Marketplace Shopping Overview

There are two roles within Marketplace. Your role within the system will determine what steps are needed to place an order. Please review the below criteria to determine which role you best fit.

Shoppers (Guide starts on Page 3):

- Must access Marketplace through the OU Marketplace link within Compass (compass.ou.edu).
- These individuals require no prior access to Peoplesoft and are automatically available for all University staff.
- They can select items from Marketplace vendors and create carts for a Requestor to process.

Requestors (Guide starts on Page 5):

- Must access Marketplace through the eProcurement tab in PeopleSoft Financials (fs.ou.edu).
- These individuals must complete Procure to Pay Training and be granted the Department Purchasing Entry role within PeopleSoft Financials.
- They inherit all abilities that Shoppers have — and thus can shop for themselves or others within the Marketplace — but have the added ability of creating Requisitions within Marketplace and submitting orders for financial approval.

Marketplace Tips & Tricks

- Many suppliers allow you to check the status of an order. Grab the PO number from within PeopleSoft and navigate to the supplier’s Marketplace PunchOut. Locate the order status page for the respective supplier and put the PO number in to get up-to-date information about your shipment.
- If the Request is closed before being saved, you can select “Resubmit Cart” from the cart review screen (see Appendix A).
- If you have issues accessing Marketplace PunchOuts, try resetting your browser cache and cookies or use another web browser.
- Contact OUMarketplaceSupport@ouhsc.edu for questions regarding the Marketplace.
## Change Log

<table>
<thead>
<tr>
<th>Date Changed</th>
<th>Version Number</th>
<th>Change(s)</th>
<th>Affected Page(s)</th>
</tr>
</thead>
<tbody>
<tr>
<td>11/01/2021</td>
<td>1.00</td>
<td>Created Document</td>
<td>All</td>
</tr>
<tr>
<td>12/01/2021</td>
<td>1.01</td>
<td>Added section on Resubmitting Cart</td>
<td>10</td>
</tr>
</tbody>
</table>
Marketplace Shopper Guide

1. Log in to the Marketplace Shopper link located at compass.ou.edu under PeopleSoft Production Financials Environments.

2. Once logged in, all current Marketplace vendors can be seen in the tiles located at the lower center of the page. There are two options to shop. Either click the icon in the Punch-Out menu for the supplier you want to shop with or enter a search term in the search bar near the top.
3. Once you have selected all the items for your order, return to your cart in Marketplace. Here, you can assign a name for the cart to make it distinguishable or leave it as the default. Now it is time to assign the cart to your department Requestor by selecting Assign Cart.

4. Once you have selected Assign Cart, you can either select your default Cart Assignee if you have one set up or select SEARCH to find the user. Once your Requestor is selected, you can input comments if desired, then hit Assign to send the cart.
Marketplace Requestor Guide

1. Log into PeopleSoft Financials (fs.ou.edu) and navigate to the Marketplace by going to the eProcurement module, selecting Requisition and clicking OU Marketplace.

2. Once in Marketplace you will see your assigned carts on the right. Click Carts Assigned to Me to view them.
3. Here you will see all Carts assigned to you. Click View to begin processing the cart, Activate to add things to the cart, or Return to send the cart back to the shopper for edits.

4. When viewing the cart, select Review Shipping to proceed. You also have another chance to send the cart back to the Shopper using Return Cart or Assign it to another Requestor.
5. In the Review Shipping screen, you can review and edit the Shipping address as needed. Once the address is correct click Send to PeopleSoft.

6. Now the Cart has turned into a PeopleSoft Requisition. To assign Chartfield information for each line item expand the drop-down menu, then expand Accounting Lines, and finally select Chartfields2. Here you can assign your budget information to the Requisition.
7. Another option is to update all lines at once. You do this by clicking the checkbox next to each line you want to change and selecting Mass Change below and to the right of all lines. Here you can change the budget information for multiple lines at once.

8. Once budget information has been selected for every line, verify again that the Shipping information is correct and check the Ship To Confirmation box. Then select Check Budget.
9. Once the Budget Checking Status reflects as Valid, the Requisition can be submitted for approval. Select Save & Submit to initiate this process.

10. On the Confirmation screen you are shown the Requisition number. You can check the status of the Requisition in Manage Requisitions using this number. You are also given a preview of the Approvals that the Requisition must pass. You can keep track of the approval progress there.
Appendix A – Resubmit Cart

1. Once a cart has been submitted to PeopleSoft, it must be saved within PeopleSoft for the requisition to stay. If you have left the window before saving the Requisition, you must return to Marketplace to reprocess the cart.

2. Locate the cart by using the left navigation to select Orders > My Orders > My Carts.

3. Here you will see a list of all carts you have processed. Select the cart you wish to reprocess.

4. On the cart review screen, select the dropdown next to the cart identifier and select Resubmit Cart.

5. This will open a new Requisition in PeopleSoft for processing.