



HigherMarkets Training Manual

For Requisitioners

SciQuest – October 2006

University of Texas, Medical Branch



SCIQUEST TRAINING MANUAL

PREPARED FOR

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PREPARED BY



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WELCOME

Objectives

The purpose of this handbook is to familiarize Requisitioners with the SciQuest HigherMarkets application. We hope it will help you:

- Understand the available functionality in the HigherMarkets application.
- Search for and order items at the best possible price.
- Create flexible, easy-to-understand purchase requisitions.
- Easily manage the requisition process.

Understanding the Format

A **Lesson** is created for each major functional area of the system. Within each lesson is an overview of the goals and functions within the lesson, along with an explanation of any new concepts.

Each lesson contains Exercises, which provide an explanation of the objective, and step-by-step instructions on how to perform the task. The following information is provided for each exercise:

Exercise Number

Exercise	Name of the exercise
Objective	Description of the functionality that the exercise demonstrates
Steps	List of steps to execute the exercise

What you will learn...

The document is organized according to the major functions of the SciQuest HigherMarkets application:

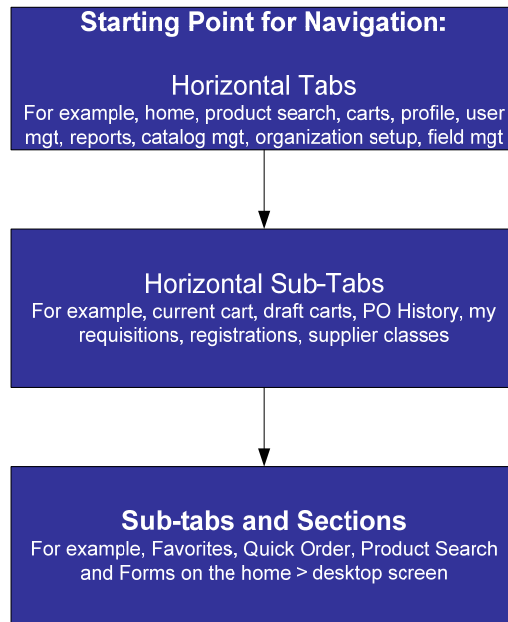
1. **The Basics**- includes an overview of accessing Online Help, and accessing the site (login).
2. **Searching for Items**- using the different types of search methods available, comparison shopping, ordering non-catalog items, and more.
3. **Favorites**- includes setting up items as personal favorites, along with creating folders to manage your favorites.
4. **Shopping Carts and Checkout**- including defining your requisition.

THE BASICS

Lesson 1: OVERVIEW

Site Navigation

Upon logging into the HigherMarkets application, it is possible to begin navigating through the system. The system can be navigated at two primary levels, which are shown below:



Navigation basics:


- How to get around the site...
 1. The first step of navigation is to select the desired area of the system in which to work using the navigation tabs (buttons) along the top of the application.
 2. To further drill-down into the system, select the appropriate sub-tab beneath the top level navigation.
 3. Various screens have additional tabs within the screen, such as on the product search screen which contains Favorites, Quick Order, Product Search, and Forms on tabs within the screen. Select a tab to retrieve the specific screen desired.

Navigation Details...

1. **User Information.** In the upper left-hand corner of the application, information about the user is displayed within a boxed area.
2. **Screen Title.** In the application header, just below the user information box, the title of the current screen displays.
3. **Cart Summary.** The upper right corner of the application displays a summary of the shopping cart. Included is the cart name (by default, this is your user name, the date, and sequential order # for the day), the number of items in the cart, and the total cart amount. Click this shortcut to go directly to the cart page where you the cart details can be reviewed and updated.
4. **Search for.** This feature allows a variety of searches to be executed from anywhere within the application. With the search fields readily available in the drop down menu, it is no longer necessary to navigate to specific screens to run the desired search.
5. **Navigation tabs.** Across the top of the application are navigation tabs. By clicking on these tabs, the information in the screen below refreshes to display the topic or function covered in that particular part of the application.
6. **Home**– provides access to the desktop home screens. From the desktop home screen, searches can be performed, the organizational message is displayed, and purchasing information can be reviewed. The last sub-tab selected is remembered and displayed the next time the home navigation tab is selected.
 - a. **My Favorites**– are used to create and define personal favorites folders and items. Items can be moved and copied between folders; current folders and items can be edited and removed. Note: Favorite items can be also be added through search results and the checkout screens.
 - b. **Product Search**– contains the same four tabbed screens shown on the home => desktop page, which allow detailed product searches, quick searches in the case where the product SKU is known, and ordering of favorite items.
 - c. **Carts**– is used to view and modify the current shopping cart, create new carts and delete existing carts, and prepare the cart for processing.
7. **Navigation Sub-tabs.** Beneath the top-level navigation is a level of sub-tabs. By clicking on these sub-tabs, the information in the screen below refreshes to display the specific topic or function covered in that particular part of the application.
8. **Search Options.** To access a specific function, click on the tab at the top of the box. The active tab is highlighted. From the Search tabs, a wide variety of functions are available, including the ability to execute detailed product searches and quick searches, in the case where the product SKU is known, and add favorite items to the cart.



Refer to the End-User Handbook for more information about Desktop features.

9. **Online Help.** Online Help is accessed by clicking on the question mark anywhere in the application () or by clicking on hyperlink text. Text with associated Help is indicated by text that changes colors when mousing-over the text. Much of the text in the application can be selected and a secondary Help window displays.

Lesson 2: ACCESSING THE APPLICATION

This lesson focuses on end-user access to the HigherMarkets application.

Key Concepts

Users and Roles


A user is any person that has access to the HigherMarkets application. UTMB roles include Requisitioners (users accessing the HigherMarkets application via PeopleSoft eProcurement) and Researchers (users directly accessing the HigherMarkets application for inquiry purposes)

Exercises

Logging into the Application

This exercise demonstrates how a user can log into the HigherMarkets application via PeopleSoft to create their eProcurement Requisition.

Exercise 1

Exercise	Logging into the Application
Objective	To log a user with appropriate permissions into the application
Steps	<ol style="list-style-type: none"> 1. Log into PeopleSoft using your username and password. 2. Access eProcurement => Create Requisition. 3. From the Find items tab, click the Research Marketplace link. <div style="text-align: center; margin: 5px 0;">  </div> 4. The HigherMarkets application displays. Once logged in, the Requisitioner permissions and functionality are accessible. <p>Note: You will make changes to your PS requisition as needed (i.e., funding, delivery, and shipping) in the same manner as all other PS punchout orders</p>

SEARCHING FOR ITEMS

Lesson 3: SEARCH METHODS

Key Concepts

Searching and Shopping Techniques

HigherMarkets provides several methods to find the appropriate items for requisitioning. Depending on the information known about the required product or service, one or more of the following methods can be used to search for the product or service:

- **Search by Vertical** – search results can be filtered to a specific product vertical/commodity to reduce the number of products found.
- **Search by Keyword** – product description, product category, supplier name, manufacturer name, catalog number, manufacturer's number and other key product descriptors can be used to find the required product or service.
- **Browse by Supplier** – filter results to those from a specific supplier.
- **Browse by Category** –view all items from all suppliers for a specific category (commodity).
- **Punchout Shopping** – search an external supplier's website, to find the required products for purchasing. Items are returned to the HigherMarkets shopping cart for processing.
- **Chemical Resource** –commercially available chemical products are found using chemical structures and sub-structures drawn by the user.
- **Antibody Resource** – parametrically search for antibody products by selecting host, species reactivity and other product attributes.
- **Quick Order** – if the exact catalog number is entered (supplier of manufacturer), Quick Order automatically adds the item to the cart without requiring the user to add the item manually.
- **Favorites** – store frequently ordered and preferred items in an organized personal manner for fast retrieval and requisitioning.
- **Product Comparison** –view side-by-side comparison of similar items to compare item details to make more informed.

Punch out and Hosted Catalogs







A catalog is a supplier's product offering. HigherMarkets provides access to both hosted and punch out catalogs. These are described below.

Hosted Catalog – SciQuest hosts hosted catalogs, i.e., SciQuest maintains the searchable database of participating supplier's catalog information. Each participating supplier provides the information. Hosted catalogs offer greater control to organizations for product presentation in Search Results, e.g., promotion of preferred vendors. Hosted catalogs enable searching across all suppliers with hosted catalogs simultaneously with a single consistent interface.

Punch out Catalogs – Search and content of supplier's product offerings are done through the supplier's website. Punch out catalogs are accessed through the HigherMarkets application by selecting the appropriate supplier's icon in the interface. The search interface, product presentation, and add to cart functionality varies by supplier.

Search Results Details and "How to's"

Search Results display at the lower portion of the screen. Below are some detailed explanations for the Search Results user interface:

- **Product Sorting.** By default, products are listed in the order of search results. In addition, products can be sorted by any column containing the  icon below the column name. Select  icon again to reverse the sort.
- **Icon Definitions.** Both products descriptions and supplier names may have icons next to them. The **Search Legend** link at the top and bottom of the Search Results launches a pop-up that explains each of the icons. Additionally, mouse-over text is available for icons to view their description.
- **Adding Items to Your Cart.** To add an item listed in Search Results to the shopping cart, enter the Quantity, and then click the  button. To add multiple items to the cart, select the checkbox next to each item in the Select column, choose the Add To Current Cart option in the drop-down action menu (default), then click the  button.
- **Adding Items to your Favorites.** You can also add items from your search results to your favorites by selecting Add to Favorites from the drop-down action menu (default), then click the  button.
- **Comparing Items in Search Results.** From the search results, product details can be compared to determine which one should be ordered. Select the check box next to the products to be compared, choose the compare products option in the action pull-down, and click the  button.
- **Access Additional Pages.** To page through search results, use the arrow buttons or page entry field to go to a specific page of search results. This information is displayed above and below the search results.

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Exercises

Searching by Vertical

Searching by product vertical helps reduce the number of products from appearing in Search Results by filtering out those not in the selected vertical. The available verticals are found on the Product Search tab of the Search interface.

The list of verticals available varies by organization depending on the suppliers enabled.



Exercise 2

Exercise	Selecting a Product Vertical
Objective	This exercise will demonstrate how to maneuver between product verticals.
Steps	<ol style="list-style-type: none"> 1. Login to the system. 2. Open the Product Search tab using one of the following methods: <ol style="list-style-type: none"> a. Select your organization's logo in the top left corner. This is a shortcut to the home page. From there, select the Product Search tab. b. From the home page navigation tab, select the Product Search tab. c. From the search navigation tab, select the Product Search tab. 3. If advanced search option... is displayed next to the Search button, click on advanced search option... to expand the product search area. 4. One or more verticals will display on the left side of the screen in the Categories section. 5. Select the vertical containing the product of interest by clicking it. The active vertical is highlighted. <p>TIP: HigherMarkets will remember the last vertical searched and will set this as the default vertical the next time the Product Search tab is accessed.</p> <ol style="list-style-type: none"> 6. Using the search criteria, enter keywords to find the desired item, and then click Search. 7. To perform additional searches... <ol style="list-style-type: none"> a. To perform the <i>same search</i> in a <i>different vertical</i>, simply select the new vertical. The values entered in the search criteria are preserved between verticals. b. To perform a new search and to remove the current values, click on the Product Search tab. The search interface is reset (keywords are

removed), but the vertical is the same as the last one selected.

Searching by Keyword



Help on using each of the search fields is accessed by clicking on the search field name, e.g., **must include the words**.

Keyword searching can be performed within any product vertical where hosted catalogs are available. The fields available vary depending on the type of item being searched. For example, although all verticals have the *include any of the words* field, you can only search by *CAS #*, which is an identifier specific to chemicals, in the Lab Supplies vertical.

Note: If a product vertical has only punch out suppliers, the search field interface is not available.

Key Points for Searching

- Select the **ALL** category for searching all hosted categories simultaneously. This is not recommended unless the vertical for the desired product or service is not known.
- **Multi-Searches**-multiple suppliers, manufacturers, or catalog numbers can be searched simultaneously to help limit search results. Use any of these search fields and separate the multiple values by a space.
- For best results, four (4) or more characters should be entered in the search criteria field.

Exercise 3

Exercise	Searching by Keyword
Objective	Find the desired products using the search criteria fields available through Product Search.
Steps	<ol style="list-style-type: none"> 1. Open Product Search. 2. If advanced search option... is displayed next to the Search button, click on advanced search option... to expand the product search area. 3. Select the desired vertical from the column on the left side of the screen. 4. Enter search tokens in the appropriate search field(s). An explanation of each of the fields is provided below. <ol style="list-style-type: none"> a. must include the words - Only products including all the words entered in this field are returned in search results. b. include any of the words - Search results will include products containing any of the words entered in this field. Products containing more than one word appear higher in search results than products with only one. c. include exact phrase - Products containing the exact words (including spaces and punctuation) in the ordered entered are returned. d. exclude the words - Products including any of the words entered in this field are excluded from Search Results. Another search field must be used when using the exclude function. e. Supplier Name - Enter the supplier's name in this field to limit results to the entered supplier. Enter multiple supplier names separated by spaces to limit results to a set of certain suppliers. f. Manufacturer Name - To find products produced by a specific manufacturer, enter the name of that manufacturer here Enter multiple manufacturer names separated by spaces to limit results to a set of certain manufacturers.

	<p>g. Catalog No. (SKU) - Enter the catalog number or SKU (Stock Keeping Unit) for the required product (s). To search for multiple catalog numbers, enter them separated by spaces.</p> <hr/> <p>TIP: For best results, the entire SKU should be entered. If the whole SKU is not known, use one of the keyword searches, e.g., must include. Or, select the Include similar terms check box, and include the known portion of the SKU.</p> <hr/> <p>h. Product Size - Enter the units for the product size and select the dimension of the units from the pull-down menu. For example, enter 500 for units and select mL from the pull-down for product size = 500mL. This is available only in the Lab Supplies category.</p> <p>i. CAS No. - This search field is available in the Laboratory Supplies category only. CAS numbers can be entered in any format using numbers, brackets, braces, parentheses and dashes. (Any other characters are stripped.) The search engine will convert the entered value to the appropriate format to return only products with the entered CAS number.</p> <p>j. Include similar terms - If the exact spelling or only partial search terms are known, select this box. The search engine finds products containing terms that are similar to those entered. Selecting/deselecting this box is remembered for future searches. Note: Use this option when exact searching does not yield the desired results.</p> <p>k. Products per page - The number of product results per page can be set from the default of 20 up to 200. The values set here are remembered between searches.</p> <p>5. After defining your criteria, click the Search button. The Search Results display at the bottom of the screen.</p> <hr/> <p>TIP: Multiple search fields can be used to further filter Search Results.</p>
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Browse by Supplier is an electronic version of a paper catalog.

Searching by Supplier

The Browse by Supplier functionality is much like using a table of contents from a paper catalog. Once the desired chapter is found (category of products in this case), a single click takes the user to all the products provided by that supplier in that selected category.

Exercise 4

Exercise	Browse by Supplier
Objective	Find the desired products for a specific supplier using the Browse by Supplier search.
Steps	<ol style="list-style-type: none"> Open Product Search. Select the Browse By Supplier link found under Other Searches on the left side of the screen. The Browse By Supplier search window displays. <div data-bbox="727 1606 1036 1759" data-label="Image"> </div> All enabled active suppliers are displayed. <ol style="list-style-type: none"> To search by supplier name, catalog name, or catalog type, click Search for Supplier link above the Supplier Search Results. <ol style="list-style-type: none"> Enter a supplier or catalog name in the Supplier/Catalog

	<p>Name field.</p> <p>ii. Or, the search results can be filtered using the Show Types drop down menu to select any of the criteria listed below:</p> <p style="padding-left: 40px;">Hosted Catalog Supplier</p> <p style="padding-left: 40px;">Punch Out Supplier</p> <p style="padding-left: 40px;">All</p> <p>4. From the list of suppliers, select the desired supplier by clicking the appropriate link in the Supplier Name column. The Supplier details and category listing displays.</p> <p>5. From the supplier category page, select the desired product category by clicking on its name or the + next to its name. Continue drilling down into the categories (expanding/collapsing) until you locate the sub-category that you would like to view.</p> <p>6. Final sub-categories (with items) are indicated with the word view next to it. Click the view button to view the items for the supplier in that particular category. You will be taken to the Search Results page.</p> <hr/> <p>TIP: On the Search Results page immediately above the product results is a hyperlink to Browse Categories. Select this link to return to the prior list of categories and select a different product category for viewing.</p>
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Searching by Category



Browse by Category is a way to view similar products from all vendors in one place.

The Browse by Category functionality is similar to the Browse by Supplier functionality. The main difference is instead of viewing one supplier's table of contents; all supplier tables of contents are shown. Using this functionality is equivalent to opening numerous paper catalogs from many suppliers to the same section – beakers for example.

Exercise 5

Exercise	Browse by Category
Objective	Find the desired products using the Browse by Category search.
Steps	<ol style="list-style-type: none"> Open Product Search. Select the Browse By Category link found under Other Searches on the left side of the screen. The Browse By Category screen displays. <div style="border: 1px solid black; padding: 5px; margin: 10px 0;"> <p style="text-align: center; margin: 0;">Other Searches</p> <p style="margin: 0;"> Browse by Supplier</p> <p style="margin: 0;"> Browse by Category</p> <p style="margin: 0;"> chemicals</p> </div> A full list of available categories, across all hosted catalogs is presented. This is your full table of contents. Drill-down to the category of your choice using the + and – functions, which allow you to expand and collapse categories. Final sub-categories (with items) are indicated with the word view next to it. Click the view button to view the items in that particular category. You will be taken to the Search Results page. The Search Results page displays all of the items in the category selected for all suppliers. <hr/> <p>TIP: On the Search Results page immediately above the product results is a hyperlink to Browse Categories. Select this link to return to the prior list of categories and select a different product category for viewing.</p>



Punchout vendor sites are very useful in finding products and services that require some configuration like computers, oligonucleotides, etc.


Searching with Punch Out Suppliers

Punch outs to suppliers' websites can also be performed. When accessing a punchout supplier via HigherMarkets, the user is automatically authenticated to the supplier, so the supplier's website knows which organization the user is from to show the appropriate products and pricing.

Punchout vendors are shown with icons (typically company logos) at the bottom of the search interface for each vertical. The **All** vertical shows all punch out vendors.

IMPORTANT: The interface and usability of punchout shopping varies between suppliers.

Exercise 6

Exercise	Shop from Punch out suppliers.
Objective	Use a punch out site to find the desired product.
Steps	<ol style="list-style-type: none"> 1. Open Product Search and select the desired vertical from the column on the left side of the screen. 2. Below the keyword search area, the Punch out section is available where all the available punch out suppliers for the vertical selected are shown. 3. Click the supplier icon. The browser is redirected to the supplier's website. The supplier's website is framed within the HigherMarkets browser window. 4. To cancel the punch out, select the  button at the top of the screen. 5. Once within the punch out site, use the appropriate search tools to find the desired products. Once all products are found, check out of the punch out site. The products in the punch out shopping cart are returned to the HigherMarkets shopping cart. <p>TIP: An order is NOT being placed with the supplier when checking out of their punchout site. The purchasing process continues once returned to HigherMarkets.</p> <ol style="list-style-type: none"> 6. Additional products can be added to the HigherMarkets shopping cart from other punch out vendors as well as hosted catalog vendors



Chemical Resource allows chemists to find commercially available products in the terms they generally use, e.g., chemical structures and sub-structures.

Using Chemical Resource

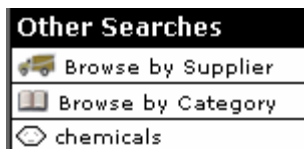
Chemical Resource is a tool geared specifically to chemists. This searching tool allows chemists to search for commercially available products by drawing structures and sub-structures. Additional parameters can be included to refine search results including molecular weight and molecular formula.

Note: The ChemDraw plugin is required to use the Chemical Resource tool. This may require approval from your IT department. The plugin is accessible from the Chemical Resource interface.

Exercise 7

Exercise	Chemical Resource
Objective	Access the Chemical Resource tool and find commercially available products by drawing chemical structures and sub-structures.
Steps	<ol style="list-style-type: none"> 1. Open Product Search. 2. Select the Chemicals link found under Other Searches on the left side of the screen. Note: This link is only available to users with the appropriate

permission. The Chemical Resource tool is opened in a new browser window.



- If the Cambridgesoft plugin has not been loaded, only textual searches can be performed, e.g., CAS#, molecular weight, molecular formula, etc.
- If the plugin is not loaded, a message appears on the screen to load it. Select the link if structure searching is desired.
- Follow the on-screen directions to load the plugin. This will likely take several minutes to download and load.
- Follow the instructions included on the Chemical Resource to find the desired compounds.
- Once a compound of interest is identified, select the **Catalog#'s** button to see which commercially available products are available in the hosted catalog.
- Search Results within HigherMarkets are presented based on the suppliers enabled by the organization.


NOTE: If a no search results message appears, it is due to the fact that the organization has opted to not include the vendors who provide these products.

Using Antibody Resource

Antibody Resource is a tool geared specifically to biologists or researchers who use antibodies in their research. This search tool is a parametric search that allows users to filter products based on antibody specific attributes, e.g., Clone, Species Reactivity, Conjugate, etc.

Exercise 8


Exercise	Antibody Resource
Objective	Access the Antibody Resource parametric search to find commercially available antibody products.
Steps	<ol style="list-style-type: none"> Open Product Search. Select the Antibodies vertical from the Categories listing on the left side of the screen. Antibodies is a sub-category of Lab Supplies, as shown in the graphic below: <div data-bbox="725 1430 997 1761" data-label="Image"> </div> Once Antibodies is selected, search criteria specific to antibody searches displays. Select the appropriate category, conjugate, or host from the respective pull-

	<p>downs if appropriate.</p> <p>5. After defining your criteria, click the Search button. The Search Results display at the bottom of the screen. Antibody Search results contain additional columns relevant to Antibodies. Sorting can be performed by any of the</p> <p>6. Columns with  below the column name.</p>
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Lesson 4: ADDITIONAL SEARCH FUNCTIONALITY

Exercises

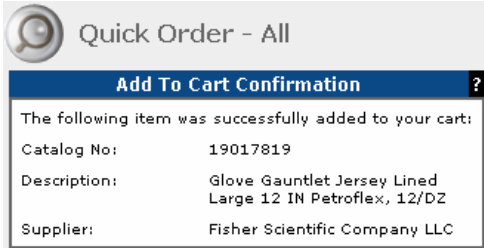
Using Quick Order

 Quick Order searches both the supplier and manufacturer part numbers to find products.

Quick Order is used when the exact product catalog number (SKU) is known. Both the supplier and manufacturer part numbers are searched when using **Quick Order**.


If the catalog number entered is an exact match to a product in the hosted catalogs, and there is only one match, the product is automatically added to the shopping cart. If an exact match is not found or more than one product is found, Search Results are presented to allow for the selection of the appropriate product.

Exercise 9

Exercise	Quick Order
Objective	Add items to the cart when the complete catalog number is known.
Steps	<ol style="list-style-type: none"> 1. Login to the system. 2. Open the Quick Order tab using one of the following methods: <ol style="list-style-type: none"> a. Select your organization's logo in the top left corner. This is a shortcut to the home page. From there, select the Quick Order tab. b. Select the Quick Order tab from the home page navigation tab. c. Select the Quick Order tab from the search navigation tab. 3. Select the appropriate vertical to search from the Categories list once the Quick Order tab is active. 4. Enter the catalog numbers in one or more of the Catalog # /SKU fields and click the Add to Active Cart button. One of the following occurs: <ol style="list-style-type: none"> a. If the catalog number entered is an exact match to a product in the hosted catalogs and there is only one match, then the product is automatically added to the shopping Cart
	

	<p>NOTE: If you would like to add the SKU automatically, it is important to enter the SKU exactly as the supplier has it listed. You should include periods, dashes, parenthesis, units of measure, etc... whenever this type of information is included in the supplier's identification.</p>
	<p>b. If an exact match is not found or more than one product is found, Search Results are presented to allow for the selection of the appropriate product.</p>
	<p>NOTE: Turn on the Include Similar Terms checkbox to see a list of similar items, even the exact SKU is known. By enabling this checkbox, the item will most likely not be added to the cart, but similar products to the one desired may be found/viewed.</p>

Review Additional Supplier/Product Information

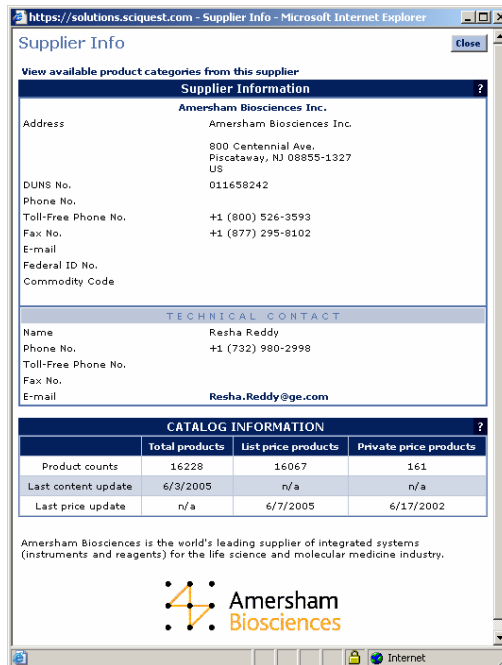
 Items can be added to the shopping cart from the product details pop-up window.

After searching for an item, the Search Results are displayed. If more information about the item or the supplier for the item is required, select either the product description or the supplier name in Search Results.

Supplier information contains contact information as well as links to their web site. Product information can contain additional product attributes as well as links to product specific information like MSDS.

Exercise 10

Exercise	Additional Supplier/Product Information
Objective	Review supplier and product information not contained on the Search Results screen.
Steps	<ol style="list-style-type: none"> 1. Search for products using any of the search tools mentioned in this handbook. Search Results display at the bottom of the screen. 2. To view additional information on the <i>supplier</i>, select the supplier name from the Supplier Name column in the Search Results. A secondary window displays with details about the supplier, including contact information and possibly item and catalog details. An example is shown below.



- Click the **Close** button to exit the window.
- To view additional information on the product, select the appropriate link from the Product Description column. The Product Details secondary window displays. An example is provided below:



- Review the information. To see more information about the product, click the **Click Here** link beside of **More Information**. A new browser is opened directed to the supplier website-typically the specific product page on their site. Click the **Close** button to exit the window
 ... OR...
 Enter the quantity to be purchase in the **Quantity** field, and then click the **Add to Cart** button.



Adding keywords, or selecting one of the suppliers or categories listed in the suppliers/categories with matches area at the top of the Search Results page can be used to refine search Results.

Refining Search Results

If the Search Results presented are too broad or are not exactly what is desired, they can be refined without starting over. The initial keywords used for the search can be added to, removed, or modified as needed.

Exercise 11

Exercise	Refining Search Results
Objective	Refine Search Results after the initial search is completed.
Steps	<ol style="list-style-type: none"> Search for products using any of the search tools mentioned in this handbook. Search Results display at the bottom of the screen. To refine the result set by <i>supplier</i>, select one of the suppliers from the Suppliers with Matches table in the upper left-hand side of the screen (shown below). To refine the result set by <i>category</i>, select one of the categories from the Categories with Matches table in the upper left-hand side of the screen (shown below). <div data-bbox="841 793 1321 1142" data-label="Image"> </div> <p>NOTE: Preferred suppliers are highlighted in the Suppliers with Matches list. The suppliers are listed in alphabetical order with the number of items matching the search criteria shown in parenthesis on the right side of the supplier name. Matching categories are also presented in alphabetical order with the number of matches provided.</p> <ol style="list-style-type: none"> To modify, add, or delete keywords, select the Expand to refine search link to open Product Search. <div data-bbox="688 1478 1479 1598" data-label="Image"> </div> <ol style="list-style-type: none"> From the Product Search screen, enter new keywords, modify/delete existing keywords, and/or change verticals. Click Search to produce the new search results. After refining the search, the updated search path is shown above the search results. For example, <div data-bbox="737 1772 1386 1822" data-label="Text"> <p>Results for: +large +cylinder > Lab Safety Supply Inc.</p> </div>



The Compare function allows multiple products to be viewed side-by-side.

Using the Comparison Function

Side-by-side comparisons are a good way to determine which product is best suited for a particular need. The **Compare** function allows the selection of two or more products to do a direct side-by-side comparison of the product attributes of each.

Note: This feature is used to evaluate HOSTED catalog items only. Items from punchout suppliers do not display in the search results; and therefore cannot be part of the side-by-side product comparison.

Exercise 12

Exercise	Product Comparison
Objective	Compare two or more products side-by-side.
Steps	<ol style="list-style-type: none"> Search for products using any of the search tools mentioned in this handbook. On the right hand side of the Search Results, select two or more check boxes under the Select column for the products to be compared. Select Compare from the drop-down list box above or below the search results (as shown below), and then click the Go button. The Product Comparison screen displays and replaces the search results. <div style="border: 1px solid black; padding: 2px; margin: 5px 0;"> Compare </div> The Product Comparison page lists, vertically, all of the products selected for comparison. Product attributes are shown on the left side of the page. Scroll down to review the information for each item/attribute. Details on using this screen: <ol style="list-style-type: none"> To remove a product from the compare page click the check box at the top of the product and select the Remove action from the action menu and click the GO button. The product is removed from the list of items. Click on any of the links, indicated in bold text, for more information. These links typically open a new browser directed to the specific products webpage on the supplier's website. Click the more info link to view a detailed product description, and if available, a graphic of the item (indicated by the camera). <div style="border: 1px solid gray; background-color: #f0f0f0; padding: 2px; margin: 5px 0;"> more info? </div> To add an item to the cart, enter the quantity in the Quantity field, then click the Add to Cart icon. <div style="margin: 5px 0;"> Qty <input style="width: 40px;" type="text" value="1"/> </div> Click the Back to Search Results button to go back to the original search results and cancel the product comparison. From here, additional products can be selected for comparison.

YOUR FAVORITES

Lesson 5: MANAGING FAVORITES

Key Concepts

Favorites

Personal favorites are those that an individual identifies for future purchasing. With personal favorites, folders and sub-folders can be created to manage the favorites; users have full control over items in their personal folders.

Exercises

Adding Favorite Items to your Cart




Users may add items from **Favorites** to the cart in two ways, each of which is explained below.

The **Favorites** functionality allows individuals to store items that are referenced or ordered on a regular basis.

Once items are added to **Favorites** they can be added to a shopping cart from either of two places: from the **Favorites** tab accessed via the home page or Search Tools navigation tab OR from the My Favorites navigation tab.

Exercise 13

Exercise	Adding Items from Home Page/Favorite Tab to a Cart
Objective	To add items from the Favorites tab on the Home page to a shopping cart.
Steps	<ol style="list-style-type: none">1. Login to the system.2. Navigate to the Home screen. Select the Desktop sub-menu if not already selected.3. Select the Favorites tab. Note: the Home page defaults to the last tab the user visited.4. From the folder drop-down, select the folder from which to select products to add to the cart. 5. After the folder is selected (my favorites, or a sub-folder), the favorite items for the folder displays.6. Select the item or items to add to the cart:<ol style="list-style-type: none">a. Click on a single product to highlight it and click Add to Active Cart.b. There are two ways to select multiple items:<ul style="list-style-type: none">▪ Press Shift on the keyboard and then select multiple items in a <i>contiguous</i> list.



Nickname	Qty	Catalog No.
3Com Etherlink Server NIC Card 10-pack-----	1	#330303-----
Acco Premium Silverette Paper Clips, Jumbo, Box Of ----	1	#808899-----
Acco World Brand Paper Clips, Jumbo, Box Of 100 Cl ----	1	#808907-----
Adaptec ANA-62022 PCI NIC Card, 5-pack-----	1	#228114-----
Battery-----	1	#0764-----
Great White Inkjet 24 Paper, 8 1/2" x 11"-----	1	#680009-----

▪ Press **Ctrl** (Windows) and then select multiple items in a *non-contiguous* list.

Nickname	Qty	Catalog No.
3Com Etherlink Server NIC Card 10-pack-----	1	#330303-----
Acco Premium Silverette Paper Clips, Jumbo, Box Of ----	1	#808899-----
Acco World Brand Paper Clips, Jumbo, Box Of 100 Cl ----	1	#808907-----
Adaptec ANA-62022 PCI NIC Card, 5-pack-----	1	#228114-----
Battery-----	1	#0764-----

7. Click the **Add to Active Cart** button. The favorite or favorites are added to the cart.


Exercise 14

Exercise	Adding Items from My Favorites page to a Cart
Objective	To add items from the Favorites page to a shopping cart.
Steps	<ol style="list-style-type: none"> Login to the system. Select the My Favorites navigation menu. The Active Folders tab on this page is selected by default. Browse through the list(s) of Folders/Product Names. <ol style="list-style-type: none"> Click on any closed folder  to expand it and show its contents. Click on any open folder  to collapse it and hide its contents. To view additional product detail: <ol style="list-style-type: none"> Click a product's Select checkbox and press the Details button to view additional product information or click on the product name to view additional information. To add one or more items to the cart: <ol style="list-style-type: none"> Edit the value in a product's Quantity field as necessary (to select a quantity other than the product's default value). Click the product's Select checkbox, and press the Add to Active Cart button. Note: This also works to select and add multiple items. To add the entire contents of a folder to the cart: <ol style="list-style-type: none"> Edit the Quantity fields as necessary for any of the individual products within a folder. Click on the Select checkbox next to that folder—this will select the checkbox next to all items in that folder—and select Add to Active Cart. This function will work with multiple folders or items.

Adding Items to My Favorites

Using the **Favorites** functionality, items that are referenced or ordered on a regular basis can be stored for easy access.

Exercise 15

Exercise	Add an item to Favorites from Search Results
Objective	To add products from Search Results to the user Favorites.
Steps	<ol style="list-style-type: none"> 1. Login to the system. 2. Search for products using any of the search tools mentioned in this handbook. 3. On the Search Results page choose one or more items to add to Favorites. <ol style="list-style-type: none"> a. Place a check in each item's Select checkbox. b. Select Add to Favorites from the drop-down list box above or below the search results (as shown below), then click the Go button c.  4. The Add to Favorites popup displays. From there, determine what folder the item(s) will go into and what they will be named. Scroll through the list of existing Favorites Folders and select the appropriate destination folder. <ol style="list-style-type: none"> a. If multiple items are selected, all will go into the same folder. b. If an item requires a new destination folder, create the new folder in the Favorites section and then add the product to it. 5. Edit each product's Name as necessary and set the default Quantity to store in Favorites. 6. Click Submit or Cancel as appropriate.

Exercise 16

Objective	To add products from a Shopping Cart to the user Favorites.
Steps	<ol style="list-style-type: none"> 1. Login to the system. 2. Shop for a few items and add them to the cart. 3. Access the cart: click the cart link in the upper right-hand corner of the screen. The current cart displays in the order section of HigherMarkets. 4. From the cart review page, choose one or more items to add to Favorites. <ol style="list-style-type: none"> a. Place a check in each item's Select checkbox. b. Select Add to Favorites from the drop-down list box above or below the search results (as shown below), then click the Go button 5. The Add to Favorites popup displays. From there, determine what folder the item(s) will go into and what they will be named. Scroll through the list of existing Favorites Folders and select the appropriate destination folder. <ol style="list-style-type: none"> a. If multiple items are selected, all go into the same folder. b. If an item requires a new destination folder, create the new folder in the Favorites section and then add the product to it. 6. Edit each product's Name as necessary and set the default Quantity to store in Favorites. 7. Click Submit or Cancel as appropriate.



Users may use the standard **Folder/Subfolder** structure to organize Favorites.


Creating Favorites Folders and Sub-folders

Favorites supports the traditional **Folder/Subfolder** structure. Any folder structure can be created, in terms of adding new folders (if any) and nesting subfolders within them as appropriate.

Ideas for Favorites folder structure

- Products from a single supplier
- Products in a single commodity
- Top (n) products ordered
- Products for a particular experiment
- Products needed for new hires
- Products ordered every week
- Products ordered for a specific Principal Investigator


Exercise 17

Exercise	Create a new Favorites folder with a nested subfolder
Objective	To create a new folder or subfolder within Favorites.
Steps	<ol style="list-style-type: none"> 1. Login to the system. 2. Select the My Favorites navigation menu. 3. Favorites defaults to the Active tab. Select the Edit Folders tab. Note the Favorites Legend link in the upper right for a visual reference. 4. In the row for the My Favorites main folder, click the New Sub Folder button  to create a new folder. The Subfolder popup opens. 5. Give the new folder a Name and click Submit. 6. Click the New Sub Folder button in the new folder's row to nest a folder within the new folder. Repeat the rest of the process as necessary.

Copying Items between Folders

Favorites supports **copying** Favorites items from one folder to another. This might be done to have a product included as part of several folders that are ordered frequently.

Exercise 18

Exercise	Copying Items Between Favorites Folders
Objective	To copy items from any Favorites folder for which they have permissions to any other for which they have Edit permissions.
Steps	<ol style="list-style-type: none"> 1. Login to the system. 2. Go to the My Favorites navigation menu. 3. Favorites defaults to the Active tab. Select the Edit Folders tab. Note the Favorites Legend on the left for a visual reference. 4. In the row for the item to copy, click the Copy to Folder button.  5. The Copy Product popup opens. Select the Destination Folder and click Submit.




Items can be **moved** from one Favorites folder to another.

Moving Items between Folders

Favorites supports **moving** products from one Favorites folder to another. This may be necessary if a product is accidentally added to the incorrect folder or if a group of products was added to Favorites that need redistributing.


Exercise 19

Exercise	Moving Items Between Favorites folders
Objective	To move items between any Favorites folders for which they have edit permissions.
Steps	<ol style="list-style-type: none"> 1. Login to the system. 2. Go to the My Favorites navigation menu. 3. Favorites defaults to the Active tab. Select the Edit Folders tab. Note the Favorites Legend link in the upper right for a visual reference. 4. In the row for the item to copy, click the Move to Folder button.  5. The Move Product popup opens. Select the Destination Folder and click Submit.


Editing Favorite Items and Folders

Once items have been set up as favorites, the name and/or quantity may need to be modified. These functions can be performed as-needed; the favorites will automatically be updated.

Exercise 20

Exercise	Editing Favorites Folders
Objective	To edit any Favorites folder for which they have edit permissions.
Steps	<ol style="list-style-type: none"> 1. Login to the system. 2. Go to the My Favorites navigation menu. 3. Favorites defaults to the Active tab. Select the Edit Folders tab. Note the Favorites Legend link in the upper right for a visual reference. 4. In the row for the folder to edit, click the Edit Folder or Product button.  5. The Edit Folder popup opens. Update the Folder Name and submit or cancel as appropriate.

Exercise 21

Exercise	Editing Favorites Items
Objective	To edit any Favorites item for which they have edit permissions.
Steps	<ol style="list-style-type: none"> 1. Login to the system. 2. Go to the My Favorites navigation menu. 3. Favorites defaults to the Active tab. Select the Edit Folders tab. Note the Favorites Legend on the left for a visual reference. 4. In the row for the item to edit, click the Edit Folder or Product button.  5. The Edit Product popup opens. Update the Product Name and/or the default Quantity and submit or cancel as appropriate.




Items can be **deleted** from Favorites as necessary.


Deleting Favorite Items and Folders

Favorites items or folders can be deleted as necessary. Sometimes items are no longer available, regularly ordered items change, or an incorrect item may have been added to Favorites

Exercise 22

Exercise	Deleting Favorites Items
Objective	To delete items from Favorites.
Steps	<ol style="list-style-type: none"> 1. Login to the system. 2. Go to the My Favorites navigation menu. 3. Favorites defaults to the Active tab. Select the Edit Folders tab. Note the Favorites Legend in the upper right for a visual reference. 4. In the row for the item to delete, click the Delete Folder or Product button.  5. The Delete Product popup opens and requests confirmation for deleting the item. Submit or cancel as appropriate.

Exercise 23

Exercise	Deleting Favorites Folders
Objective	To delete folders from Favorites.
Steps	<ol style="list-style-type: none"> 1. Login to the system. 2. Go to the My Favorites navigation menu. 3. Favorites defaults to the Active tab. Select the Edit Folders tab. Note the Favorites Legend in the upper right for a visual reference. 4. In the row for the folder to delete, click the Delete Folder or Product button.  <ol style="list-style-type: none"> a. Note that if the Delete Folder or Product button does not appear in the row of the folder to delete, that means there are products in that folder. b. In this case, first delete the individual products in the folder. c. Once all products are deleted from the folder, the Delete Folder or Product button appears. Click it to continue. 5. The Delete Product popup opens and requests confirmation for deleting the folder. Submit or cancel as appropriate.

SHOPPING CARTS AND CHECKOUT

Lesson 6: SHOPPING CART FUNCTIONALITY

Key Concepts

Shopping Carts

Shopping Carts represent items selected for purchase by the end user. Listed below are some details related to shopping carts:

Exercises

Adding Items to the Cart

Items can be added to the cart through many of the screens in the application. Listed below are the different places where products can be found:

- Product Search Results
- Product Details Popup
- Product Comparison
- Home page Favorites
- Quick Order
- Punchouts
- Favorites page


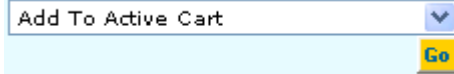
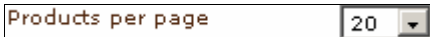
The exercises below demonstrate adding items to the cart from the various locations listed above. Unless otherwise noted, whenever an item is added in each of the exercises below, the system will confirm the total quantity of items added to the cart:

1 item(s) added to the cart.


Additionally, the **Cart** button in the upper right corner of the Home Page will update reflecting the total quantity and cost of items in the cart:



Exercise 24

Exercise	Adding Items to the Cart from Product Search Results
Objective	To add items to their cart from the Product Search Results page.
Steps	<ol style="list-style-type: none"> 1. Login to the system. 2. Search for products using any of the search tools mentioned in this handbook. Search Results display at the bottom of the screen. 3. To add a single item to the cart, set the desired quantity and click the Add to Cart button . 4. Alternatively, choose one or more items to add to the cart: <ol style="list-style-type: none"> a. Set the desired quantity for each item. b. Place a check in each item's Select checkbox. c. Select Add to Active Cart from the drop-down list box above or below the search results (as shown below), then click the Go button <div style="text-align: center;">  </div> 5. If items appear across multiple pages of search results, there are two options: <ol style="list-style-type: none"> a. Add items from the first page and then repeat the process as appropriate for the subsequent pages. b. Perform a new search by using the same keywords and selections, except change the number of products that display per page. This is the last field on the search screen. When the new list of products display, select from the list of items. <div style="text-align: center;">  </div>

Exercise 25

Exercise	Adding Items to the Cart from a Product Details Popup
Objective	To add items to the cart from the Product Description popup.
Steps	<ol style="list-style-type: none"> 1. Login to the system. 2. Search for products using any of the search tools mentioned in this handbook. Search Results display at the bottom of the screen. 3. Click on an item's Product Description to open its Product Details popup. 4. Set the desired quantity and click the Add to Cart button. 

Exercise 26

Exercise	Adding Items to the Cart from Product Comparison
Objective	To add items to their cart from search result product comparison
Steps	<ol style="list-style-type: none"> 1. Login to the system. 2. Open the Product Comparison screen as described in Using the Comparison Function. From this screen, add items to cart in one of two ways: <ol style="list-style-type: none"> a. Click the Add to Cart button for a single item. <p style="text-align: center;">OR</p> <ol style="list-style-type: none"> b. Place a check in the desired items' Select checkboxes and choose Add to Active Cart in the Action Dropdown list (above or below Comparisons table), and click the GO button.

Exercise 27

Exercise	Adding Items to the Cart from Home Page Favorites
Objective	To add items to their cart from the Favorites tab on their Home page.
Steps	<ol style="list-style-type: none"> 1. Login to the system. 2. The Home page defaults to the last tab the user visited. Select the Favorites tab. 3. From the dropdown folder list select the folder from which to choose products. 4. Select the products(s) to add to cart. 5. Press the Add to Active Cart button. 6. In this instance, the system does not provide a message detailing the number of items added to the cart, it only updates the Cart button details.

Exercise 28

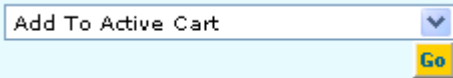
Exercise	Adding Items to the Cart from Quick Order
Objective	To add items to their cart from the Quick Order tab on their Home page.
Steps	<ol style="list-style-type: none"> 1. Login to the system. 2. The Home page defaults to the last tab the user visited. 3. Select the Quick Order tab and search for an item. <ol style="list-style-type: none"> a. If Quick Order finds an exact match it will automatically add the product to the cart. The system also provides a comprehensive message about what was added, including Catalog Number, Description, and Supplier. The quantity is always 1 b. If it finds multiple items that meet the search criteria the system will present the standard Product Search Results screen.

Exercise 29

Exercise	Adding Items to the Cart from Punchouts
Objective	To add items to their cart from a supplier's punchout site.
Steps	<ol style="list-style-type: none"> 1. Login to the system. 2. The Home page defaults to the last tab the user visited. Select the Product Searches tab and select an active punchout. 3. The application redirects to the supplier's punchout site. 4. Search for products and add products to the cart in the supplier's punchout (this process varies by supplier). 5. Use the supplier's mechanism to return products to HigherMarkets (this process

	again varies by supplier).
	6. Upon returning to HigherMarkets the user will be on the cart page.

Exercise 30

Exercise	Adding Items to the Cart from your Favorites page
Objective	To add items to their cart from the Favorites tab on their Home page.
Steps	<ol style="list-style-type: none"> 1. Login to the system. 2. The system defaults to the user's Home page. Select the Favorites page (as opposed to the Favorites tab on the Home page itself). 3. The Favorites page defaults to the Active Folders tab. 4. Browse through the folders and items in the Active Folders tab and place a check in the Select checkbox for all items to add to the cart. 5. Click any of the three Add to Active Cart buttons on the page. 

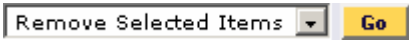
Removing Items from the Cart



Specific items may be removed from a cart or the entire cart can be emptied altogether.


Items can be removed from shopping carts either individually or all at once. Items are typically removed when it is determined that another product is needed instead, the item does not fit (due to cost, quantity, etc), or accidental selection.

Exercise 31

Exercise	Removing Specific Items from the Cart
Objective	To remove specific items from the shopping cart but leave others in place.
Steps	<ol style="list-style-type: none"> 1. Login to the system. 2. Go to a shopping cart with items in it. 3. In the cart select one or more items to remove: <ol style="list-style-type: none"> a. Place a check in the Select checkbox in the row for each item to remove. For this exercise, leave at least one item in the cart. b. Choose Remove Selected Items in the Action Dropdown list (above the items in the cart), and then click the Go button.  4. The system removes the selected items and updates the Cart button totals in the upper right corner of the screen.

Exercise 32

Exercise	Removing All Items from the Cart
Objective	To remove all items at once from the shopping cart
Steps	<ol style="list-style-type: none"> 1. Login to the system. 2. Go to a shopping cart with items in it. 3. Choose Remove All Items in the Action Dropdown list (above the items in the

	<p>cart)—it is not necessary to select any checkboxes.</p> <p style="text-align: center;">  </p> <ol style="list-style-type: none"> 4. Press Go. 5. A confirmation popup opens. Choose OK to remove all items or Cancel to stop. 6. The system removes all items and updates the Cart button totals in the upper right corner of the screen.
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Updating Items in the Cart

Once products have been added to the shopping cart, it may be necessary to change some of the product information, such as quantity.

This feature applies only to hosted catalog items. Punchout items must be updated in the supplier's punchout site.

Exercise 33


Exercise	Updating Quantity of Items in the Cart
Objective	To update the quantity of a hosted catalog item in the cart.
Steps	<ol style="list-style-type: none"> 1. Login to the system. 2. Go to a shopping cart with a hosted catalog item in it. 3. In the Quantity field of the row for the product to modify enter the desired quantity. 4. Click the Save button at the bottom of the page. 5. The TOTAL at the bottom of the page and the Cart button in the upper right corner of the application both update with the revised amounts.

Creating New/Draft Carts

New carts can be created whenever necessary. Additionally, draft carts can be created for future use. Creating draft carts may be useful for setting up orders that are similar or that might be used later.

Details about the cart icons:



The **Active** cart's icon is always highlighted in blue.

➤ Active cart: 


➤ Draft cart: 

Exercise 34

Exercise	Creating New/Draft Carts
Objective	To create new carts and navigate through their draft carts.
Steps	<ol style="list-style-type: none"> 1. Login to the system. 2. Select the draft carts navigation tab. 3. Click the Create Cart button. A new cart is displayed with a default name; change the name of the cart if desired. 4. Click the save button to add the new cart to the draft cart list.



	<p>a. Search for and add a product to the cart.</p> <p>5. Return to the draft carts navigation tab.</p> <p>6. Each of the carts created are listed. To make a different cart active, click the  button next to the cart to activate. The cart icon now displays the active cart icon .</p>
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Deleting Shopping Carts

 Carts can be deleted with the click of a button.

Exercise 35

HigherMarkets has no restrictions on the number of draft shopping carts that can be created. Occasionally certain carts may no longer be needed; therefore, HigherMarkets allows the deletion of entire shopping carts with one click.

Exercise	Deleting Shopping Carts
Objective	To delete draft shopping carts.
Steps	<ol style="list-style-type: none"> 1. Login to the system. 2. Click the Shopping Cart button in the upper right corner to go to the active cart. 3. Select the draft carts sub-menu under the carts main level menu to go to the list of existing draft shopping carts. If there are no shopping carts in the drafts section, for this exercise create a new cart. It is not necessary to add any products to it. 4. Find the cart to delete, whether the current cart or a draft cart. Cart details: <ol style="list-style-type: none"> a. Note that the active cart icons are highlighted in blue. Cart icons: <ol style="list-style-type: none"> i. Active cart  b. Inactive (Draft) icons are white. Cart icons: <ol style="list-style-type: none"> i. Draft cart  <p>Press the Delete button on the right side of the screen. The system allows deleting Active and Draft carts with products in them.</p>

Lesson 7: CHECKING OUT

Key Concepts

The Checkout Process

The checkout process allows the user to submit a shopping cart order from HigherMarkets into the PeopleSoft application.

- **Place Order** is the button used to begin the checkout process. Note: Checkout will not occur until all system errors are corrected.

Exercises




This exercise demonstrates how a user can complete a requisition by submitting a shopping cart.

Submitting the Shopping Cart

Users can submit a shopping cart to complete a requisition. The application validates the shopping cart for proper completion of cart details and, if necessary, prompts the user to correct/edit appropriate details.

Exercise 36

Exercise	Submit a shopping cart.
Objective	To complete shopping process by submitting a shopping cart.
Steps	<ol style="list-style-type: none">1. Login to the system.2. Create a new shopping cart by selecting the Carts menu option and then the Create Cart button.3. Click on the Product Search menu option, perform a search, and add appropriate items to the shopping cart.4. Click on the shopping cart icon in top right corner of the screen once all products are in the shopping cart. Note the order workflow status is displayed below the cart sub tab, and that Edit Cart is highlighted to indicate the current activity. 5. Click on the Place Order button in the shopping cart. If the order has any errors with associated details, the Review page is displayed with an error message in red font against yellow background. A specific error message is also displayed next to specific fields for each affected line item. The user can edit the values as needed and click on Place Order again to submit the order.6. HigherMarkets passes the shopping cart to PeopleSoft for further order processing.