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 <u>OUMarketplaceSupport@ouhsc.edu</u> for questions regarding the Marketplace.

Change Log

Date Changed	Version Number	Change(s)	Affected Page(s)
11/01/2021	1.00	Created Document	All
12/01/2021	1.01	Added section on Resubmitting Cart	10

Marketplace Shopper Guide

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

Home	
HOME /	
PeopleSoft Production Financial Environments	
Financials (FSPRD) - Production System	
Financials OU Marketplace - Production System - For Shoppers Only	
PeopleSoft Production HR Environments	
Adaptive Budget and Planning	
PeopleSoft NON-PROD COMPASS FS Environments	
PeopleSoft NON-PROD COMPASS HR Environments	
NORMAN Legacy HRMS and FIN Systems - Inquiry Only	
OUHSC Legacy HRMS and FIN System - Inquiry Only	
Copyright © 2021 The Board of Regents of the University of Oklahoma. All rights reserved. Disclaimer Copyright Equal Opportunity Employer Mission Statement	Built and Managed by OU IT Web Services
Disclaimer Copyright Equal Opportunity Employer Mission Statement	Contractor of the second second

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.

ketplace.	Simple Advanced Search for products, suppliers, f	forms, part number, etc.	Go to: Favorites Forms Qui	ck Order Browse: Suppliers	There are no Action Iterr	is to display.
	Showcases					
	Punch-Out Option 1:	Punchout	CDING	E Book	Information Technology	FIRSTENAL Maintenance Repair Operations
	Pieher Scientific Lab / Research	ThermoFisher Sciences Life	Maintenance Repair Operations	Netical Supplies / Equipment	Printing Services	QIAGEN
	SKOVA-ALDINCH Lab/ Research	STAPLES Office / Business Supplies	WWR	GRAINGER Maintenance Repair Operations		

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.

						All 👻 Si	earch (Alt+Q) 15.14 USD	× ▼ ► ▲
							📃 🖶 Assign Cart	Review Shipping
						· ·	Details	-
							For	
EW ITEMS Item(s) was retrieved	on: 11/4/2021 3:35:2	18 PM					Name test cart	
m Point, 1.0mm, Black Ink, 60/Pac I Colors, Dozen (25053)							test Cart	
	Catalog No.	Size/Packaging	Unit Price	Quantity	Ext. Price		Estimate (15.14 USD)	
nt Pen, Medium Point, 1.0mm, K)	442901	РК	5.40	Qty: 1 PK	5.40		Total:	15.
602700 / SUPP-OFFICE								
Tip, Assorted Colors, Dozen	739318	DZ	9.74	Qty: 1 DZ	9.74			
602700 / SUPP-OFFICE								

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.

2 Items			Assign Cart To:	no value				Detail
			Note To Assignee:	OF SEARCH				
Staples · 2 Items · 15.1	4 USD User Search		>					
SUPPLIER DETAILS	User Search							
	Last Name 👔				Assign	Close		
item	First Name 🚷			kaging	Unit Price	Quantity	Ext. Price	Estim
	User Name 👩				5.40	Qty: 1 PK	5.40	Total:
	Email 🗿							
	Role 📵		•					
	Results Per Page	10	•		9.74	Qty: 1 DZ	9.74	
∧ ITEM DETAILS ♦			Search Close					
	602700 /	SUPP-OFFICE						

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.

< OU Homepage			eProcurement		
Manage Requisitions	Create Requisition @				
Requisition	Welcome		lome 🥕 My Preferences 🌼 Requisition Settings	1 📜 0 Lines	Checkout
Requester Setup	Request Options	Search All	v)	Search	Advanced Search
Activity Summary	Enter search criteria or select from the menu on the right to begin creating your requisition.	Web Browse Supplier Wel OU Marketplace			
Print POs		OU Warketplace			
Supplier					
	-				

2. Once in Marketplace you will see your assigned carts on the right. Click Carts Assigned to Me to view them.

							Cancel PunchOut
Organization Message	Shop				··· Act	ion Items	
Welcome!	Simple Advance	d Goto: Fav	orites Forms Quick O	Irder Browse: Supplie	ers MY	ASSIGNED APPI	ROVALS
MESSAGE BOARD	Search for products, sup	pliers, forms, part number, etc.		Q	Cart	s Assigned To Me	0
Check back frequently for updates regarding OU Marketplace.							
0							
_ ¥	Showcases						
	Punch-Out						~
	Functi-Out						~
MARKETPLACE	B iH Audio Visual	BIO FAD Lab / Research	CDWG	Complete Back		tion Technology	FASTENAL Maintenance Repair Operations
MARKETPLACE		Contraction of the Internal Property of the In	CDWG	Ch Book			Maintenance Repair
MARKETPLACE NORMAN I DRLAHOMA CITY I TULIA Need some help? Marketplace Questions:	Audio Visual	Lab / Research	MSC Maintenance Repair	inter	Informa	tion Technology	Maintenance Repair Operations
Need some help? Marketplace Questions: oumarketplace Questions: invoice Help:	Audio Visual	Contraction of the Internal Property of the In	MSC		Informa		Maintenance Repair Operations
MARKETPLACE NORMAN I DIRLANGMA CITY I TULIA Need some help? Marketplace Questions: cumarketplacesupport@ouhsc.edu Invoice Help: HSCT/UIS: AP-processing@ouhsc.edu Norman: FSInvoices@ou.edu	Audio Visual Electric Lab / Research	Lab / Research	Maintenance Repair Operations	Medical Supplies / Equip	pment Q	tion Technology	Maintenance Repair Operations
MARKETPLACE NORMAY I DELAHOMACITY I TULIA Need some help? Marketplace Questions: oumarketplace Questions: oumarketplacesupport@ouhsc.edu Invoice Help: HSCT/UIS: AP-procesation@ouhsc.edu	Audio Visual	Lab / Research	MSC Maintenance Repair	Netical Supplies / Equi	pment Q	tion Technology	Maintenance Repair Operations

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.

									- Can	
Shop 🕨 My Carts and	Orders View Carts Assigned Carts								it out	icel Punchi
Cart Manage	ement								Create	Cart 2
Draft Carts	Assigned Carts									
Assign Substitute Filter Assigned	Carts									
Туре 🗢	Shopping Cart Name	Cart Description	Date Created	Total 🗠	Create	d By 🗠	Assigned	dTo 🗢	Action	
Normal	test cart		11/5/2021	15.14 US	SD			-	View 🔻	
								View		
								Activate Return	6	
								Delete		
Vhen vi	ewing the cart,	select Review Sl	hipping to p	proceed. Yo	ou als	so have	anot	her cha	ance to	
		select Review Sl e Shopper using								
end the	e cart back to th			rt or Assign	it to	anothe	er Rec	questor	·.	
end the						anothe				
end the	e cart back to th			rt or Assign	it to	anothe	er Rec ^{um Cart}	questor	·.	۲
end the	e cart back to th			rt or Assign	it to	nchOut Ret	er Rec um Cart etails	questor	·.	×
end the Shopping Cart 2 Items	e cart back to th			rt or Assign	it to	nchOut Ret	er Rec ^{um Cart}	questor	·.	۲
end the Shopping Cart 2 Items	e cart back to th • 150843579 • ems · 15.14 USD			rt or Assign	it to	anothe	er Rec um Cart etails	questor	·.	۲

				-	E 🖶 Ca	ncel PunchOut	Return Cart Assign Cart	Review Shipping
2 Items							Details	
Staples · 2 Items · 15.14 USD							For	
SUPPLIER DETAILS							Name	
leed to make changes? MODIFY ITEMS VIEW ITEMS Item(Sharpie Tank Highlighter, Chisel Tip, Assorted Colors, Dozen (25 BIC Round Stic Xtra-Life Ballpoint Pen, Medium Point, 1.0mm, B	5053)		PM				test cart	
Item	Catalog No.	Size/Packagi ng	Unit Price	Quantity	Ext. Price		Estimate (15.14 USD) Total:	1
Sharple Tank Highlighter, Chisel Tip, Assorted Colors, Dozen (25053)	739318	DZ	9.74	Qty: 1 DZ	9.74			
▲ ITEM DETAILS ♦ Commodity Code 602700 / SUPP-OFFICE								
BIC Round Stic Xtra-Life Ballpoint Pen, Medium Point, 1.0mm, Black Ink, 60/Pack (GSM609	442901	РК	5.40	Qty: 1 PK	5.40			
► ITEM DETAILS Commodity Code 602700 / SUPP-OFFICE								
								6

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.

Cart • 150843579	•				Ξ	•	Cancel P	unchOut Assign Cart	Send To PeopleSoft
Summary PO Preview	v Comments Attachments H	istory							Step
General		<i>"</i>	Shipping		ø	Step 1	~	Draft	
Cart Name	test cart		Attn					Total (15.14 USD)	~
Prepared by			Bldg: 0447 Floor: 0001					Subtotal	15.14
Prepared for			2750 VENTURE DR ROOM 0001						15.14
Ship Via	Best Carrier-Best Way		NORMAN, OK 7306 United States	9					
2 Items							· ·		
Staples · 2 Items ·	15 14 USD								
otapico 2 iterito									
∧ SUPPLIER DETAILS									
PO Number To	Be Assigned								
Sharpie Tank Highlight	MODIFY ITEMS VIEW ITEMS Item(ter, Chisel Tip, Assorted Colors, Dozen (25	053)							
	fe Ballpoint Pen, Medium Point, 1.0mm, B								
Item		Catalog No.	Size/Packagi ng	Unit Price	Quantity	Ext. Price			
Sharpie Tank Highlight (25053)	er, Chisel Tip, Assorted Colors, Dozen	739318	DZ	9.74	Qty: 1 DZ	9.74	🗆		
(20000)									

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.

Expand lines to review shipping and acc	ounting details			÷	Add More Items	J				
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			Î
Shipping Line 1	*Ship To	2750_0001 Q	Add Shipto Comme	ents	Quantity	1.0000				
	Address	2750 VENTURE DRIVE ROOM 0001			Price	9.7400	Price Adjus	tment		
		NORMAN, OK 73069					Pegging In	quiry		
	Attention To	60.					Pegging W			
	Due Date	21					Custom Fie	elds		
	Accounting Lines									
	*Distribute By	Qty Y SpeedCt	art 🔍 🔍							
	Accounting Lines					Personalize Fir	d View All	al 📑	First 🚯 1 of	f 1 🕢 Last
	Chartfields1 Chartfields1	elds2 Details Details 2	Asset Information Asset	t Informa	tion 2 <u>B</u> udget I	nformation [::::	0			
	Account Fund	Org Functio	n Entity	Source	Purpose	PC Bus U	nit Project	A	ctivity	
	602700	Q Q	Q Q		Q	Q	Q	Q	G	
▶ □ 2		STAPLES ADVANTAGE	1.0000	Cello P	ack	5.4000	5.40	₿ a	♀ Add	Û
Select All / Deselect All	Select lines to:	Add to Favorites	Add to Template(s)	ÛD	elete Selected	€ <mark>_</mark> Ma:	s Change			
					То	tal Amount	15.14 USE			
hipping Summary										
_ Edit for All Lines										
Ship To Location	2750_0001	🗆 Ship	To Confirmation							
Address	2750 VENTURE DRIVE ROOM 0001									
	NORMAN, OK 73069									
Attention To	Attn:									

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 Field:	3											
					Edit Lin	es/Shipping/A	ccounting for Select	ted Lines						
		Add More Iter	ns		Line Infor	mation 🕐								Н
er	Quantity	UOM	Price	Total	Note: The entered of	e information be on this page will	ow does not reflect the replace the data in the	e data in the sele corresponding f	cted requisitio ields on the se	n lines. Wh lected line	en the 'OK' s that are av	button is clicl ailable for so	ked, the data urcing.	
ES ADVANTAGE	1.0000	Dozen	9.7400	9.74		Supplier ID	Q	Suppli	er Location		Q			
ES ADVANTAGE	1.0000	Cello Pack	5.4000	5.40		Buyer	Q		Category		Q			
Favorites	Add to Template(s)	Delete Selected	500	Mass Change		Information								
			Total Amount	15.14 USD		To Location Due Date Comments	Q 19		Attention					
					Please	SpeedChart enter GL Business unting Informa fields1 Detail Percent			Personaliz			First 🕢 1 o	_	
					d interest	1			Account	Fund	Org	Q		
at Voucher			Add I	more Comments and At							Loa	d Values From	Defaults	
					ок	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 (2)				<u></u>					
Line Description		Supplier	Quantity	UOM	Price	Total	Details	Comments	Delete
I Sharpie Tank Highlighter, Chis		STAPLES ADVANTAGE	1.0000	Dozen	9.7400	9.74	B	⇔ Add	Û
BIC Round Stic Xtra-Life Ballp		STAPLES ADVANTAGE	1.0000	Cello Pack	5.4000	5.40		⇔ Add	Î
Select All / Deselect All	Select lines to:	Add to Favorites	Add to Template(s)	Delete Selected	i∃_Ma	ss Change			
					Total Amount	15.14 USD			
ipping Summary									
Edit for All Lines Ship To Location Address	2750_0001 2750 VENTURE DRIVE ROOM 0001 NORMAN, OK 73069		Ship To Confirmation						
Attention To Comments	Attn:								
equisition Comments and Attachments Enter requisition comments	ŝ								
								(J	
Send to Supplier	Show at Receipt	Shown at Voucher			Add more	Comments and	Attachmen	ts	
Enter approval justification for this rea	quisition								
								2	
								11	
역 Check Budget								2	
Check Budget	Save for Later	🕆 Add More Items	68 Preview Approvals	Add Request Docume	nt			2	

Requisition Lines (2)										
Line Description		Supplier	Quantity	UOM	Price	Total	Details	Comments	Delete	
I and the start of the start	r,	STAPLES ADVANTAGE	1.0000	Dozen	9.7400	9.74		\bigcirc Add	Û	
BIC Round Stic Xtra-Life Ballp	e	STAPLES ADVANTAGE	1.0000	Cello Pack	5.4000	5.40	晶	♀ Add	Î	
Select All / Deselect All	Select lines to:	Add to Favorites	Add to Template(s)	Delete Selected	温	Mass Change				
				Total Amount Pre-Encumbrance Balance		15.14 USD Not Available				
Shipping Summary										
Edit for All Lines Ship To Location Address	2750_0001 2750 VENTURE DRIVE ROOM 0001 NORMAN, OK 73069		Ship To Confirmation							
Attention To Comments	Attn									
Requisition Comments and Attachmer	nts									
Enter requisition comments										
								2		
Send to Supplier	Show at Receipt	Shown at Voucher			Add mo	ore Comments and	Attachmen	ts		
Approval Justification										
Enter approval justification for this r	requisition							17		
								4		

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.

our requisition has been submitted.		
Requested For	Number of Lines	2
Requisition Name test cart	Total Amount	15.14 USD
Requisition ID 0000016111	Pre-Encumbrance Balance	
Business Unit NORMN		Not Available
Status Pending		
Priority Medium		
Budget Status Valid		
View printable version 🖉 Edit This Requisition	Check Budget	
Department Manager Approval Pending Multiple Approvers Reg Department Managers Apply Approval Changes Create New Reguisition Manage Reguisitions		

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.

rt • 339116	•					Ξ	۲	8	Cancel PunchOut	2 of 13 Results	
Summary Taxes/		tory									
General	Resubmit Cart Add Comment Add Notes to History	Shipping			•••			~	Total (15.14 USD)	Completed	
Cart Name Prepared by Ship Via	t Name View My Orders (Last 90 Days) Continue Shopping		Attn: tyle Wilson Bildg: 0447 Filoor: 0001 2750 VENTUED RIVE ROOM 0001 NORMAN, OK 73069 United States						Subtotal Tax1 Tax2		
2 Items							[- ·			
Staples · 2 Item	s · 15.14 USD						[
	N/A es? VIEW ITEMS Item(s) was retrieved on:										
	lighter, Chisel Tip, Assorted Colors, Dozen (250 a-Life Ballpoint Pen, Medium Point, 1.0mm, Bla		609-BLK)								
Status Item		Catalog No.	Size/Packaging	Unit Price	Quantity	Ext. Price					
	lighlighter, Chisel Tip, Assorted Colors, Doze	739318	DZ	9.74	Qty: 1 DZ	9.74	[

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