U MARKET

1. <u>Log In:</u> The website is umarket.umn.edu and click "Shop Now" and log in with your x.500
2. <u>Vendors:</u>
    a. U Market vendors umbrella
        i. Free shipping, in stock at warehouse, usually next-day shipping
    b. U Market punch-out vendors
        i. Links directly to their website, shipping costs not included
3. <u>How to Order:</u>
    a. Searching for Items
        i. Search field at top of screen, advanced search, drop down filters
        ii. Searching in this box searches in all 34 vendor product lists
    b. Prices vs. "Order from Supplier"
        i. Compare prices by adding products to cart, and eliminating later
    c. Go to Punch Out website
        i. Different for each company, because it is actually their website
        ii. Select add to Requisition
        iii. Can continue to search on website same as you would normally
        iv. Continue out of Punchout website and back to UMarket
            1. Also see Cancel Punch-out (does not add item to cart)
    d. Go to U Market website
        i. Add item directly from U Market, no punchout
    e. View Cart in the top right corner
    f. Show each vendor by the items that it sorts out by,
        i. Can all be in the same cart, POs will dispatch separately to each vendor
    g. Prices are shown
    h. Delete items that you do not want
    i. Name this cart
        i. Include the letters "ME" your name/lab name, and items, description, etc. (Something you will remember this by)
    j. Select "Proceed to Checkout"
        i. Cart Tab
            1. **Ignore yellow boxes**, Margaux fills this out
            2. Add attachment
                a. Example: Quote, Ustores Authorization for Alcohol
        ii. Justification Tab
            1. Select "Justification (5 W's)
            2. Include who, what, where, why, and how these items are going to be used
            3. Include your EFS chart string.

4. Include FAB number
5. Include special shipping instructions (e.g. Ship to G217 Mayo)
6. Select "Add Comment"
7. Can add multiple comments here at the same time.

   iii. Attachments Tab
1. Can view attachments in this tab
2. To add attachments, you must return to the cart.

   iv. History Tab
1. View which user did what

k. Select Assign Cart

   i. Select Name from Dropdown menu
1. Search for Margaux's name: **Margaux Lassegard <lass0081>**
2. Search for your Professor's name
3. Can also send cart to another person in the lab, anyone with x.500
   a. Round robin until the final person has added his/her items

   ii. Can either add the justification here, or in the Justification Tab.

4. Approvals:

a. Approval Methods

   i. Send cart to Advisor/Professor for review and approval

   ii. Cart is sent to your researcher with purchasing authority (email on file with ME Purchasing Office)

   iii. Email Advisor/Professor for approval, copy ME Purch, send cart to Margaux

b. Advisor/Professor must send cart to Margaux in the end in order for the cart to be processed.

   i. Margaux will send cart back to requester if more information is needed

c. Margaux submits cart to accountants for approval

   i. Accountants will send cart back if more information is needed

d. Once accountant approval is obtained, the cart is finally submitted into PeopleSoft, dispatched to the vendor as a PO.

FEEDBACK:

Please let us know what you like, what you don't like, what we can fix, etc. This system is very new and we are still able to request changes if necessary.

See training materials on www.umarket.umn.edu for more information.