

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

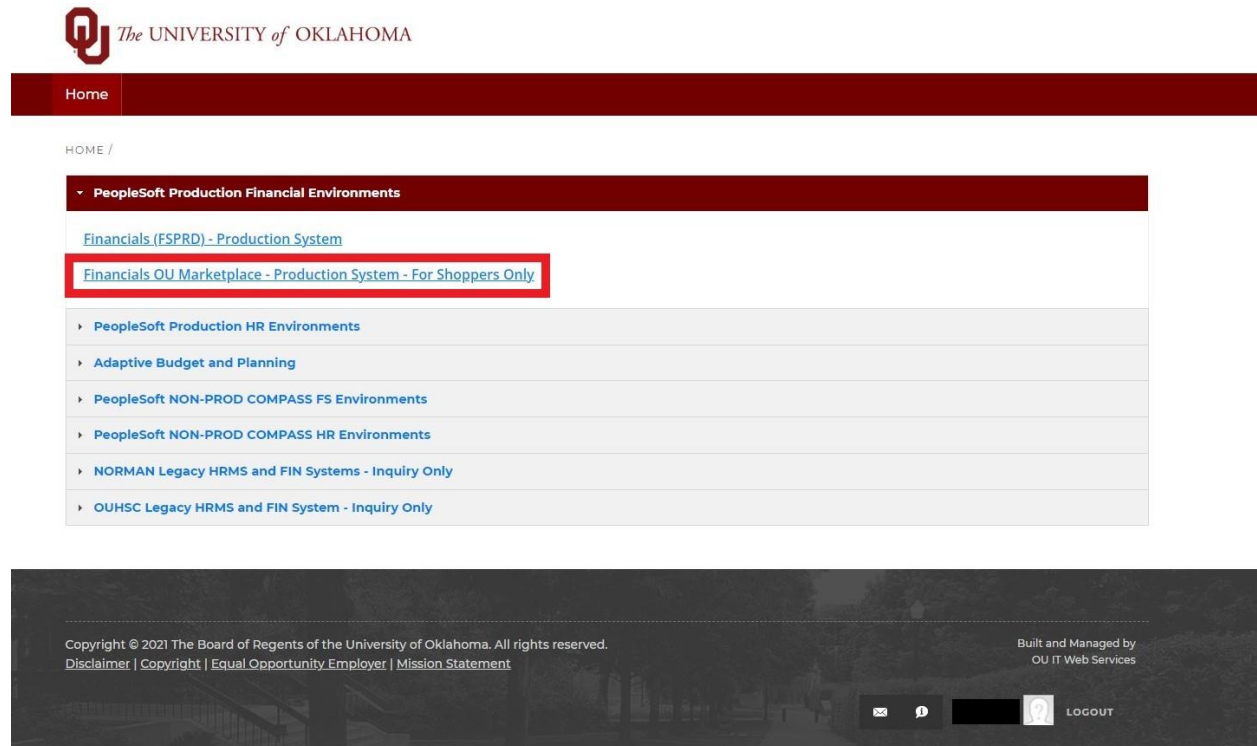
- Many suppliers allow you to check the status of an order. Grab the PO number from within PeopleSoft and navigate to the supplier's Marketplace PunchOut. Locate the order status page for the respective supplier and put the PO number in to get up-to-date information about your shipment.
- If the Requestion 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

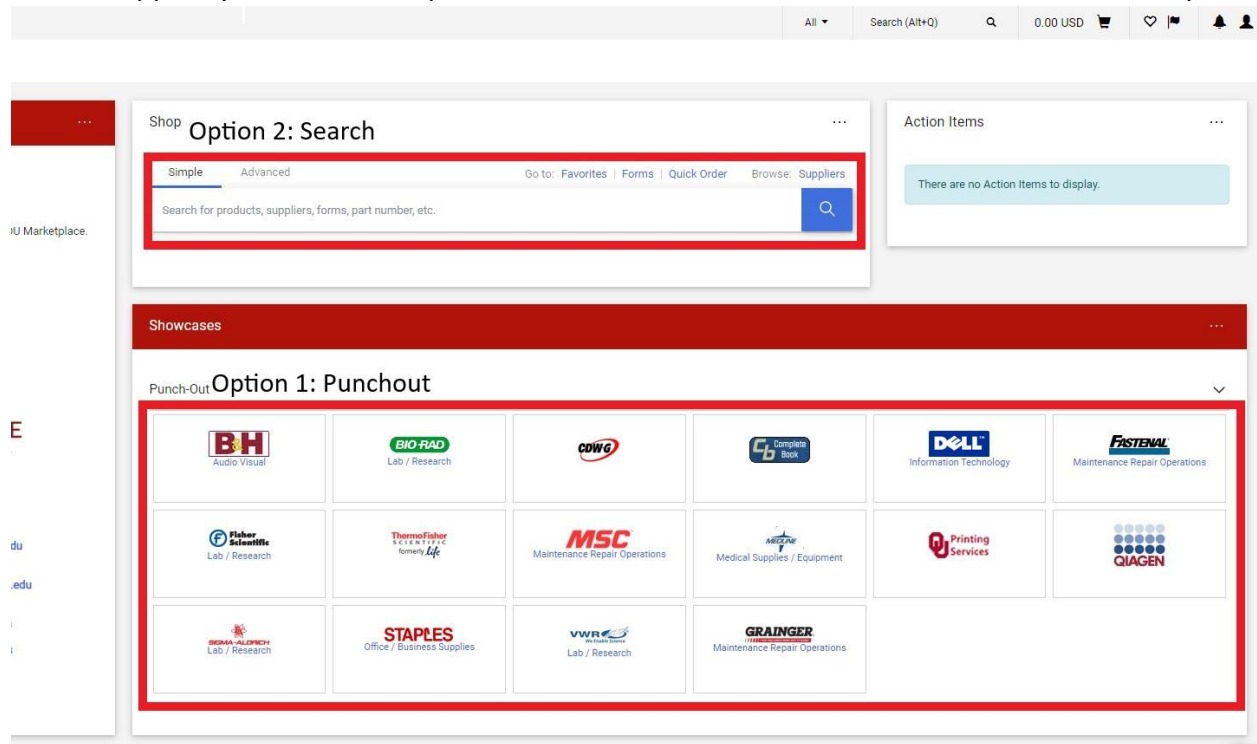
[illegible]

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.

The screenshot shows the Marketplace Shopping Cart interface. At the top, there is a search bar and a total amount of 15.14 USD. Below the search bar, there is a table of items. The 'Assign Cart' button is highlighted in red. To the right of the table, there is a 'Details' panel showing the cart name 'test cart' and the total amount '15.14 USD'.

Catalog No.	Size/Packaging	Unit Price	Quantity	Ext. Price
442901	PK	5.40	Qty: 1 PK	5.40
739318	DZ	9.74	Qty: 1 DZ	9.74

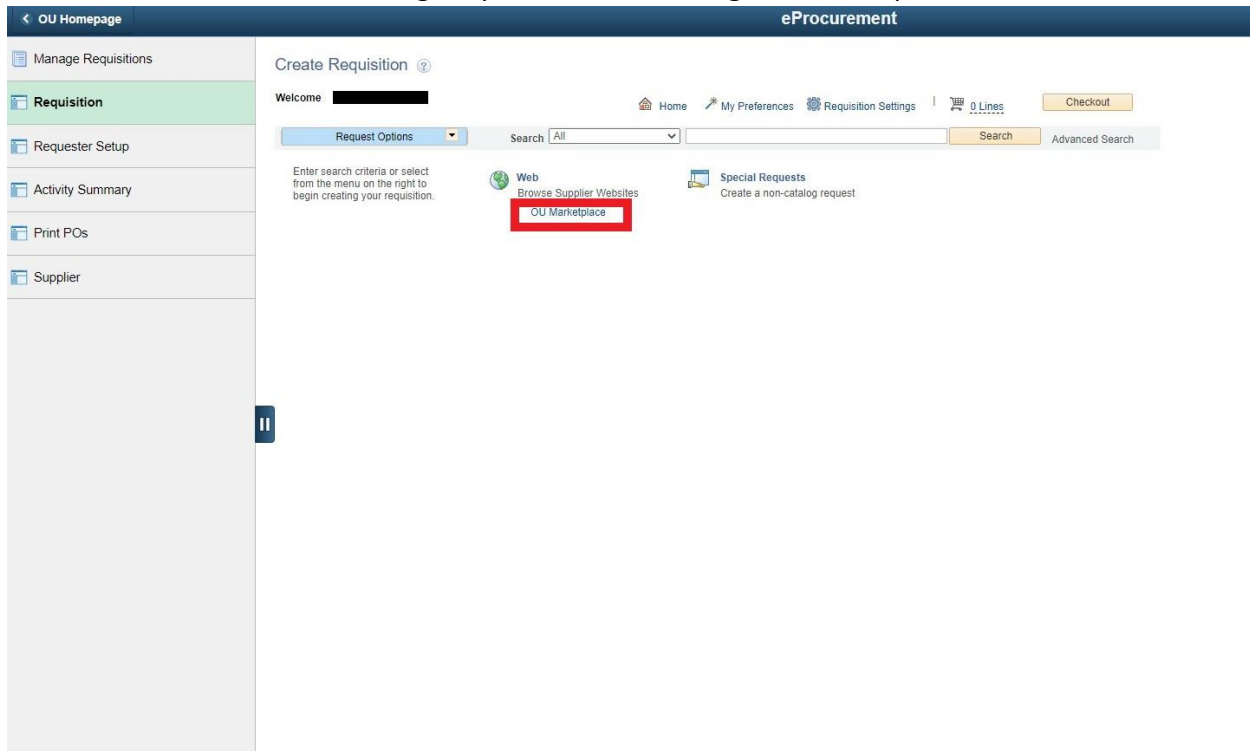
4. Once you have selected Assign Cart, you can either select your default Cart Assignee if you have one set up or select SEARCH to find the user. Once your Requestor is selected, you can input comments if desired, then hit Assign to send the cart.

The screenshot shows the Marketplace Shopping Cart interface with the 'Assign Cart: User Search' dialog box open. The dialog box has a 'User Search' section with fields for Last Name, First Name, User Name, Email, Role, and Results Per Page. There is also a 'Note To Assignee' field and an 'Assign' button. The background shows the cart items and the 'Assign Cart' button.

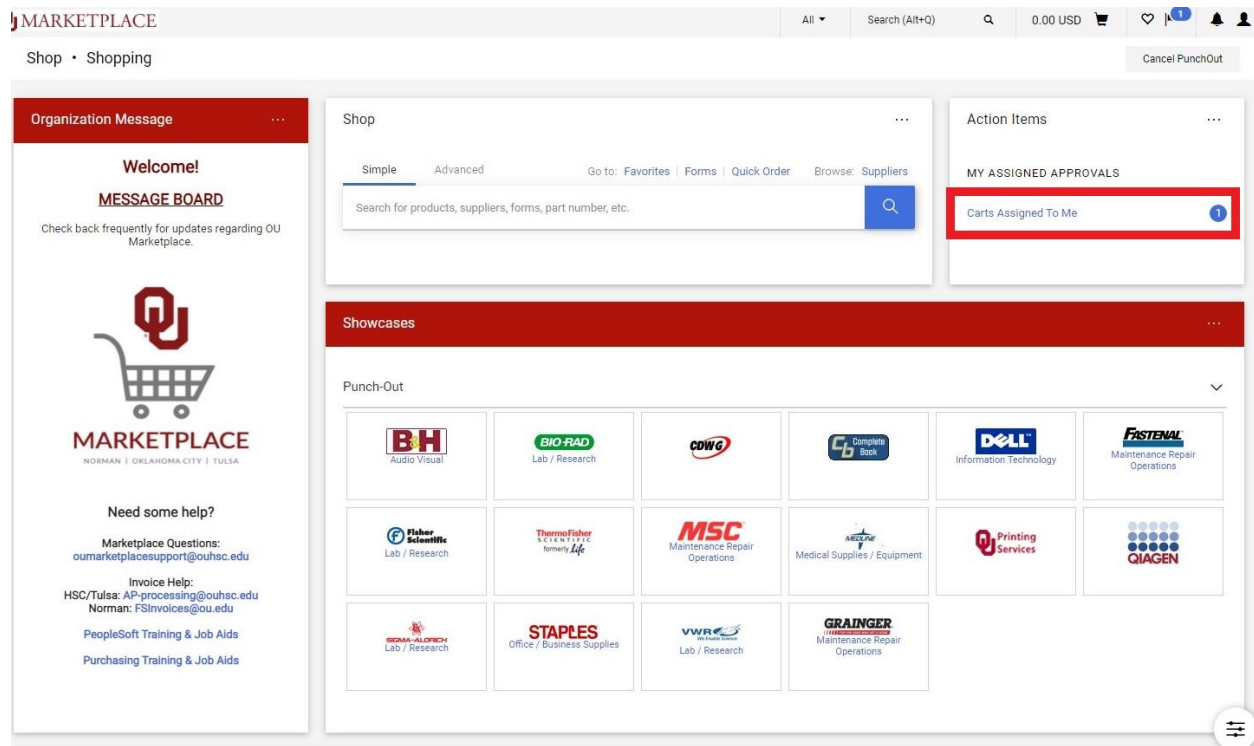
Item	Unit Price	Quantity	Ext. Price
BIC Round Stic Black Ink, 60/Pk	5.40	Qty: 1 PK	5.40
Sharpie Tank Highlighter, Ch	9.74	Qty: 1 DZ	9.74

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.

MARKETPLACE

Shop > My Carts and Orders > View Carts > Assigned Carts

Cancel PunchOut

Cart Management

Create Cart ?

Draft Carts Assigned Carts

Assign Substitute

> Filter Assigned Carts

Type	Shopping Cart Name	Cart Description	Date Created	Total	Created By	Assigned To	Action
Normal	test cart		11/5/2021	15.14 USD			<div>View</div> <div>View</div> <div>Activate</div> <div>Return</div> <div>Delete</div>

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.

Shopping Cart • 150843579

Cancel PunchOut

Return Cart Assign Cart Review Shipping



2 Items

Staples • 2 Items • 15.14 USD

SUPPLIER DETAILS

Need to make changes? [MODIFY ITEMS](#) | [VIEW ITEMS](#) Item(s) was retrieved on: 11/5/2021 1:10:30 PM

- Sharpie Tank Highlighter, Chisel Tip, Assorted Colors, Dozen (25053)
- BIC Round Stic Xtra-Life Ballpoint Pen, Medium Point, 1.0mm, Black Ink, 60/Pack (GSM609-BLK)

Item	Catalog No.	Size/Packaging	Unit Price	Quantity	Ext. Price	
 Sharpie Tank Highlighter, Chisel Tip, Assorted Colors, Dozen (25053)	739318	DZ	9.74	Qty: 1 DZ	9.74	<input type="checkbox"/>
<div>ITEM DETAILS</div> <div>Commodity Code 602700 / SUPP-OFFICE</div>						
 BIC Round Stic Xtra-Life Ballpoint Pen, Medium Point, 1.0mm, Black Ink, 60/Pack (GSM609-BLK)	442901	PK	5.40	Qty: 1 PK	5.40	<input type="checkbox"/>
<div>ITEM DETAILS</div> <div>Commodity Code 602700 / SUPP-OFFICE</div>						

Details

For

Name

test cart

Estimate (15.14 USD)

Total: 15.14

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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.

MARKETPLACE

Cart • 150843579

Summary PO Preview Comments Attachments History

General

Cart Name: test cart

Prepared by: [Redacted]

Prepared for: [Redacted]

Ship Via: Best Carrier-Best Way

Shipping

Attn: [Redacted]

Bldg: 0447

Floor: 0001

2750 VENTURE DRIVE

ROOM 0001

NORMAN, OK 73069

United States

Step 1

Step 2

Draft

Total (15.14 USD)

Subtotal: 15.14

2 Items

Staples - 2 Items - 15.14 USD

SUPPLIER DETAILS

PO Number: To Be Assigned

Need to make changes? [MODIFY ITEMS](#) | [VIEW ITEMS](#) Item(s) retrieved on: 11/5/2021 1:10:30 PM

- Sharpie Tank Highlighter, Chisel Tip, Assorted Colors, Dozen (25053)
- BIC Round Stic Xtra-Life Ballpoint Pen, Medium Point, 1.0mm, Black Ink, 60/Pack (GSM609-BLK)

Item	Catalog No.	Size/Packaging	Unit Price	Quantity	Ext. Price
Sharpie Tank Highlighter, Chisel Tip, Assorted Colors, Dozen (25053)	739318	DZ	9.74	Qty: 1 DZ	9.74

ITEM DETAILS

Manufacturer: SANFORD CORP

Contract: 602700 / SUPP-OFFICE

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.

Custom Fields

Cart Summary: Total Amount 15.14 USD

Expand lines to review shipping and accounting details

[Add More Items](#)

Requisition Lines

Line	Description	Supplier	Quantity	UOM	Price	Total	Details	Comments	Delete
1	Sharpie Tank Highlighter, Chis	STAPLES ADVANTAGE	1.0000	Dozen	9.7400	9.74			

Shipping Line 1

*Ship To Address: 2750_0001, 2750 VENTURE DRIVE, ROOM 0001, NORMAN, OK 73069

Attention To: [Redacted]

Due Date: [Redacted]

Accounting Lines

*Distribute By: Qty

SpeedChart: [Redacted]

Accounting Lines

Chartfields1: [Redacted]

Chartfields2: [Redacted]

Details: [Redacted]

Details 2: [Redacted]

Asset Information: [Redacted]

Asset Information 2: [Redacted]

Budget Information: [Redacted]

Account	Fund	Org	Function	Entity	Source	Purpose	PC Bus Unit	Project	Activity
602700									

Shipping Summary

[Edit for All Lines](#)

Ship To Location: 2750_0001

Address: 2750 VENTURE DRIVE, ROOM 0001, NORMAN, OK 73069

Attention To: Attn: [Redacted]

Comments: [Redacted]

Ship To Confirmation: [Redacted]

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.

Custom Fields

Add More Items

Line	Description	Quantity	UOM	Price	Total
1	STAPLES ADVANTAGE	1.0000	Dozen	9.7400	9.74
2	STAPLES ADVANTAGE	1.0000	Cello Pack	5.4000	5.40

to Favorites Add to Template(s) Delete Selected **Mass Change**

Total Amount 15.14 USD

☐ Ship To Confirmation

at Voucher Add more Comments and Attachments

Edit Lines/Shipping/Accounting for Selected Lines

Line Information

Note: The information below does not reflect the data in the selected requisition lines. When the 'OK' button is clicked, the data entered on this page will replace the data in the corresponding fields on the selected lines that are available for sourcing.

Supplier ID Supplier Location Buyer Category

Shipping Information

Ship To Location Due Date Attention Comments

Accounting Lines

SpeedChart

Please enter GL Business Unit before selecting other chartfield values

Accounting Information

Personalize Find First 1 of 1 Last

Chartfields1 Details Asset Information

Dist Percent Location GL Unit Account Fund Org Function

1 1 1 1 1 1 1 1

Load Values From Defaults

OK Cancel

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.

Requisition Lines

Line	Description	Supplier	Quantity	UOM	Price	Total	Details	Comments	Delete
1	Sharpie Tank Highlighter, Chis	STAPLES ADVANTAGE	1.0000	Dozen	9.7400	9.74		Add	
2	BIC Round Stic Xtra-Life Ballp	STAPLES ADVANTAGE	1.0000	Cello Pack	5.4000	5.40		Add	

Select All / Deselect All Select lines to: Add to Favorites Add to Template(s) Delete Selected **Mass Change**

Total Amount 15.14 USD

Shipping Summary

Edit for All Lines

Ship To Location 2750_0001

Address 2750 VENTURE DRIVE
ROOM 0001
NORMAN, OK 73069

Attention To Attn: [REDACTED]

Comments

☐ Ship To Confirmation

Requisition Comments and Attachments

Enter requisition comments

☐ Send to Supplier ☐ Show at Receipt ☐ Shown at Voucher

Add more Comments and Attachments

Approval Justification

Enter approval justification for this requisition

Check Budget

Save & submit Save for Later Add More Items Preview Approvals Add Request Document

9. Once the Budget Checking Status reflects as Valid, the Requisition can be submitted for approval. Select Save & Submit to initiate this process.

Requisition Lines

Line	Description	Supplier	Quantity	UOM	Price	Total	Details	Comments	Delete
1	Sharpie Tank Highlighter, Chis	STAPLES ADVANTAGE	1.0000	Dozen	9.7400	9.74		Add	
2	BIC Round Stic Xtra-Life Ballp	STAPLES ADVANTAGE	1.0000	Cello Pack	5.4000	5.40		Add	

☐ Select All / ☐ Deselect All Select lines to:

Total Amount: 15.14 USD
Pre-Encumbrance Balance: Not Available

Shipping Summary

Ship To Location: 2750_0001 ☒ Ship To Confirmation
Address: 2750 VENTURE DRIVE
ROOM 0001
NORMAN, OK 73069
Attention To: Attn: [REDACTED]
Comments:

Requisition Comments and Attachments

Enter requisition comments:

☐ Send to Supplier ☐ Show at Receipt ☐ Shown at Voucher

Approval Justification

Enter approval justification for this requisition:

 Budget Checking Status: Valid

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.

Confirmation

Your requisition has been submitted.

Requested For: [REDACTED]	Number of Lines: 2
Requisition Name: test cart	Total Amount: 15.14 USD
Requisition ID: 0000016111	Pre-Encumbrance Balance: Not Available
Business Unit: NORMN	
Status: Pending	
Priority: Medium	
Budget Status: Valid	

Department Manager Approval

test cart: Pending

Department Manager Approval

Pending

Multiple Approvers
Req Department Managers

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.

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Cart • 339116

Summary Taxes

Copy to New Cart
Resubmit Cart
Add Comment
Add Notes to History
View My Orders (Last 90 Days)
Continue Shopping
View Carts

General

Cart Name
Prepared by
Ship Via

Shipping

Attn: Kyle Wilson
Bldg: 0447
Floor: 0001
2750 VENTURE DRIVE
ROOM 0001
NORMAN, OK 73069
United States

Completed

Total (15.14 USD)
Subtotal
Tax1
Tax2

2 Items

Staples • 2 Items • 15.14 USD

^ SUPPLIER DETAILS

PO Number N/A

Need to make changes? [VIEW ITEMS](#) Item(s) was retrieved on: 11/5/2021 1:41:54 PM

- Sharpie Tank Highlighter, Chisel Tip, Assorted Colors, Dozen (25053)
- BIC Round Stic Xtra-Life Ballpoint Pen, Medium Point, 1.0mm, Black Ink, 60/Pack (GSM609-BLK)

Status	Item	Catalog No.	Size/Packaging	Unit Price	Quantity	Ext. Price	
1	Sharpie Tank Highlighter, Chisel Tip, Assorted Colors, Dozen (25053)	739318	DZ	9.74	Qty: 1 DZ	9.74	...

^ ITEM DETAILS

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