

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 2):

- 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 4):

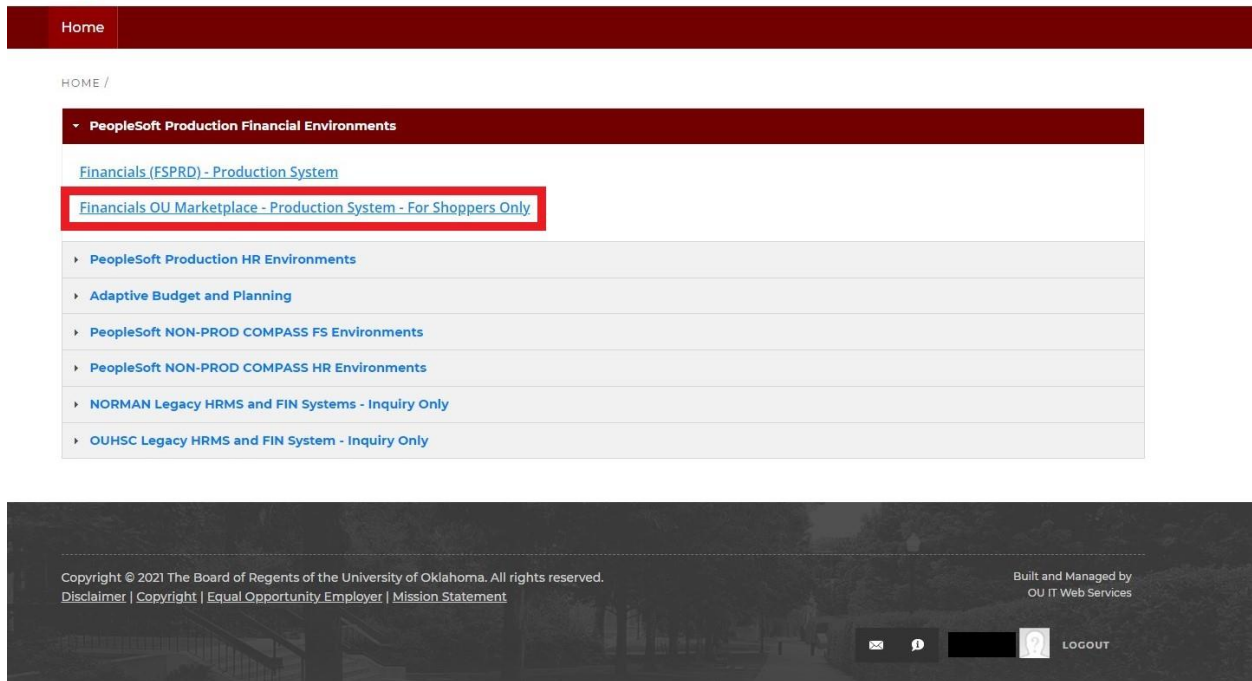
- Must access Marketplace through the eProcurement tab in PeopleSoft Financials (fs.ou.edu).
- These individuals must complete Procure to Pay Training and be granted the Department Purchasing Entry role within PeopleSoft Financials.
- They inherit all abilities that Shoppers have – and thus can shop 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

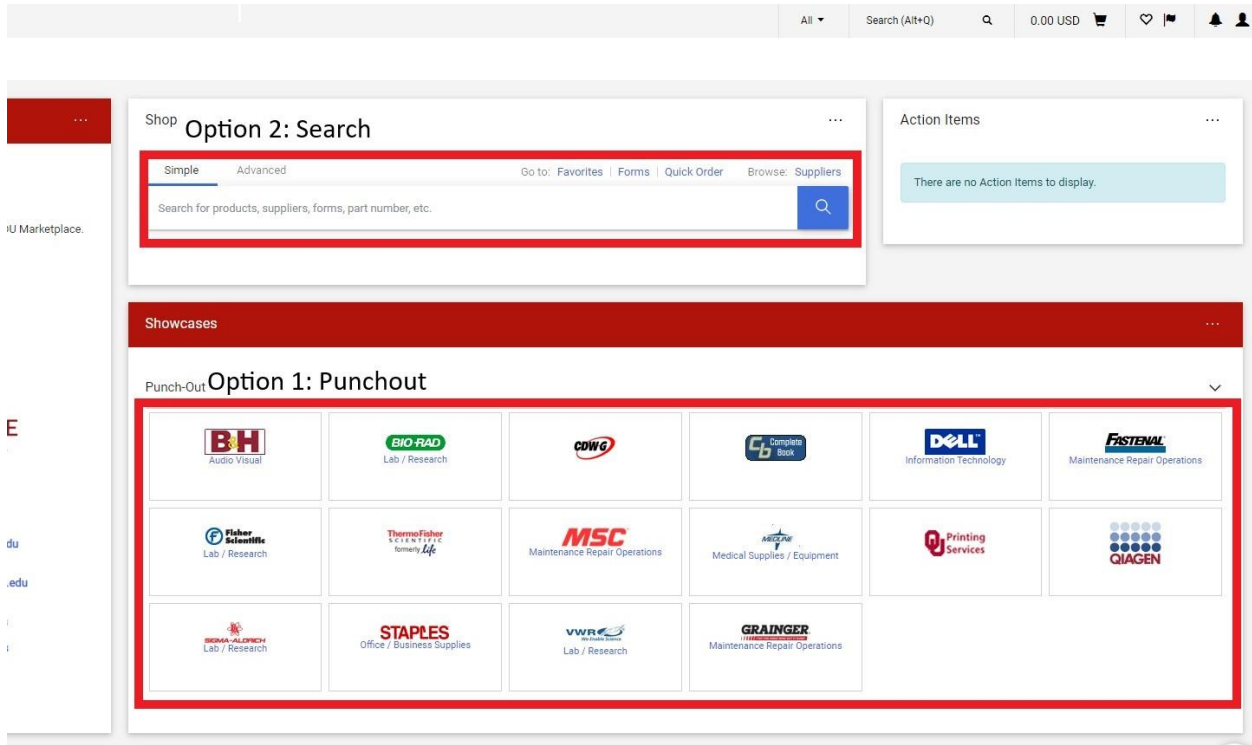
- Many suppliers allow you to check the status of an order. Grab the PO number from within PeopleSoft and navigate to the supplier's Marketplace PunchOut. Locate the order status page for the respective supplier and put the PO number in to get up-to-date information about your shipment.
- If you have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

Marketplace Shopper Guide

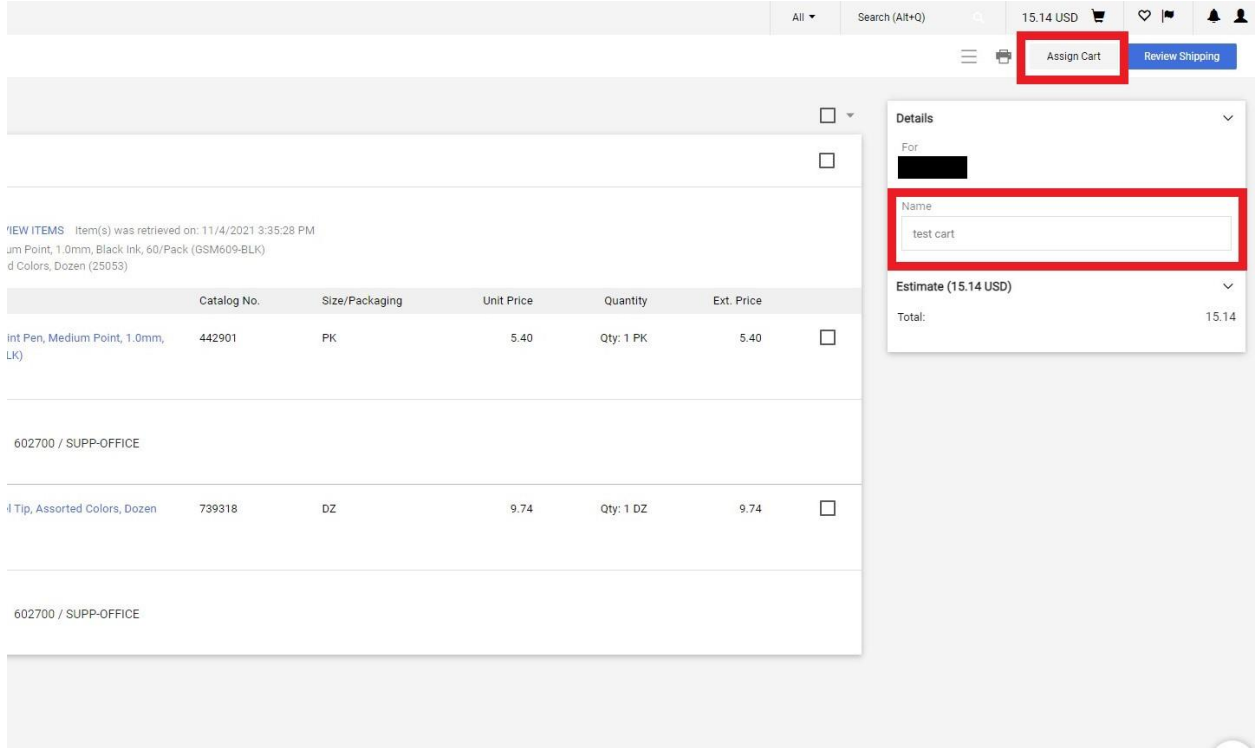
1. Log in to the Marketplace Shopper link located at compass.ou.edu under PeopleSoft Production Financials Environments.



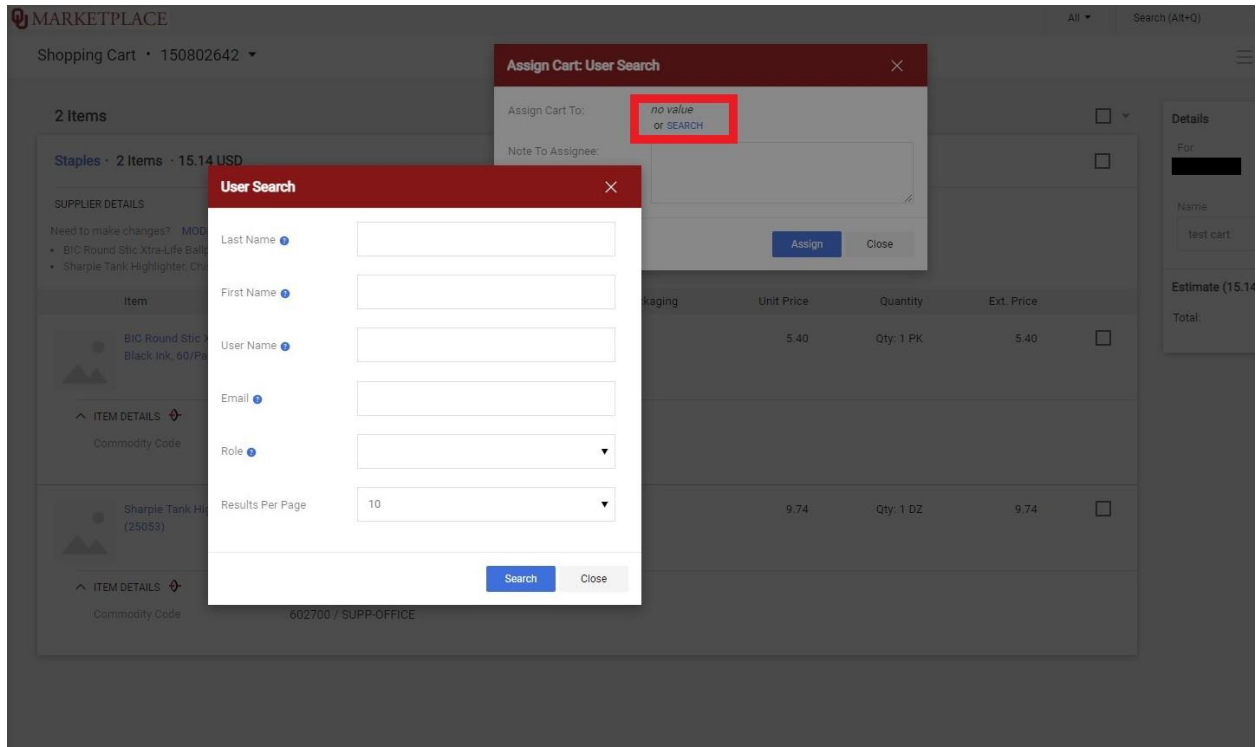
2. Once logged in, all current Marketplace vendors can be seen in the tiles located at the lower center of the page. There are two options to shop. Either click the icon in the Punch-Out menu for the supplier you want to shop with or enter a search term in the search bar near the top.



- 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.

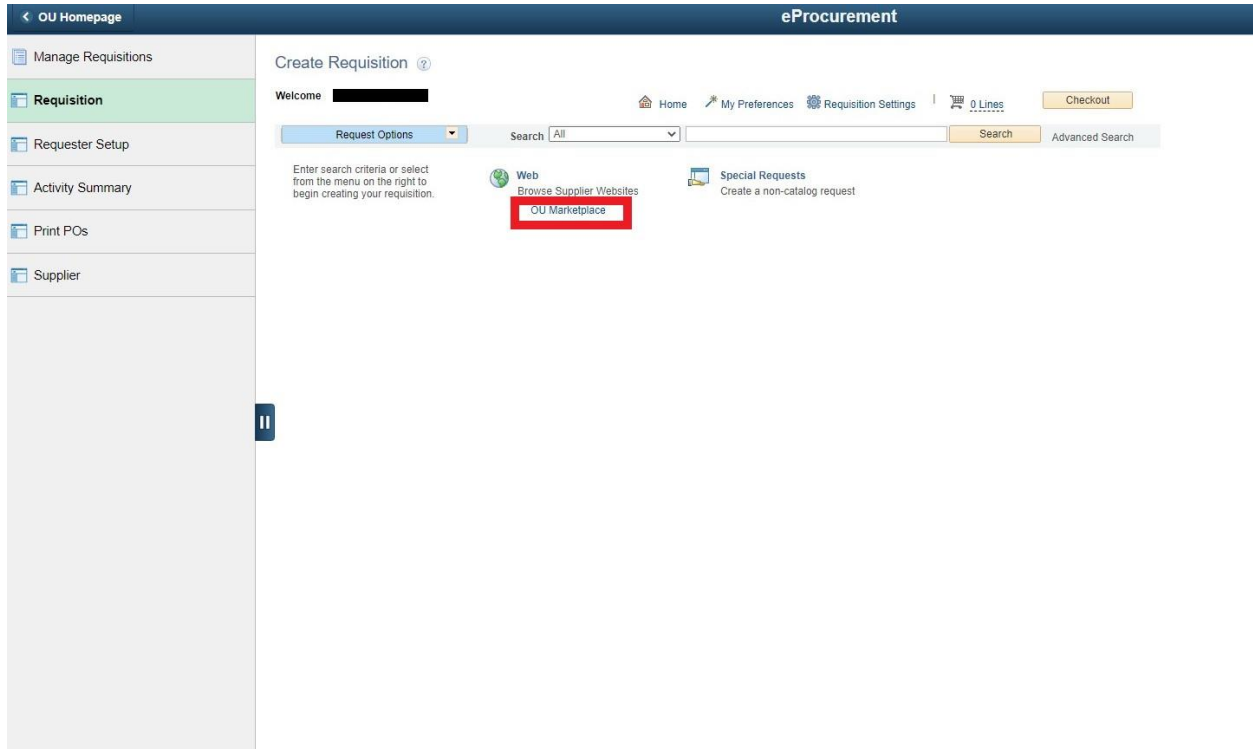


- Once you have selected Assign Cart, you can either select your default Cart Assignee if you have one set up or select SEARCH to find the user. Once your Requestor is selected, you can input comments if desired, then hit Assign to send the cart.

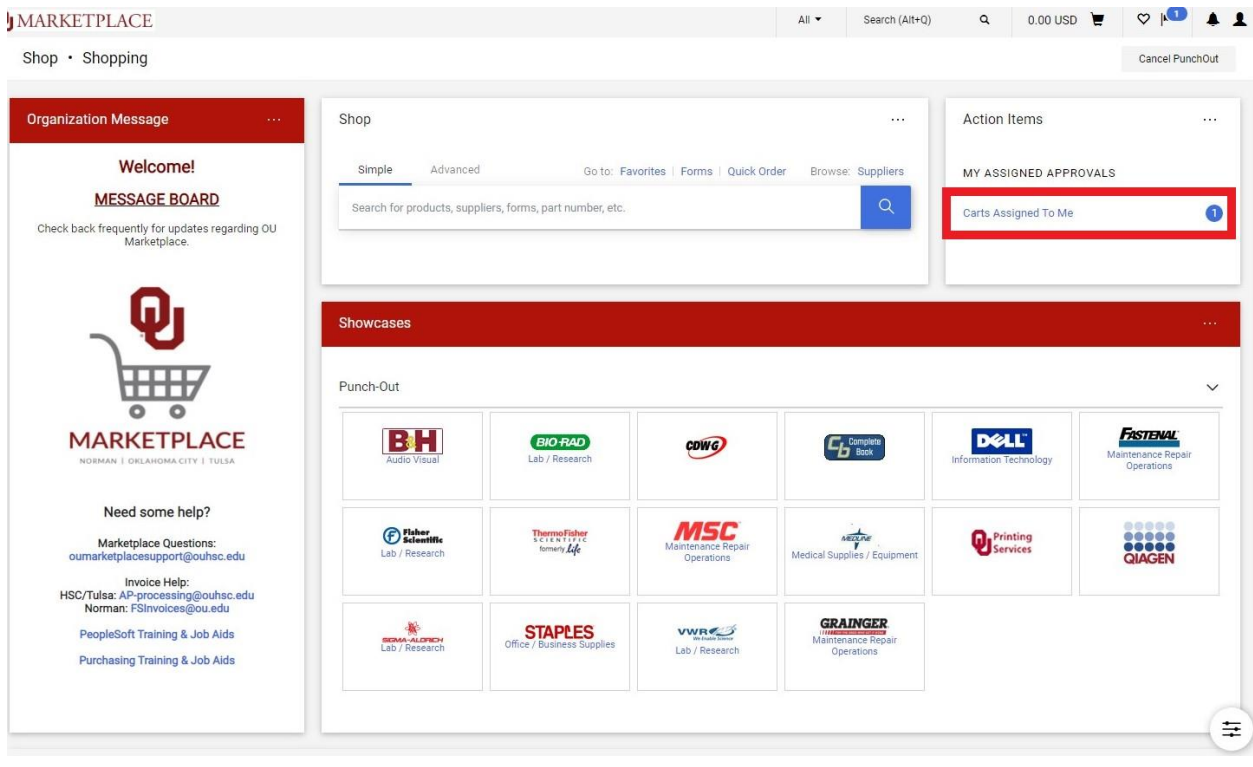


Marketplace Requestor Guide

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.

The screenshot shows the 'Cart Management' page with a table of assigned carts. The table has columns for Type, Shopping Cart Name, Cart Description, Date Created, Total, Created By, Assigned To, and Action. A dropdown menu is open for the 'View' action of a cart named 'test cart'.

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

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.

The screenshot shows the 'Review Shipping' page for a shopping cart. The page displays item details and a summary section. A red box highlights the 'Return Cart', 'Assign Cart', and 'Review Shipping' buttons.

Shopping Cart • 150843579

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"/>
^ ITEM DETAILS ^ Commodity Code 602700 / SUPP-OFFICE						
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"/>
^ ITEM DETAILS ^ Commodity Code 602700 / SUPP-OFFICE						

Details

For [REDACTED]

Name
test cart

Estimate (15.14 USD)

Total: 15.14

Return Cart Assign Cart Review Shipping

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- 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 | All | Search (Alt+Q) | 15.14 USD | Cart | Heart | 1 | Bell | User

Cart • 150843579 | Cancel PunchOut | Assign Cart | **Send To PeopleSoft**

Summary | PO Preview | Comments | Attachments | History

Step 1

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 2

Draft

Total (15.14 USD)
 Subtotal: 15.14

2 Items

Staples - 2 Items - 15.14 USD

PO Number: To Be Assigned

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)
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Manufacturer: SANFORD CORP | Contract: | Commodity: 602700 / SUPP-OFFICE

- 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: 2750_0001 | Add Shipto Comments | Quantity: 1,0000 | Price: 9.7400

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

Attention To: [Redacted] | Due Date: [Redacted]

Accounting Lines

*Distribute By: Qty | SpeedChart: [Redacted]

Accounting Lines

Chartfields1	Chartfields2	Details	Details 2	Asset Information	Asset Information 2	Budget Information
602700	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]

Account: 602700 | Fund: [Redacted] | Org: [Redacted] | Function: [Redacted] | Entity: [Redacted] | Source: [Redacted] | Purpose: [Redacted] | PC Bus Unit: [Redacted] | Project: [Redacted] | Activity: [Redacted]

1 | 2 | BIC Round Stic Xtra-Life Ballp | STAPLES ADVANTAGE | 1,0000 | Cello Pack | 5.4000 | 5.40

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 | Ship To Confirmation:

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

Attention To: Attn: [Redacted] | Comments:

- 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.

The screenshot shows a requisition line editor interface. In the background, there is a table with two requisition lines. A 'Mass Change' button is highlighted with a red box. An 'Edit Lines/Shipping/Accounting for Selected Lines' dialog box is open, showing various fields for Line Information, Shipping Information, and Accounting Information. The Accounting Information section is highlighted with a red box, showing a table with columns for Dist, Percent, Location, GL Unit, Account, Fund, Org, and Function.

- 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.

The screenshot shows the requisition summary and approval justification interface. The 'Shipping Summary' section shows the 'Ship To Confirmation' checkbox highlighted with a red box. The 'Check Budget' button is also highlighted with a red box at the bottom of the page.

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

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 Balp	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
 Edit for All Lines
 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: [Text Area]
 Send to Supplier
 Show at Receipt
 Shown at Voucher

Approval Justification
 Enter approval justification for this requisition: [Text Area]

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