Introduction to SHOPPER

In eMARS 3.10, **SHOPPER** will replace URCATS and URSRCHMA. **SHOPPER** is the starting point to procure the items/services you need that are available from a Master Agreement. (The Exercise starts on Page 5.)
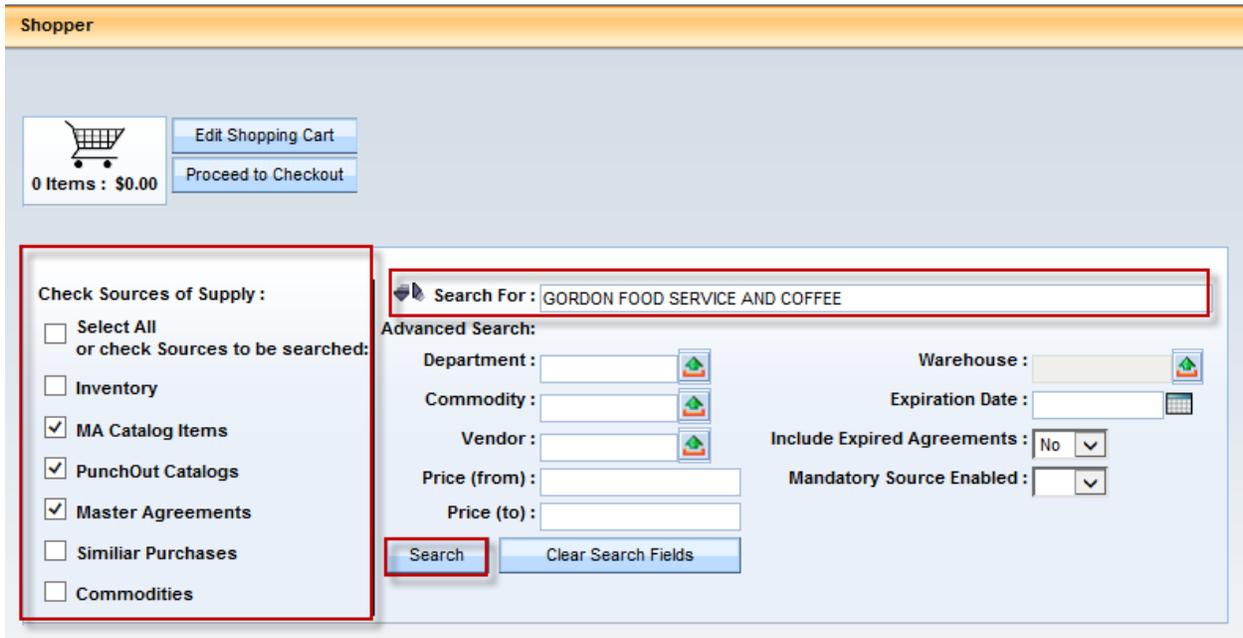
To Begin:

Access the **Procurement Workspace,** click on **SHOPPER**

OR

Enter **SHOP** in the **Jump To**: [Jump to: SHOP ⬆ Go] Click **Go**.

The SHOPPER page will open.

Deselect all **Sources of Supply** except **MA Catalog Items, PunchOut Catalogs and Master Agreements** check-box. This means that the inquiry will only search for MA Catalog items, Punchout Catalogs and Master Agreements

Type in your search criteria into the "**Search For**" field and click **Search**. This search fields supports special characters and reserve words for advanced searching. The following table shows how reserve words work:

Reserved Word	Examples	Search Result
AND	computer and mouse	Returns catalog records with both terms. Relevancy is increased based on the number of times both words occur.
ACCUM	Computer ACCUM Mouse ACCUM Wireless	Returns catalog records with either or both terms. Relevancy is increased based on the number of times both words occur
OR	laptop or notebook	Returns catalog records with either laptop or notebook in any of the fields.
NOT	Notebook NOT MA12344	Excludes records that contain the specified key word. In this example it would return records with the word notebook which does not have MA12344 in any of the fields.

The percent character "…%..." may also be used as a wildcard to replace individual characters. For instance the search query "boo%" would return results for both "book" and "boot". Or any word that starts with "boo" like "booster".

Note: The standard eMARS wildcard character of "…*…" does not work on this inquiry. Please use the "…%..." instead. This is the exception to the rule.

When using the SHOPPER Search, it is important to include detailed information into the **Search For** field. This will ensure a quick and relevant search for the desired items. If the Master Agreement document ID or Vendor Code is known, this should be included into the search for field.

When searching for an item that exists on a large *Master Agreement Catalog* it is helpful to have an electronic copy of that catalog to use as a resource. Once a copy of the catalog has been downloaded users will be able reference this spreadsheet to locate the supplier part number and extended description included on the *Master Agreement*.

The following are steps to download a copy of a *Master Agreement Catalog:*

1. Open the desired *Master Agreement* within eMARS.
2. Navigate to the *Commodity Line* component.
3. Click *File* on the bottom right of the page.
4. Select the Attachments page.
5. Locate the most current version of the catalog, and highlight it.
6. Click *Download*.
7. Save the Excel spreadsheet to your *Desktop*.

Once the copy has been saved to your desktop, it may be referenced when making payments or processing *Delivery Orders* against the *Master Agreement*. The spreadsheet may be sorted based on the *Supplier Part Number, Unit Price, Item Description,* etc. Once you have located the item(s), the *Supplier Part Number, Unit Price, Item Description,* etc. may then be entered into the URCATS search criteria. Master Agreement Catalogs are modified as necessary. Users should delete the downloaded spreadsheets from their desktop and download again for future purchases as the Master Agreements are modified as necessary.

Review the results of the Catalog search. The search will produce a set of results that are sorted based on relevancy (that is, based on how closely the item matches the search criteria entered).

Once an item(s) is selected on SHOPPER, users will need to identify their desired method to procure the items. Users can create the following different types of documents from the SHOPPER search:

- **DO**- The **DO/DO2** document can be generated directly from the **SHOPPER** search by using the **Document Identifier** pick list on the **Checkout Page. The Department**, **Unit**, **Auto Numbering** fields must be populated in this section. In the **Additional Information** section, the **Shipping** and **Billing Locations** and **Delivery Date** fields must be populated with your information in order for eMARS to generate the **DO/DO2** document.
- **PRC**- The **PRC** can be generated directly from the **SHOPPER** search on the **Checkout** page by selecting **PRC** from the **Document Identifier**. The **Auto Numbering** box in the **Document Identifier** section will need to be selected. Under the **Additional Information** section, the **Shipping** and **Billing Locations** and the **Delivery Date** fields must be filled in order for eMARS to generate the Payment Request.

Select the items you wish to order by adding the quantity of the item.

Click on **Add To Cart.**

Click on **Checkout.**

Click on **Proceed to Checkout.**

Fill in the required fields under **Document Identifier** and **Additional Information**.

Click **Checkout** again and the **DO/DO2 or PRC** document is generated and opened for completion.

Exercise 1 — Generate a Delivery Order (DO) Using SHOPPER

Scenario

Your Department needs to pay for coffee supplies for the cafeteria. A Master Agreement was previously created by Finance, Office of Material & Procurement Services and is accessible through **SHOPPER**. The purchasing office will create the **Delivery Order** to procure the items.

Task Overview

Generate a **Delivery Order (DO)** payment from **SHOPPER.**

Procedures

1. At the top of the screen**,** type **SHOP** in the **JUMP TO** field. Click <u>**Go**</u>. Shopper search screen will open.

   Or, click on the **Procurement Workspace**. Under **Search for Items or Awards**, click on **<u>SHOPPER</u>**

> NOTE: Deselecting all boxes except **MA** Catalog Items, ensures the results are only items on Master Agreement. (also, selecting Menu – Page Help gives helpful hints on advanced searches)

2. Uncheck the **Select All** box.
3. Select the **MA Catalog Items, PunchOut Catalogs and Master Agreements.**

Search Tips for SHOPPER

- **Do NOT** use a hyphen "**-**". Using this character will produce in undesired results. Use search criteria that does not include the hyphen. For instance, if you are searching for a specific Master Agreement number, C-05989898, you should search using just the number and wildcard, %05989898%. Or, if you are searching for a supplier part number that contains the hyphen such as AB123-01, search for AB123%.
- Use Supplier Part numbers when possible.
- Stay away from broad searches such as "Cardinal%" or "Ikon%". There are several large contracts, some with several thousand lines. Using broad searches on these contracts will take substantially longer.

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4. Type your search criteria (EX: *Gordon Food Service and Coffee)* in the **Search For** field.
5. Click **Search**. See the search results below. To see more results, Click the **Next** button at the bottom of the screen.
6. **Select** the items for purchase by entering the quantity needed. EX: Choose 12-Cup RT Coffee FIL, URN Cleaner Brewrite. Quantity of 1 each.
7. Click **Add To Cart**.
8. Click **Next** at the bottom to see items on next page if not all the items to be purchased are on the same page. EX: Choose Coffee Condiment Kit by entering the quantity of 1.

> NOTE: If more items are to be purchased and those items are not on the same page, choose the items on the page displayed, enter the quantity and click on Add to Cart. Then click on Next to go to the next page of items. Choose the items on each page and add them to the cart before going to the next page of items.

Shopper

Edit Shopping Cart

Proceed to Checkout

3 Items : $47.31

Check Sources of Supply :

☐ Select All
  or check Sources to be searched

☐ Inventory

☑ MA Catalog Items

☐ PunchOut Catalogs

☑ Master Agreements

☐ Similiar Purchases

☐ Commodities

Search For : GORDON FOOD SERVICE AND COFFEE

Advanced Search:

Department :	Warehouse :
Commodity :	Expiration Date :
Vendor :	Include Expired Agreements : No
Price (from) :	Mandatory Source Enabled :
Price (to) :	

Search   Clear Search Fields

▼ Available From MA Catalogs

Mandatory Source	Quantity	Unit	Unit Price	Commodity Code	CL Description	Description	Supplier Part Number	Vendor	Source	Expiration	Image	
No	1	CASE	$8.77	64000	12-CUP RT COFFEE FIL	PAPER AND PLASTIC PRODUCTS, DISPOSABLE	116637	Gordon Food Service	MA 758 1200000983	2015-06-25		Details
No	1	CASE	$14.64	64000	URN CLEANER BREW-RITE	PAPER AND PLASTIC PRODUCTS, DISPOSABLE	189189	Gordon Food Service	MA 758 1200000983	2015-06-25		Details
No	1	CASE	$23.90	64000	COFFEE CONDIMENT KIT	PAPER AND PLASTIC PRODUCTS, DISPOSABLE	671673	Gordon Food Service	MA 758 1200000983	2015-06-25		Details

First Prev Next Last   Add to Cart

9. Click **Add to Cart**.   The number of items you have selected will appear in the Shopping Cart in the top right corner. (If you need to view or remove items from the cart, Click **Edit Shopping Cart**)

10. Click **Proceed to Checkout.**

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11. Under **Document Identifier**, select **DO or DO2.** Your *Dept* and *Unit* should infer from your user profile.
12. **Auto Numbering** field should be checked.
13. Under **Additional Information**, type in your **Shipping and Billing Location** and **Delivery Date**.
14. Click **Checkout**. (Click **OK** to the prompt to checkout.)
15. The **DO or DO2** document is opened. On the Header, type in the **Document Description** with information you would want to see on a report.
16. On the Requestor Issuer Buyer tab, type in the **Requester ID**.

> **NOTE:** If a secondary vendor is to be used, On the Header, go to the Reference section, Agreement Vendor Line field and enter the Vendor Line Number from the Master Agreement. Validate to see the change in vendor name.

17. Review the **Vendor Section** (the vendor code & information infer from the MA.)
18. Click on the **Commodity Section**. Verify the items that you ordered and need to pay are on the **DO**.

19. Since we have more than one **Commodity line**, we will use the <u>**Accounting Distribution**</u> section to add the accounting information and it will infer it to all the lines on the **PRC**. Click on <u>**Accounting Distribution**</u>.
20. Click <u>**Insert New Line**</u>. The **Event Type** will infer to PR05 (encumbering).
21. Enter the **Accounting Distribution** information on the General Information tab:

Required Fields	Values
Distribution %	**100**
Accounting Template	**Enter your Acct Template or your Funding information EX: FINCRC**

22. Click On Fund Accounting

Required Fields	Values
Object Code	**Enter the correct Object Code EX: E341**

23. Click <u>**Save**</u> and see the <u>**Distribute Accounting**</u> button appear in the bottom right corner.
24. Click the **Distribute Accounting** button to create and infer the Accounting lines to each **Commodity Line**.
25. Click <u>**Validate**</u> to see the accounting that inferred on each accounting line. Correct any errors, if there are any. Look at the **Header** to verify the amount is correct.

26. To verify the Accounting information did infer the correct information, click on the Commodity Line(s) then click on **Accounting** or **Posting** for each Commodity Line to view the accounting.

27. **Assemble** the document from the **Header** of the document. The assembly of the document will generate an Adobe PDF version of the Delivery Order which can be emailed to the vendor upon final approval. The assembly job should take 1-2 minutes.

Follow the below steps to **Assemble** the **DO**:

To Assemble:
1   From the Header Section, select the **Related Actions** Menu
2   Select **Assemble Document**
3   Select the desired form that will be used to print the document. (If processing a modification, the Mod form will need to be selected.)
4   Select **Submit Assemble Request** (this will initiate the document assembly process)
5   As the job is running, select the **Refresh** link to follow the job.

Once the Assembly job completes successfully, the generated Adobe PDF document will need to be viewed and downloaded.

> **Note**: If the document fails assembly, look for the reason. On the Header, click on the Related Actions button. Click on View Assembly Request. Click on View Job Log Messages. Call CRC if you need help with assembly. Click Cancel and Back when ready to return to the document.

28. Click **Back**

To View or Download:
1   From the Header, select **Attachments** from the **File Menu**.
2   Identify the attachment generated from the assembly process, and select Download

29. Click **Submit** once the **DO/DO2** validates successfully and has been successfully assembled.   The **DO/DO2** will route through the Workflow process that your department/agency has set up for document approvals.
30. **Write down** the Delivery Order Document ID for future use.

> ### NOTE: WORKFLOW
>
> Once your document is submitted, it goes from Draft to Pending Status. The document cannot be edited in Pending Status. Once in Pending status, the document will route according to the Workflow your department has set up for the approval process. Users that are designated as "approvers" will have access to the Worklist(s) the document is assigned. Approvers take the document to their own Worklist for review and to apply the approval.

Creating the PRC or PRCI (used for Internal Vendors only) from the DO or DO2

PRC referencing award documents (Copy Forward)

Various types of award documents (PO, PO2, PON2, DO, DO2, CT, CT2) can be created within eMARS depending upon the circumstance and the procurement authority of the department. These award documents must be properly referenced on the payment document to ensure the integrity of the award and properly track and liquidated the actions on the award. *The Copy Forward functionality can be used to ensure payments are properly referencing the award.* The Exercise for the Copy Forward starts on Page 14.

Copy Forward All Lines

To pay against all lines on the award document, users should follow the steps below:

1. Locate and open the award document through the Document Catalog.
2. Click Copy Forward located at the bottom of the document.
3. Enter Dept, Unit and select Auto Numbering.
4. Select either **PRC** for an external vendor or **PRCI** for an internal vendor.
5. Click OK.

Copy Forward Selected Lines

To pay against selected lines on the **DO/DO2**, users should follow the steps below:

1. Locate and open the award document through the Document Catalog.
2. Click on the Commodity Section of the document.
3. Select appropriate lines. Hold down the Control (**CTRL**) key on the keyboard. While keeping the **CTRL** key held, use the mouse to select the desired lines. Once selected the lines will be highlighted in blue.
4. Click **Copy Forward** located at the bottom of the document.
5. **Deselect** the Select Entire Document Checkbox.
6. Enter Dept, Unit and select **Auto Numbering**.
7. Select either **PRC** for an external vendor or **PRCI** for an internal vendor.
8. Click OK.

When creating the **PRC/PRCI** via the Copy Forward function, the payment document is populated with data from the referenced award. Users will complete the document with appropriate quantities, dollar amounts and vendor invoice information, then validate and submit the document for approval.

Using the **Copy Forward** function allows for easy document entry because the information on the referenced document is automatically inferred to the **PRC** or **PRCI**. The Accounting information is not present at first on the **PRC** or the **PRCI** document; the document must be validated before the Accounting information is displayed.

Verify Partial/Final Reference Type on Payment (PRC) Documents

When creating **PRC** documents referencing award documents, be sure to verify the partial/final reference type located under the *Reference* area of the *Commodity Section and Accounting Section..* Choosing the *Final* reference type will close the corresponding commodity line, thus preventing any further payments against that line. Therefore, it is very important that you do not choose *Final* prematurely.

As a standard practice it is best to follow these steps when completing your PRC:

Step 1. Select appropriate lines if applicable

Step 2*. Copy Forward* from the award to the **PRC**.

Step 3. Change the *Quantity* or *Contract Amount* to the proper amount to be paid.

Step 4. Select the appropriate *Reference Type (Partial/Final)*. **Only select *Final***

if you are sure no other payments will be made against the line.

Step 5. Validate to infer the *Accounting Lines* from the award. It is best not to

validate prior to completing Step 4.

Step 6. Enter all other required fields.

Step 7. Validate again to ensure document is without error.

Step 8. Double check the *Partial/Final Reference Type on the Commodity and*

Accounting line..

Step 9. Submit the **PRC**.

Exercise 2 — Copy Forward from an Award Document (DO or DO2 to a PRC/PRCI

Scenario

Your Department established a **Delivery Order** to purchase the goods or services. The **DO/DO2** has been approved accordingly. The payable office will use the **Copy Forward** option to create a **PRC** for payment.

Task Overview

Create a **PRC** document using the **Copy Forward** functionality from a **DO** award.

Procedures

1. From the Secondary Navigation Panel, click **Search**.
2. Open the **Document Catalog**.
3. Enter the following information:

Required Fields	Values
Code	**DO/DO2**
Dept	**Enter your Department**
ID	**Enter the Award/Contract Document Number**

4. Click **Browse.**
5. Click the **DO/DO2** ID number link to open the document. The **DO** document opens to the Header section.
6. At the bottom of the screen, click **Copy Forward.**   The Copy Forward page opens.

7. Enter the following information below the "To Document" line.

Required Fields	Values
Dept	**Enter your Dept Number**
Unit	**Enter your Unit**
ID	**Select the Auto Number checkbox**
Target Document Type	**Select the PRC (or PRCI if the DO was with an Internal Vendor)**

NOTE: The Copy Forward to a PRC can be done from all awards, DO, DO2, PO, PO2, CT, CT2 and PON2 substituting the referencing award Document Code/ID in Step 3.

8. Click **OK**. The new **PRC** document opens to the **Header** section. Most fields on the **PRC** should be inferred from the **DO** document.

9. Click the **Vendor** section. The page opens to the General Information tab.

10. Enter the following in the **Disbursement Options** tab.

Required Fields	Values
Scheduled Payment Date	**Enter the date the Payment is Due. (If left blank, the system will infer the date the document is submitted.)**

11. Enter the following in the **Invoice Information** tab.

Required Fields	Values
Vendor Invoice Number	**Enter the Invoice Number from the Vendor's Invoice**
Vendor Invoice Date	**Enter the date from the Vendor's Invoice**

12. Click the **Commodity** section. The page opens to the General Information tab.

13. Enter the following in the **General Information** tab on the **PRC** for each Commodity line.

Required Fields	Values
Qty or Contract Amount	**Enter the Qty or Contract Amount to be paid**

14. Enter the following in the **Reference** tab.

Required Fields	Values
Reference Type	**Choose Partial (Unless the line is to closed out)**

15. Go to the Accounting Section. When the PRC was generated, the **Accounting** lines came over to the **PRC** from the **DO/DO2**. Check the **Reference** tab to ensure lines are not closed out prematurely. *Choose Partial if future payments will need to made. Choose Final ONLY if you are expending the whole amount or wish to close the Commodity and Accounting line.*

16. Click **Validate.**

17. Check for errors. If errors are present, correct them and click **Validate** again.

18. Click **Submit** after all errors have been corrected.

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