



CASE WESTERN RESERVE
UNIVERSITY EST. 1826

SmartCART Window Shopper Training Manual

Created on 6/16/2010 10:07:00 AM

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Window Shopper

SmartCART (Convenient Advanced Requisitioning Tool) is a software tool that consolidates the ordering of those things that you need to get your job done. How does it work? Think Amazon.com...one place where multiple vendors will list their products so your transaction and invoicing is automatic.

The SmartCART system went live on campus May 2010. The system has various vendors to purchase items. The **Hosted Catalogs** are vendors that have catalogs, similar to a paper catalog, that you can search across and are specific to CWRU. The **Punchout Catalogs** are those that go directly to the company website and allow a user to purchase items online and then pull that information back into the SmartCART system.

The SmartCART system also has a Window Shopper feature. This allows users who do not have access to Financials to create a cart and then assign that cart to their approver to create the requisition and buy the product(s). Window Shoppers can be set up by filling out the form on the eProcurement and Distribution website and completing training to gain access to the system.

For more information, please see the Procurement and Distribution website at <http://campusservices.case.edu/PDSHome.aspx>

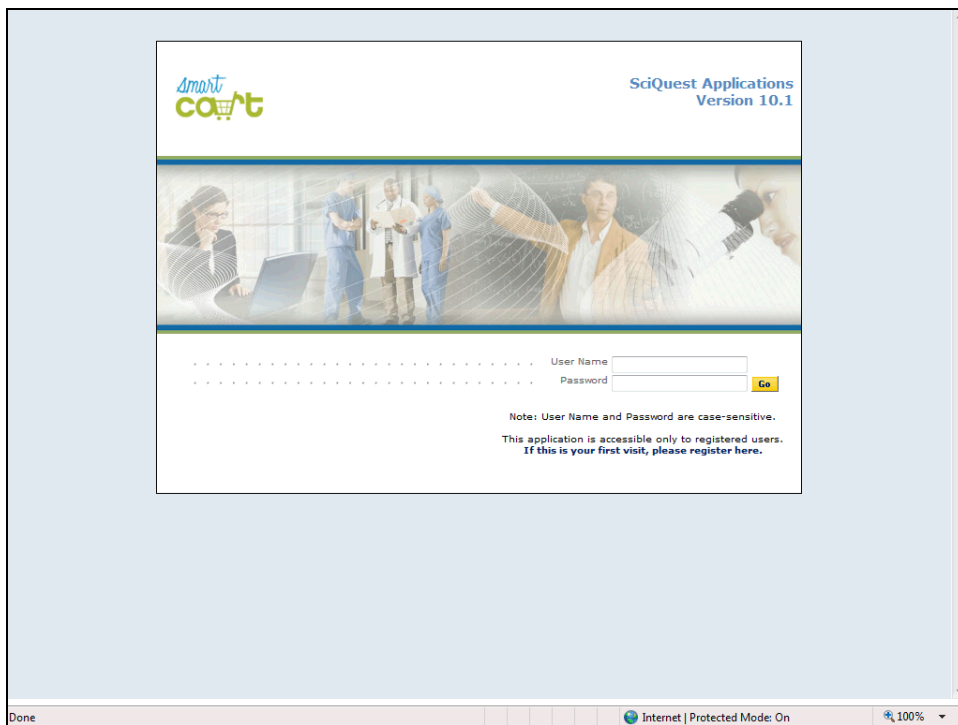
Window Shoppers using the SmartCART system


Procedure

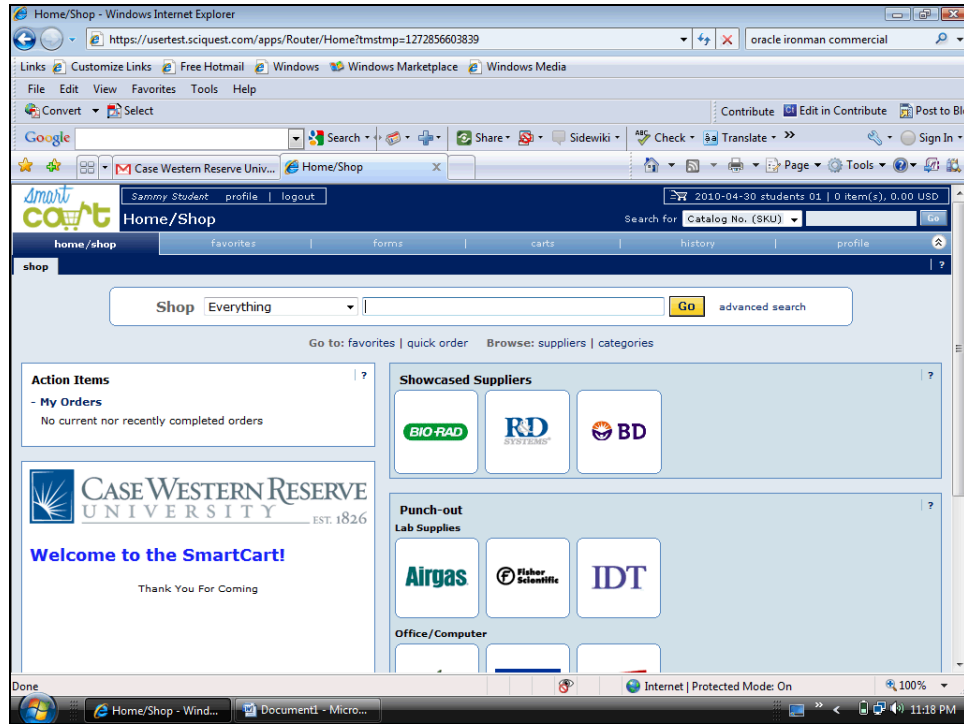
Before using the Window Shopper SmartCART system complete the Window Shopper form on the Procurement & Distribution website at <http://campusservices.case.edu/PDSHome.aspx>

Log into the SmartCART system at
<https://solutions.sciquest.com/apps/Router/Login?OrgName=CaseWestern&URL=>

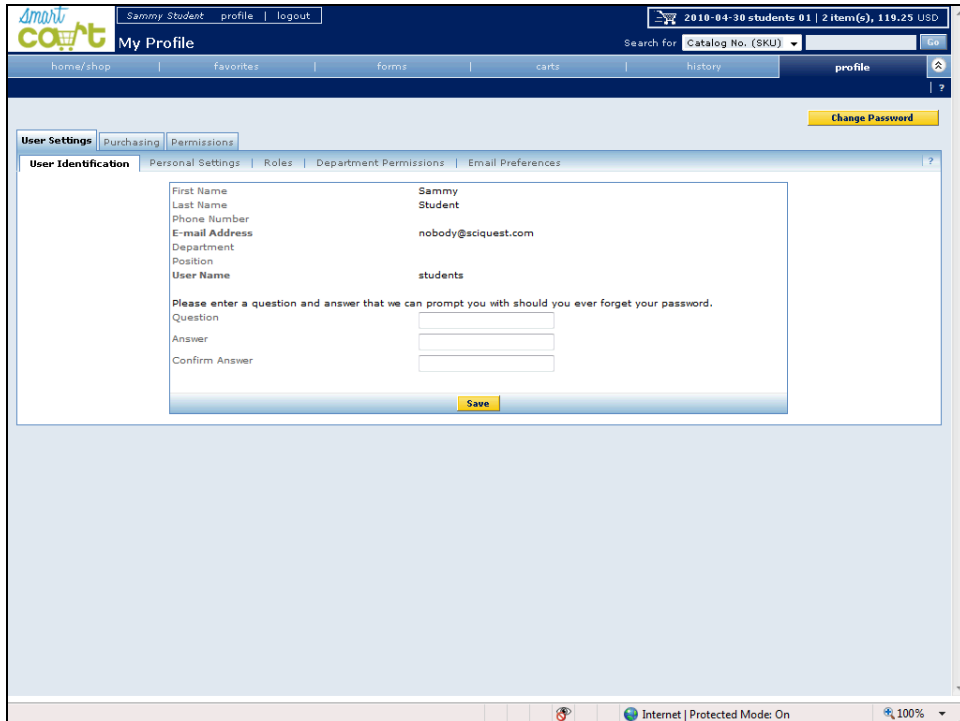
Your UserName will be smart and your caseID, for example smartpjx11.
Your default password will be cart and your caseID, for example cartpjx11.



Step	Action
1.	Enter your User Name in the User Name field.
2.	Enter your default Password in the Password field. You can change your password after logging into the system.
3.	Click the Go button. 



Step	Action
4.	After logging in, change your password from the default by clicking the profile object. <div data-bbox="440 1079 760 1136" style="border: 1px solid black; background-color: #4f81bd; color: white; padding: 5px; display: inline-block; margin-top: 10px;">profile</div>



SmartCart
Sammy Student profile | logout
2010-04-30 students 01 | 2 Item(s), 119.25 USD

My Profile
Search for Catalog No. (SKU) [] Go

home/shop | favorites | forms | carts | history | profile

User Settings | Purchasing | Permissions **Change Password**

User Identification | Personal Settings | Roles | Department Permissions | Email Preferences

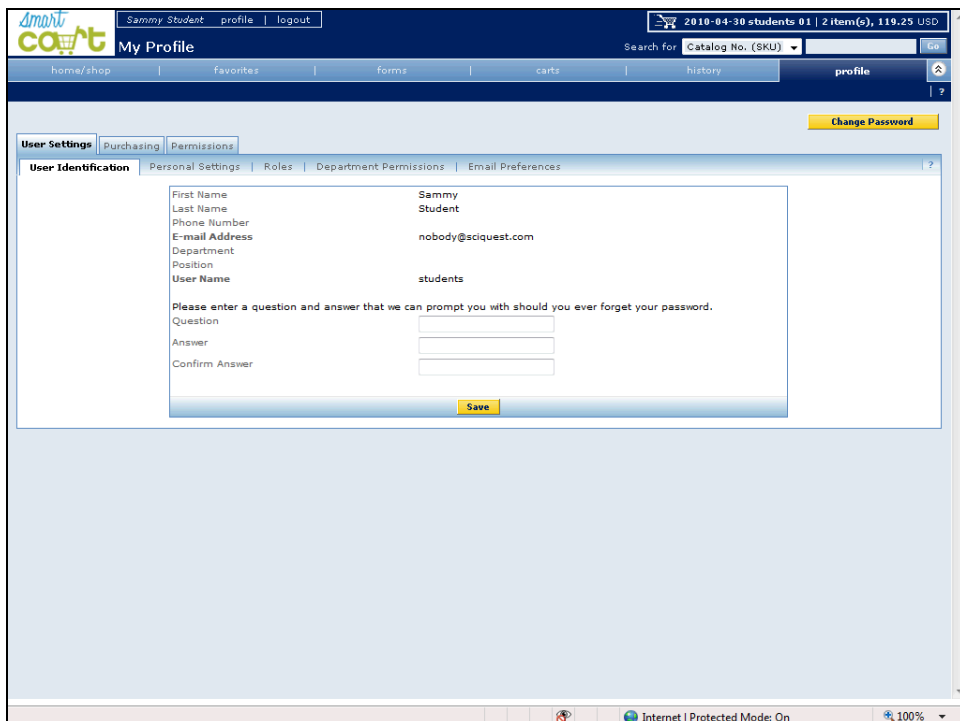
First Name: Sammy
Last Name: Student
Phone Number: []
E-mail Address: nobody@scquest.com
Department: []
Position: []
User Name: students

Please enter a question and answer that we can prompt you with should you ever forget your password.

Question: []
Answer: []
Confirm Answer: []

Save

Step	Action
5.	The User Settings tab should appear. User Settings



SmartCart
Sammy Student profile | logout
2010-04-30 students 01 | 2 Item(s), 119.25 USD

My Profile
Search for Catalog No. (SKU) [] Go

home/shop | favorites | forms | carts | history | profile

User Settings | Purchasing | Permissions **Change Password**


User Identification | Personal Settings | Roles | Department Permissions | Email Preferences

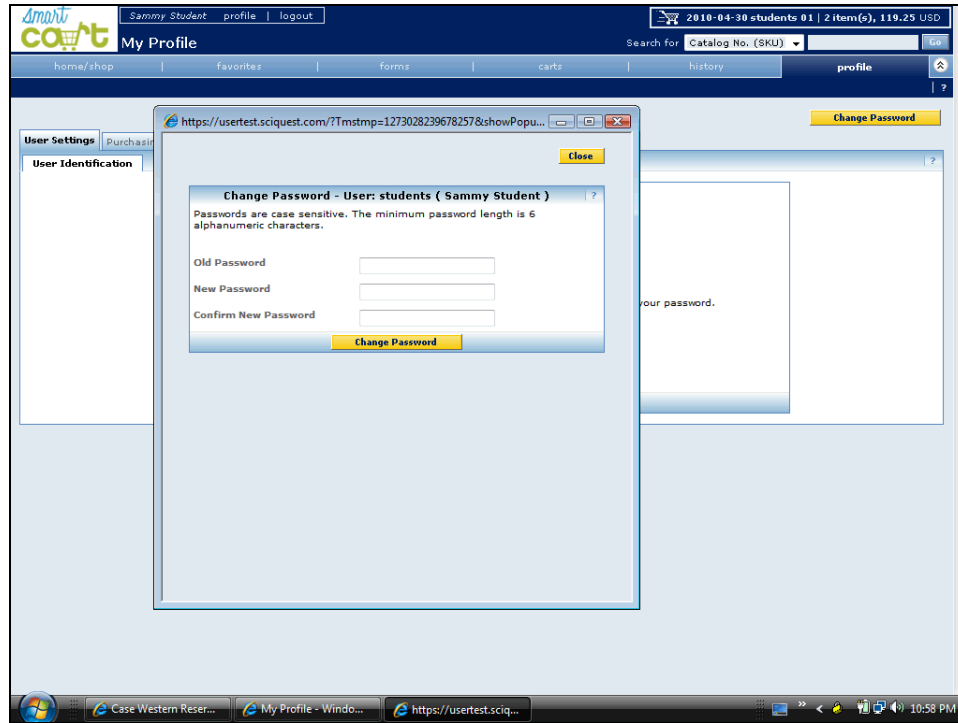
First Name: Sammy
Last Name: Student
Phone Number: []
E-mail Address: nobody@scquest.com
Department: []
Position: []
User Name: students


Please enter a question and answer that we can prompt you with should you ever forget your password.

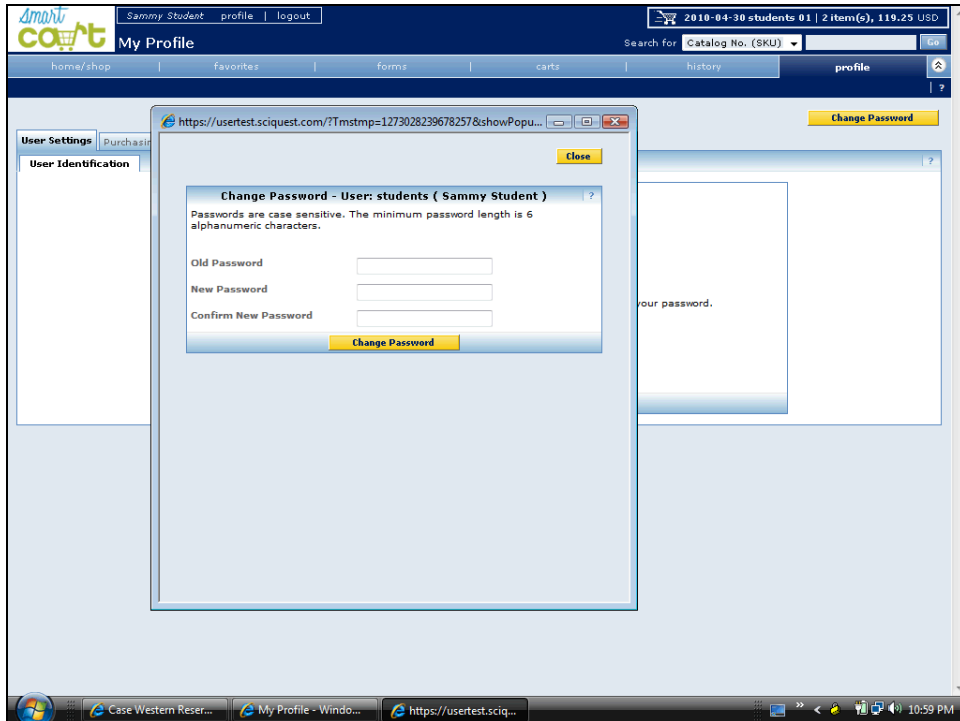
Question: []
Answer: []
Confirm Answer: []



Save

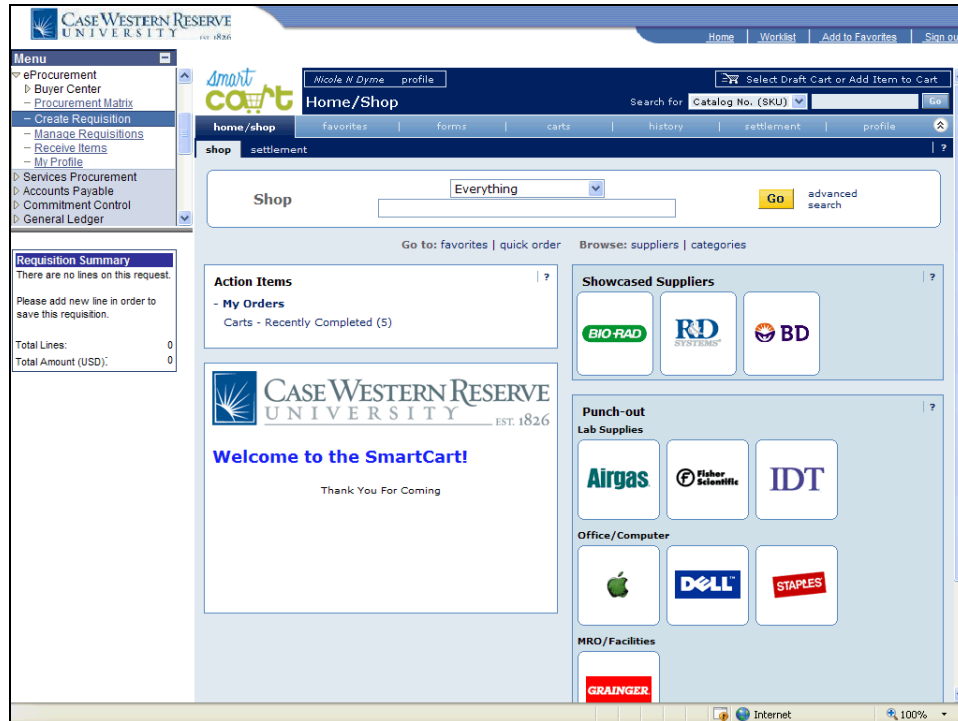
Step	Action
6.	Click the Change Password button. 




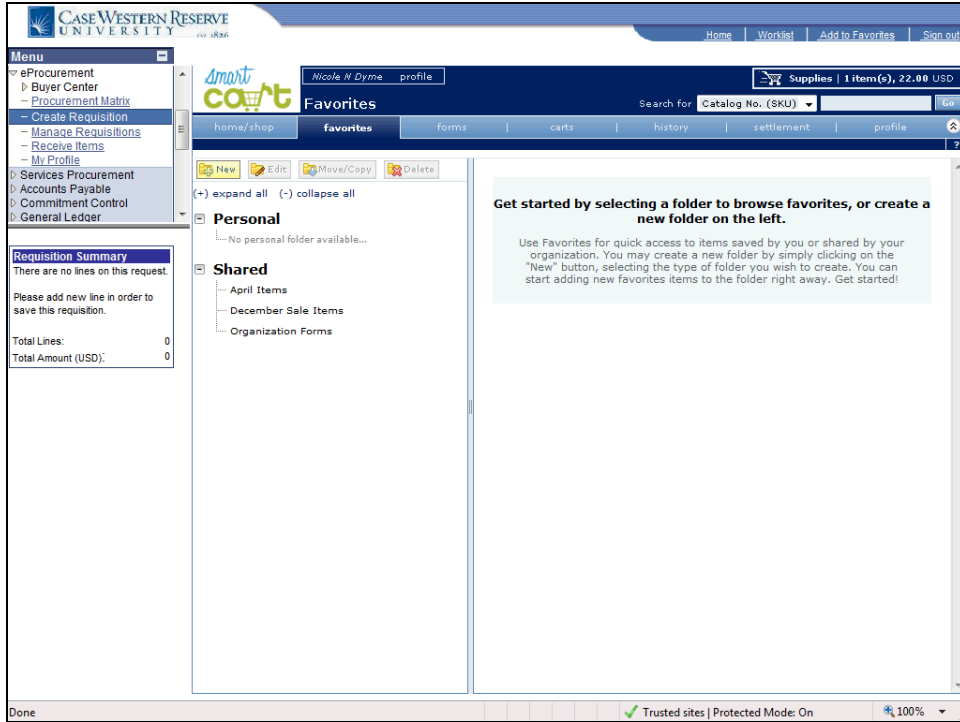
Step	Action
7.	The Change Password screen opens. 



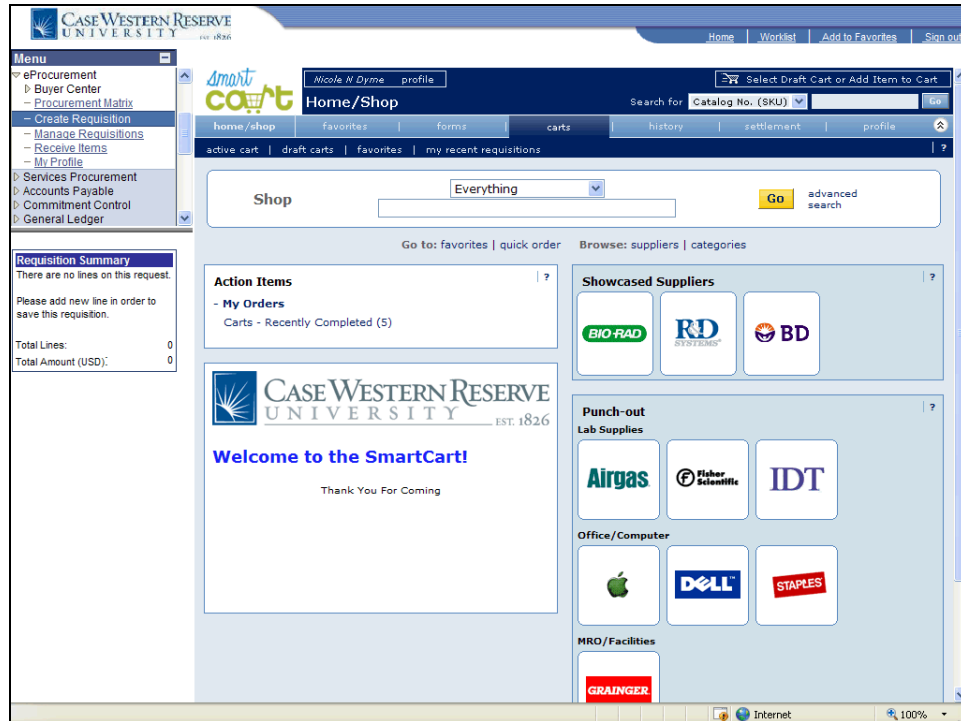
Step	Action
8.	Enter the current password in the Old Password field.
9.	Enter the new password into the New Password field.
10.	Enter the new password again into the Confirm New Password field.
11.	Click the Change Password button. 
12.	The message Password change complete will appear. Click the Close button. 



Step	Action
13.	The home/shop link will always bring you back to the Home page.
14.	The favorites item shows a view of those items in SmartCART that you have marked as favorites for the ease of frequent purchasing. 

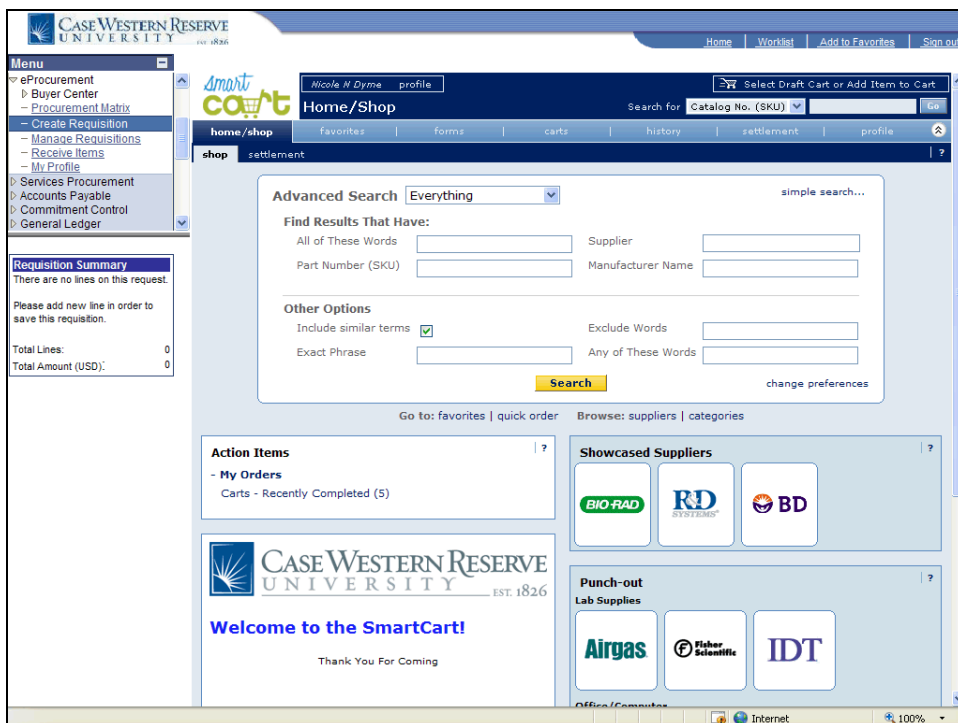


Step	Action
15.	The favorites area works similar to your file Explorer on your computer. Personal are those favorites that have been selected by the user. Shared are those that have been posted by Procurement to highlight items or vendors.

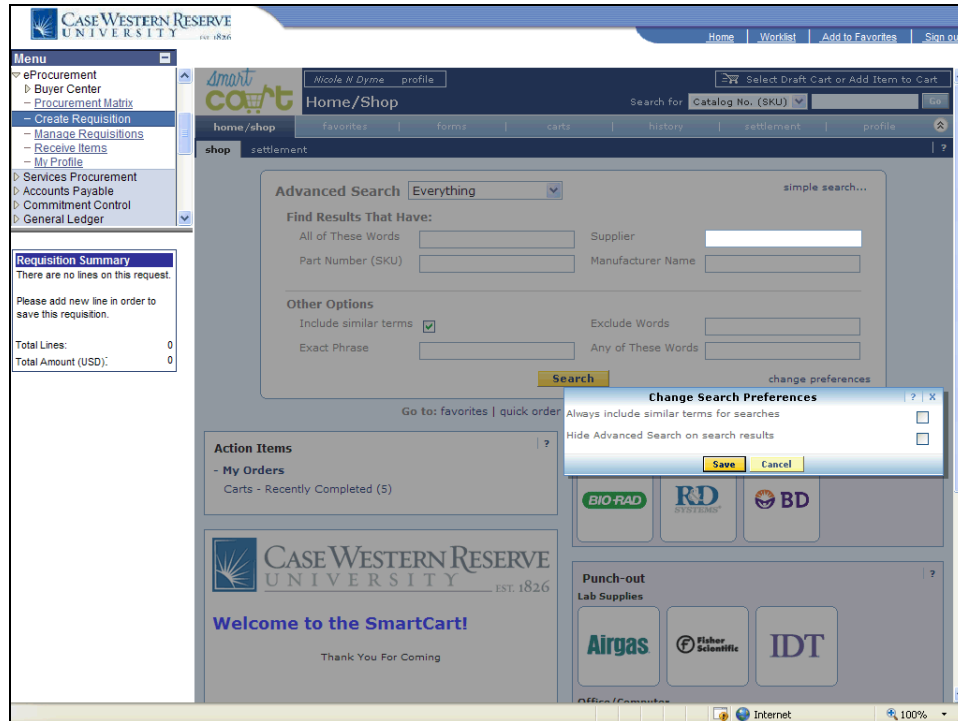



Step	Action
16.	The cart s item will allow you view your active carts, draft carts, and your recent purchases.
17.	The history item, allows you to search for Carts that have been purchased. These items are historical. Active and draft carts and purchases are not viewed here.
18.	The Showcased Suppliers box shows those suppliers that Procurement has chosen to highlight. They may be new vendors or vendors having specials for that month.
19.	Punch-out suppliers are listed by category, those listed are the most popular vendors in their category. More punchout suppliers may be available than are listed on the home page. Use the Browse: suppliers link to see all suppliers available in SmartCART.
20.	The Action Items box shows on the SmartCART home page when orders have been completed. Completed orders are those that have been Placed.
21.	The Welcome box will contain messages from Procurement for SmartCART users. Messages can include, but are not limited to, new vendor information, specials from a vendor, or notices to users.
22.	The Cart icon and information on the top right of the home page will contain information about the cart that is being created. Information includes, the name of the cart (default or custom), number of items and the total dollar amount purchased.

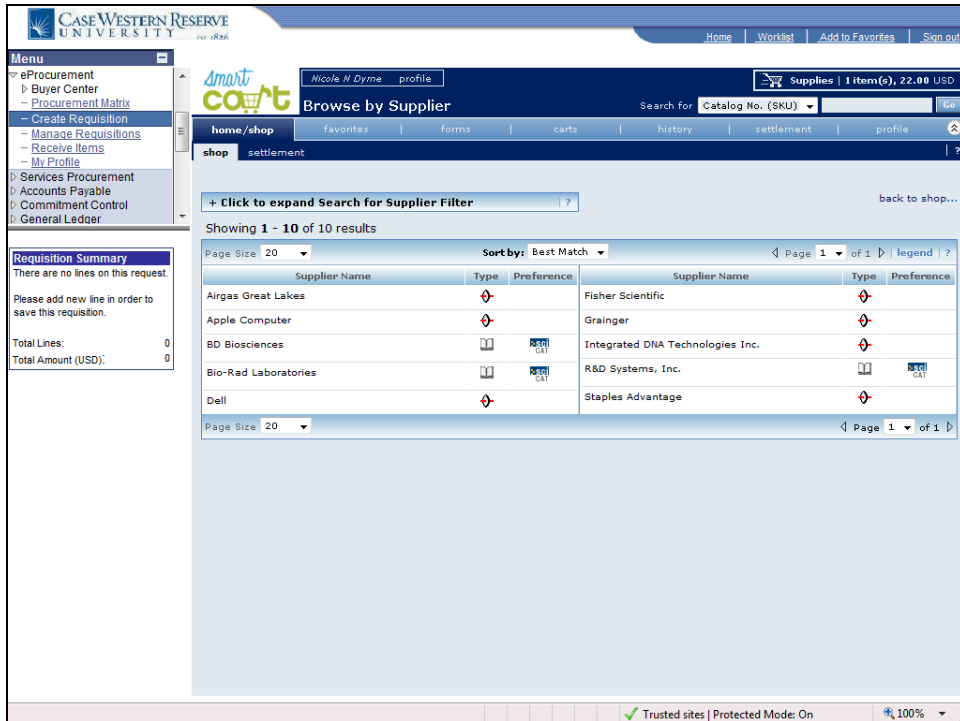
Step	Action
23.	The Search for area, will allow searching in hosted catalogs only. These catalogs are hosted within the system. Searching punchout catalogs is not available from the SmartCART system since these catalogs leave SmartCART and enter the vendor website.
24.	Another area for searching is the " Shop at the Top " option. This is for hosted catalogs only. Search by category using the drop down and selecting or search using the Everything category.
25.	To utilize searching for all options which includes partial searches of your keyword. Click the advanced search link.



Step	Action
26.	The advanced search options will open. The first time you search, change your preferences. Click the change preferences link on the bottom right of the search area. change preferences



Step	Action
27.	A new box Change Search Preferences will open. Click the check box, Always include similar terms for searches option.
28.	Click the Save button. 
29.	Note the Preferences Saved text in the bottom right of the Advanced Search box.
30.	To return to the " <i>Shop at the Top</i> " box, click simple search... in the top right of the Advanced Search box.
31.	To see all vendors and suppliers in SmartCART, click the suppliers link next to Browse:.

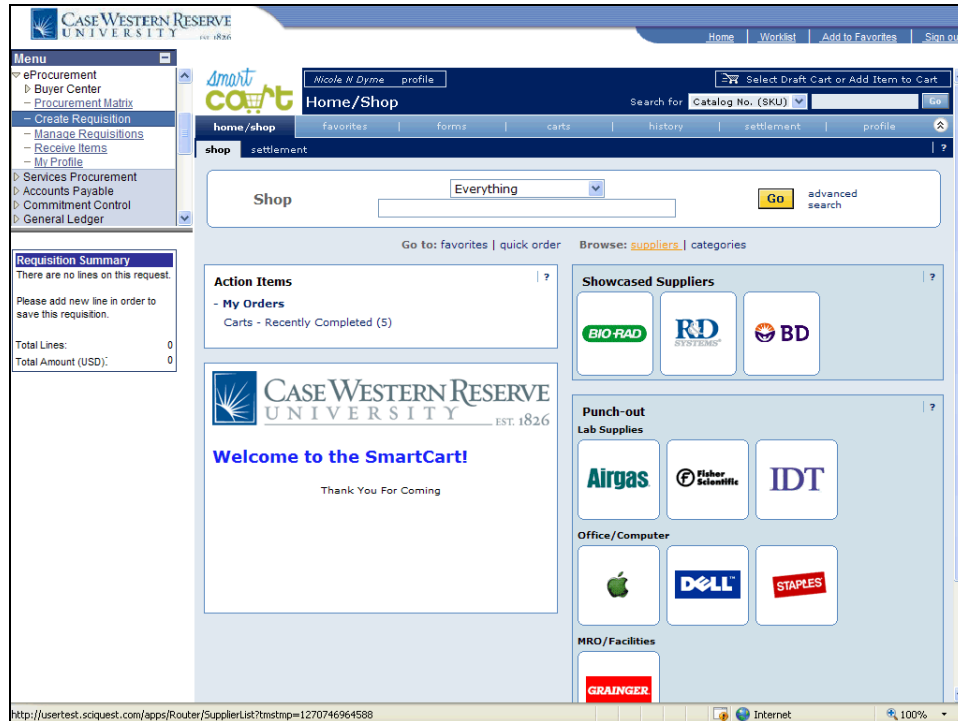


The screenshot displays the 'Browse by Supplier' interface. At the top, there is a navigation bar with 'Home', 'Worklist', 'Add to Favorites', and 'Sign out'. Below this is a search bar and a 'Supplies | 1 Item(s), 22.00 USD' indicator. The main content area shows a list of 10 suppliers. The list is sorted by 'Best Match' and shows page 1 of 1. The suppliers listed are:

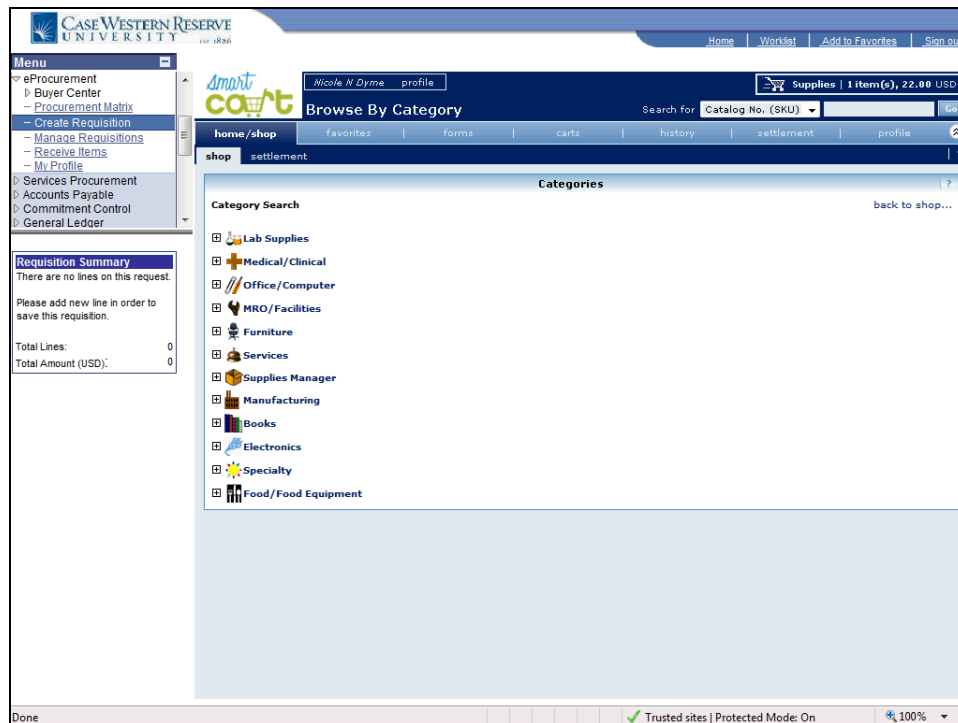
Supplier Name	Type	Preference	Supplier Name	Type	Preference
Airgas Great Lakes	Punch-out		Fisher Scientific	Punch-out	
Apple Computer	Punch-out		Grainger	Punch-out	
BD Biosciences	Hosted Catalog		Integrated DNA Technologies Inc.	Punch-out	
Bio-Rad Laboratories	Hosted Catalog		R&D Systems, Inc.	Hosted Catalog	
Dell	Punch-out		Staples Advantage	Punch-out	



At the bottom of the page, there is a status bar indicating 'Trusted sites | Protected Mode: On' and a zoom level of '100%'.

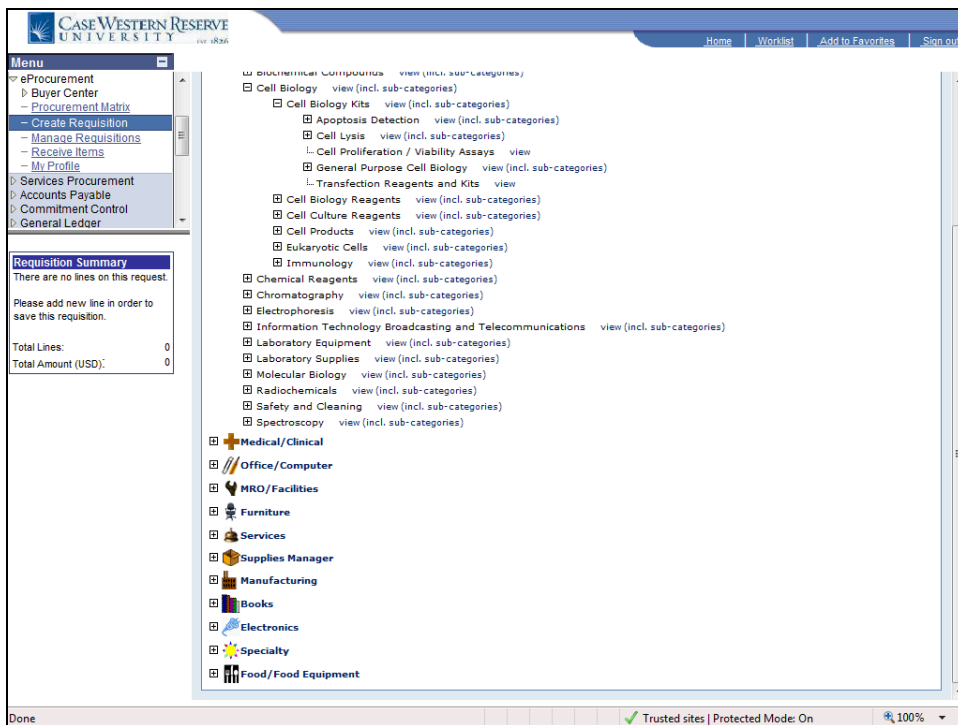
Step	Action
32.	The list of vendors page opens. Punch-out Suppliers are indicated by the arrow through the bullseye icon.
33.	Hosted Catalog Suppliers are indicated by an open book icon.
34.	To return, click the back to shop... link in the top right of the page. back to shop...




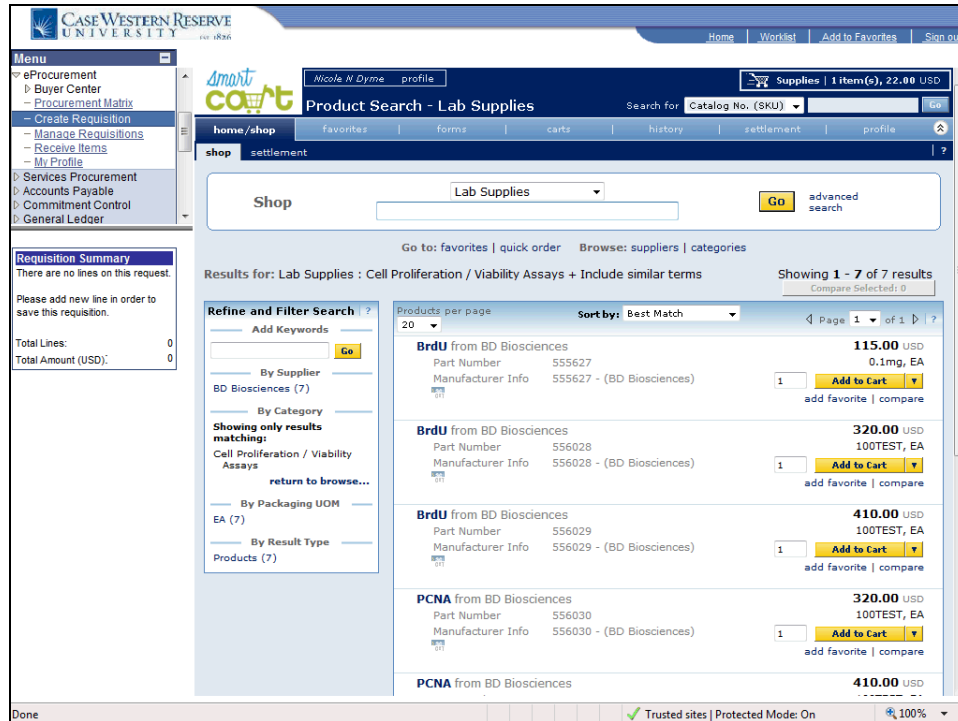
Step	Action
35.	To see items to purchase by category, click the categories link next to the Browse: .



Step	Action
36.	The Categories screen appears. Each category can be expanded and drilled down for more detail. For our example, click the Lab Supplies + button. 
37.	The category, becomes finer by smaller categories. For our example, click the Cell Biology + button. 
38.	To drill down further, click the Cell Biology Kits link.



Step	Action
39.	Note as you drill down, the view link and view (incl. sub-categories) link. In our example we will click an item that does not have sub categories by clicking the view link. 



Step	Action
40.	<p>The SmartCART home pages appears with items from the hosted catalogs that match the category(ies) that we chose.</p> <p>To return to the Home Page you can click home/shop.</p>
41.	<p>Users should now be familiar with the SmartCART Home page, links, and location of items.</p> <p>End of Procedure.</p>

Window Shoppers - Creating A Cart

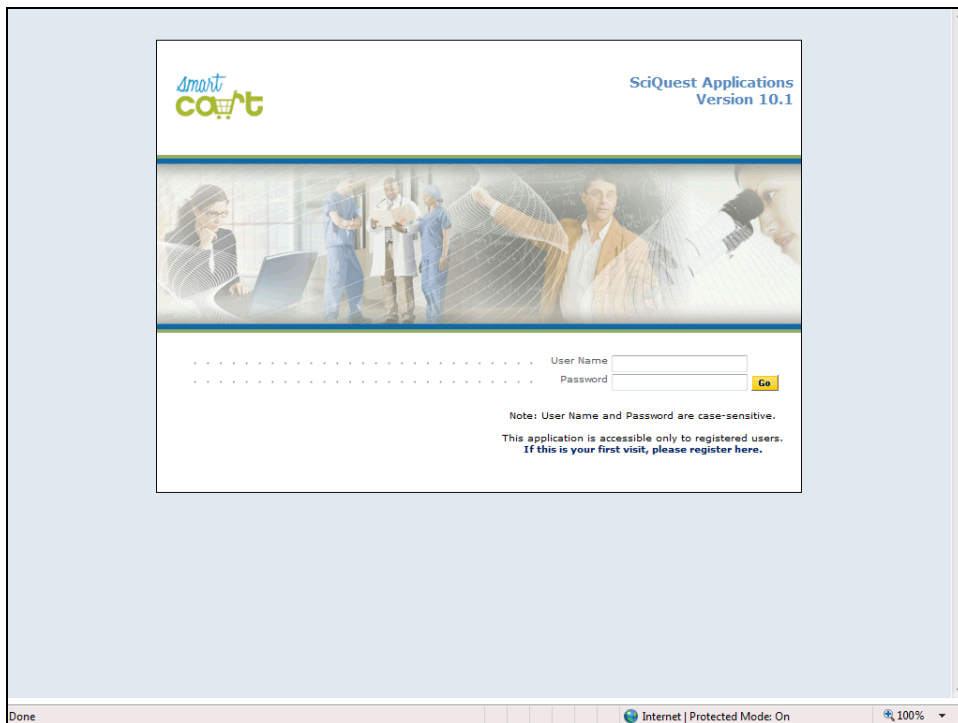
Window Shoppers are those that do not have access to Financials but can order items from SmartCART and pass the cart onto their department approvers to place the order and requisition. Window shoppers also have the ability to re-assign their cart to another approver. It is also possible to view carts to find the status the orders.


Procedure

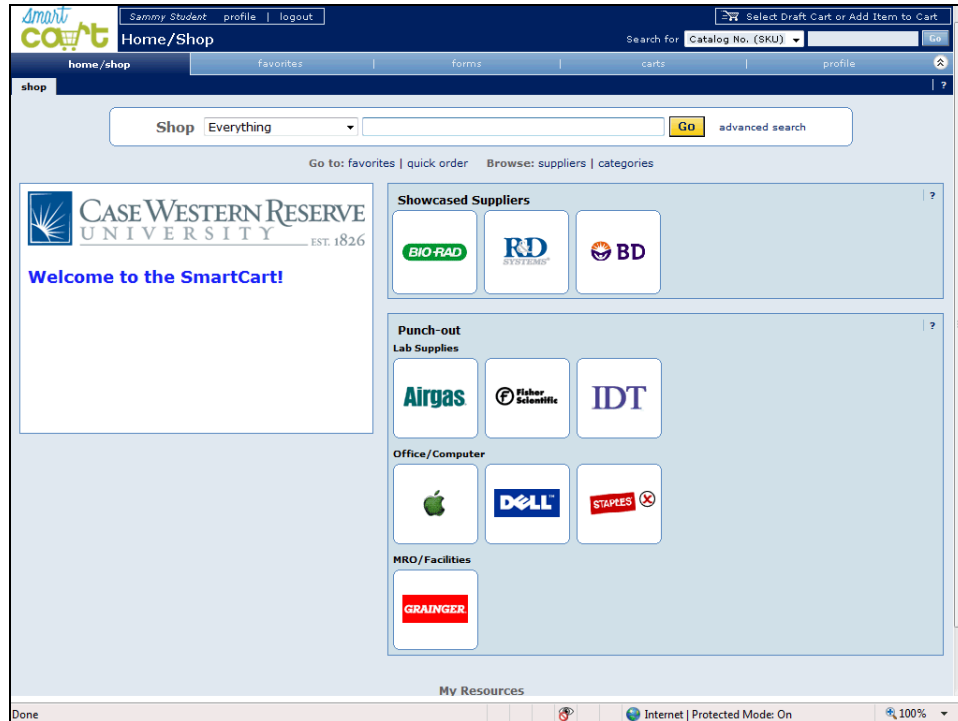
To begin, navigate to the web address

<https://solutions.sciquest.com/apps/Router/Login?OrgName=CaseWestern&URL=>

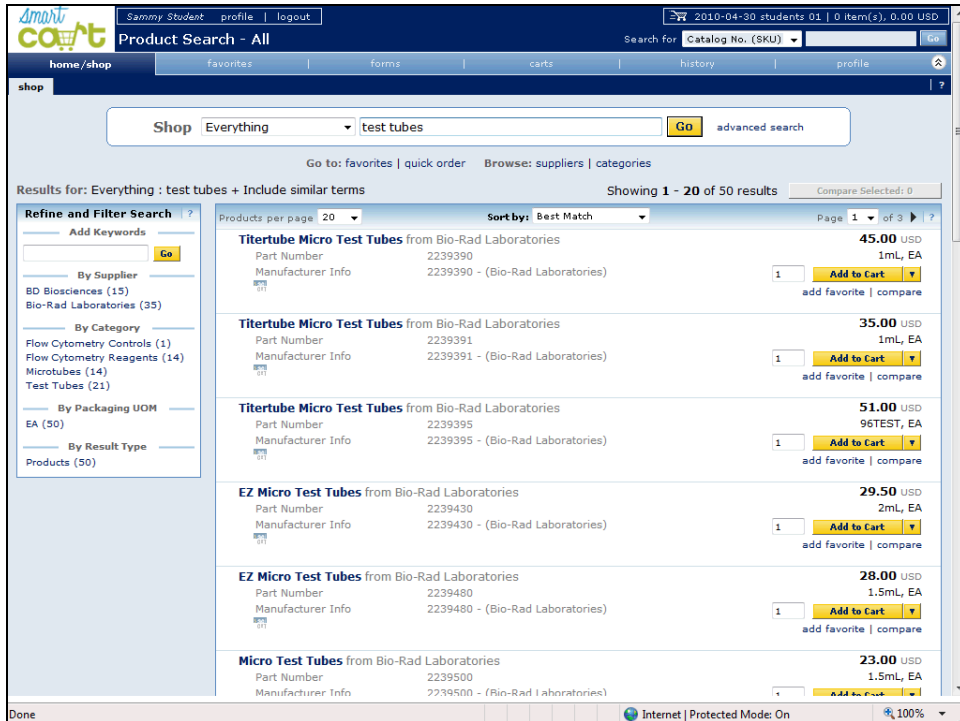
Log in with your UserName and default Password.






Step	Action
1.	Enter your User Name in the User Name field. Your UserName will be smart+ your Case ID.
2.	Enter your default Password in the Password field. Your default Password will be case + your CaseID.
3.	Click the Go button. 

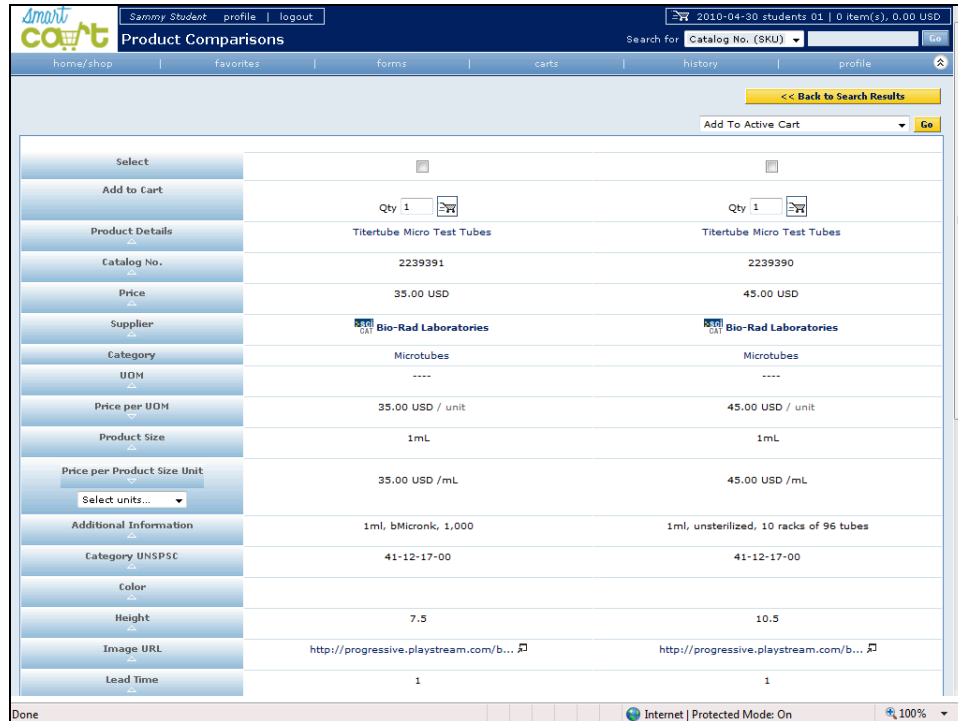




Step	Action
4.	<p>The SmartCART Home Page appears.</p> <p>For details about the SmartCART Home Page see the document "Window Shoppers Using the SmartCART System".</p> <p>For this example we are going to order an item from a Hosted catalog and an item from a Punchout catalog.</p> <p>Type "test tubes" in the "Shop at the Top" and click Go.</p> <div style="border: 1px solid black; width: 150px; height: 20px; margin-left: 20px;"></div>
5.	Click in the Shop field.
6.	Enter the desired information into the Shop field. Enter " test tubes ".
7.	Click the Go button.

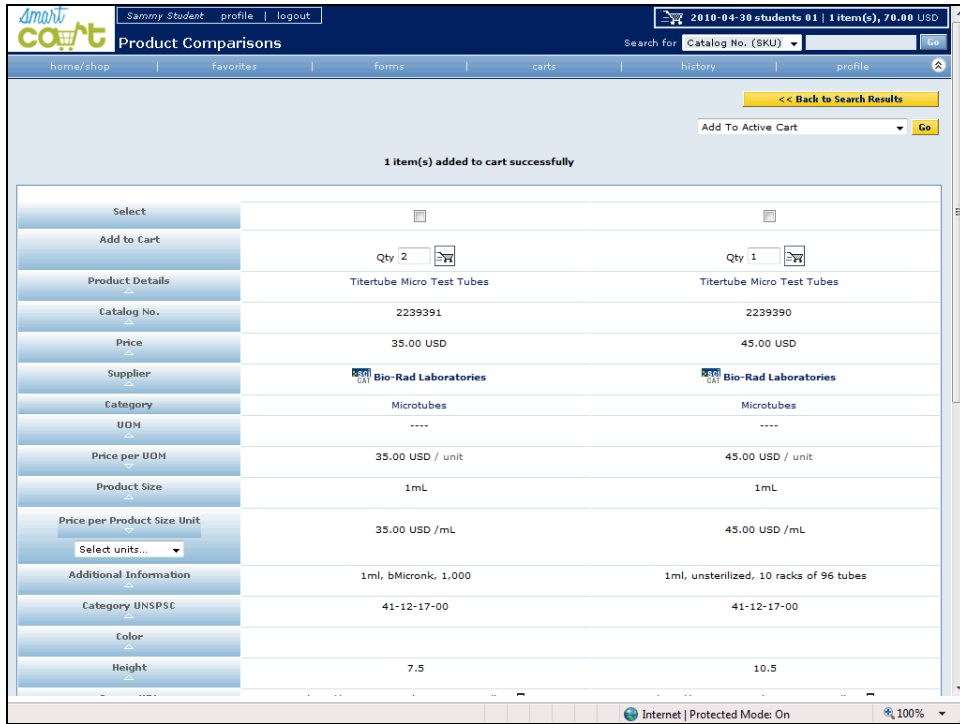


The screenshot shows the SmartCart website interface. At the top, there is a navigation bar with 'home/shop', 'favorites', 'forms', 'carts', 'history', and 'profile'. A search bar contains 'test tubes' and a 'Go' button. Below the search bar, there are links for 'Go to: favorites | quick order | Browse: suppliers | categories'. The main content area displays search results for 'test tubes' with 20 items per page. The results are sorted by 'Best Match' and show a list of products from Bio-Rad Laboratories. Each product entry includes the product name, part number, manufacturer info, price, and quantity. There are 'Add to Cart' and 'compare' buttons for each item. A 'Compare Selected: 0' button is visible at the top right of the results area. The left sidebar contains a 'Refine and Filter Search' section with various filters like 'By Supplier', 'By Category', and 'By Packaging UOM'.

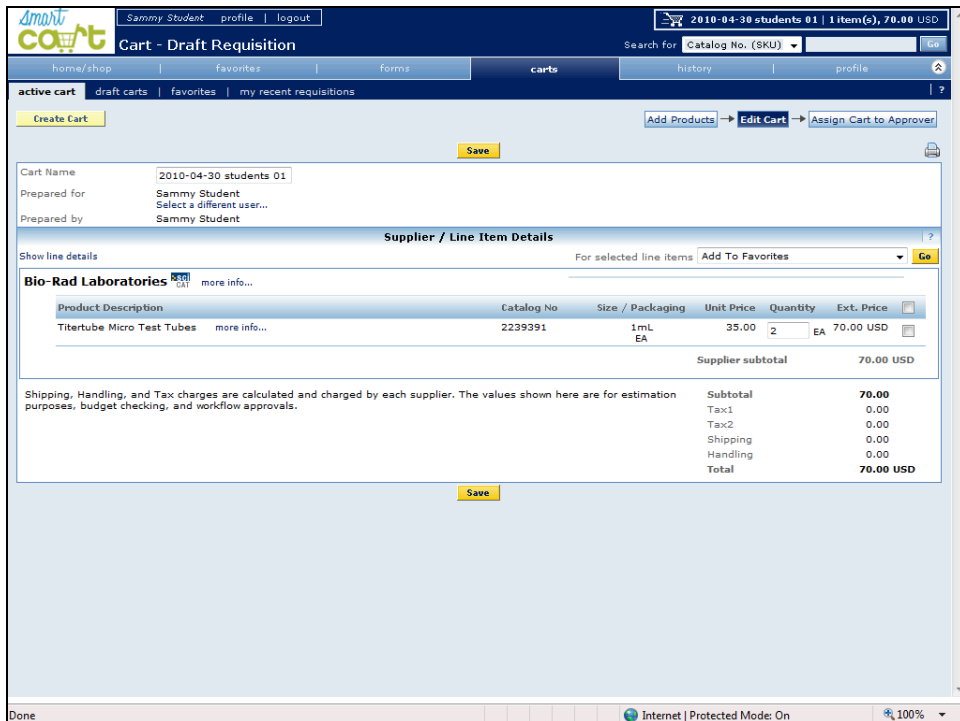
Step	Action
8.	Enter the amount and click Add to Cart. Click add favorite to add to your favorites list.
9.	Click the compare link. 
10.	Click the compare link. 
11.	Click the Compare Selected: 2 button. 




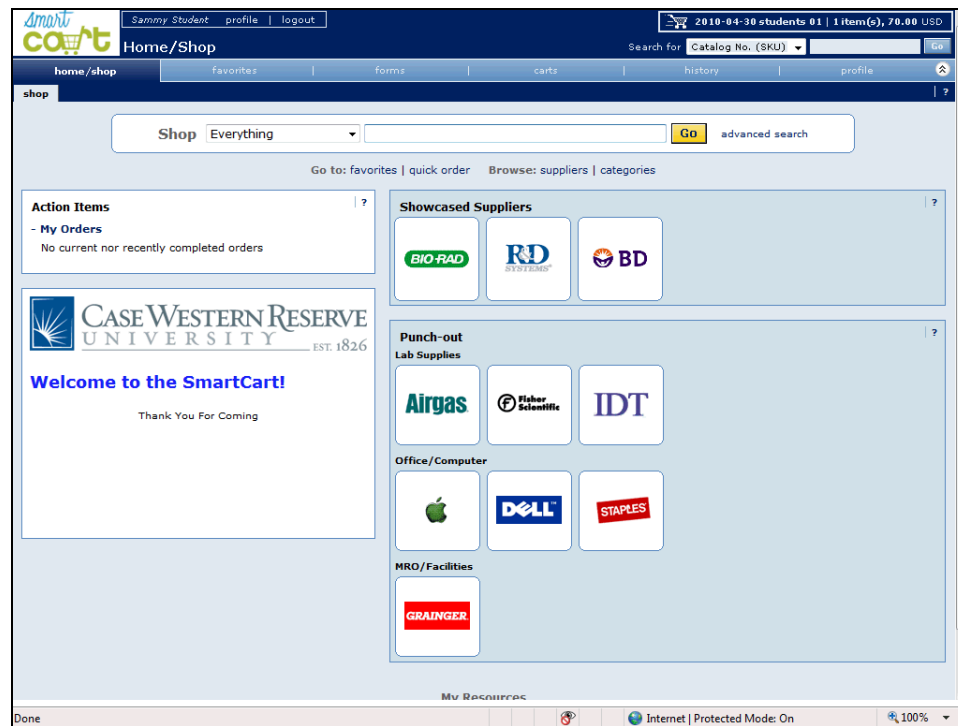
Step	Action
12.	Order the item from the comparison screen. Click in the Qty field. 
13.	Enter the desired information into the Qty field. Enter " 2 ".
14.	Click the Add to Cart button. 





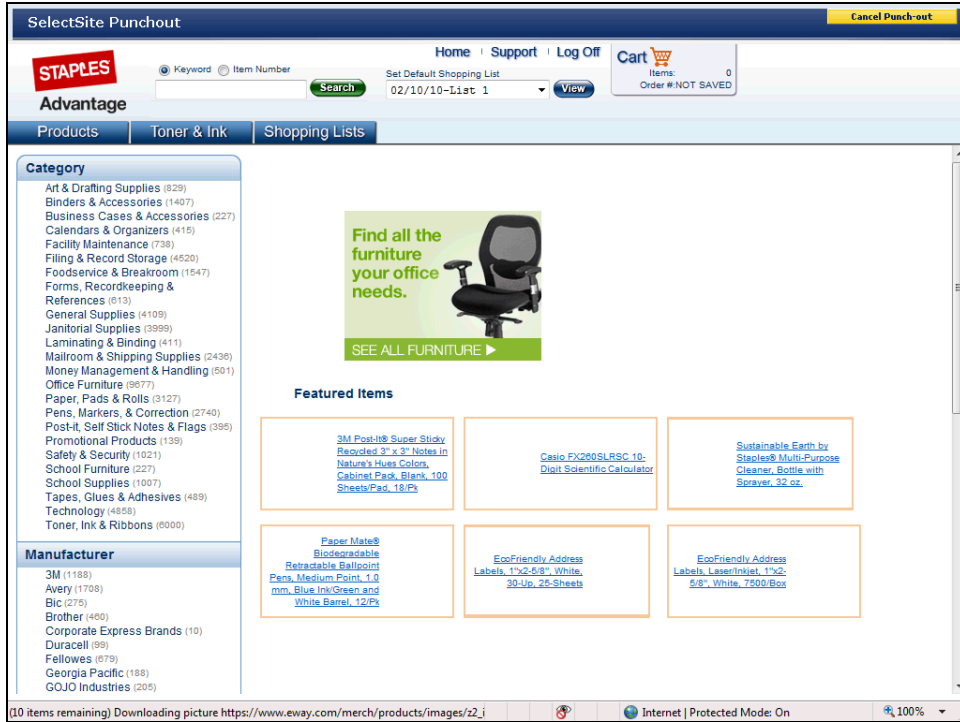
Step	Action
15.	<p>Click the Cart link to return to your Cart.</p> <p>2010-04-30 students 01 1 item(s), 70.00 USD</p>



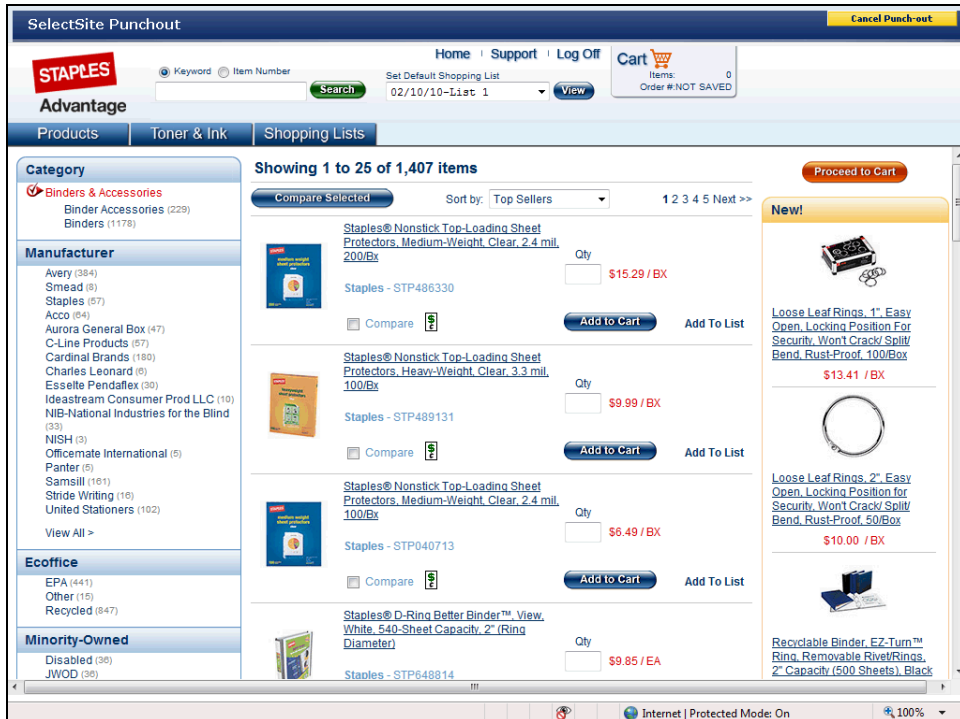
Step	Action
16.	Your SmartCART cart will appear. To add another item click the Add Products button. 





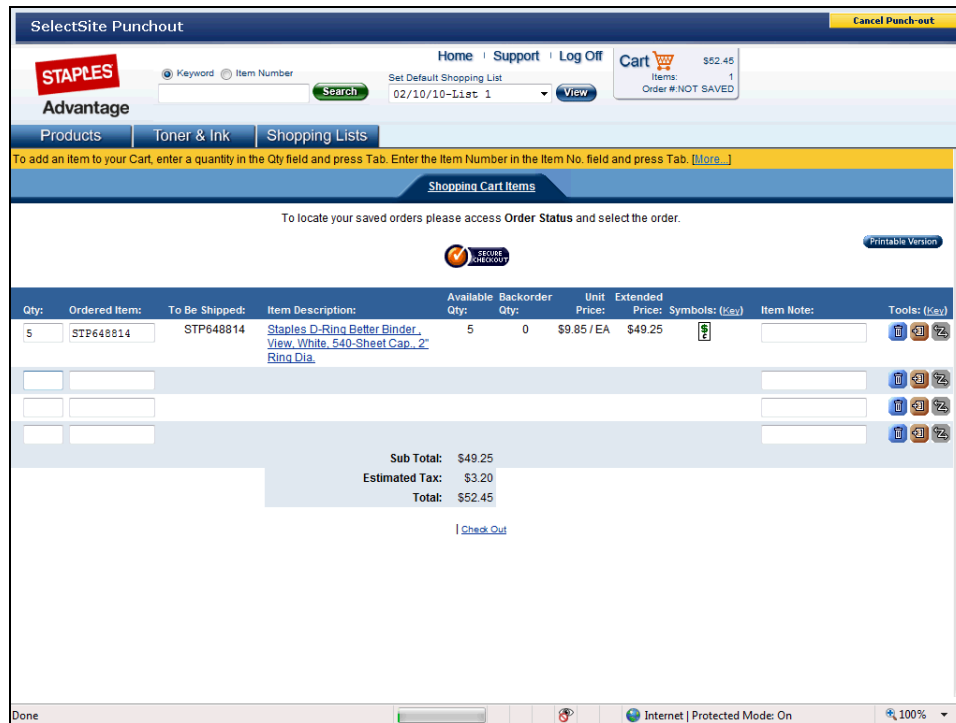
Step	Action
17.	Click the Staples Advantage button. 
18.	At any time to go back to SmartCART from a Punchout catalog, click the Cancel Punch-out object.
19.	The Staples Punchout appears. Notice it is the same as the eway website. Order as usual, in our example, click the Products button. 




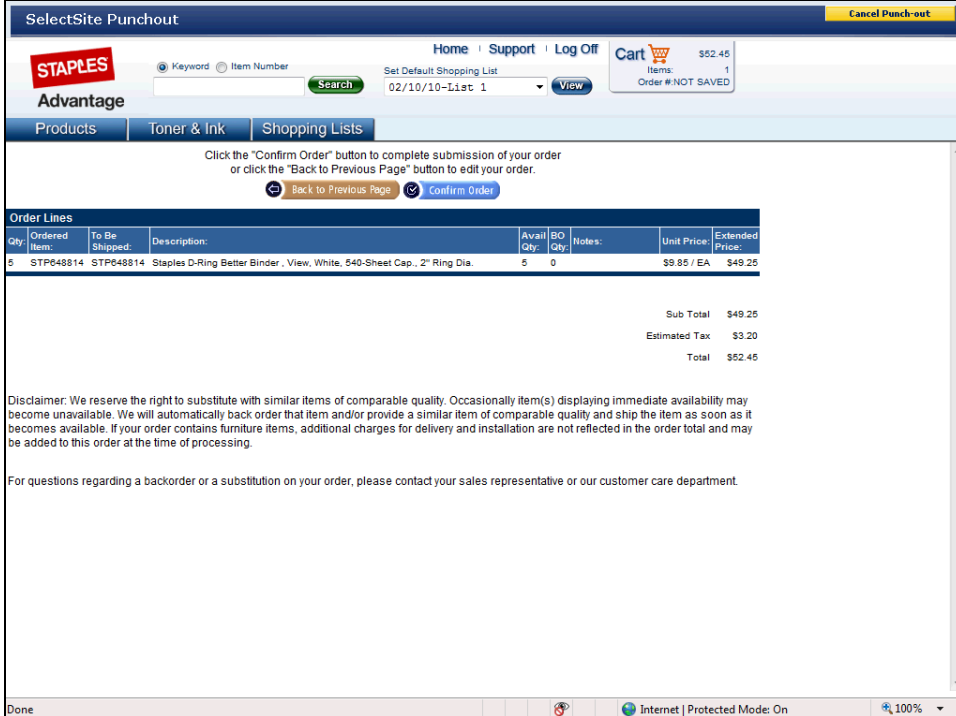
Step	Action
20.	For this example, click the Binders & Accessories link. Binders & Accessories



Step	Action
21.	Order an item by entering the quantity to order.
22.	Click the Add To Cart button. 
23.	When ready to complete the purchase, click the Proceed to Checkout button. 



Step	Action
24.	Review the order and click the Check Out button. 



SelectSite Punchout Cancel Punch-out

Home | Support | Log Off Cart \$52.46
Items: 1
Order #: NOT SAVED

STAPLES Advantage

Products | Toner & Ink | Shopping Lists

Click the "Confirm Order" button to complete submission of your order or click the "Back to Previous Page" button to edit your order.

[Back to Previous Page](#) [Confirm Order](#)


Qty	Ordered Item	To Be Shipped	Description	Avail Qty	BO Qty	Notes	Unit Price	Extended Price
5	STP648814	STP648814	Staples D-Ring Better Binder, View, White, 540-Sheet Cap., 2" Ring Dia.	5	0		\$9.85 / EA	\$49.25

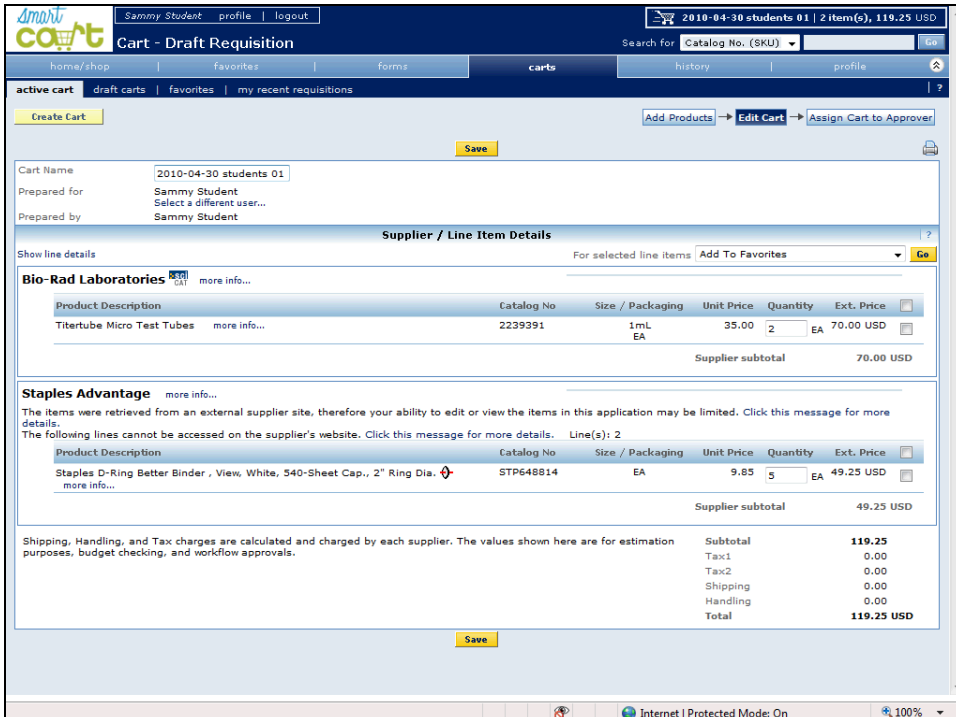
Sub Total \$49.25
Estimated Tax \$3.20
Total \$52.45

Disclaimer: We reserve the right to substitute with similar items of comparable quality. Occasionally item(s) displaying immediate availability may become unavailable. We will automatically back order that item and/or provide a similar item of comparable quality and ship the item as soon as it becomes available. If your order contains furniture items, additional charges for delivery and installation are not reflected in the order total and may be added to this order at the time of processing.

For questions regarding a backorder or a substitution on your order, please contact your sales representative or our customer care department.

Step	Action
25.	To finalize the order, click the confirm order button.





SmartCart 2010-04-30 students 01 | 2 item(s), 119.25 USD

Cart - Draft Requisition

home/shop | favorites | forms | carts | history | profile

active cart | draft carts | favorites | my recent requisitions

Create Cart Add Products → Edit Cart → Assign Cart to Approver

Save

Cart Name: 2010-04-30 students 01
Prepared for: Sammy Student
Prepared by: Sammy Student

Supplier / Line Item Details

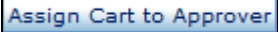
Show line details For selected line items Add To Favorites [Go](#)

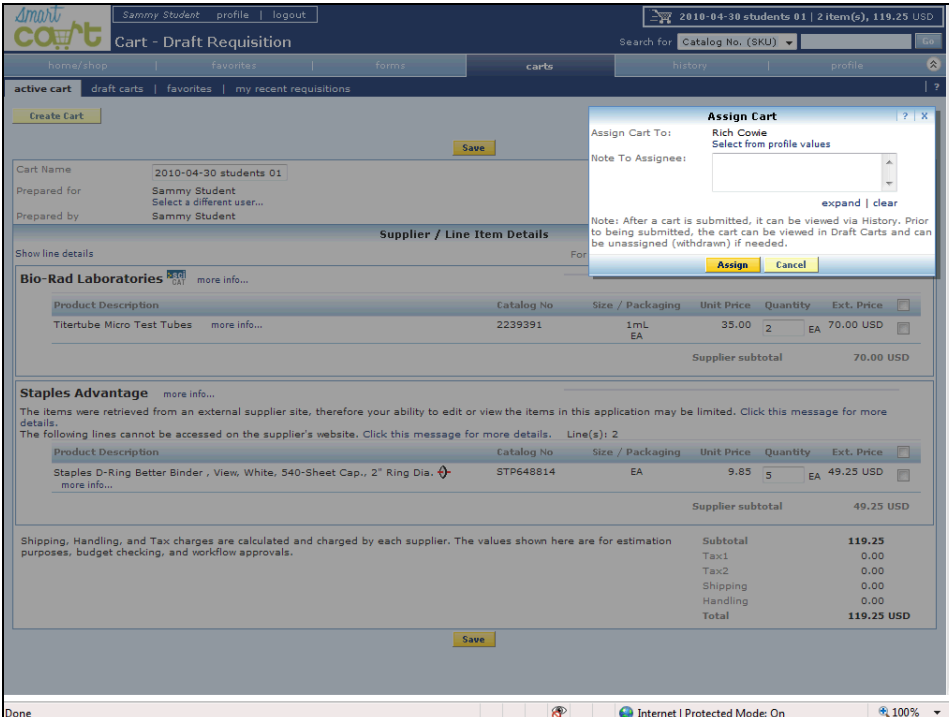
Product Description	Catalog No	Size / Packaging	Unit Price	Quantity	Ext. Price
Bio-Rad Laboratories <small>more info...</small>					
Titertube Micro Test Tubes <small>more info...</small>	2239391	1mL EA	35.00	2 EA	70.00 USD
Supplier subtotal					70.00 USD
Staples Advantage <small>more info...</small>					
The items were retrieved from an external supplier site, therefore your ability to edit or view the items in this application may be limited. Click this message for more details.					
The following lines cannot be accessed on the supplier's website. Click this message for more details. Line(s): 2					
Staples D-Ring Better Binder, View, White, 540-Sheet Cap., 2" Ring Dia. <small>more info...</small>	STP648814	EA	9.85	5 EA	49.25 USD
Supplier subtotal					49.25 USD



Shipping, Handling, and Tax charges are calculated and charged by each supplier. The values shown here are for estimation purposes, budget checking, and workflow approvals.

Subtotal	119.25
Tax1	0.00
Tax2	0.00
Shipping	0.00
Handling	0.00
Total	119.25 USD

Save

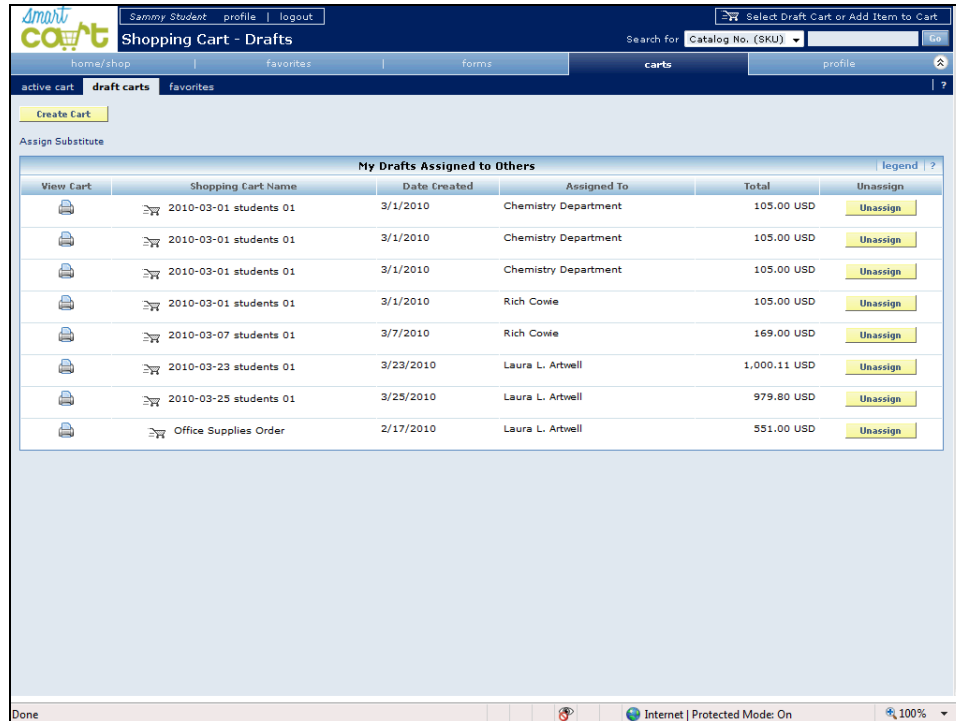
Step	Action
26.	Notice your Cart default name. Today's date, your ID, and a number. Change the Cart Name to something meaningful for this order.
27.	Enter the new name into the Cart Name field.
28.	After the SmartCART cart appears. Review items for accuracy. Edit quantity and delete items in your SmartCART before assigning to an approver. Click the Assign Cart to Approver link. 




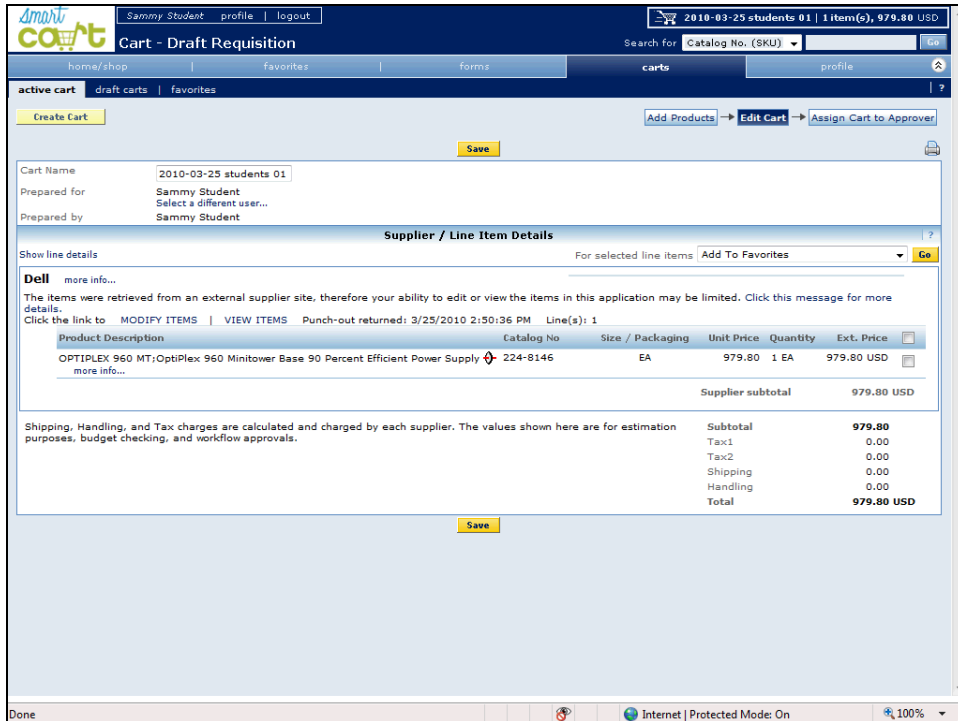
Step	Action
29.	Choose a name to assign the car to if the default name is not the correct assignee. For example, the person is unavailable. 
30.	Enter detailed information for your approver into the comment field. For example, the speedtype and account or purchase details.
31.	Click the Assign button. 



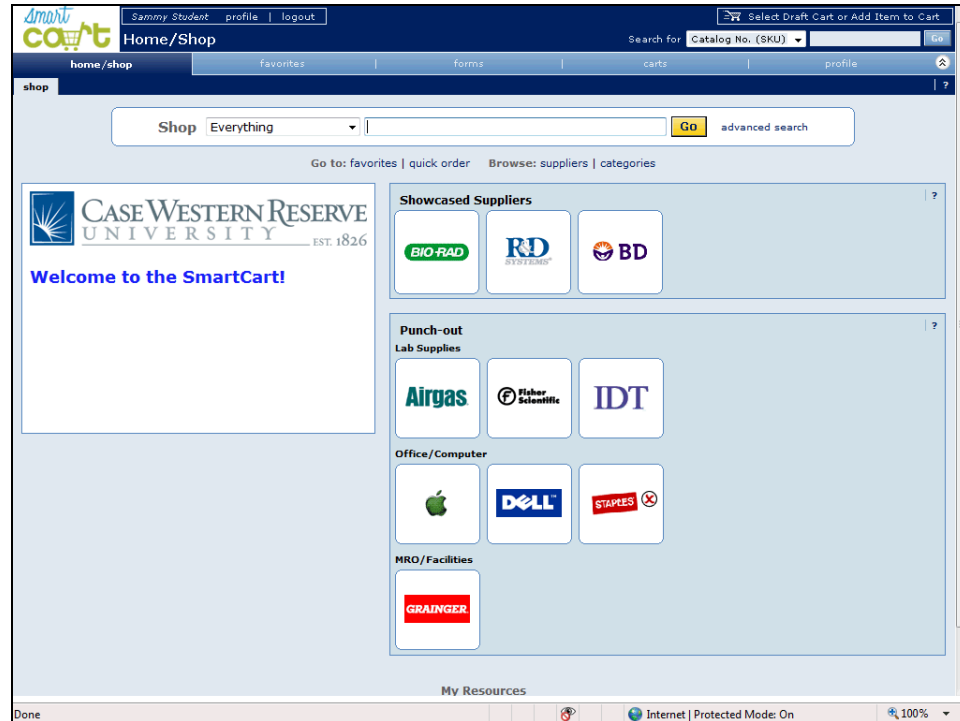
Step	Action
32.	<p>The Cart confirmation screen appears with the information that you entered for your approver to view. Click the draft carts object.</p> <div style="border: 1px solid black; padding: 2px; display: inline-block;">Shopping Cart Information</div>
33.	<p>Click the draft carts menu item.</p> <div style="border: 1px solid black; padding: 2px; display: inline-block;">draft carts</div>




Step	Action
34.	<p>The My Drafts Assigned to Others list appears. These are all the carts you have assigned but have not been approved and processed.</p> <p>Click the Unassign button to assign your cart to a different approver.</p> <p></p>



Step	Action
35.	The cart opens. Click the Assign Cart to Approver link to re-assign the cart to another approver. Assign Cart to Approver
36.	Select a new name or department from the drop down Select from profile values . Indicate in the Note to Assignee: field why are are re-assigning and include the Speedtype, your name, and other details this person would like to know.
37.	Click the Assign button. Assign
38.	The confirmation screen appears with the information that was entered. Shopping Cart Information



Step	Action
39.	Click the carts and then draft carts menu items. 
40.	View your same cart with a new Assigned To person to approve.
41.	This completes the section about how to create a SmartCART as a window shopper. End of Procedure.