Room/Ste/Floor field, if appropriate.



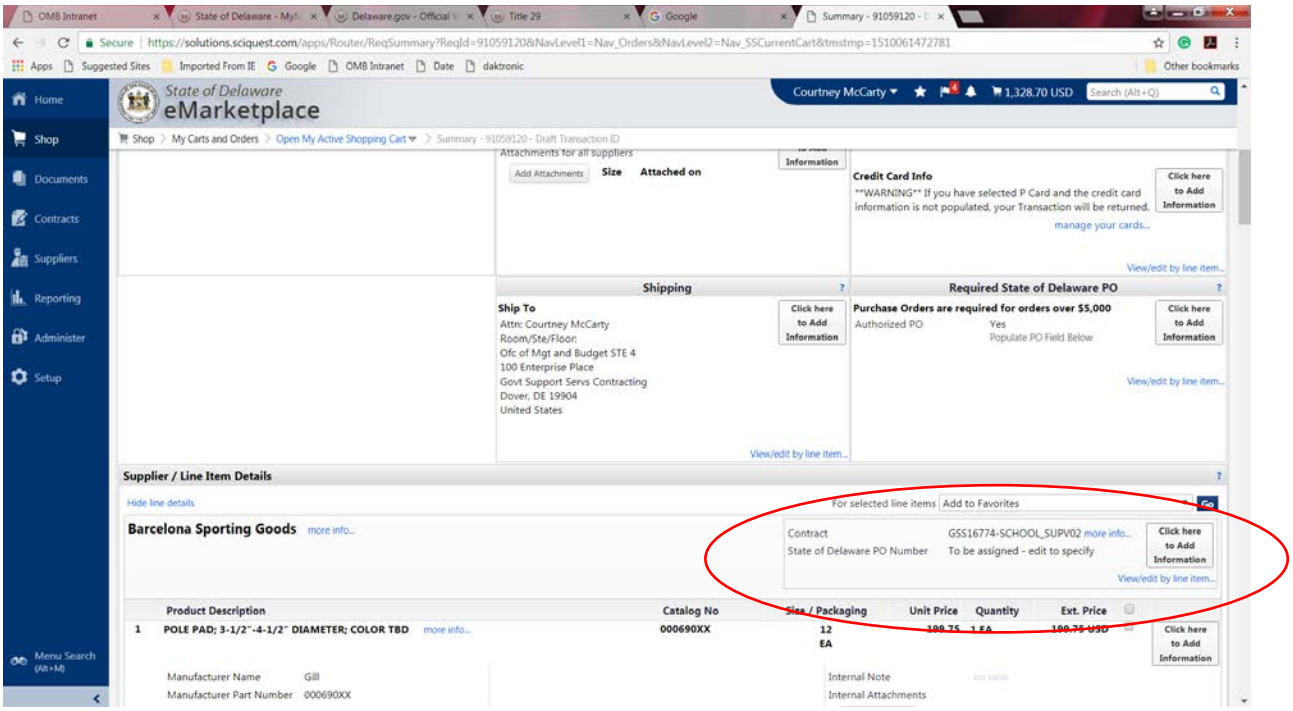


  - **Billing/Payment Options**: The second **Click here to Add Information** will need to be completed with each order. After clicking the button you will select **Payment Option/Enter State PO# if available**. From the drop down you can select: **Invoice Me Later** or **P Card**. Once you have made your selection you can click **Save**.
  - **Credit Card Info**: The third **Click here to Add Information** will need to be completed anytime you select P Card as the Billing/Payment Option. Enter your credit card details and click **Save**. *While you can save a credit card, for convenience, it will not store the security code. You do not want to click **manage your cards…** Using this option will not give you the opportunity to add your cards 3 digit security code and your cart will be rejected.* Use the **Click here to Add Information** button. Here you can select your stored card and enter the security code.

- **Shipping:** You will populate this address the same way we did the Bill To Address above.
- **Required State of Delaware PO:** For each order you will need to complete this section. After clicking, **Click here to Add Information** you will click **Payment Option/Enter State PO# if available**. From the drop down box you can choose **No – No Further Action Necessary** or **Yes – Populate PO Field Below**. *Please note you will not enter the PO # in this section of the order Summary.*

That completes the Order Summary Basics. If you are not using a Purchase Order you can proceed with placing the order or assigning the cart. If you are using a Purchase Order you need to enter the PO#. Because a cart can have multiple vendors in it (your internal policies may restrict this.) **the PO# is entered at the Supplier Details**. This will be just below the Shipping and Required State of Delaware PO Boxes.

You will once again **Click here to Add Information**. A text field will appear where you can enter your State of Delaware PO#. Once complete click **Save**.

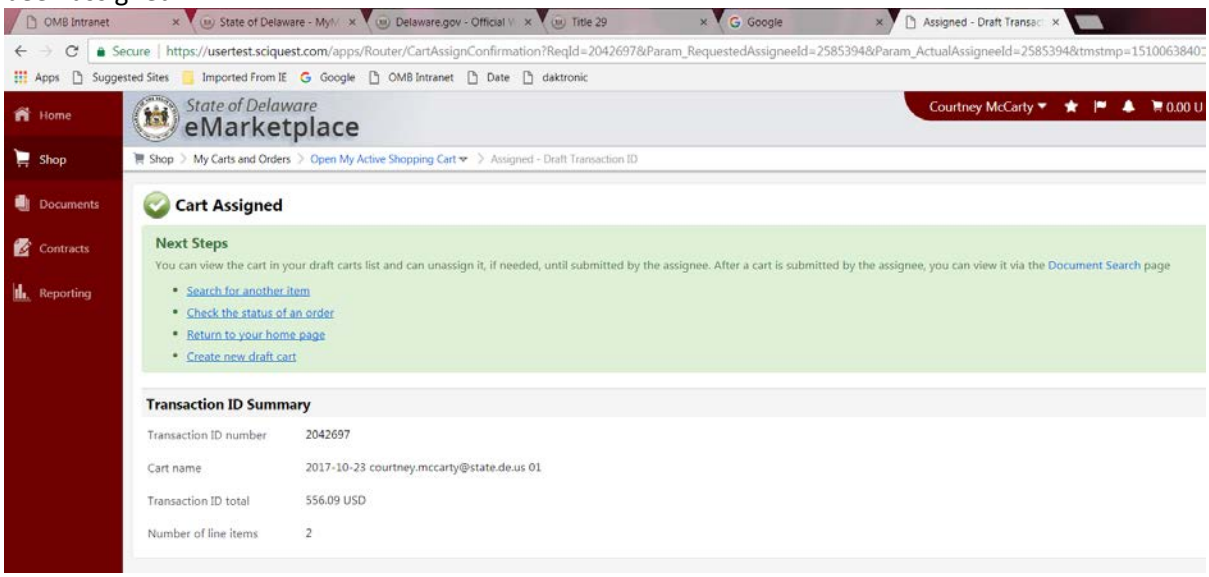


Placing your Order

You are now ready to place the order. The following instructions will be based on the Shopper & Requester Roles.

Shopper

- You will have one option – Assign Cart. After you click **Assign Cart** a box will appear. You will first click **Search for an assignee**. You can search by any of the available fields or you can simply click Search and it will bring up all your available options. Click **Select** for the appropriate person and then **Assign**. You will receive a message similar to the screenshot below, showing the cart has successfully been assigned.



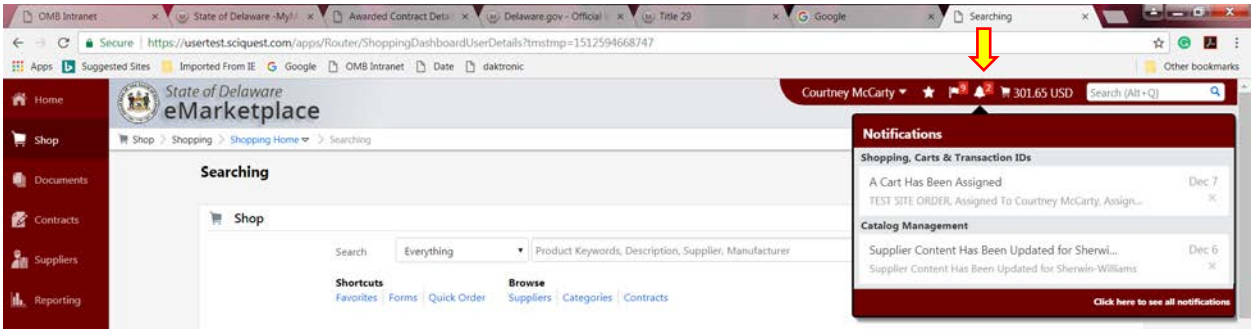
Requester

As a Requester you can submit a Shoppers cart or create and submit your own cart. **Submit Requisition** will send the order to the vendor(s) for processing.

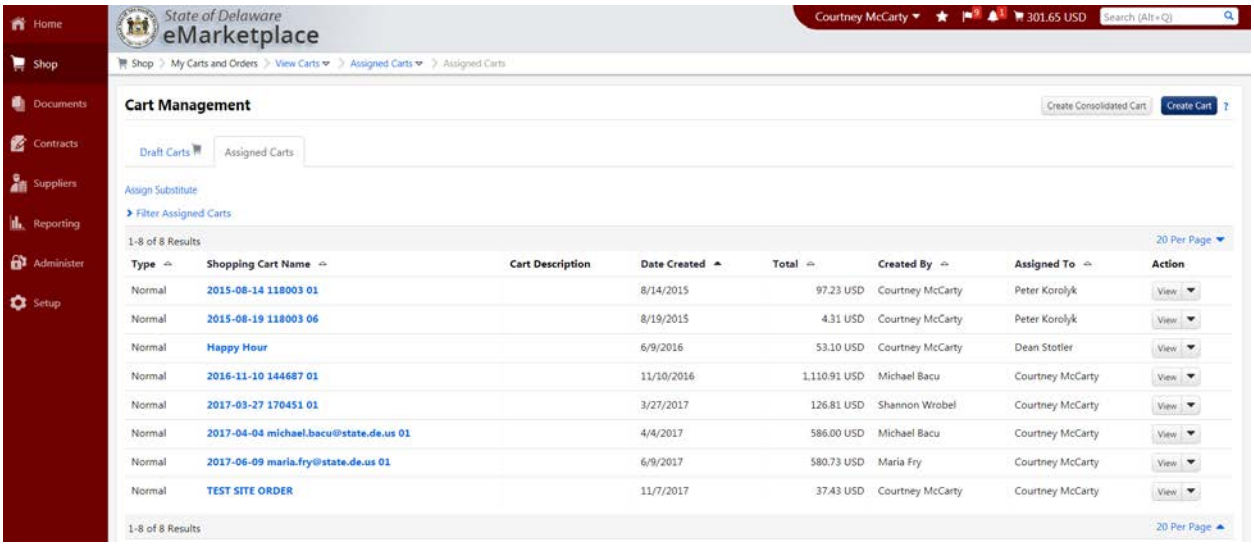
Submitting Shopper Cart

You received a notification that a Shopper has assigned their cart to you, now what? You can access the cart, one of two ways…

From the top right hand side, clicking on the bell and then the cart assignment notification.

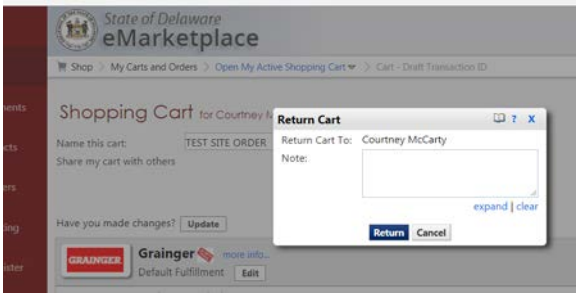


This action will bring you to the **Assigned Carts** list. You can also get here from the left hand side menu (**Shop > My Carts and Orders > View Carts > Assigned Carts**).



Click on the appropriate cart name to view the order. Once the cart has been brought up you can review the order details.

- If no edits to the cart are required and you are ***approving the order*** you can **Proceed to Checkout**. Review the **Summary** tab to ensure all required information has been filled in and accurate. Once satisfied click **Submit Requisition**.
- If edits are required to the cart and you wish the Shopper to make the changes you can **Return Cart**.



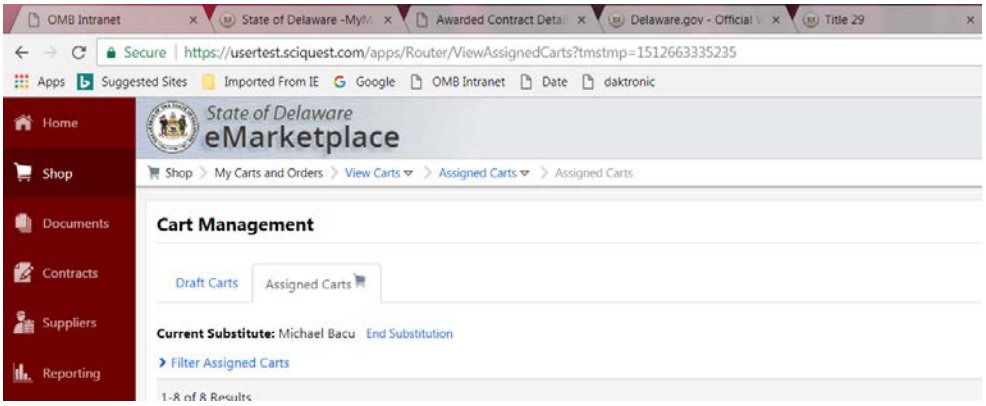
A note box will populate so you can include a message to the shopper on why the order has been returned.

Assign a Substitute

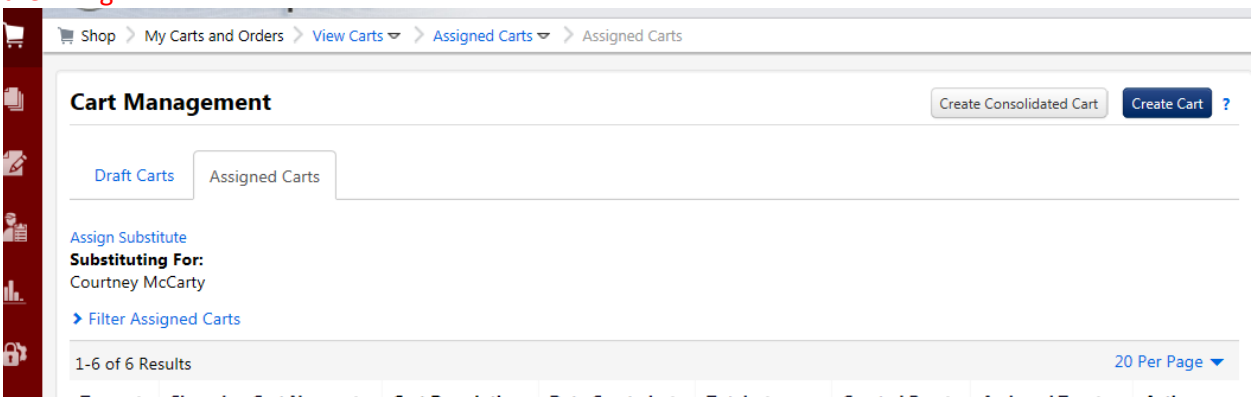
You are the only Requester for your Office and will be on vacation for a week. Orders may need to be reviewed and approved while you are out. What do you do? Assign a Substitute. Please note this person will need to have the Requester role in order to process orders in your absence.

From the left side menu select **Shop > My Carts and Orders > View Carts > Assigned Carts**.

1. Click the **Assign Substitute** link.
2. From the User Search window, and enter sufficient details to find your substitute. Click **select** next to the appropriate person. Your assigned carts tab will now show your current substitute's name.
3. When you have returned and the substitution is no longer needed click **End Substitution.**



Please note that your "substitute" will not receive a system notification that they are substituting for you. Make sure you let them know. When they do sign in they will see under **Assigned Carts** that they are filling in.



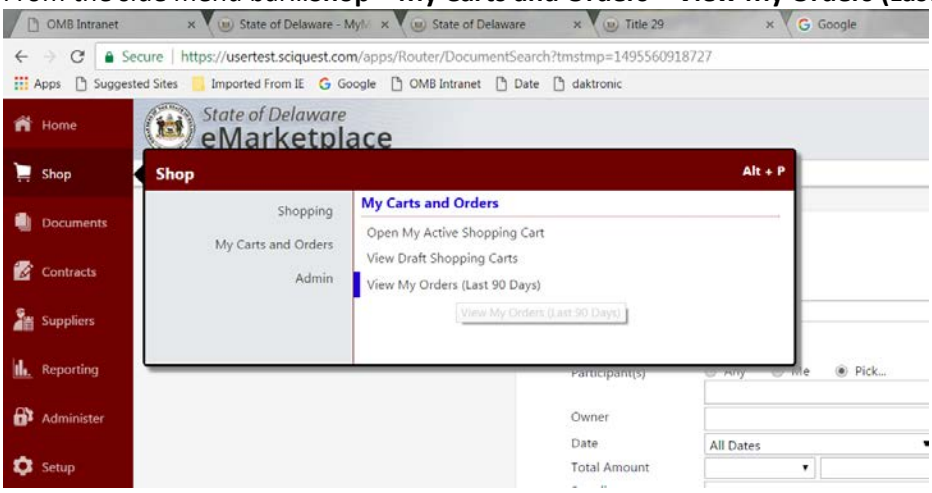
Tips and Tricks

To help you navigate the system a few tips and tricks have been incorporated. If you run across something that you cannot find the answer to within this document you can check out the training snippets and FAQs online or send an email to eMarketplace@state.de.us for further assistance.

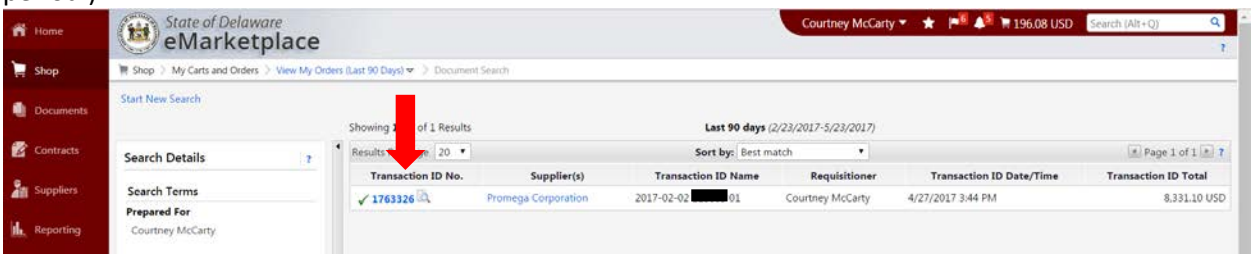
Re-order Item

Let's say you need to reorder an item; however, it was not saved as a "favorite". If you know the order number you can open the previous order, mark the item, and copy it to an active cart. Refer to screenshots below for guidance.

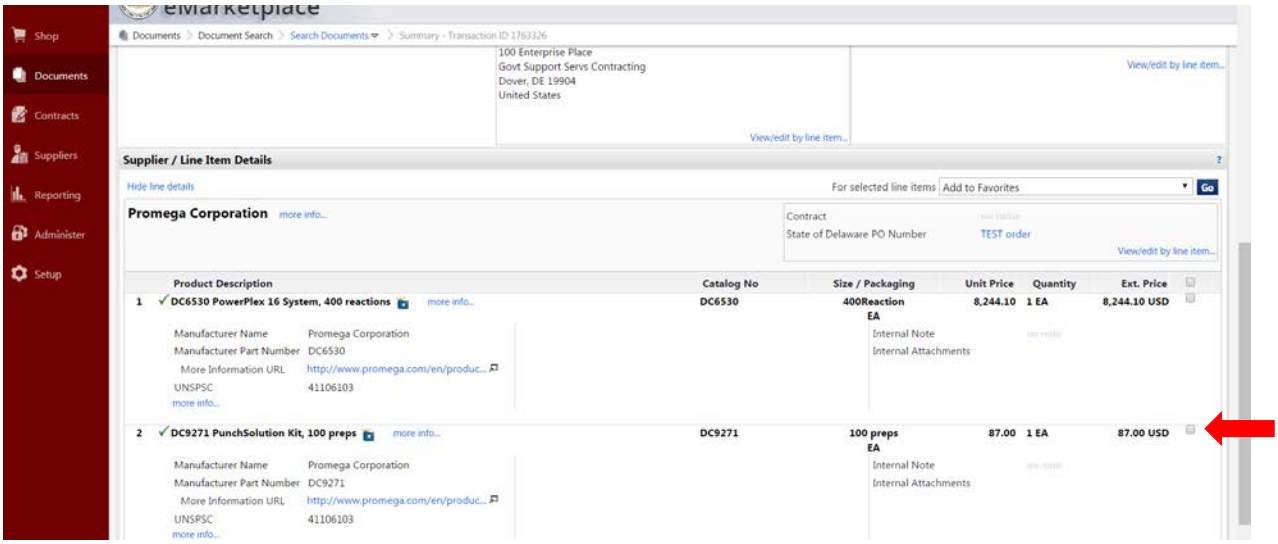
From the side menu bar…**Shop** > **My Carts and Orders** > **View My Orders (Last 90 Days)**



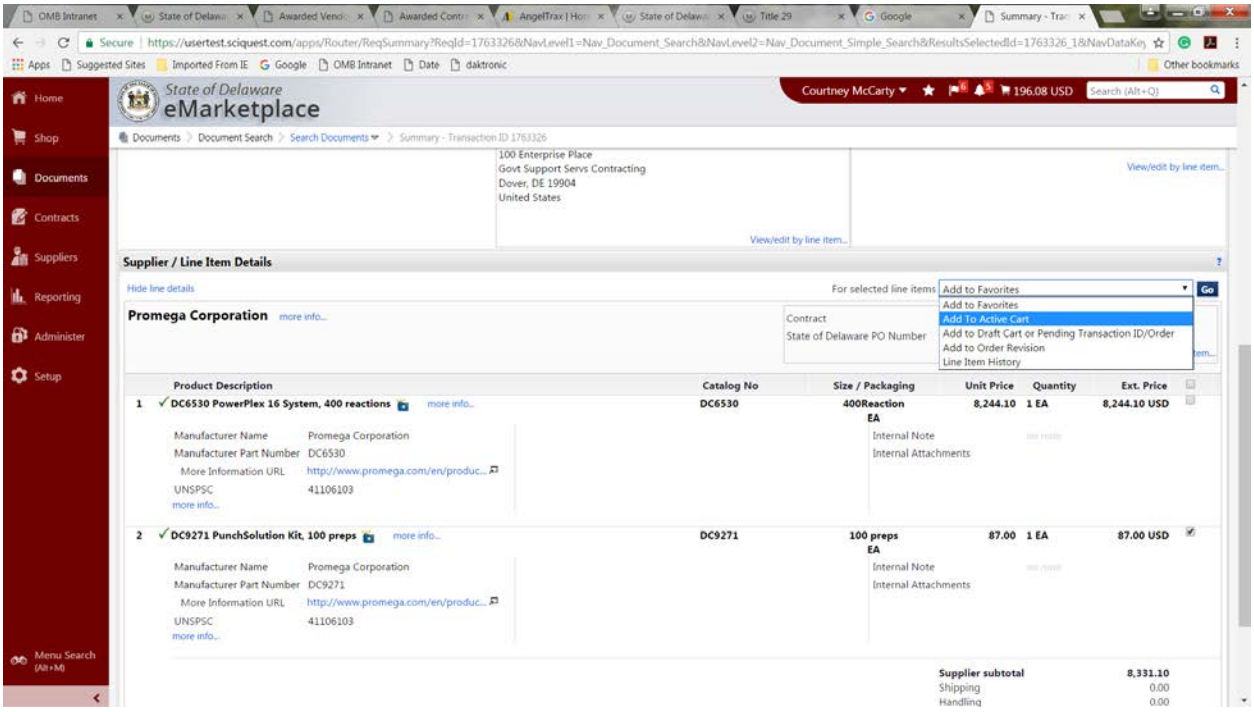
Select the appropriate cart, by clicking on the **Transaction ID No**. (You may have to adjust the search period.)



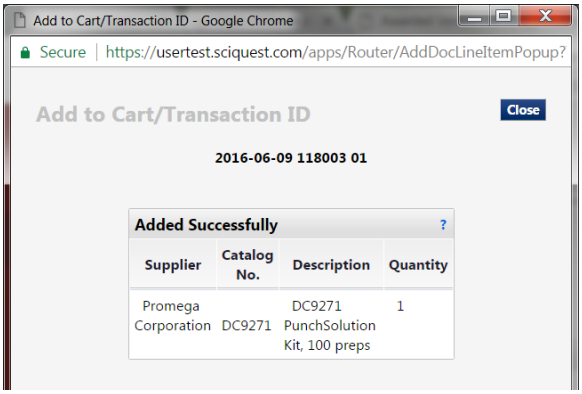
When the order opens you will be on the **Summary** tab, you will need to scroll down to see the items included in the previous order. Once you have identified the item you need to reorder, check the box next to the item.



Go to the **For selected line items** just below **Supplier/Line Item Details** header and select **Add to Active Cart** from the drop down. Then click **Go**.

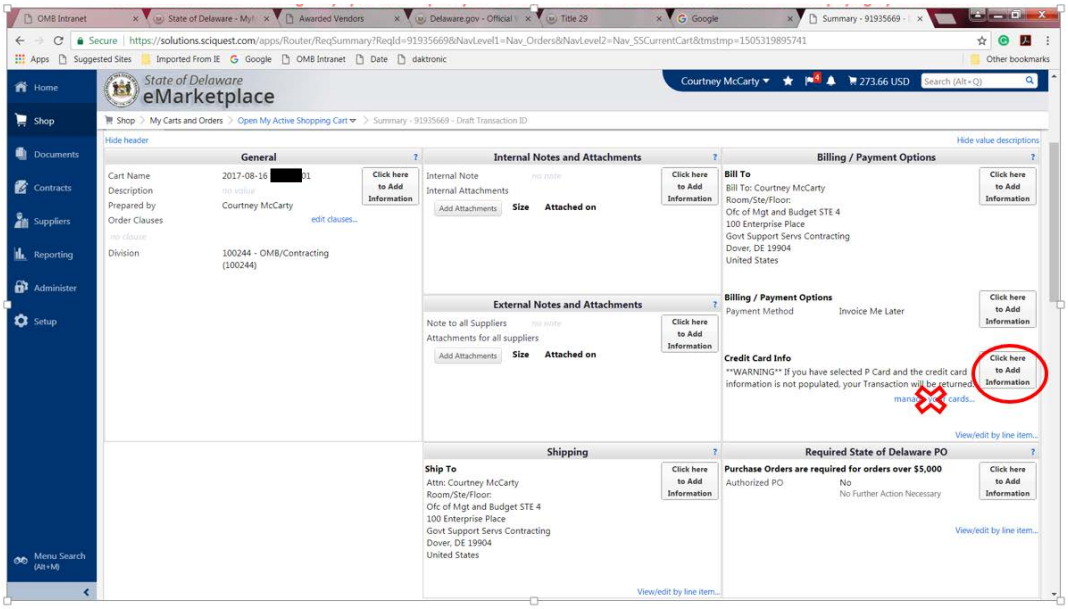


The item will appear in your active cart and you will receive the following message. After clicking Close, you will remain on the previous order details. Click **Home** to **continue shopping** or click on your **shopping cart** to **Proceed to Checkout**.



Managing Your Cards

While you can store your credit card, it does not save the security code. When in the checkout process if you “manage your cards” instead of “Click here to Add Information” you will not be prompted to enter the security code and your cart will be returned.

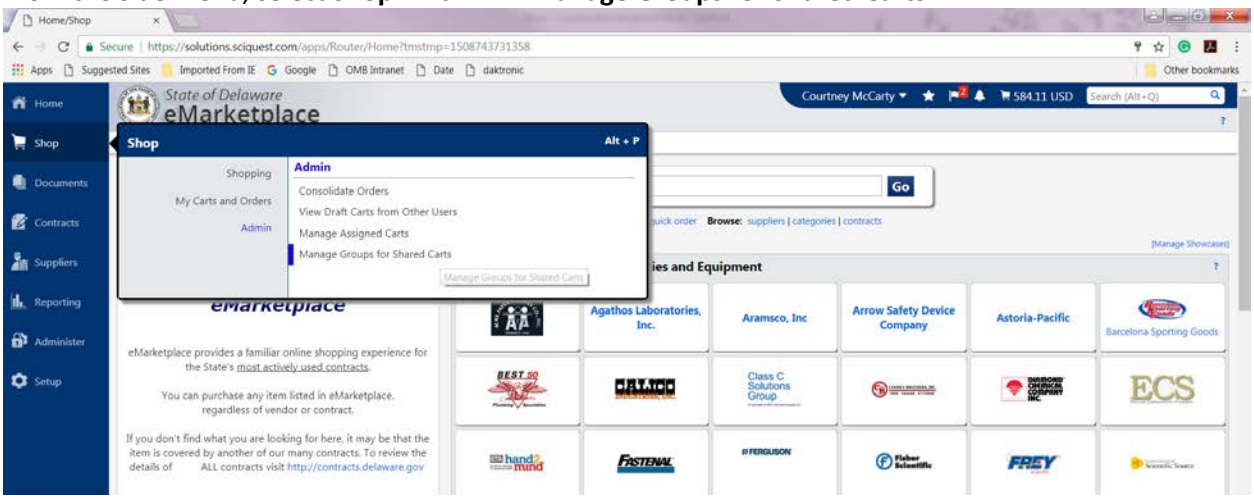


Shared Carts

In order to create a Shared Cart group, the creator must have Shared Cart permissions. Permissions can only be given by Central Administrator. Once permissions have been granted…

Shared Cart Set-up

From the side menu, select **Shop** > **Admin** > **Manage Groups for Shared Carts**



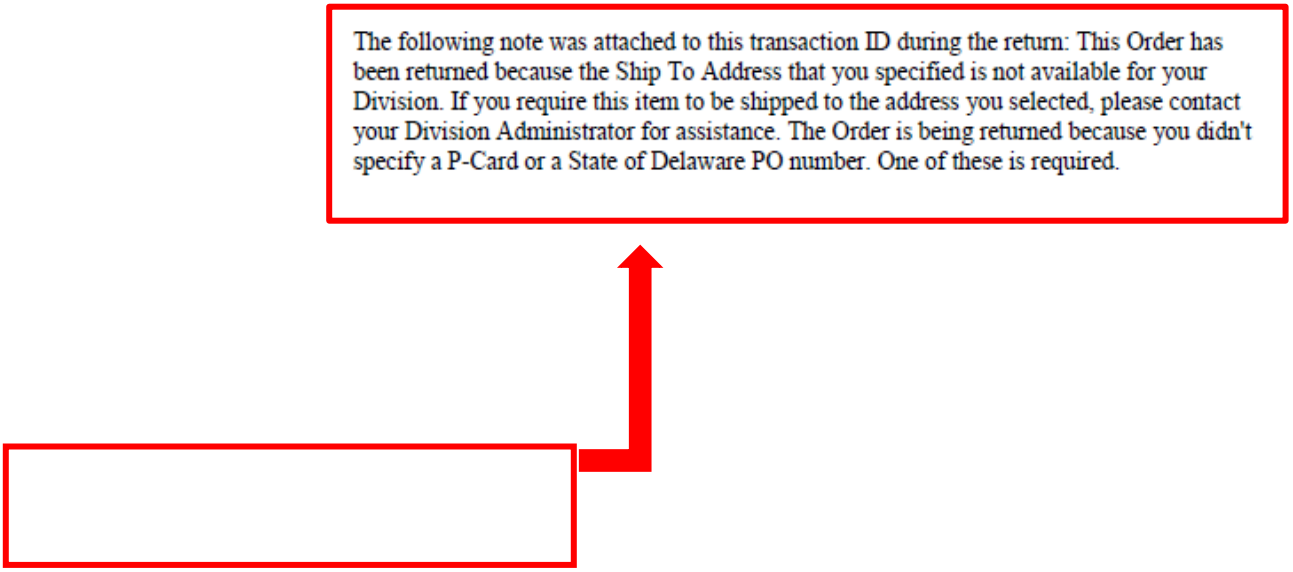
Click **Create New Group. Name** the group and **Save.** To add individuals to the group click on **user**, under User Group Members. Once you have added your individuals **save**.

Shared Cart Creation

1. Create a draft cart and select the box **Share my cart with others**.
2. Select the group the cart is to be shared with.
   **The other users in the group can then have visibility to the cart. They can lock the cart so that no one else can make changes while they are working on it.*

Returned Cart

You double check your cart before submitting and are confident you did everything correctly, and then an email pops up that says your cart was returned! What happened? At the very bottom of the email you will find a reason for the return. It is below the closing salutations so can be hard to spot (refer to screenshot below so you know where to look.)



Reasons for Returns and how to fix:

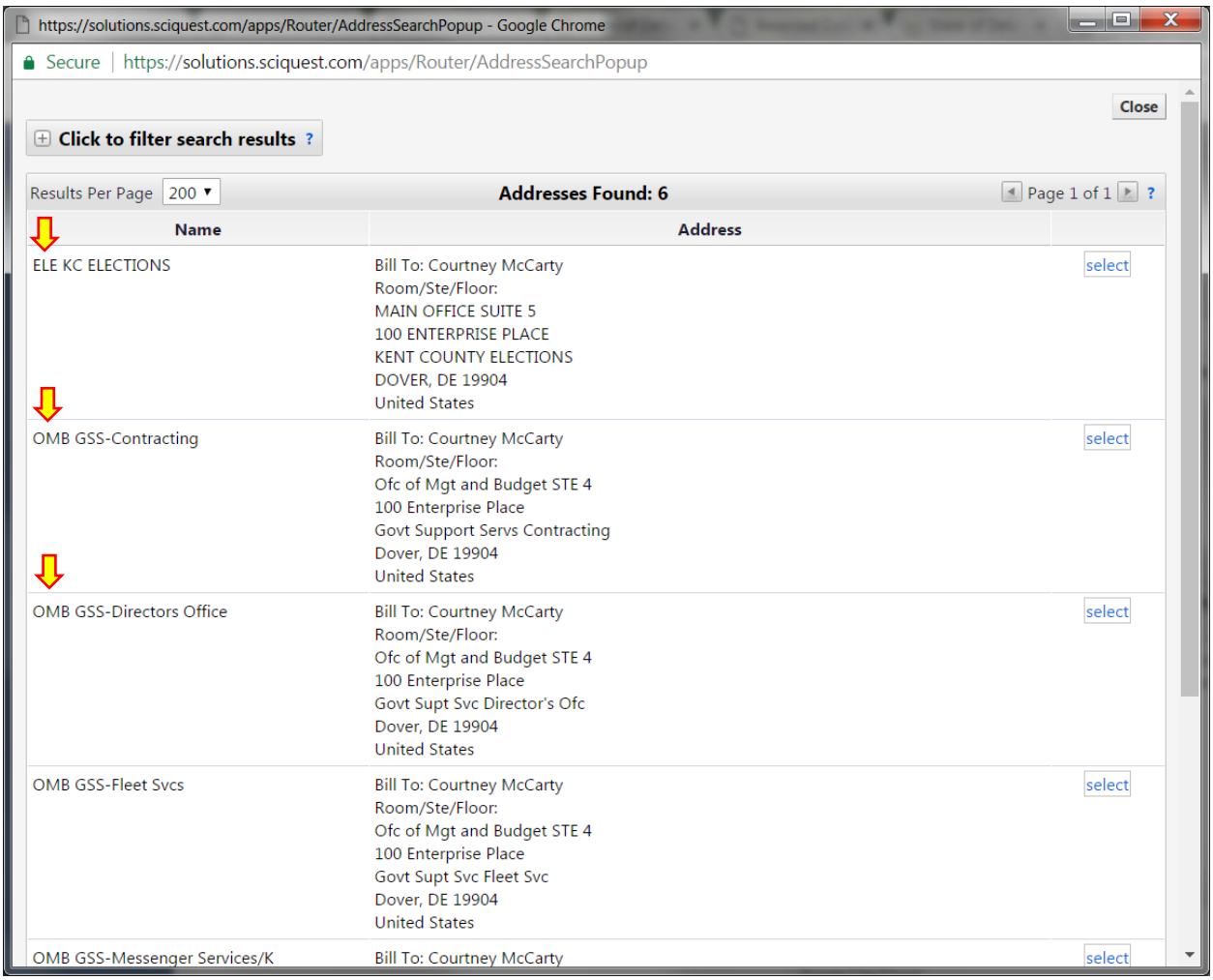
Reason: The Order is being returned because you didn't specify a P-Card or a State of Delaware PO number. One of these is required.

What: Chances are you entered your P-Card information; however, missed selecting P-Card as the payment option *(or entered the P-Card details using manage my card, instead of **Click here to Add Information**. For this error, click here to go to section covering this error.)*

Fix: If you open the cart and go to the Summary tab, you should see a yellow box on the right hand side stating **Required Entry**. Simply click on the pencil in the yellow box (or "click here to Add Information"). Click **Payment Option/Enter State PO# if available** and select P Card from the drop down menu. You should now be good to go!

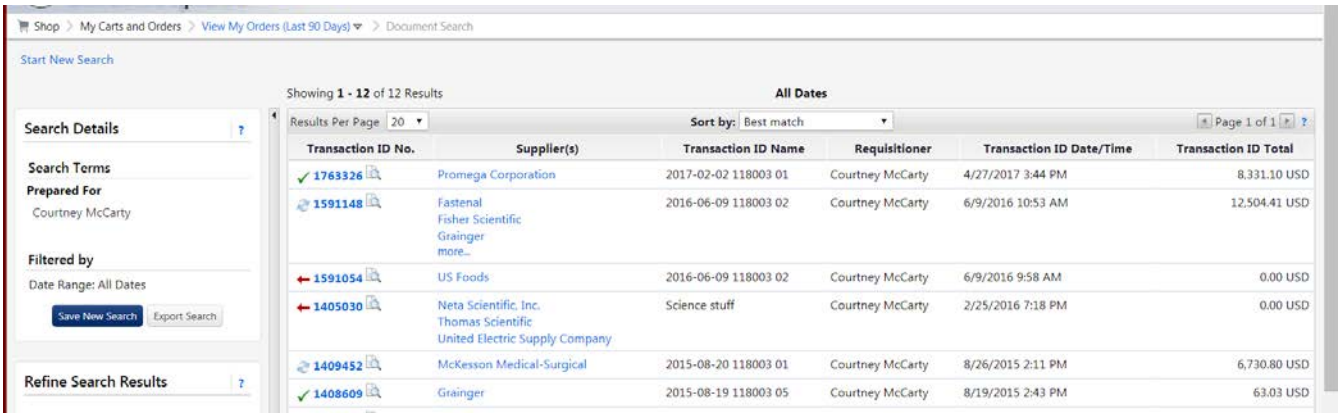
Reason: This order has been returned because the Ship To Address that you specified is not available for your Division.

What: The address is correct, but is it? Does the location have multiple agencies? You may have inadvertently selected another Agency's address (Example: DHSS selecting a DSCYF address)
Fix: Double check the address. From the address search box, you will see a "Name" assigned to each address. Does the "Name" you originally selected have your Agency abbreviation associated, or another agency's? Using the screenshot below as an example: working within OMB, my order will not go through if the ELE address is selected.



Order History

Not sure the order went to the vendor? Let's take a look. From the side bar menu, select Shop, **My Carts and Orders**, **View My Orders (last 90 days)**. If you need to expand the date range you can do so once the search details populates. You will see something similar to the screenshot below.



- The ***checkmark*** next to the Transaction ID No. means the order has been sent successfully to the vendor(s).
- The ***two arrows circling*** each other, means the order is pending for some reason.
- The ***red arrow point*** to the left means the cart was rejected for some reason.

To expand the dates, under **Refine Search Results**, select the appropriate option under **Date Range** from the drop down.