

Shopper Guides

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Create Default Profile Information

Task Definition: Select and save a default person who will be getting your cart and completing the order process – known as the **Assignee**.

In this task – Add assignees and set the default assignee by:

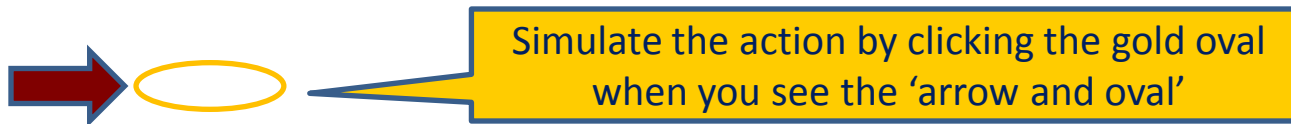
- Assignee first/last name
- Email address
- PennKey

Steps – Go to the **'User Info'** tab and select the **'Purchasing'** sub-tab:

- Search for your default Assignee
 - Click **[Add Assignee]**
 - Search by Name or Email address
- Select your default Assignee
 - From the list of results click the button in the column marked **'Preferred'**



The Assignee must have access to BEN Buys as either a Requisitioner or Purchase Order Manager.



To see this in **Shopper**...click [here](#) 

Step 1: Setting up the Default Assignee

My Profile Search for Catalog No. (SKU)

home/shop | favorite lists | forms | carts | user info | AAA | ?

User Settings | **Purchasing** | Permissions | History

Custom Fields | Purchasing/Approval Limits | Addresses | Product Views | Punch-out Access | **Cart Assignees** | ?

Search for and add new assignees to your profile.

Select a default assignee to make assigning your carts easier.

My Cart Assignees

Name	Preferred	Delete
KAREN M 10012640 HIGGINS	<input checked="" type="radio"/>	<input type="button" value="Delete"/>
BRIAN 10149957 CAPUTO	<input type="radio"/>	<input type="button" value="Delete"/>

https://usertest.sciquest.com/apps/R...638387&LeftNav=&tmstmp=1310495665716

Task Definition: Keep your preferences and default Assignee up to date.

In this task – You maintain the data that makes your shopping experience more efficient.

- Add Assignees to your stored list of assignee names
- Select/change your default assignee

Steps – Go to the **user info** tab and select the **Purchasing** sub-tab

- Click **[Add Assignees]** to add additional Assignees to your profile, and **[Delete]** to remove Assignees
- Click the **'Preferred'** button to set your default approver



Remember to save your changes after editing your Profile information.



Simulate the action by clicking the gold oval when you see the 'arrow and oval'

To see this in **Shopper**...click [here](#)



Step 1: Add Assignees



Go to 'user info' Tab and select the 'Purchasing' sub-tab and 'Cart Assignees'

My Profile

Search for Catalog No. (SKU)

home/shop | favorite lists | forms | carts | **user info** | | ?

User Settings **Purchasing** | Permissions | History

Custom Fields | Purchasing/Approval Limits | Addresses | Product Views | Punch-out Access | **Cart Assignees** | ?

Search for and add new assignees to your profile.

←

My Cart Assignees		
Name	Preferred	Delete
KAREN M 10012640 HIGGINS	<input checked="" type="radio"/>	<input type="button" value="Delete"/>
BRIAN 10149957 CAPUTO	<input type="radio"/>	<input type="button" value="Delete"/>

https://usertest.sciquest.com/apps/R...638387&LeftNav=&tmstmp=1310495665716

Click **[Add Assignees]** to add new Assignees, and **[Delete]** to remove existing Assignees



Step 2: Set/Change Default Assignee

Go to 'user info' Tab and select the 'Purchasing' sub-tab and 'Cart Assignees'

My Profile Search for Catalog No. (SKU) Go

home/shop | favorite lists | forms | carts | user info

Add Comment

User Settings **Purchasing** Permissions History

Custom Fields | Purchasing/Approval Limits | Addresses | Product Views | Punch-out Access **Cart Assignees**

Add Assignees

Select a default assignee

Name	Preferred	Delete
KAREN M 10012640 HIGGINS	<input checked="" type="radio"/>	Delete
BRIAN 10149957 CAPUTO	<input type="radio"/>	Delete

Click the 'Preferred' button to select and/or change your default Assignee

Create a Shopper Cart

Task Definition: Search for and select items from the Penn Marketplace.

In this task – Find items and add them in your *shopping cart*, such as:

- Office supplies
- Lab supplies
- Computer supplies

Steps – After logging on to the Penn Marketplace as a Shopper:

- Search for item(s) by:
 - Description
 - Part #
 - Supplier
 - Supplier punch out ordering site
- Use filters to narrow your search, for example:
 - Supplier
 - Category
 - Unit of measure (UOM)
- Add the item(s) to your cart



You may repeat the steps in this task as necessary.

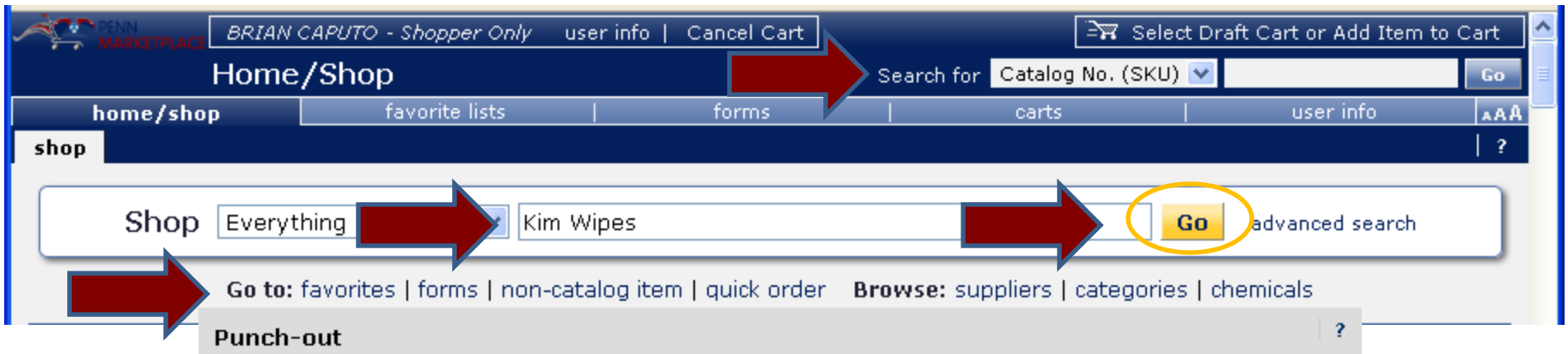


Simulate the action by clicking the gold oval when you see the 'arrow and oval'

To see this in **Shopper**...click [here](#)



Step 1: Search for items(s)



The screenshot shows the top navigation bar of the Penn Marketplace website. At the top left, it displays the user name "BRIAN CAPUTO - Shopper Only" and options for "user info" and "Cancel Cart". On the right, there is a shopping cart icon and a button that says "Select Draft Cart or Add Item to Cart". Below this, the "Home/Shop" section includes a search bar with a dropdown menu set to "Catalog No. (SKU)" and a "Go" button. A red arrow points to this search bar. Below the search bar is a navigation menu with tabs for "home/shop", "favorite lists", "forms", "carts", and "user info". A red arrow points to the "forms" tab. Below the navigation menu is a "shop" section with a search bar containing "Everything" and "Kim Wipes". A red arrow points to the "Everything" dropdown, another red arrow points to the search input field, and a yellow circle highlights the "Go" button. Below the search bar, there are links for "Go to: favorites | forms | non-catalog item | quick order" and "Browse: suppliers | categories | chemicals".

Search by a variety of methods, for example: product description, part number, supplier name or Penn specific ordering sites.



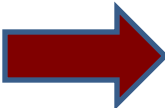
The grid displays various supplier logos categorized into three sections:

- Lab Supplies:** Technologies, RNA Sequences, Life Technologies, Chemicals
- Medical/Clinical:**
 - BENCO Dental
 - HENRY SCHEIN® Dental, Clinical, Athletic Supp
 - MCK McKesson Medical Surgical
 - OM Owens & Minor
- Office/Technology:**
 - DELL™ Computer Hardware
 - lenovo Computer Hardware
 - TELROSE Office DEPOT Office Supplies
 - B&H Photo Supplies
 - CDWG Computer Supplies&Peripherals
 - club colors Custom Imprinted Apparel



Step 2: Use filters to narrow your search

Filters help narrow your search results



- Filter Results**
- By Custom Attribute**
 - Green (8)
 - By Product Flag**
 - Recycled (21)
 - By Supplier**
 - Fisher
 - Scientific (2)
 - Office Depot (99)
 - TestSupplier_Content (5)
 - By Supplier Class**
 - Contract Supplier (2)
 - Free Ground Shipping (2)
 - (AT) Small Business Enterprise (2)
 - By Category**
 - Chart Paper (2)
 - Correction fluid (1)
 - Mimeograph paper (1)
 - Multipurpose paper (19)
 - Printer or copier paper (72)
 - By Packaging UOM**
 - 5/BX (1)
 - 10/BX (2)
 - 500/BX (1)
 - CS (1)
 - 1/CS (2)
 - By Result Type**
 - Products (106)
 - By Manufacturer Name**
 - Ability One (7)
 - Boise (10)
 - Corporate Express (1)
 - Domtar (5)
 - Domtar Paper (10)

available	Manufacturer Info	STP135855 - (Corporate Express)	1	Add to Cart	add favorite compare
	Hammermill Color Copy Paper, 11in. x 17in., 28 Lb., 96 Brightness, Ream Of 500 Sheets	from Office Depot	Part Number 343427	Manufacturer Info 10254-1 - (Ibrands/Hammermill Paper)	Order from Supplier EA add favorite compare
	Hammermill Color Copy Paper, 8 1/2in. x 11in., 28 Lb., 96 Brightness, Ream Of 500 Sheets	from Office Depot	Part Number 343454	Manufacturer Info 10246-7 - (Ibrands/Hammermill Paper)	Order from Supplier EA add favorite compare
	Xerox High-Speed Copy Paper, 8 1/2in. x 11in., 20 Lb., 84 Brightness, Case Of 10 Reams	from Office Depot	Part Number 275474	Manufacturer Info 3R2047 - (Xerox Corp)	Order from Supplier EA add favorite compare
	Xerox High-Speed Copy Paper, 8 1/2in. x 11in., 20 Lb., 84 Brightness, Ream Of 500 Sheets	from Office Depot	Part Number 345603	Manufacturer Info 3R2047RM - (Xerox Corp)	Order from Supplier EA add favorite compare
	Xerox High-Speed Copy Paper, 8 1/2in. x 14in., 20 Lb., 84 Brightness, Ream Of 500 Sheets	from Office Depot	Part Number 345611	Manufacturer Info 3R2051 - (Xerox Corp)	Order from Supplier EA add favorite compare
	Xerox High-Speed Copy Paper, 11in. x 17in., 20 Lb., 84 Brightness, Ream Of 500 Sheets	from Office Depot	Part Number 345629	Manufacturer Info 3R3761 - (Xerox Corp)	Order from Supplier EA add favorite compare
	Hammermill CopyPlus(R) Copy Paper, 8 1/2in. x 11in., 20 Lb., 84 Brightness, Case Of 10 Reams	from Office Depot	Part Number 347005	Manufacturer Info 105007 - (Ibrands/Hammermill Paper)	Order from Supplier EA add favorite compare

You may use several filters in combination if necessary.

Step 3: Add the item(s) to your cart

per Only user info | Cancel Cart Select Draft Cart or Add Item to Cart

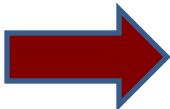


Product Search - All Search for Catalog No. (SKU) Go

favorite lists forms carts user info AAA ?

Everything Kim Wipes Go advanced search

Go to: favorites | forms | non-catalog item | quick order Browse: suppliers | categories | chemicals

Products per page 200 Compare Selected: 0

<p>Enter the quantity for each item selected.</p> 		<p>Kim Wipes Lens Cleaning Wipes, 200/BX from Bacter Shield Animal Health</p> <p>Part Number 23678 Manufacturer Info 34155 - (Kimberly Clark Profession)</p>	<p>5.17 USD BX</p> <p><input type="text" value="1"/> Add to Cart ▼ add favorite compare</p>
		<p>Vial, Autosampler; National Scientific; Target; LoVial; Crimp Top; Wide Opening; Amber with ID; 2mL; 12 x 32mm; Glass; Kim-Sheild; 100/PK from Fisher Scientific</p> <p>Part Number 03378350 Manufacturer Info C4011-K2W - (National Scientific)</p>	<p>9.99 USD PK</p> <p><input type="text" value="1"/> Add to Cart ▼ add favorite compare</p>

Click **[Add to Cart]** to add the product into your shopping cart.

Assign the Cart

Task Definition: Name and assign your cart to the person who will complete the order process.

In this task – Describe the need of the requirement and if applicable how the purchase will be funded and send your cart to an Assignee.

Steps – Select your cart from ‘Carts’ tab

- Name the cart
 - The cart name should help the Assignee know who the cart is from and what it is for
- Enter Cart comments
 - For example:
 - Why the product(s) is need and for whom
 - How the purchase will be funded
 - Unit of measure (UOM)
- Select the Assignee
- Confirm the cart assignment



You may assign your cart to your default Assignee or select a different Assignee as needed.



Simulate the action by clicking the gold oval when you see the ‘arrow and oval’

To see this in **Shopper**...click [here](#)



Step 1: Name the Cart

BRIAN CAPUTO - Shopper Only user info | Cancel Cart 2011-07-12 bcaputo 02 | 1 item(s), 9.99 USD

Cart - Draft Requisition Search for


home/shop | favorite lists | forms | **carts** | user info | AAA


active cart | draft carts | favorites

 **Shopping Cart** for BRIAN CAPUTO - Shopper Only 1 Item(s) for a total of **9.99 USD**

Name this cart: Enter a cart name in 'Name this cart'

Have you made changes? Perform an action on (0 items selected)...

 **Fisher Scientific**  **1** more info...

Product Description		Unit Price	Qty/UOM	Total
Item added on Jul 12, 2011 <input type="button" value="Add to Favorites"/> <input type="button" value="Remove"/> <input type="button" value="More Actions"/>	 Vial, Autosampler; National Scientific; Target; LoVial; Crimp Top; Wide Opening; Amber with ID; 2mL; 12 x 32mm; Glass; Kim-Sheild; 100/PK Part Number 03378350 Manufacturer Info C4011-K2W - (National Scientific)	9.99 USD 100/PK, PK	<input type="text" value="1"/> <input type="button" value="Update"/>	9.99 USD

Provide a useful cart name when forwarding to the Assignee.

Step 2: Select the Assignee

BRIAN CAPUTO - Shopper Only user info | Cancel Cart

2011-07-12 bcaputo 02 | 1 item(s), 9.99 USD

Cart - Draft Requisition

Search for Catalog No. (SKU) Go

home/shop | favorite lists | forms | carts | user info

active cart | draft carts | favorites

Shopping cart

Name this cart: 20

Have you made changes? Update Help Add Non-Catalog Item

Fisher Scientific SBE 1 more info...

Product Description

Item added on Jul 12, 2011

Add to Favorites Remove More Actions

larger image

Vial, Autosampler; National Scientific; Target; LoVial; Crimp Top; Wide Opening; Amber with ID; 2mL; 12 x 32mm; Glass; Kim-Sheild; 100/PK

9.99 USD 1 9.99 USD
100/PK, PK Update

Part Number 03378350
Manufacturer Info C4011-K2W - (National Scientific)

Assign Cart

KAREN M 10012640 HIGGINS
Select from saved assignees
Search for an assignee

Comment To Assignee: This is a comment

expand | clear

Note: After a cart is submitted, it can be viewed via History. Prior to being submitted, the cart can be viewed in Draft Carts and can be unassigned (withdrawn) if needed.

Assign Cancel

Your default Assignee will be showing as the current Assignee.



You can search for and select a different Assignee by clicking the link 'Search for an assignee'.

Step 3: Enter Cart Comments



The screenshot shows the 'Cart - Draft Requisition' page for user BRIAN CAPUTO. A modal window titled 'Assign Cart' is open, showing the assignee 'KAREN M 10012640 HIGGINS' and a text input field for a comment containing 'This is a comment'. A red arrow points from a yellow callout box to the comment field.

After clicking [Assign Cart], the comment box opens.

Assign Cart

Assign Cart To: KAREN M 10012640 HIGGINS
Select from saved assignees
Search for an assignee

Comment To Assignee: This is a comment

expand | clear

Note: After a cart is submitted, it can be viewed via History. Prior to being submitted, the cart can be viewed in Draft Carts and can be unassigned (withdrawn) if needed.

Assign **Cancel**

Item added on Jul 12, 2011

Add to Favorites **Remove** **More Actions**

Fisher Scientific **Fisher Scientific** **SBE** **1** more info...

Product Description

Vial, Autosampler; National Scientific; Target; LoVial; Crimp Top; Wide Opening; Amber with ID; 2mL; 12 x 32mm; Glass; Kim-Sheild; 100/PK

9.99 USD 1 9.99 USD
100/PK, PK **Update**

Part Number 03378350
Manufacturer Info C4011-K2W - (National Scientific)

Enter a comment for the Assignee that will help them complete the order.

Step 4: Notification of Cart Assignment

Shopping Cart Information



Congratulations! Your cart was successfully assigned for further review.

Review the confirmation and verify that the cart items, total, and comments are correct.

At this point, you can view the cart in your draft carts list and can unassign, if needed, until submitted by the assignee. After a cart is submitted by the assignee, you can view it via requisition history search.

You included the following note for the assignee:

This is a comment

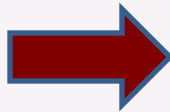
You have assigned the shopping cart to another user. At this time, you may close this frame or the browser.

Cart number	602876
Cart name	2011-07-12 bcaputo 02
Cart total	9.99 USD
Number of line items	1

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

- Search for another item
- Return to your home page
- Create new draft cart

Choose the next action





Unassign Carts

Task Definition: Withdraw a cart(s) that has not been picked up yet by an Assignee.

In this task – Unassign a cart so you can edit the cart contents and/or the cart comments.

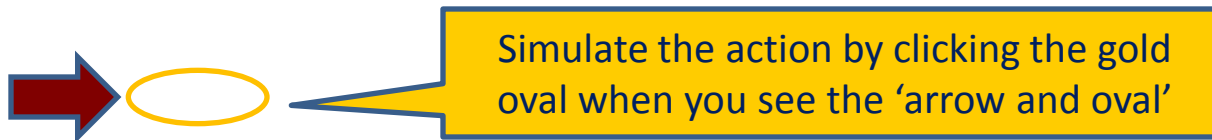
- The unassigned cart becomes your active cart



You can reassign the cart back to the original Assignee or select a different Assignee when reassigning the cart after editing.

Steps – Go to the Carts tab and select the Draft Carts sub-tab

- Click [**Unassign**] to remove the cart from the Assignee and make it your active cart



To see this in **Shopper**...click [here](#)

Step 1: Unassign the Cart(s)

Go to 'carts' Tab and select the 'draft carts' sub-tab

BRIAN CAPUTO - Shopper Only user info | Cancel Cart Select Draft Cart or Add Item to Cart

Penn Marketplace - Shopping Cart - Drafts Search for

home/shop | favorite lists | forms | **carts** | user info | AAA

active cart | **draft carts** | favorites | ?

My Draft Carts						legend	?
Active Cart	Shopping Cart Name	Date Created	Cart Description	Total	Delete		
	TEST Shopping cart for RETURN	7/6/2011		9.99 USD	<input type="button" value="Delete"/>		

My Carts Assigned to Others						legend	?
View Cart	Shopping Cart Name	Date Created	Assigned To	Total	Unassign		
	2010-12-02 bcaputo 01	12/2/2010	VIRA O 10154420 HOMICK	SD		<input type="button" value="Unassign"/>	
	2011-03-22 bcaputo 01	3/22/2011	VIRA O 10154420 HOMICK	1,045.60 USD		<input type="button" value="Unassign"/>	
	Centrifuge tubes for the new lab.	1/12/2011	RAVI 41949391 AVVARI	19.98 USD		<input type="button" value="Unassign"/>	

Click [**Unassign**] to remove the cart from the Assignee and make it your active cart.