

## **Shopping in U Market**

The purpose of this job aid is to provide step-by-step instructions on how to shop for standard goods and supplies using the University's preferred purchasing method and online ordering system, U Market. The intended audience is individuals who will serve in the "shopper" role. A shopper is a University employee authorized by the department to shop for and buy appropriate business related purchases. Please note: there are two primary roles responsible for using U Market: shoppers and requesters. Separate access and training is required to be a requester. For more information, visit: www.umn.edu/ohr/trainingservices

## How to Shop in U Market

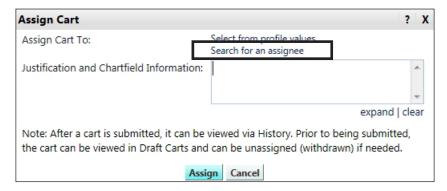
- 1. Navigate to umarket.umn.edu. Click <Shop>.
- 2. Enter your internet ID and password. Click <Login>.
- 3. Perform a search for the items to be purchased. Enter key words that describe the item to be purchased. Click <Go>. Tip: enter specific criteria to narrow the search results (e.g., test tube glass heat-resistant)



- a. Use the **Filter Results** feature on the left side of your screen to narrow the results by supplier, category, unit of measure (UOM), etc.
- b. Click < Compare > for up to three items you are considering (for prices, features, etc.).
- 4. To select the item and place it in the cart, enter the quantity and click <Add to Cart>. Note: Products labeled with a red star are from the lowest price supplier, the preferred supplier U Market Stock.
- 5. To begin the checkout process, click the shopping cart icon located at the top right side of the screen. Click <View My Cart>. The **Shopping Cart** page will appear. The CartName field will default to include the user name and the date the cart was initiated. This name will not usually be meaningful or helpful when trying to identify various carts and orders. It is important to create a cart name that is identifiable by the shopper and the EFS requester. Departments should consider a cart naming convention for department or unit. Click <Save>. Click <Proceed to Checkout>.
- 6. A review page will appear. The category codes that best capture the type of item to be purchased must be selected.
  - a. First apply the same codes to all lines in the shopping cart: Click < Required field: Capital/Non-Capital> in the Almost Ready to go! box near the top of the screen. For each item, click the item drop down menus to select Capital/Non-capital, Class and Category. Click < Save>. Note: Capital equipment costs \$5,000 (effective 7/1/13) or more and has a useful shelf life of at least one year.
  - b. To assign unique category codes for different lines/items, scroll down and click on the edit button for the line that you want to change. Select proper codes for the item. Click <Save>.

## **Shopping in U Market**

- 7. The **Final Review** screen will appear, indicating the cart is ready to be submitted. Click <Assign Cart>.
- 8. An **Assign Cart** message box will appear where action must be taken.
  - a. Assign Cart To: an EFS requisition preparer must be selected to complete the order in EFS as a requisition. Click <Search for an assignee> to search for and select a requisition preparer in the department who will complete the order. If you have already set up your assignee in your profile, click <Select from profile values>. Shoppers do not need to assign carts to approvers, the approval function still happens in EFS.



- b. The **User Search** message box will appear. Enter the requester's information and click <Search>. Once located, click the requester's name.
- c. Upon selecting the requester, the **Assign Cart** message box will reappear.
- d. Enter text into the Justification and Chartfield Information box BEFORE clicking < Assign >.

Per University purchasing procedures the following information must be entered:

- A business justification that clearly explains the "5W's" (who, what, where, when and why) of the purchase
- ii. The financial accounting information (EFS ChartField String)
- iii. Shipping information (where the items are to be physically delivered)
- iv. Any other specific instructions such as special handling
- e. Click <Assign>. Note: Once the shopper has clicked <Assign>, it will notify the assignee that a cart is waiting to be processed in EFS. Until the assignee selects the cart for processing, the shopper can edit or delete the cart.
- 9. The EFS requisition preparer assigned to the cart will review it to ensure that it adheres to policy and departmental process. If the cart meets the requirements, the requester will create a requisition from the cart that will be routed to the appropriate EFS approvers. If the cart does not meet the requirements, the requester will include a note of explanation to the shopper in the pop-up window with the returned cart. Carts may be sent back to the shopper for more information.